City of Wyndham

Activity Centres Strategy 2016

Prepared for

City of Wyndham

by

Essential Economics Pty Ltd

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Authorship

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INTRODUCTION

Background to Wyndham Activity Centres Strategy

This Activity Centres Strategy has been prepared for the City of Wyndham by Essential Economics Pty Ltd, and is intended to provide the basis for activity centre planning in Wyndham over the next 20 years and beyond. The Strategy contains detailed economic analysis of the current and future roles of existing and planned activity centres, building on previous work undertaken for Wyndham, as described in the following timeline.

1990

Werribee Growth Area Plan

Prepared for the then Shire of Werribee, the Plan set a long-term framework for urban growth centred on Werribee Township and with increased density along transport routes and near activity

1991 & 1998

Wyndham Activity Centres Strategy

Based upon the principles identified in the Werribee Growth Area Plan, the Strategy assessed activity centre requirements based on population forecasts and the growth in supportable floorspace in Wyndham.

2002

Melbourne 2030

Emphasises role of activity centres and aims to cluster retail, commercial, social and community functions in transit-oriented centres. New Urban Growth Boundary (UGB) reduced developable area in Wyndham.

2004 - 2005

Growth Area Review and Framework Plan

Wyndham Committee for Smart Growth undertook a review as input to the Wyndham Growth Area Framework Plan (WGAFP), which expanded the UGB and identified additional future growth in Truganina and Tarneit.

2008

Melbourne @ 5 million and Precinct Structure Plans

Melbourne @ 5 million updated directions of M2030, further expanded UGB and proposed new Regional Rail Link. Growth Areas Authority established to co-ordinate Precinct Structure Plan (PSP) process.

2014-16

Plan Melbourne/Plan Melbourne Refresh

Included reference to creating 20 minute neighbourhoods and updating Precinct Structure Planning Guidelines for activity centres in growth areas.

Current

Current Context for Land Use Planning

A total of 17 PSPs in Wyndham either completed or under preparation. The Regional Rail Link is finished construction with stations at Wyndham Vale and Tarneit opened in June 2015.

Vision For Activity Centres

This Vision is intended to be an overall guiding statement. Specifically,

> ***"Wyndham's activity centres will develop in a way that promotes a vibrant and robust activity centre network; encourages a diverse mix of uses; is efficient and viable for investors, businesses, consumers and other users; generates employment and income opportunities; promotes sustainable social and environmental outcomes; and functions in a manner which focuses on the needs of residents and visitors to the City".***

Role of the Wyndham Activity Centres Strategy

This update and review of the Wyndham Activity Centres Strategy has been commissioned by Council to ensure that activity centre policy in the municipality is considered against accurate and up-to-date information and contemporary understanding.

The role of the activity centres strategy is to guide Council decision-making in relation to activity centre-based development in the City of Wyndham. This includes consideration of the following broad themes:

1. **Supportable floorspace growth and development** as an indicative guide to Council of the magnitude of development that it is prudent to plan for in activity centres policy

2. **Definition of centre roles** so that the functions of centres are easily definable and certainty is provided for stakeholders, including Council, developers, traders and the general community

3. **Identifying opportunities for new activity centre development** so that Council and other stakeholders understand the potential scale and nature of new development

4. **Centre improvements** which generate benefits for the community including employment and economic development

5. **Strategic direction** so that Council and the community have a policy framework that promotes the achievement of good land use outcomes and promotes a proactive decision-making process

6. **Guidance for assessing development applications** so that Council can make informed decisions with the benefit of the best available information against a robust set of strategic land use and development policies.

The Wyndham Activity Centres Strategy is just one element of the range of policies adopted by Council which sit under the strategic directions set by State Government and which guide development in the municipality.

As such, the Wyndham Activity Centres Strategy sits within the broader framework of the planning system, as shown in Figure 1 (see over page).

Figure 1 Strategic Land Use Policy Context

State Government Strategic Direction

Plan Melbourne/ Plan Melbourne Refresh

Other relevant land use policies applying statewide and across Metropolitan Melbourne

City of Wyndham Land Use Planning

Wyndham Activity Centres Strategy

Municipal Strategic Statement

Planning Scheme

Other relevant strategies and policies

State Government Land Use Planning

The Melbourne West Growth Corridor Plan

Precinct Structure Plans

Regional Rail Link and other initiatives

Report Structure

The Wyndham Activity Centres Strategy 2016 is presented in two sections:

Section A contains the Wyndham Activity Centres Strategy 2016, comprising:

- A summary of issues which need to be addressed through the Strategy
- Strategic policy considerations which need to be appreciated when planning for activity centre development in Wyndham
- An activity centre development framework to guide future development in Wyndham
- A process for assessing development applications in activity centres in Wyndham.

Section B presents an economic analysis of Wyndham as background research to the Strategy, and comprises the following assessments:

- Historical and forecast population in Wyndham and socio-economic characteristics of the resident population
- Population capacity in Wyndham within the Urban Growth Boundary
- Retail spending estimates, both current and forecast

- Examination of the existing activity centre network in Wyndham and a description of the existing centres
- Preparation of estimates of supportable future retail floorspace development and assessment potential development trends for office floorspace and other commercial uses.

Definitions

Activity Centres

Activity centres are places where many of the key facilities and services which meet the needs of the surrounding resident population are concentrated. Activity centres are normally, although not always, characterised by the presence of retail activity, and can also include a wide range of non-retail functions, including community activities and services, recreation, office/commercial, education, and residential. Current planning policy in Victoria promotes a diverse range of retail and non-retail functions in activity centres and this direction is implemented in the *Wyndham Activity Centres Strategy 2016*.

Activity Centre Peripheries

Activity centre peripheries are areas immediately adjacent to activity centres where a range of high intensity uses such as shops may be discouraged or prohibited. Depending on zones and related provisions, the periphery of activity centres can accommodate other uses such as low-scale office space (including consulting rooms), schools, community centres, places of assembly and worship, other employment uses, and higher-density residential (although these uses can also be encouraged within centres). Activity centre peripheries are areas which have a strong geographic or functional synergy with the core of the activity centre.

This strategy does not define activity centre peripheries or specific activity centre boundaries. The exact location of activity centre boundaries and the extent of activity centre peripheries will be determined, if warranted, on a case-by-case basis by localised planning strategies such as Precinct or Local Structure Plans, or in their absence by the Business 1 zone, plus any adjacent business zone and an adjacent Mixed Use zone if a schedule to the zone defines it as part of the activity centre.

Retail and Non Retail Activity

In this report, a comprehensive retail-economic analysis has been undertaken in order to assist in guiding activity centre planning. Retailing is typically the main activity generator in most activity centres in outer suburban areas such as Wyndham, and the magnitude and type of retail floorspace is normally a key determinant of a centre’s functional role in serving the surrounding community.

Many other forms of activity - such as banks, estate agencies, accountants and medical clinics, and services such as libraries, child care and community support agencies - have strong synergies with centre visits associated with retailing activities, and are appropriately provided in activity centres.

Retail is also a sector of the economy which is easily analysed in terms of land use change due to its strong relationship with the population and retail spending levels in the surrounding catchment.

In contrast, demand for non-retail functions in activity centres can be difficult to forecast due to factors which include state and federal government policy, prevailing market conditions, and individual business decisions. However, non-retail functions are key components of activity centres and associated planning policy, and their importance to the development of the *Wyndham Activity Centres Strategy 2016* is reflected in a strong set of policy directions, supported, where appropriate, by economic analysis.

Commercial and community services are vital to community wellbeing and a view exists that these are underprovided in Wyndham at present. As a result, a key policy objective of this Strategy is to ensure that a stronger mix of commercial and community functions exists in activity centres in the City of Wyndham. Such an outcome will better meet the needs of the community.

Encouraging appropriate medium and higher density residential development within, and on the edge, of activity centres is also an important objective of the Strategy. Such development will enhance local housing choice and have synergies with existing and proposed public infrastructure (including public transport).

It will also contribute to improved local employment opportunities, in circumstances where the proportion of professional, administrative and other “white collar” people in the resident workforce is well above their share of the job supply.

Retail Function

The *Wyndham Activity Centres Strategy 2016* outlines the retail function of centres as an analytical tool in assessing the retail sector in the municipality, and as a policy tool to guide retail development outcomes. Broad indications of supportable retail floorspace by centre have been prepared in order to inform Council policies in relation to retail development at individual activity centres.

This retail analysis forms only one component of the Strategy.

Activity centres are also explicitly encouraged in the Strategy as a focus for a broad mix of uses consistent with the objectives of the State Planning Policy Framework (SPPF). The identification of a retail function for activity centres <u>does not</u> replace the classification of centres according to their status within the SPPF.

ANZSIC Classifications for Retail Activity

Retail

Throughout this report the use of the term “retail” - when describing land use, floorspace, retail development potential, etc. - refers to total shopfront retailing and is based on the ANZSIC classifications adopted by the Australian Bureau of Statistics (ANZSIC 1993) and used in the ABS Retail Census 1991/2 (which also incorporates a number of personal services in the definition of shopfront retailing).

Retail activity can be further categorised according to the broad *type* of retail use, such as **food** retailing, **non-food** retailing and **retail services**.

In this Strategy, reference is also made to more specific definitions, such as **homemaker retailing**, as described below.

It is important to note that for the ANZSIC classifications, businesses are categorised according to the *predominant* activity carried out by each business. As a result, some businesses that are defined as belonging to the retail sector have a significant share of their sales which are derived from trade or business purchases, rather than from spending by private households. Similarly, some businesses are predominantly in the wholesale sector but also have a component of retail sales.

Food retail

This retail category includes businesses such as supermarkets and grocery stores, liquor stores, take-away food retailers, and businesses primarily involved in the sale of other specialised food products such as bakeries, fresh food produce etc. For the purpose of this Strategy, cafes and restaurants are included in the definition of food retailing (noting that this category is included in the definition of selected personal services in the ABS Retail Census classification).

Non-food retail

This includes businesses which are involved in the retail sale of personal and household goods, including department stores and shops selling clothes, shoes, soft furnishings, furniture, homewares, appliances, recreational goods, etc. This definition also includes household equipment repair services.

For the purposes of this report, the definition of Non-food retail does not include the ANZSIC industry sub-divisions *marine equipment* retailing, *motor vehicles sales and parts* and *garden supplies* retailing. This is a minor exclusion which reflects the fact that these uses have large areas of land which are not typically part of a “shopfront” environment.

Retail: Refers to land used to sell goods by retail, or by retail and wholesale, and land used to sell services or to hire goods.

This includes activities such as *shop* (see below), *food and drink premises* and *trade supplies*, all of which are generally included in the ANZSIC-based definition of *Retail*.

This definition also includes land used for gambling premises, gardening supplies, manufacturing sales, motor vehicle, boat and caravan sales, market, post office and primary produce sales. These categories are not typically considered part of the retail industry and are excluded from the ANZSIC-based definition of retail.

The definition of retail land use in Victoria Planning Schemes is much wider than the definition of *Retail* used by the ABS and adopted for the purposes of this report.

Shop: Refers to land used to sell goods and services by retail and to hire goods, but excluding other types of *Retail* land uses listed above.

Includes *Restricted Retail Premises* (see below), as well as supermarkets, department stores, convenience shops, video shops, dry cleaning agent, hairdressers and beauty salons, bottle shops, laundromat and adult sex bookshops.

Generally, all shop uses can be categorised as *Retail* in terms of the ABS classifications (see note below relating to restricted retail uses); however, other ABS *Retail* uses are not included in the shop definition, such as food and drink premises, trade supplies, and so on.

Restricted Retail: This is a subset of *shop* use, and refers to land used to sell or hire auto parts and accessories, camping equipment, electric light fittings, equestrian supplies, floor and window coverings, furniture, furnishings, manchester (fabrics and bedding), household appliances and electrical goods, home entertainment goods, party supplies, swimming pools and office equipment and supplies.

The term *Restricted retail* is commonly interchanged with “peripheral sales” or “bulky goods”, and describes retail (i.e., ABS-defined) uses which typically require large sites and which may seek to locate away from traditional shopping centres.

However, the *restricted retail* definition includes uses not defined as retail for the purposes of this Strategy, including the sale of auto parts and accessories and the sale of swimming pools. In addition, “restricted retail” does not necessarily include many of the homewares-type retail product categories which are now an important component of the large format “ homemaker” retail market that is defined in this report .

Trade supplies: Is a subset of Retail Premises and includes land used to sell by both retail and wholesale, or to hire, materials, tools, equipment, machinery or other goods for use in:

- a Automotive repairs and servicing;
- b Building;
- c Commerce;
- d Industry;
- e Landscape gardening;
- f The medical profession; primary production; or local government, government departments or public institutions.

Trade supplies uses are often located on the fringe of activity centres, or integrate with areas supporting restricted retailing.

Office: Is defined in the Planning Scheme as land used for administration or clerical, technical, professional or other like business activity. No goods or materials intended for manufacture, sale or hire may be stored on the land. Other than electoral office and medical centre, it does not include any other defined use. In general, Office uses as defined in the Wyndham Planning Scheme are encouraged to be located in activity centres.

This definition of Office does not include ancillary office space associated with factories, warehouses, hospitals and similar businesses which are often more appropriately located in out- of-centre locations.

A summary of the relationship between the above planning definitions and retail and commercial land uses is shown in the following Table (over page).

Retail services

This refers to selected personal services typically undertaken at shopfront locations, and includes optometrists, DVD/video hire outlets, laundries and dry cleaners, hairdressers and beauty salons, film processing outlets, and shops offering personal and household goods for hire.

Homemaker retailing

In addition to the broad retail types defined above, the Activity Centres Strategy adopts a land use definition that relates specifically to large-format shops that sell ***homemaker*** merchandise. This sub-category has been defined to enable consideration of shop types that seek large sites with sufficient display area to accommodate large or bulky products (such as furniture, whitegoods, etc.). These shop types have previously been described in planning schemes as *peripheral sales* or *bulky goods* retailing.

In recent years, a trend has been noted whereby the range of products available in what was formerly called "bulky goods" retail have expanded to include many household or homewares products that do not necessarily fit the conventional definition of bulky goods merchandise. Examples include haberdashery, household linen and furnishings, cooking utensils and cutlery, home electrical, computers, photographic equipment, audio disks and tapes, etc.

The definition of homemaker retailing in this Strategy takes into account both the traditional bulky merchandise and the homewares products now commonly sold in large format sites such as along Old Geelong Road in Hoppers Crossing.

GST

All retail spending figures quoted in this report are expressed in constant 2014 dollars and include GST.

Land Use Terms Used in Victoria Planning Schemes

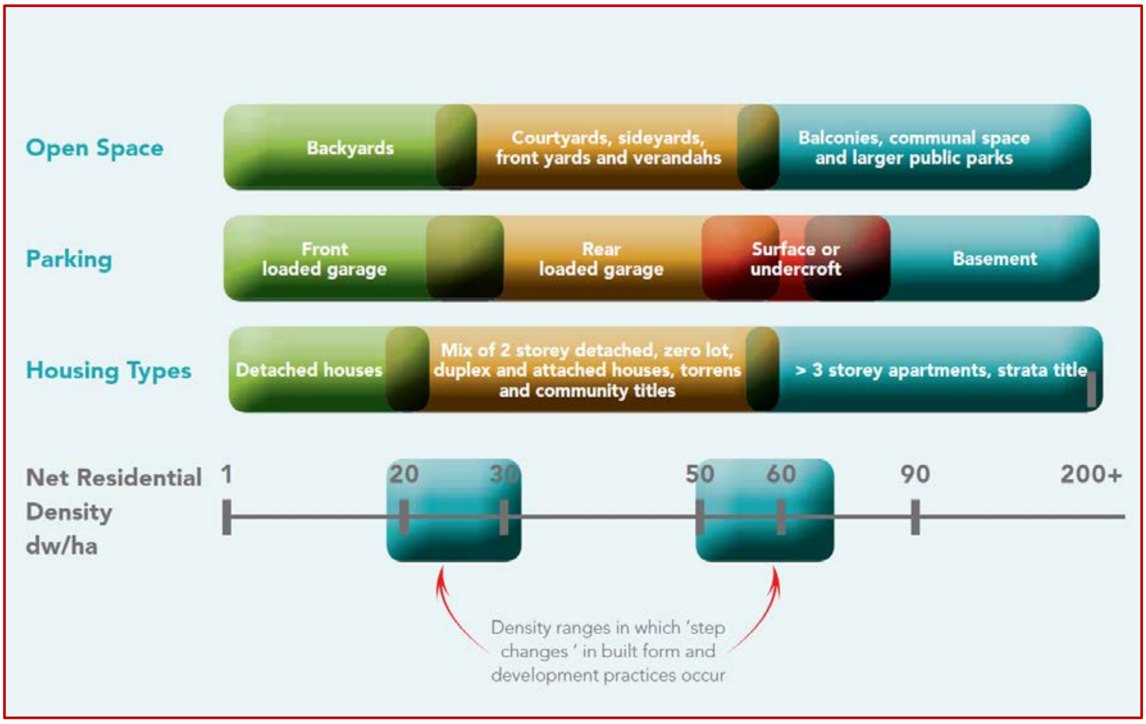
The following terms are used in Victoria Planning Schemes to describe land uses for the purposes of zones, schedules to zones, overlays, etc.

Planning Definition	Allows	Is it consistent with retail definition as adopted by ABS and within this Strategy?
Retail	A very wide range of land uses selling or hiring retail or wholesales goods and service	Includes all *retail* uses as defined by the ABS, although also incorporates a wide range of commercial and industry uses that are not a part of the retail industry.
Shop (sub-set of retail)	Virtually all shopfront type land uses.	Yes
Restricted Retail (sub-set of Shop)	Large format sales and retailing	Generally yes. Retail industry definition excludes automotive sales, swimming pools and office equipment sales, but includes all other components of restricted retail planning definition.
Trade Supplies	Trade and industry sales.	Can include some homemaker type retailing, in particular hardware.
Food and Drink Premises	For sale of food and drink for immediate consumption.	Includes convenience restaurant and restaurant uses that are considered a retail activity.
Office	Office space and other general business premises for a clerical, technical, professional or administrative use.	No. Office floorspace is generally considered separately to retail.

Residential Development Types

In order to guide residential development within and on the periphery of activity centres, it is useful to consider Industry benchmarks on the scale of new buildings and residential development. An example is the guide prepared by Landcom in New South Wales (Figure 1) which is generally accepted in the property industry as an appropriate indication of the interaction between residential development formats and dwelling density.

Figure 1: Residential Density Guide for New Development



Source: Landcom, Residential Density Guide

Catchment / Trade Area

The term "catchment" (or trade area) is commonly used in retail and activity centre planning and in this Strategy Report to refer to the geographic area which represents a centre's main source of trade. Catchments served by activity centres are determined by a wide range of factors, including:

- The location, size and composition of the activity centre
- The proximity and composition of other activity centres
- The catchment served by other activity centres (although recognising that the overlap of catchments is common)
- The accessibility of the centre via road and public transport

- The physical barriers to movement, such as rivers, rail lines and major roads
- The location of residential growth areas.

Hierarchy of Activity Centres / Network of Activity Centres

Typically, activity centre location and development follows a hierarchical pattern, with the highest-order centre at the top of the hierarchy and with lowest-order centres at the base of the hierarchy, with the middle of the hierarchy occupied by centres of varying, generally intermediate roles and functions. In essence, centres situated at or near the top of the hierarchy have a greater provision of floorspace, a wider and deeper provision of retail, commercial, community and other facilities and services, and serve larger trade areas, commonly with an emphasis on “comparison” goods than the smaller centres situated towards the base of the hierarchy, normally with a strong focus on “convenience” goods, especially food and groceries.

The benefit of applying a hierarchical approach is that a centre’s position in the hierarchy typically denotes the centre’s role and function, and highlights the centre’s likely composition. In essence, the ‘hierarchy of centres’ approach provides the empirical basis for identifying centres according to role, function, size and componentry. This is critical to developing activity centres policy which provides the range of centres which best meets the needs of the community.

While the term ‘network of centres’ is adopted in this Strategy to conform with planning policy nomenclature, it is emphasised that the ‘network’ classification used in the Strategy is underpinned by research relating to the ‘hierarchy of centres’, thus providing substantiation to the adopted approach.

SECTION A: WYNDHAM ACTIVITY CENTRES STRATEGY 2016

A1 Introduction

Section A presents the Wyndham Activity Centres Strategy, which consists of:

- A summary of issues which need to be considered in the preparation of the Strategy
- A set of strategic policy directions which have been prepared in order to provide guidance to Council and other stakeholders
- n activity centre development framework which describes the existing and proposed network of activity centres in Wyndham
- A set of recommendations to guide the assessment of development applications against the Strategy and to guide more detailed planning.

The Wyndham Activity Centres Strategy is presented in the following Chapters, and is based on consideration of all of the main points developed in Section B: Research and Analysis.

A2 Summary of Key Issues

This section describes the key issues that need to be addressed by the Wyndham Activity Centres Strategy, based on the analysis undertaken as background to the study and shown in Section B: Research and Analysis.

Issue 1 Population Growth and Change

Substantial population growth is forecast to continue in the City of Wyndham over coming decades and this will generate demand for supporting facilities and services, including retail and non-retail and other employment-generating activities. This Strategy seeks to ensure that most of these new facilities and services will be concentrated in and around activity centres. New residential development will also be incorporated into activity centres.

Clearly, the change in population and the development of greenfield land for new residential development will create pressure for ongoing activity centre development to meet the community's needs. However, current decisions in relation to activity centre planning and development need to be made in the context of ensuring that the longer-term objectives for activity centre development are not compromised. A sensible balance between current and future activity centre requirements will need to be achieved over coming years.

Response: The Activity Centres Strategy will need to respond to the rapid population growth occurring in Wyndham by meeting the current demand for additional facilities and services, without undermining the long-term objectives it sets out for activity centre development.

Issue 2 Determining Activity Centre Roles

It is important that existing and proposed centres have clearly defined and identifiable roles in the activity centre network in order to assist Council and other stakeholders in directing future investment. This will serve to reduce uncertainty in relation to future outcomes and allow for more effective and integrated planning. In response, the Strategy identifies a network of existing and planned activity centres to serve future demand.

Activity centres are defined according to the overall priority of each centre as a location for a wide range of public and private sector investment including retail, commercial, residential, community social, administrative and transport functions etc. This priority is reflected in the classification of key centres as either a Principal or Major activity centre – note that with the release of the Plan Melbourne metropolitan strategy that does not identify a metropolitan activity centres hierarchy, these classifications reflect planning aspiration for the City of Wyndham.

Activity centres are also described in terms of their retail function. The definition of a retail classification for centres provides greater structure and certainty (compared with planning policy definitions) in relation to the expected retail development outcomes for Council and private sector stakeholders.

This is particularly important in an urban growth area such as Wyndham where a sustainable hierarchy of centres is developed that meets community need in a manner consistent with strategic land use policies. The Wyndham Activity Centres Strategy also provides an indicative retail floorspace distribution for centres, which can be used to help define the role of specific centres and create a greater degree of certainty for developers, traders and the community.

The definition of centres according to their retail function ensures that Wyndham develops a sustainable retail sector which meets the needs of residents, and contributes to the broader objectives of activity centre policy.

Response: The Activity Centres Strategy will provide guidance on the role and function of current and planned centres within Wyndham. This includes understanding the broader role of centres in the activity centre hierarchy, as well as determining the appropriate retail function of centres which will support the creation of a vibrant and diverse retail sector in Wyndham that meets the needs of the community.

Issue 3 Increasing the Range of Activity Centre Functions

Activity centres in Wyndham are currently dominated by retail uses, with the exception of Werribee City Centre and the East Werribee Employment Precinct.

As the population of Wyndham expands over coming years, an increasing need to locate a range of functions in activity centres will emerge, including commercial activities (office, business service, industry, etc.), community, cultural and social facilities, transport, education and civic infrastructure.

It is also expected that activity centres will have a role in providing residential choice within Wyndham by supporting the development of higher density residential development formats.

The importance of the non-retail role of activity centres needs to be recognised and encouraged through appropriate policies in the Strategy.

Response: The Activity Centres Strategy will support the development of a wide range of non- retail commercial, community, cultural, residential and other land uses within activity centres, having regard for the place that an existing or planned centre will have in the municipality’s hierarchy of centres.

Issue 4 Flexibility for Future Change

The dynamic nature of a modern market economy such as Australia's will need to be considered in activity centre policy for Wyndham. Some of the key drivers of change are likely to include:

- Broad, macro-economic issues such as economic growth, interest rates, private and public sector investment etc.

- Shifts in consumer behaviour and preferences
- Changing levels of household debt and the willingness of consumers to use credit finance
- Product innovation
- Changing socio-demographics (e.g., ageing population)
- Development of new forms of retailing and business activities (e.g., internet, outlet centres).

Similar drivers of change can be expected for many other functions, particularly in terms of the scale and location of public sector investment in civic, community, health and education facilities, as well as public and private sector investments in residential development within activity centres.

Since the Activity Centre Strategy is intended to guide policy over a substantial period of time, it is important that sufficient flexibility is available to accommodate change. This will assist in maintaining the relevance of the Strategy over time and allow for positive reactions to innovation and change that are a natural part of a modern market economy.

Response: The Activity Centres Strategy will develop a framework for activity centre development which has sufficient rigour to promote development outcomes consistent with policy objectives, yet allows for innovation and change where this achieves a community benefit and does not undermine growth area planning principles.

Issue 5 Support Growth Area Planning

Implementation of the Activity Centres Strategy needs to occur in the context of the significant degree of planning which has already occurred in the Wyndham growth area.

Over the past decade, a number of significant changes to growth area planning for Wyndham have created a high degree of 'planning uncertainty' and this has made activity centre planning difficult. However, in the recent past a range of policies have been implemented, and commitments given, which result a relatively robust framework that identifies future urban development outcomes in Wyndham. These planning-related policies, strategies and projects include the following:

- Plan Melbourne metropolitan strategy
- Identification of protected remnant native grasslands
- Identification of East Werribee Employment Precinct
- Construction of Regional Rail Link project running between Werribee and Deer Park
- Confirmation of station locations for the Regional Rail Link
- Release of the Melbourne West Growth Corridor Plan

- Outcomes of the Western Regional Employment and Industrial Development Strategy (WREIDS) study
- Progress in the preparation of Precinct Structure Plans in Wyndham.

Despite the progress that has been made in planning for urban growth in Wyndham, some uncertainty remains associated with possible minor revisions to the UGB, the yet-to-be-completed PSPs, ongoing planning for the long-term future of the Regional Rail Link etc.

Response: The Wyndham Activity Centres Strategy will need to respond to, and be consistent with, the urban growth framework being applied in Wyndham. However, the Strategy must also recognise that the final nature of urban development in Wyndham has not been completely determined and that, where necessary, an appropriate degree of flexibility is required in order to respond to a range of potential urban development outcomes.

Issue 6 Promoting Employment and Investment

As the City of Wyndham expands, it is important that opportunities for employment and investment are maximised so that the community will benefit from a strong local economy. Activity centres have an important role in this regard due to their role as locations for a wide range of retail, commercial and many other functions, and the opportunities for economic activity they provide.

Activity centre policy should also encourage the establishment of higher-order economic activities, such as professional services, education and technological research, which increase the levels of wealth and income generated locally.

A particular focus of the Strategy is to ensure that activity centres attract a wide range of commercial and business services, in addition to their traditional retail role. In this way, activity centres can accommodate business growth and provide a diverse range of employment opportunities. At present, a large share of Wyndham residents travel outside the municipality in order to access employment (see also Section B: 4) and so, over time, it is important that increased employment self-sufficiency is achieved.

The role of the retail sector also needs to be recognised in view of its high contribution to total employment and the fact that retail is an important employment "gateway" for a many young people entering the work force. A vibrant and sustainable retail sector is also an important catalyst for promoting investment in activity centres and attracting non-retail functions, many of which rely on the exposure and activity generated by retail.

Response: The Activity Centres Strategy needs to maximise the opportunities for Wyndham to generate employment and investment so as to promote the future economic prosperity of the City and its residents.

Issue 7 Residential Development

Although most residential development in Wyndham is expected to involve the construction of detached dwellings on “greenfield” sites, growth in demand for medium and higher-density residential development options in proximity to activity centres is expected. This trend is being driven by lifestyle trends and demographic changes, and it is important that housing choice in Wyndham is encouraged by sustainable forms of residential development within, or on the fringe of, current and planned activity centres.

In addition to accommodating residential development, where this is appropriate, activity centres must be mindful of the needs of local residents, and contribute to the liveability of the communities in which they are located.

Council is currently preparing a Housing Strategy for Wyndham that is expected to provide guidance on facilitating higher residential densities within and around activity centres, with an emphasis on higher-order centres and those with a train station.

Response: The Activity Centres Strategy will recognise the opportunities for centres to incorporate higher-density residential formats and contribute to the liveability of their community.

Issue 8 Location and Urban Design

In addition to being important locations for the provision of retail, commercial and community functions, activity centres have significant influence on the liveability of urban areas and creating a sense of community to surrounding residents.

Activity centres are dependent for their success upon accessibility to potential customers, with the most successful centres usually located at prominent positions near or at the intersections of major transport routes, thus benefiting from high levels of accessibility and visibility. The design of centres should seek to achieve the optimum balance of convenience and accessibility to all users of the particular centre, including pedestrians, cyclists, buses, trains, taxis, private vehicles, delivery vehicles, service and emergency vehicles, and so on.

In addition, activity centres in Wyndham should offer a high quality urban design that is user-friendly and generates a sense of community pride. Centres should incorporate public open spaces in which they can accommodate a diverse range of both informal and formal activities, including ‘people-watching’, eating, reading, chatting, market stalls and other community events, all of which are essential ingredients in any successful activity centre.

Response: The Activity Centres Strategy will seek to develop a network of activity centres in Wyndham which are accessible, attractive and successful. High quality urban design outcomes will be a priority of the Strategy, supported by public open space that provide for a diverse range of formal and informal activities, with the goal of creating places which meet the day-to-day needs of residents, create a sense of place and engender a sense of community.

A3 Vision and Objectives

This Vision is intended to be an overall guiding statement to assist Council and other stakeholders in suitably planning for the on-going development of activity centres in Wyndham. Specifically,

> ***"Wyndham's activity centres will develop in a way that promotes a vibrant and robust activity centre network; encourages a diverse mix of uses; is efficient and viable for investors, businesses, consumers and other users; generates employment and income opportunities; promotes sustainable social and environmental outcomes; and functions in a manner which focuses on the needs of residents and visitors to the City".***

A4 Strategic Policy Direction

The following guiding principles reinforce the policy direction set by Council and other relevant government authorities.

(1) Support the activity centre network

The activity centre network will be supported so that the roles and functions of each centre are easily identifiable and provide certainty for stakeholders, including Council, developers, property owners and businesses. Development of land uses outside the activity centre network – which should otherwise be located in an activity centre – is discouraged, subject to the directions of the Municipal Strategic Statement and Planning Scheme .

(2) Provide an Accessible Activity Centre Network

The location and design of activity centres will optimise accessibility within and around centres, and will reflect sustainability principles and enhance local amenity through reduced private vehicle traffic levels, congestion and associated air emissions, and provide a safer environment for pedestrians. Integration with sustainable forms of transport, including public transport (trains and buses), as well as walking and cycling, will be actively encouraged.

(3) Encourage a wide mix of commercial and community activities in Principal, Major and Large Neighbourhood Centres

This Activity Centres Strategy will encourage the future development of activity centres as lively foci for a wide range of activities including shopping, business, community services, housing, employment and leisure. In particular, the nominated Principal, Major and Large Neighbourhood activity centres will be the focal points for a mix of land uses.

Important benefits to be gained from broadening the mix of activities available at activity centres include the benefits of aggregating and clustering like uses, the efficient allocation and extended use of infrastructure, and expanding the social and environmental benefits associated with factors such as reducing private vehicle trip-making, improving public transport access, generating employment, and encouraging more vibrant centres.

This expansion in activities should be encouraged through guidelines supporting a wide mix of uses in activity centres and applying the principles associated with transit-based design, noting that a centre's classification will influence the type and extent of activities locating in the centre. Planning for activity centres should avoid an overly "prescriptive" approach which specifies a required mix of commercial activities for a centre, except to the extent that centres are planned to accommodate "signature" land uses, such as retail anchors (such as supermarkets) and key community infrastructure (as appropriate).

Beyond that, sufficient flexibility should be provided for the market to determine commercial land use outcomes in activity centres, and with the support of appropriate policies and strategy documents.

(4) Retain retail expenditure through the provision of an efficient activity centre network

The development of retail facilities will be encouraged where such facilities meet the requirements of residents and visitors, and where such development is in accordance with the activity centre framework and long-term planning goals. Where possible, residents and businesses should be provided with the appropriate range of retail and other services they require. Timely and appropriate activity centre development generates local economicbenefits in the form of jobs, incomes, ongoing investment and improved levels of service, and should contribute to local amenity through quality urban design, and in optimising accessibility to retail and associated services, would contribute to environmental, social and economic sustainability of growth.

(5) Refine and consolidate the existing activity centre network

Existing centres will continue to make an important contribution to economic development in Wyndham. The roles of existing centres will continue to be supported, and centre redevelopment and expansion is encouraged where this contributes to the ongoing health of the activity centre network.

(6) Identify an appropriate role for local activity centres, (including single convenience shops) which promotes access to convenience-oriented goods and services in a viable manner

New urban development areas will include local activity centres including individual convenience shops, which facilitate residents' access to basic, day-to-day convenience-oriented goods and services. These small centres, should be located where they have good access to passing trade, serve a walk-in local catchment, and enjoy exposure to other activity generators (such as schools), so that the long-term commercial viability of these small centres is achieved.

Council will need to work with businesses and land owners in order to facilitate appropriate development in existing small local convenience centres in Wyndham which are poorly performing (in some cases run-down or vacant) and which have lost much of their original role as local retail activity centres. Options for these locations may include re-development for residential, community or mixed-use activities. (See Section A6.6)

(7) Closely monitor out-of-centre development, and ensure that such development is restricted to nominated locations

Retail and other relevant commercial uses that occur away from activity centres will conform to the principles of quality design, accessibility and sustainability through policies which seek to aggregate uses at nominated locations.

In a rapidly developing area such as Wyndham, development pressure is likely to occur on sites located away from activity centres (for example, on sites with main road frontage), and for a range of retail and related activities such as homemaker (bulky goods) shopping, building/trade supplies, hardware sales, and other large format commercial activities.

These development pressures will arise from the increasing popularity of large-scale retail stores, typically in homemaker retail categories such as furniture, whitegoods and other electrical equipment, camping equipment, hardware, and so on. These stores typically seek large sites outside activity centres where their considerable retail floorspace and car-parking requirements can be met, and where land costs are lower. Other key site criteria relate to the need for exposure to a large regional catchment and excellent access arrangements, typically with frontage to a main arterial road.

A key issue for activity centre policy is how to accommodate these popular forms of retail and commercial development, and which are clearly in demand from consumers, while encouraging a sustainable form of development that conserves infrastructure resources, encourages improved visual amenity, and contributes to the goal of a vibrant and sustainable activity centre network for Wyndham.

It is important that this development occurs with an emphasis on the creation of large integrated developments or precincts that accommodate multiple tenants, thereby reducing the need for multiple car trips and encouraging other forms of transport access to develop.

These developments should occur either in the existing Old Geelong Road strip, or in other locations identified by Council after appropriate consultation with relevant stakeholders – and with a clear policy preference for edge-of-centre locations at Major and Principal activity centres. (See Section A7)

(8) Support the establishment of new activity centres where they are justified by new residential development, contribute to net community benefit, and are consistent with the defined Activity Centre Network for Wyndham

Council will support development applications for new centres where the proponent clearly establishes the retail need for such a development, and where the development is consistent with the operation of the Activity Centre Network.

Newly-developing urban areas require the timely provision of new activity centres in order to ensure that the needs of new residents are met, and to reduce the travel demands for these residents in accessing these retail and other requirements. Nevertheless, situations may arise where short-term development pressures conflict with the longer-term goals associated with the proposed network of activity centres in Wyndham. These pressures will be minimised through the prompt and efficient approval of development that is consistent with the proposed network, as well as by efforts by policymakers to ensure that the integrity of the activity centre network is maintained.

Use of Retail Floorspace Allowances

In Victoria's urban growth areas, including Wyndham, planning schemes have often allowed retail floor areas in activity centres "as-of-right" up to a specific floor area in the previous Business 1 Zone; or other appropriate planning zone. Beyond the as-of-right allowance, modest further increases in retail floorspace has been achievable through permit applications, with more significant increases pursued through amendments to the planning scheme.

The use of retail floorspace allowances can assist in the creation of a strong hierarchy and network of centres, and encourage investor confidence; both consistent with planning policy objectives.

Although floorspace cap provisions have been removed from a number of zones in the recent reforms to the Victorian Planning Provisions, this planning tool remains available in the Urban Growth Zone that applies to much of Wyndham.

> The <u>indicative</u> retail floorspace allowances in this Strategy are intended to assist the City of Wyndham in achieving an appropriate retail floorspace provision for specific centres and across the municipality.

(9) Encourage Local Economic Development and Employment

Activity centres in Wyndham will be locations which support new business development, provide a focus for private sector investment, and maximise local employment opportunities. Activity centres should develop in a manner which encourages entrepreneurship and in a manner whereby new and start-up businesses can be accommodated. A strong network of commercially-successful activity centres will also be attractive to investors and can be expected to generate a wide range of flow-on economic and other benefits to Wyndham.

Current State planning policy strongly supports growth area planning which achieves a high degree of economic self-sufficiency in terms of jobs and economic development, and which minimises the travel needs of the population. Within Wyndham, activity centres will provide a high-quality business environment through the provision of appropriate infrastructure and by providing locations which are accessible to customers and attractive to employees and visitors.

(10) Activity Centre Planning and Design

This Strategy, subject to discretion reflecting local circumstances, adopts the Built Environment and Heritage provisions in the State Planning Policy Framework (SPPF) and Municipal Strategic Statement (MSS). Furthermore, the Strategy advocates the adoption of the Activity Centre Design Guidelines published by the Department of Sustainability and Environment in 2005, the Precinct Structure Plan Guidelines of the Growth Areas Authority (as updated from time-to-time) and any specific provisions in relevant Precinct Structure Plans.

Community Facilities and Services

Council has an active role to play in achieving a wider mix of activities through the location of appropriate community facilities and infrastructure in or adjacent to activity centres, and through ensuring that sufficient zoned land can be provided for centre activities. The range of community elements to be incorporated in centre planning and design (as appropriate) include:

- Public plazas and relaxation areas
- Relevant community infrastructure such as libraries and other services
- Scope for, and/or provision of, private community facilities such as churches, clubs etc
- Space for charitable groups and other non-government organisations

(11) Assessing Development Applications

A process will be developed whereby guidance can be provided to Council when assessing new retail development proposals. This assessment process will clearly define the information and reporting requirements that need to be met by developers, and which will aid Council in assessing the development in the context of the policy recommendations in this Strategy.

Chapter 10, Development Applications, includes a description of how the Strategy is intended to be used in considering development proposals; a list of information that may be required to accompany development proposals; and assessment criteria to guide the consideration of planning proposals by Council.

For the East Werribee Employment Precinct, consideration is also required in relation to the joint governance arrangements for this land between Council and the Metropolitan Planning Authority.

(12) Monitoring and Review

Monitoring and review of the Strategy is important in order to assess progress and to ensure that the Strategy remains a relevant document in guiding activity centre planning and development. The review process should be undertaken every 5 years and in association with a review of other relevant Council and State Government policies and strategies.

A5 Wyndham Activity Centre Network

A5.1 Activity Centre Planning Principles

This chapter describes the Wyndham Activity Centre Network, and shows the appropriate location and role of activity centres in the municipality. The network has been prepared with reference to previous activity centre policy in Wyndham, Plan Melbourne, *Melbourne 2030* (as the most recent metropolitan strategy identifying a hierarchy of centres), the Melbourne West Growth Corridor Plan, and the directions outlined in the PSP process currently being undertaken in the growth areas of the City.

In identifying the network of activity centres to serve the City of Wyndham, the following planning principles have been applied:

- **Accessible for the population** – the activity centre network has been planned so that distances between residential areas and activity centres is minimised. This will ensure a high degree of accessibility to facilities for all residents living within the UGB. Specifically, the analysis only considers new activity centres with greater than 3,000m^2 of retail floorspace, or where otherwise noted.

  Small local centres and corner stores not identified in the Strategy will provide additional retail facilities and increased accessibility to basic services, and these are discussed in broad terms rather than on an individual basis. The locations for small centres will be determined through the preparation of precinct structure plans, having regard for guidelines that seek to ensure that residents are within 1km from basic retail facilities.

- **Community Focal Point** – activity centres have been located where it is considered they will have the best opportunity to act as focal points for their surrounding catchments. For example, centres have been placed at transport nodes and central to their catchments, where possible.

- **Transport Choice** – activity centres have been placed in locations that are accessible via existing and planned private and public transport, and wherever achievable will be co-located with major transport infrastructure (such as railway stations, transport hubs etc.).

- **Economic Viability** – each centre has been assessed according to the principles of economic viability of its retail and other components, as determined by the size of the catchment served by each centre, the location and size of nearby centres, and other relevant factors.

- **Employment and Business Growth** – activity centres have been identified which have the opportunity to be a focus for employment and business growth. A particular emphasis of planning for Wyndham is the opportunity to maximise local employment, and therefore activity centres must be located and developed in a manner which is attractive to businesses and their employees, especially in regard to journey-to-work accessibility.

The definition of an activity centre network for Wyndham, and the application of indicative retail floorspace recommendations for activity centres, has also been undertaken by way of reference to classifications which reflect the retail role and function of individual activity centres within the context of Wyndham.

In this context, the distribution of retail floorspace among existing and proposed activity centres in Wyndham requires an assessment of each centre's role and an allocation of retail floorspace that is consistent with that role, and this assessment is undertaken within the overall context of delivering retail and a whole range of other facilities and services to the surrounding localities (in this case, the City of Wyndham) through these activity centres.

While the term 'network' is used in this Strategy to describe the distribution of existing and proposed activity centres, it is important to note that these distributions are based on reference to the hierarchical pattern of centres and activities. This approach substantiates in an empirical manner the classification of activity centres, as indicated later in this section.

A further consideration is that, beyond establishing a clear hierarchy around existing major centres and future transit-oriented hubs, the retail floorspace allowances provided in this Strategy are indicative of likely development potential and should only be applied as a guide to activity centre planning and development by Council.

Opportunities for more detailed examination of a centre's role and size (in floorspace terms) will occur during preparation of Precinct Structure Plans and Local Structure Plans. Council also retains the discretion to consider retail applications on the basis of the Retail Planning Assessment Criteria described in Section A: 9 of this Strategy.

A5.2 Activity Centre Classification

The Wyndham Planning Scheme identifies the following activity centres in Wyndham:

- **Principal Activity Centre**: These centres are intended to be a focus for higher-order shopping facilities, major entertainment venues, office and commercial activities, community and government functions, etc. These centres are a high priority for private and public sector investment.

  Principal Activity Centre in Wyndham: Werribee City Centre

- **Major Activity Centres**: These centres generally have similar characteristics to Principal Activity Centres, including a wide mix of retail, business, community and other uses, but typically are a lower priority than Principal Activity Centres for private and public sector investment.

  Major Activity Centres in Wyndham: Werribee Plaza, Manor Lakes, Hoppers Crossing, Point Cook Town Centre, Williams Landing, Black Forest Road North, , Riverdale and Tarneit.

- **<u>National Employment Cluster</u>**: These centres are important economic precincts that play a specialised role in the community.

  National Employment Cluster in Wyndham: East Werribee Employment Precinct

- **<u>Neighbourhood Activity Centres</u>**: Are lower-order centres offering a range of local convenience services and are ideally located adjacent to community infrastructure such as schools, community centres, etc. These centres should be connected to the public transport network and encourage walking and other non-motorised transport in the communities they serve.

  In Wyndham: numerous centres, as designated in this Strategy, down to 3,000m^2.

A5.3 Need for Specific Direction on Retail

The Wyndham Activity Centres Strategy 2016 provides specific direction in relation to the retail sector in Wyndham. This reflects the importance of the retail sector in the economy and the need to ensure that the broader directions of activity centre policy in Wyndham create a retail sector which meets the needs of the community.

Recognition of the importance of retail's role in activity centre development is provided in the Retail Policy Review undertaken by DPCD in 2008. The review identifies that:

> "*while overarching policies to guide retail development are reasonably sound- that is, retailing should be supported to locate in centres and out- of-centre retailing should be discouraged - the expression of these policy objectives and the planning tools available to implement them often act as a barrier to delivering appropriate outcomes".* (Retail Policy Review, Discussion Paper, p3)

In understanding the need for the Wyndham Activity Centres Strategy 2016 to have specific consideration of the retail sector, it is important to recognise that:

- The retail sector is the key driver of visitation and activity in most activity centres
- The retail sector is the most important mechanism for the distribution and consumption of the goods and services which are fundamental to everyday life
- The retail sector, for many owners and developers of current and proposed activity centres, represents the 'highest and best use' for a centre, and is therefore the source of considerable competitive tension and controversy within a land use planning framework
- The underlying drivers of retail planning and development are generally very different from those which drive or influence the planning and development of other land uses
- The retail sector is a key driver of employment in the Wyndham economy
- The achievement of a vibrant, profitable and successful retail sector is consistent with the achievement of a wide range of policy objectives and desired outcomes in such areas as service provision, local employment, and mixed-use development

- The specific consideration of the retail sector is an important component of most local policies within the broader framework of activity centres policy
- The dominant use and activity generator in all of the existing activity centres in Wyndham, with the exception of the Werribee City Centre and the Werribee Employment Precinct, is retailing.

A5.4 Retail Function

For the purposes of analysing the retail sector in Wyndham as input to activity centre policy, description of the retail function of centres is included. Each centre is classified according to factors that include total retail floorspace, the functional role of the centre, major tenants, and the size of the surrounding catchment.

Describing a 'retail function' for analytical purposes does not represent a departure from the principles associated with State Planning Policies and the SPPF; however, reference to conventional retail terminology is more appropriate as an analytical tool with which to assess in functional terms the operation of the retail sector in Wyndham.

Metropolitan planning and this Strategy, as well as other measures such as precinct structure planning guidelines, can be expected to result in an increased diversity of uses in activity centres. However, the reality is that retail activities (and the commercial viability of such activities) will continue to be a critically important determinant of the functional role and size of most centres in the activity centre network serving Wyndham.

Table 1 shows the classification of centres by retail function in Wyndham that has been adopted for the purposes of the retail-economic analysis component of this Strategy.

Table 1 Wyndham Retail Function Classification

Classification	Catchment	Indicative Retail Floorspace
Melbourne CBD	Metropolitan-wide	500,000m^2 plus
Regional	100,000 - 350,000 people	50,000 - 150,000m^2
Sub-regional	30,000 - 150,000 people	20,000 - 50,000m^2
Neighbourhood		
- Large Neighbourhood	10,000 - 30,000 people	Up to 15,000m^2
- Small Neighbourhood	6,000 - 10,000 people	3,000 - 5,000m^2
Local Centre	Up to 6,000 people	250 - 3,000m^2

Source: Essential Economics
Note: Catchment size and retail floorspace thresholds are indicative only

Regional

A regional centre can be defined as a centre that directly provides the widest range of retail formats and facilities to a large regional-sized catchment area. A regional centre typically incorporates a selection of major tenants including department store or discount department stores, supermarkets, major national chain retailers and an extensive selection of specialty shops and other retailers. In general terms, a regional centre is the 'highest-order' retail location within the regional catchment that it serves.

Sub-Regional

This is a centre serving a broad catchment, typically comprising a wide range of retail functions, including at least one full-line supermarket and a substantial number of specialty stores trading across most non-food retail categories. Mostly, although not always, this type of centre contains one or more Discount Department Stores (DDSs). Sub-regional centres can also include a range of non-retail commercial and community-based functions.

Neighbourhood

A neighbourhood activity centre primarily serves its surrounding residential neighbourhood with grocery and other day-to-day or regular convenience retail needs. Most neighbourhood centres are located in residential areas.

They may be defined as Large or Small centres, as noted below:

- Large Neighbourhood - Large neighbourhood centres are anchored by one or more full-line supermarkets and contain a comprehensive food and grocery offer, as well as a range of basic non-food products (e.g., chemist, newsagency, hairdresser etc.). A full-line supermarket is generally larger than 3,000m^2 and includes the full range of products available in a traditional supermarket, including fresh food, delicatessen and seafood. Increasingly, consumers prefer to shop at centres containing full-line supermarkets, mainly due to the additional product range available in these stores. A large neighbourhood centre also includes a range of retail shops and services, and often has a non-retail commercial and community-based component.

- Small Neighbourhood - Small neighbourhood centres are typically anchored by a limited range supermarket of up to 3,000m^2 and serve a smaller catchment than a large neighbourhood centre. Small neighbourhood centres tend to serve a day-to-day convenience or top-up shopping role for the surrounding area.

Local Centre

This type of centre typically comprises a small strip of shops (say, 4 or 5 shops) or a corner store. The local centre serves day-to-day convenience needs (milk, paper, etc.) and meets a household's top-up or emergency shopping needs.

Local centres are typically (although not always) less than 1,000m^2 in terms of retail floorspace and, unlike Neighbourhood shopping centres and larger centres, do not have an anchor tenant, such as a supermarket, which generate the significant levels of customer traffic present in larger shopping centres.

A5.5 Summary of Activity Centre Directions

This Wyndham Activity Centres Strategy 2016 uses an **activity centre classification system**, as an indicator of major private and public sector investment priorities, and describes the **retail function** served by centres in Wyndham.

Table 2 presents a summary of the proposed Activity Centre Network for Wyndham, and the indicative retail floorspace allowances for these centres according to the operation of a functional retail sector which meets community need.

The Table is intended as a broad strategic guide to the long-term retail floorspace provision that an activity centre can achieve in order to meet appropriate retail function, and as an indication of the broader investment priorities for centres according to their classification under existing planning policy.

Retail Development Outcomes

Overall, the total retail floorspace recommendations shown in Table 2 indicate a total long-term retail provision in Wyndham of approximately 925,000m^2. This level of retail floorspace development is broadly consistent with forecasts of supportable retail floorspace identified in Section B of this Strategy. Locations for these centres are shown in Map 1.

Allowing for an average rate of employment of approximately 1 job per 24m^2 (ABS Retail Industry Australia 1998-99) of retail floorspace, total employment of 38,500 jobs would be generated in Wyndham by retail activity if this outcome is achieved. This represents approximately 21% of the total jobs required for Wyndham to achieve long-term employment self-sufficiency (180,000 jobs in total), and highlights the importance of the retail sector as a source of employment to current and future residents of Wyndham.

Non-Retail Development Outcomes

No indication of floorspace by centre has been provided for non-retail uses, although in broad terms a higher provision of non-retail floorspace is encouraged in Principal, Major, Specialised and Large Neighbourhood activity centres.

Unlike retail floorspace, which has a relatively stable and predictable relationship with population and retail spending levels, non-retail commercial floorspace is far more difficult to forecast or realistically direct to specific centres. This is due to factors including:

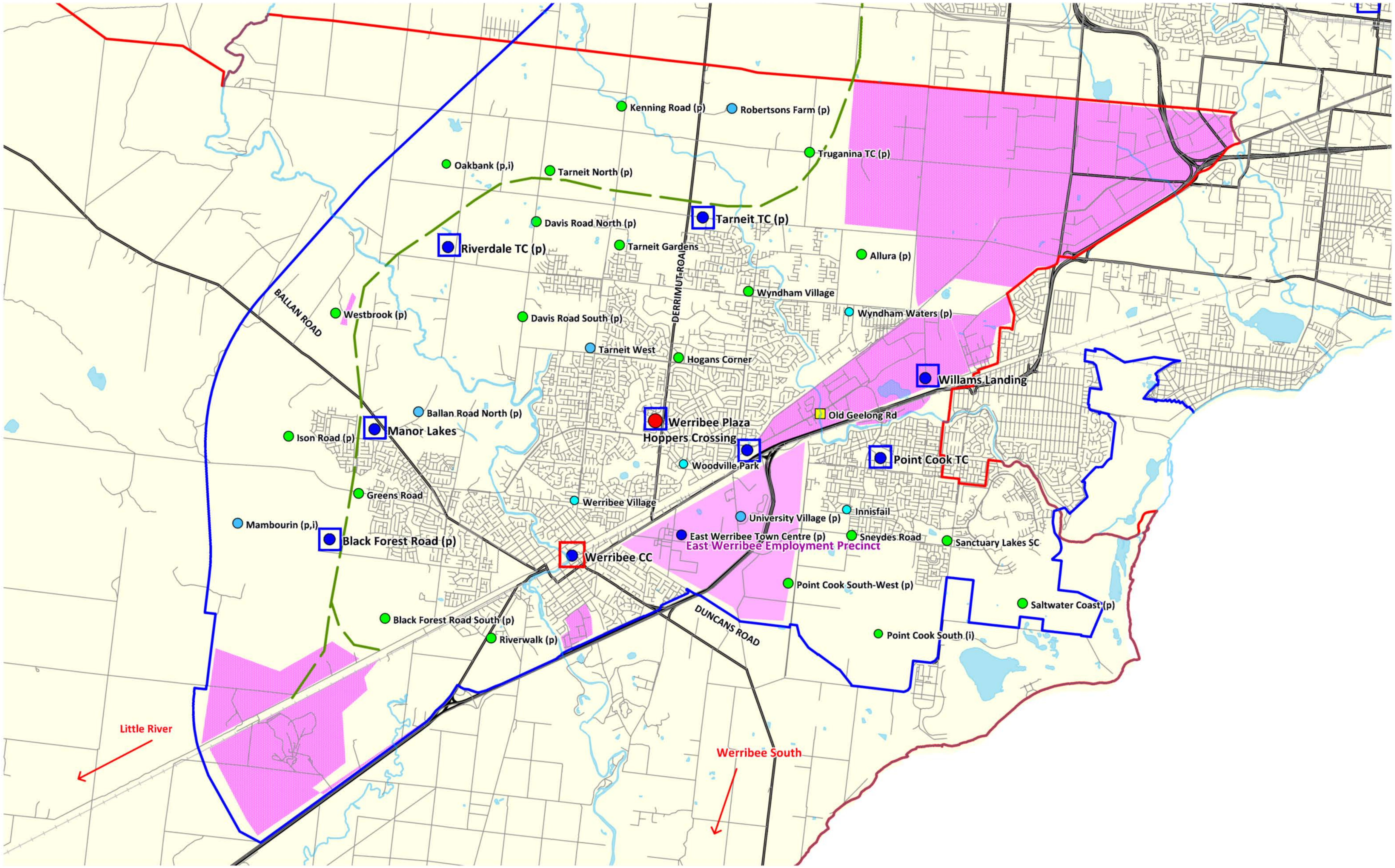
- The wide diversity of potential non-retail uses
- Policy and other influences on site availability
- Greater vulnerability of non-retail development to economic cycles

- Speculative nature of a high share of non-retail development (particularly office floorspace)
- Influence of non-economic factors in businesses choosing where to locate
- Greater choice of potential business locations for non-retail activities (i.e., they generally do not have to be in a centre).

In view of the above factors, combined with the fact that strong policy support exists for non-retail commercial development across the network of activity centres in Wyndham, no specific forecasts of non-retail commercial floorspace have been provided on a centre-by-centre basis.

However, the Wyndham Activity Centres Strategy identifies the opportunity for the City to accommodate approximately 500,000m^2 of office space at population capacity (see also Section B7). If fully tenanted, this office employment would support in excess of 20,000 jobs.

A more detailed assessment of non-retail floorspace requirements is appropriately determined during the preparation of relevant structure plans and precinct structure plans, and with reference to other local planning policy mechanisms. Collectively, these instruments need to ensure that activity centres across the City offer ample scope to achieve an appropriate scale of non-retail commercial development



Map 1 Wyndham Activity Centre Network

Table 2 Wyndham Proposed Activity Centre Network

Plan Melbourne/ Proposed Plan Melbourne Refresh Designation	Activity Centre Classification	Centre	Indicative Potential Retail Floorspace (m^2)	Retail Function
Proposed Metropolitan Activity Centre	**Principal**	Werribee City Centre	50,000 m^2	Sub Regional
Activity Centre	**Major**	Werribee Plaza	140,000 m^2	Regional
		Hoppers Crossing SC	20,000 m^2	Sub Regional
		Point Cook Town Centre	45,000 m^2	Sub Regional
		Manor Lakes	50,000 m^2	Sub Regional
		Tarneit MTC	75,000 m^2	Sub Regional
		Riverdale MTC	25,000 m^2	Sub Regional
		Black Forest Road North (proposed)	25,000 m^2	Sub Regional
		Williams Landing (proposed)	35,000 m^2	Sub Regional
Activity Centre	**Neighbourhood**	Wyndham Village	15,000 m^2	Large N'Hood
		Sanctuary Lakes Shopping Centre	15,000 m^2	Large N'Hood
		Davis Road South	10,000 m^2	Large N'Hood
		Oakbank	10,000 m^2	Large N'Hood
		Tarneit West Local Town Centre	10,000 m^2	Large N'Hood
		Truganina	8,000 m^2	Large N'Hood
		Black Forest Road South	8,000 m^2	Large N'Hood
		Westbrook	8,500 m^2	Large N'Hood
		Ison Road	8,000 m^2	Large N'Hood
		Davis Road North	8,000 m^2	Large N'Hood
		Tarneit Gardens	8,000 m^2	Large N'Hood
		Point Cook South-East (future investigation)	8,000 m^2	Large N'Hood
		Allura (Truganina South)	7,000 m^2	Large N'Hood
		Greens Road	7,000 m^2	Large N'Hood
		Hogans Corner	7,000 m^2	Large N'Hood
		Riverwalk	7,000 m^2	Large N'Hood
		Kenning Road	6,000 m^2	Large N'Hood
		Salt Water Coast	6,000 m^2	Large N'Hood
		Sneydes Road	6,000 m^2	Large N'Hood
		Mambourin	5,000 m^2	Small N'Hood
		Tarneit West Village	5,000 m^2	Small N'Hood
		Ballan Road	5,500 m^2	Small N'Hood
		Robertsons Farm	4,500 m^2	Small N'Hood
		Werribee Village	4,000 m^2	Small N'Hood
		Woodville Park	3,000 m^2	Small N'Hood
		Innisfail	3,000 m^2	Small N'Hood
National Employment Cluster/ Proposed	**Specialised**	East Werribee Employment Precinct		

National Employment & Innovation Cluster	- East Werribee TC	20,000 m^2	Sub Regional
	- Point Cook South-West	8,000 m^2	Large N'Hood
	- University Village	5,000 m^2	Small N'Hood
Other	Old Geelong Road/Laverton	95,000 m^2	Homemaker
	Williams Landing	25,000 m^2	Homemaker
	Other Location to be determined	120,000 m^2	Homemaker
	Sanctuary Lakes Boulevard	2,500 m^2	Local
	Truganina (Business Centre)	2,000 m^2	Local
	Various	250-1,500m^2 each	Local

Source: Essential Economics

A6 Directions for Specific Activity Centres

A6.1 Principal Activity Centres

Werribee City Centre

The Werribee City Centre has the largest provision of both commercial and community floorspace in Wyndham, in addition to over 35,000m^2 of retail floor area. In the future, Werribee City Centre is expected to expand its role as a mixed-use 'main-street' activity centre with a vibrant retail sector which integrates with a wide range of business and community services. The trading performance of the centre is expected to remain strong, and opportunities are likely to exist for refurbishment and redevelopment of existing retail space, and the provision of additional office, commercial, community and recreation functions. The ongoing growth of office floorspace is particularly encouraged.

Major new residential growth areas located to the south-west and west of the centre are likely to support Werribee City Centre's growth, although fragmented land holdings in the centre have the potential to restrict development. This may be mitigated in part by strong strategic land use policy support, including the structure planning process, which actively promotes consolidation and redevelopment of strategic sites, as well as the ongoing growth and diversification of the centre.

The nominal retail floorspace allowance for the Werribee City Centre in Table 2 should not be seen as a floorspace limit, but rather a current reasonable expectation of future floorspace growth at the centre. As a transit-oriented activity centre with Principal Activity Centre status, options for improving the range and intensity of development in the centre are strongly encouraged.

Werribee's status as a successful, transit-oriented centre should be enhanced by place management programs being undertaken by the Council, including:

- Increasing exposure to the Werribee River, and to Wyndham Park and Chirnside Park;
- Exploiting opportunities to support the orderly expansion of the centre;
- Enhancing streetscapes and civic art, and

- Consolidating commercial development, increasing housing densities around the centre, and encouraging residential development in the centre.

The potential for the Werribee City Centre to be classified as a 'Metropolitan Activity Centre' by the State Government should be advocated by Council. This would support the evolution of the centre into a true high-density city centre for the entire western region of Melbourne.

A6.2 Major Activity Centres

Pacific Werribee

Werribee Plaza, which is classified as a Major Activity Centre, has the largest concentration of retail floorspace in the City, and is the only shopping centre serving the entire Wyndham region. The Wyndham Activity Centres Strategy 2016 confirms Pacific Werribee as the Regional Centre for Wyndham in terms of retail function due to its central location to the current and future Wyndham urban area, strong access to the suburban road network and already well-established role as the regional retail destination.

In determining the potential for a true regional retail centre to locate in Wyndham, a comparative analysis has been undertaken. As a result of this analysis, the Pacific Werribee site is identified as offering the best opportunity for Wyndham to develop a regional retail-based activity centre, and this is the case for a range of factors:

- **Location** –the Pacific Werribee site is centrally-located to the entire Wyndham urban area and can effectively service all defined residential growth areas.
- **Accessibility** – Pacific Werribee is highly accessible from the road network and is a focus for the local bus network. Potential exists to further improve public transport links to the centre in a manner consistent with transit-oriented principles.
- **Development Site** – the Pacific Werribee site offers significant opportunities for further development, including more intensive use of existing developed land without the need for site consolidation.
- **"First -Mover " Principle** – Pacific Werribee is already operating as the regional-level retail destination for Wyndham. The centre has a wide range of major traders, including a Myer department store, two discount department stores and two major supermarket operators, as well as an expanding range of non-retail and community facilities.
- **Potential for Mixed-use Development** – although the centre is currently dominated by retail functions, the recent development of community facilities at the centre emphasises the potential for a greater mix of uses to develop on the site over time. Thus, despite its functional role as a regional shopping destination, Pacific Werribee has the potential to develop the broad mix of uses consistent with its Major Activity Centre classification.

Many regional retail centres in Melbourne and nationally are now approaching, and in some cases exceeding, 100,000m^2 of retail floorspace. In this context, it is considered appropriate that Werribee Plaza is given substantial scope for ongoing growth and development as the population of the Wyndham region further expands.

This includes ongoing growth beyond that occurring in the current redevelopment of the centre which will increase the total size of Pacific Werribee to approximately 103,000m^2.

Thus, a long-term retail floorspace forecast of 140,000m^2 has been made in view of the expectation that the Wyndham region is anticipated to reach a total population of over 475,000 persons.

Potential also exists for Pacific Werribee to significantly increase its non-retail commercial, office and community functions in association with growth in retail floorspace, and such non-retail development should be strongly encouraged by Council policy. The exact size and nature of non- retail commercial development on and adjacent to the site should be dictated primarily by market forces, rather than a specific allocation or enforced target.

Pacific Werribee will also be a preferred location for community infrastructure. The centre should have a high degree of accessibility by public transport from across Wyndham, including through the provision of a high-quality bus interchange (noting improvements currently being implemented).

A Structure Planning Process for Pacific Werribee and the surrounding land should be undertaken in accordance with State planning policy.

Hoppers Crossing

Hoppers Crossing is a strategic centre in terms of its location on the main rail corridor and at the intersection of major roads, and its status as a Transit City. However, significant space and congestion constraints exist and these serve to limit the potential for development at the centre.

An allowance for a modest increase in the retail floorspace to 20,000m^2 has been provided in order to allow some flexibility and to provide opportunities for redevelopment at the centre. The Transit Cities program also has the potential to initiate some land-use change within the centre, subject to the achievement of public and private sector investment.

Having regard for the relatively dated appearance of the Hoppers Crossing Shopping Centre (which forms the main component of the Hoppers Crossing activity centre), any moves to refurbish or redevelop the centre are supported, subject to normal planning requirements being met. The approved redevelopment of the centre to replace the existing Target with a supermarket and additional specialty shops is consistent with this outcome.

Likewise, future opportunities may emerge for more intensive development in the area located directly east of the shopping centre. Currently a mix of commercial and retail outlets operate in the Business 4 zone. It is appropriate to consider a rezoning to the new Commercial 1 Zone in this location as it represents a natural extension of the Hoppers Crossing activity centre.

Point Cook Town Centre

Point Cook Town Centre, located in Dunnings Road, is a Major Activity Centre serving the Point Cook growth area and parts of the adjacent municipality of Hobsons Bay.

The geographic catchment served by this centre is constrained to a degree by the presence of competing centres at Hoppers Crossing and the Central Square centre in Altona Meadows. Future development outcomes at Point Cook Town Centre are also potentially affected by major development on the Williams Landing site, just 2km to the north, although the centre is well located in relation to its catchment, and remaining residential growth to the south and west.

Point Cook and adjoining areas will have sufficient population to support a significant range of retail functions at the Town Centre, and the future provision of approximately 45,000m^2 of retail floorspace is supported by the Strategy.

The Point Cook Town Centre will perform a strong mixed-use role for Point Cook and will include a wide range of commercial and community functions, including a community centre and learning centre (library). Further expansion of non-retail commercial floorspace is encouraged, particularly for businesses serving the surrounding resident population (leisure, entertainment, professional services etc.).

A redevelopment of the south-west quadrant of the centre is currently underway that is replacing the former Harris Scarfe and Best and Less tenancies with a new supermarket and specialty shops.

The site enjoys excellent accessibility to residents of the Point Cook growth area, and strong progress has already been made in creating a high-quality mixed-use centre on the site. **The continued retail role of Point Cook Town Centre as the primary sub-regional shopping centre serving the Point Cook growth area is explicitly supported by this Strategy.**

Manor Lakes

Manor Lakes is the ideal location for a Major Activity Centre serving the western areas of Wyndham due to its central location to a large urban growth area, as well as its position on the Regional Rail Link. Accordingly, retail development potential at Manor Lakes is identified at approximately 50,000m^2 in floorspace terms, and with the expectation that a significant range of commercial and community functions would also be supported within the centre, in addition to those existing and planned in the centre's periphery. This potential development of both retail and non-retail activity within the Manor Lakes activity centre is important in ensuring that residents of Wyndham's west have appropriate access to employment opportunities and services.

Manor Lakes is explicitly endorsed as the main retail and commercial activity centre to serve the areas of Wyndham to the west of the Werribee River. The centre will also contain a strong mix of community related facilities and services.

In view of the lack of available existing retail facilities in Wyndham West, the development of the Manor Lakes centre should be undertaken in a timely manner so the needs of local residents can be met without requiring excessive travel distances to the more distant established centres to the east. Development of the Regional Rail Link provides an opportunity to create a genuine transit- oriented activity centre with high-quality public transport links.

Tarneit Major Town Centre (MTC)

The proposed Tarneit centre, located on the corner of Derrimut and Leakes Roads, is situated adjacent to the Regional Rail Link alignment. This centre has, for a long time, been planned as the Major Activity Centre to serve northern Wyndham.

Current urban development planning for Wyndham supports the role of Tarneit as a Major Activity Centre serving northern Wyndham in view of the site's strong locational attributes, including the potential for transit-based development. Additionally, the Western Region Employment and Industrial Development Strategy 2007 (WRIEDS) identifies the need for a centre in the vicinity as a potential location for significant office-related development, possibly as part of the development of a much more diversified "principal activities cluster".

Tarneit is well-located to provide such a role due to the potential for significant retail development, proposed passenger rail access (through the Regional Rail Link), and relative proximity to major employment areas to the north and north-east.

In view of the overall size of the catchment likely to be served by the centre in the north of the Wyndham urban area, this Strategy supports a large retail floorspace provision of 75,000m^2 for the Tarneit MTC (55,000m^2 in UGZ 10). This is sufficient floorspace to allow for a large sub-regional retail centre which is the catalyst for the development of a range of complementary commercial, community and administrative components.

The **Tarneit MTC is explicitly endorsed as the key retail and commercial activity centre to serve the northern areas of Wyndham,** planned to ensure that the location and design of such facilities, especially their larger stores, support the objective to ensure that station precincts are activated by the highest practical concentration of activities that bring substantial activity and passive oversight of station precincts in the evening and at night.

Other than commercial office and other non-retail employment activities, Tarneit also has a potential role as the location for a major homemaker retail centre to serve urban development occurring in the northern parts of Wyndham.

At present, the existing Commercial 1 zone for the Tarneit centre is located to the south of Leakes Road and the proposed station on the Regional Rail Link which will be a short distance (200 metres) to the north.

A structure planning process for the Tarneit centre is endorsed by this Strategy to ensure:

- The appropriate integration of the activity centre, including its retail core, with the proposed station
- The integration of the activity centre across both sides of Leakes Road

- The appropriate development mix between retail and other uses
- The centre is developed according to strong urban design principles and operates as a hub for community facilities and services.

Riverdale Major Town Centre

The development of a 'North West' centre, located to the north of the Werribee River on a transit corridor linking Werribee West and Deer Park, was originally proposed in the Werribee Growth Area Plan 1990. Development of this centre has been confirmed by the Melbourne West Growth Corridor Plan which nominated a 'Major Town Centre' and the opportunity for a future railway station in this locality. This has subsequently been confirmed by the draft Riverdale Precinct Structure Plan.

Based on the latest population forecasts for the surrounding catchment, the Riverdale MTC is expected to accommodate approximately 25,000m^2 of retail floorspace; this will allow the centre to serve a sub-regional retail role with supporting commercial and community functions.

Although the Riverdale MTC is expected to have a lower-order role compared with the Tarneit MTC, it is appropriate to provide Major Activity Centre status for the Riverdale MTC. This is in view of its size, location on the transit corridor, and proposed association with major community facilities for Tarneit West and wider surrounding region.

Williams Landing

The proposed Williams Landing activity centre has been designated as a Major Activity Centre it is expected to accommodate a substantial commercial office component as part of a transit oriented development associated with the new Williams Landing train station. It is expected that retail provision will play a role in enhancing and complementing the commercial office provision priority of the Williams Landing activity centre.

A key role of the Williams Landing activity centre is to act as an employment node to deliver high order business services and white collar employment opportunities. This is strongly supported to provide access to jobs for the Wyndham community. Its location will help facilitate employment and retail because it is accessible by high yield public transport.

Williams Landing is defined as a sub-regional centre according to retail function as a result of the current indicative retail floorspace allowance and classification as a Major Activity Centre. The final nature and scale of retail development at Williams Landing is influenced by factors including:

- The substantial area that can attract commercial office development, restricted retailing and housing to the activity centre precinct and the extent to which it will support the centre's retail performance.
- Point Cook Town Centre (Major Activity Centre), nearby to the south, which will serve a higher order sub-regional retail function.

- Hoppers Crossing, also a Major activity Centre, located to the west and serving a subregional retail role.
- Central Square sub-regional retail centre, located in the adjacent municipality of Hobson's Bay to the east.

It is anticipated that Williams Landing also has some potential to accommodate some homemaker retail floorspace in addition to the existing Masters store.

Where relevant, trading impacts should be considered in relation to other centres such as the Point Cook Town Centre, Central Square and Hoppers Crossing Shopping Centre. Employment generating land uses will be prioritised, with retail activities proposed within the Williams Landing activity centre needing to support and enhance this outcome.

Black Forest Road North Major Town Centre

A centre is planned for Black Forest Road North that will serve the southern areas of Wyndham Vale, Mambourin and parts of Werribee West, including areas south of Black Forest Road as well as west of the Regional Rail Link that are available for urban development. This centre will benefit from a location on the Regional Rail Link, and a significant surrounding catchment population once full residential development is reached.

This Strategy applies Major Activity Centre status to the Black Forest Road North activity centre in view of:

- The proposed size of the centre in terms of retail, commercial and community floorspace provision (see discussion below)
- Location on the Regional Rail Link and opportunities for transit-oriented development
- The community benefit of strong policy support for Black Forest Road North as an important location for employment and investment.

An indicative retail floorspace allowance of 25,000m^2 has been applied to this centre, recognising a potential sub-regional retail function. This sub-regional role is supported by the centre's central location to the surrounding catchment, the planned future railway station and significant community centre proposed by Council (including a library). It is also expected that the centre will accommodate office and other business functions.

Although Manor Lakes will operate as the higher order Major Activity Centre serving the surrounding region, residents in the south of the growth corridor extending west from Werribee will also have direct and convenient access to the Black Forest Road North centre.

It is intended that the Black Forest Road North centre will complement, not duplicate, the role and function of the Manor Lakes centre.

A6.3 Large Neighbourhood Activity Centres

Wyndham Village (Sayers Road)

Wyndham Village currently contains approximately 14,000m^2 of retail floorspace, with a limited non-retail component. Allowing for some modest additional development over coming years, an indicative retail floorspace provision of 15,000m^2 has been applied which would not be expected to impact excessively on other centres in the activity centre network. Opportunities to increase the non-retail role of this centre are to be encouraged.

Sanctuary Lakes Shopping Centre

The Sanctuary Lakes shopping centre provides an important Large Neighbourhood retail role for Point Cook and will continue to do so over coming years. Although the Point Cook Town Centre will be the major retail and commercial centre in the Point Cook area, Sanctuary Lakes will provide an important DDS (noting the relatively small sized Kmart store), supermarket and Large Neighbourhood shopping offer, in addition to some small-scale commercial and community functions.

Davis Road South

The Davis Road South neighbourhood activity centre has been identified for a site west of Davis Creek and within the area being considered in the Riverdale PSP. The centre is expected to incorporate approximately 10,000m^2 of retail floorspace and will be an important location for a range of facilities and services servicing a new urban area that is relatively self-contained due to the presence of physical barriers including the Werribee River and Davis Creek.

Oakbank

The Oakbank PSP is to be prepared for land located to the north-west of the Riverdale MTC and the Regional Rail Link. It is anticipated that a strong neighbourhood activity centre will be required to serve this community incorporating approximately 10,000m^2 of retail floorspace (subject to the more detailed analysis as the PSP is completed) and an appropriate range of commercial and community functions. An indicative location only is identified in this Strategy, although it is anticipated that the final location of the centre will be relatively central to the PSP area.

Tarneit West Local Town Centre

The Tarneit West Local Town Centre activity centre is proposed for a location on Davis Road immediately north of the Regional Rail Link and adjacent to a proposed future railway station. Transit-oriented development principles will be central to the development of the Tarneit West Local Town Centre.

It is expected that the core retail, commercial and community functions of the centre will be located to the north of the railway alignment. An indicative total of 10,000m^2 of retail floorspace has been allocated to the centre.

Truganina

A future station (as part of a later stage of development) on the Regional Rail Link is proposed at Truganina, a short distance north of Dohertys Road and west of the future alignment of Forsyth Road.

A neighbourhood activity centre is proposed on the western side of the station that is expected to incorporate approximately 8,000m^2 of retail floorspace, as well as office, commercial and service industry functions. The non-retail role of the centre is expected to be enhanced by the proximity to the substantial Truganina employment area to the east. Development of the centre will be consistent with transit-oriented development principles.

Black Forest Road South

The Black Forest Road South PSP proposes a neighbourhood activity centre incorporating approximately 8,000m^2 of retail floorspace at a location on Ison Road, a short distance north of the existing Melbourne- Geelong railway line. This centre will be closely integrated into the local road network and is approximately 1.5km south-east of the future Black Forest Road railway station. The centre is well-located to serve surrounding residents with a basic range of retail, commercial and community needs, complemented by the facilities available at other nearby centres including Black Forest Road North, Manor Lakes and the Werribee City Centre.

Westbrook

A large neighbourhood activity centre with approximately 8,000m^2 of retail floorspace and additional commercial and community facilities has been nominated for a site on the proposed Westbrook Drive. The centre is approximately 2.5km north of Manor Lakes, near the entry to the Westbrook homestead. A future employment area is proposed immediately to the east that will consolidate the role of the Westbrook centre as an important location for a range of retail and non-retail facilities.

Ison Road

Ison Road activity centre is proposed for a location approximately 1.5km south-west of the Manor Lakes Major Activity Centre on the western side of the future alignment of Ison Road. A total of approximately 8,000m^2 of retail floorspace is proposed for the centre, with additional potential for some homemaker retail to front Ison Road that is expected to be a key connector road linking Werribee West, Wyndham Vale and Tarneit.

Davis Road North

The Davis Road North activity centre is proposed for a site approximately 1km south of the Regional Rail Link. This centre will be oriented towards a new east-west ‘Main Street’ and incorporate approximately 8,000m^2 of retail floorspace. It is expected that the centre will be served by strong transport linkages to the nearby proposed Riverdale and Tarneit North railway stations.

Tarneit Gardens

The recently opened Tarneit Gardens centre is anchored by a Woolworths supermarket and will perform a strong neighbourhood-level function to nearby existing and future residential areas. An indicative retail floorspace provision of 8,000m^2 has been allocated to the centre, with a community centre and the potential for some limited commercial facilities also identified.

Point Cook South-East (Subject to future investigation)

In the south of Point Cook is an investigation area of approximately 400 hectares, much of which is expected to undergo future urban development. Subject to more detailed planning, potential may exist for an activity centre in this location incorporating approximately 8,000m^2 of retail floorspace and associated commercial and community functions. The location of any such activity centre is also subject to detailed urban design considerations, although it is important that a site is chosen with high levels of exposure and accessibility to surrounding residents.

Truganina South

Truganina South neighbourhood centre is proposed in the Truganina South Precinct Structure Plan for a prominent intersection on the proposed northern extension of Forsyth Road, a short distance south of Sayers Road.

The Truganina South centre will be a large neighbourhood centre of up to 7,000m^2 in retail floorspace. The centre will serve the area of Truganina between Leakes Road in the north and the Federation Trail in the south. The proposed site is centrally located to this region, and the recently-completed PSP proposes to integrate the centre with a range of community activities such as schools, parkland etc.

Greens Road

Greens Road is well-placed to serve a neighbourhood centre role for the areas located to the west of Lollypop Creek in Wyndham Vale. The Greens Road centre will operate as an alternative destination in the Wyndham Vale area to the larger centres at Manor Lakes to the north and Black Forest Road to the south. Retail floorspace of 7,000m^2 has been allocated to this centre, although a centre of approximately 5,500m^2 recently opened on the site. A limited stage two development for Greens Road is therefore supported by the Strategy and may include appropriate commercial and community facilities.

In the future, a new Armstrong Road will be constructed along the western boundary of the centre, with the Regional Rail Link immediately farther west. No station in the vicinity of the Greens Road activity centre is currently proposed. It is important to ensure that the design of any future road crossing of the rail corridor does not undermine the accessibility to the Greens Road activity centre for surrounding residents.

Hogans Corner

The Hogans Corner centre is expected to continue to trade successfully into the future due to its prominent location and the established nature of the surrounding residential catchment. No major land-use change is expected for this centre over coming years, although it is important to ensure that the centre maintains a high standard of presentation and design.

Riverwalk

A neighbourhood centre of up to 7,000m^2 of retail floorspace has been identified for Werribee West, on Princes Highway, south-west of the intersection with New Farm Road. This location will serve the existing Westleigh Gardens estate, Riverwalk estate currently being developed by Places Victoria and the Alfred Road precinct.

Kenning Road

The Kenning Road activity centre will serve a catchment incorporating future urban areas in the north of Wyndham and in the vicinity of Tarneit Road and Dohertys Road. With an estimated retail floorspace of 6,000m^2, the centre will be oriented to a future east-west Kenning Road and also incorporate a basic range of commercial and community facilities.

Saltwater Coast

A neighbourhood activity centre incorporating approximately 6,000m^2 of retail floorspace is proposed for the Saltwater Coast estate in what was formerly known as the 'Homestead Road Precinct' of Point Cook. This centre is to be located on Saltwater Promenade and will be relatively central to a self-contained area of urban development with an important role in meeting the basic retail and other needs of local residents.

Sneydes Road

A retail floorspace provision of approximately 6,000m^2 has been identified for the Sneydes Road centre. This is sufficient to provide a full-sized supermarket and appropriate range of supporting shops and services to surrounding residents.

A6.4 Small Neighbourhood Activity Centres

Mambourin

A small neighbourhood activity centre with approximately 5,000m^2 of retail floorspace, in addition to appropriate commercial and community functions, is proposed to serve the future population of the area in the west of the Black Forest Road North PSP. Subject to more detailed analysis through the PSP process, the size and role of the centre will be subject to review. Any such review will need to consider the proximity of the Black Forest Road North centre and the relatively self- contained nature of the precinct that is bound on two sides by transit corridors and by a major employment area to the south.

The exact location of the Mambourin activity centre is not yet defined and should be determined through the PSP process. Consideration should also be given to incorporating a business services which support the employment precinct to be developed to the south.

Tarneit West Village

The Tarneit West Village activity centre is expected to continue serving a neighbourhood-level function to the surrounding community.

Ballan Road

A neighbourhood centre incorporating approximately 5,000m^2 of retail floorspace has been identified in the Ballan Road PSP. A centre in this area will provide an important range of convenience retail and other facilities for local residents.

Robertsons Farm

The Roberstons Farm activity centre incorporating approximately 4,500m^2 of retail floorspace is intended to serve a basic convenience role to the population generally east of Derrimut Road and north of Dohertys Road. The scale of this centre is limited by the presence of flood prone land that limits residential density, and the proximity of the proposed Tarneit MTC and Truganina activity centres.

Werribee Village

No significant change is expected at Werribee Village which is located in an established residential area. The ongoing refurbishment and maintenance of this centre should be encouraged so as to ensure it continues to successfully operate as a convenience retailing destination.

Woodville Park

Woodville Park is not expected to undergo any significant change in view of its well-established nature and its lack of exposure to passing trade. Any proposals to refurbish or redevelop the centre are supported by the Strategy.

Innisfail

A small neighbourhood activity centre is located in the Innisfail Estate, directly to the north of the proposed Sneydes Road Centre in Point Cook. This centre will continue to serve a convenience- oriented role to residents.

A6.5 National Employment Cluster

East Werribee Employment Precinct

The Werribee Employment Precinct is the only Specialised Activity Centre in Wyndham. At approximately 775 hectares in area (approximately four times the size of the Melbourne CBD), the precinct is an opportunity to generate substantial investment and employment in a range of higher-order professional, research, business and other economic sectors. Plan Melbourne identifies the precinct as an emerging 'National Employment Cluster'.

The Metropolitan Planning Authority (MPA) is the responsible authority for development of the precinct. Expressions of interest process to develop a 400 hectare mixed use Major Development Parcel has been initiated, and will form a key part of the proposed East Werribee Employment Precinct.

The East Werribee Employment Precinct PSP identifies a total of 356 hectares of land for employment uses. At full-development these areas are expected to accommodate a total of approximately 60,000 jobs and allow the development of approximately 7,000 dwellings.

A 'Health and Learning Hub' is proposed adjacent to the Hoppers Crossing centre that will include a wide range of health and education uses, including a university campus and hospital. In the west of the precinct is proposed a 'Commercial Hub' that includes the East Werribee City Centre. A business park is also proposed to be located in the southern parts of the precinct adjacent to a future freeway interchange.

Approximately 143 hectares of land has been allocated to residential development, and this is expected to accommodate a further total of 4,100 dwellings and approximately 900 jobs.

Within the East Werribee Employment Precinct, a number of activity centres have been identified by the PSP. These are as follows:

- **East Werribee City Centre:** The East Werribee City Centre is expected to be dominated by office and other commercial uses, although a total provision of approximately 20,000m^2 of retail floorspace has also been identified in the PSP. In functional terms, the centre is expected to have strong synergies with the nearby Werribee City Centre and may also be served by a new Derrimut Road railway station. In terms of retail function the centre is identified as a sub-regional centre.

- **Point Cook South-West:** A neighbourhood-level activity centre is proposed for the Point Cook South West component of the employment precinct that is expected to be primarily residential in nature. The proposed centre would serve residents in this part of the employment precinct, as well as residents living across the broader south-west parts of Point Cook. An estimated retail floorspace provision of approximately 8,000m^2 has been identified for the centre.

- **University Village:** A small neighbourhood activity centre called University Village is proposed for the Health and Learning Hub. The centre is expected to serve students, staff and other visitors to the precinct, as well as the 1,500 permanent residents. A nominal retail floorspace provision of 5,000m^2 has been identified for the centre.

- **Wattle Village**: The PSP identifies the Wattle Village activity centre on a site at the southern edge of the employment precinct. Although the PSP identifies approximately 5,000m^2 of retail floorspace for this centre, the location of the Wattle Avenue centre is to be separated from the established residential area by parklands. In addition, road access to the centre is limited to a 'connector road' joining with Wattle Avenue, a local street that does not carry any significant levels of traffic. On the basis of these locational factors and the relative proximity of the East Werribee Town Centre, this Strategy does not specifically endorse the creation of the Wattle Village centre to the scale identified in the PSP. A small local centre, in the order of say 1,000m^2, may be a more appropriate scale of this centre.

'Integration areas' are also identified in the north-east and north-west corners of the East Werribee Employment Precinct. These areas reflect opportunities for integrated development complementary to the operation of the Werribee City Centre and the Hoppers Crossing activity centre.

A6.6 Local Shops and Centres

As development patterns in many of the growth areas of Wyndham become apparent, opportunities will emerge to provide small local activity centres or shops that have not been identified in this Strategy. The provision of local activity centres and convenience retail nodes is supported by the Strategy, as they enhance accessibility to local convenience facilities and create more sustainable communities.

However, over recent decades across Melbourne and indeed within Wyndham traditional corner stores and convenience strips have often been subject to high vacancy levels or have lost their role altogether. In many recently-developed residential areas of Melbourne, poorly planned and located small convenience centres and strips have struggled for commercial viability. One of the key factors has been the extension of shopping hours at larger centres, with many major supermarkets now open until at least midnight, seven days a week, and thus providing strong competition for much smaller, local centres.

However, a role still exists for local centres and shops which provide convenience goods and services to neighbourhoods that are relatively remote from larger centres. An appropriate network of local centres also promotes accessibility to basic day-to-day facilities for people who do not have access to cars (particularly those under 18 and the elderly), and can also reduce car dependency, thus minimising adverse environmental effects. Careful planning will be required to ensure the success of these small, local centres, despite the relatively modest amount of floorspace involved.

The most successful local centres are those that combine significant local catchments with locations at busy intersections, or on high profile sites on busy streets (e.g. Hoppers Crossing strip), or at locations within residential localities which enjoy high accessibility, often associated with facilities such as schools or petrol service stations. These locational attributes, especially those involving locations with frontage to main roads, allow maximum exposure for retailers and other businesses, and thus contribute to the commercial viability of such a centre.

Although it can be an advantage for a local centre to be located relatively central to its catchment, this should not be at the expense of the two main criteria relating to accessibility and visibility which are critical to the success of small convenience retail nodes. These criteria may dictate a site with frontage to a main road, or at a prominent intersection. A mix of retail, commercial and residential uses at a new local centre should also be considered, where appropriate.

Corner stores or small strips of up to approximately 500m² are typically able to succeed at sites centrally-located within residential communities, provided they serve residential catchments of at least 3,500-4,000 residents and are located at prominent collector road locations, ideally associated with schools or other community nodes. It is also an advantage for local centres to be situated in densely populated residential areas which provide a large population base living within a walkable distance of 400 metres or less; a high degree of access for those cycling and walking is also important.

If located on arterial roads, local centres may have smaller local catchments, especially if associated with petrol stations or other attractors, due to their focus on serving passing trade. However, if local convenience centres or sites are located on arterial roads, they should be designed to promote safe access to customers, especially those who walk or cycle to the shops, many of them children.

In general, although local centres will continue to serve a valuable role, they should only be encouraged in the following situations:

- Where a site is identified which has sufficient profile to benefit from some passing trade and/or other commercial or community activity (such as petrol station, schools etc), in addition to having access to a sufficient catchment of local residents; and
- Where residential catchments do not have convenient access to neighbourhood or higher- order centres.

This Strategy recommends that, in general, local centres are limited in size to approximately 1,000m^2 of retail floorspace, except in circumstances where they can be expected to have an expanded role in the future, or where local circumstances justify a higher floorspace provision. In circumstances where a local centre has become run-down or has a number of vacancies or has lost its role as a small convenience-based retail node, decisions will have to be made in regard to future development at these sites. Where a local centre has clearly had its convenience retail role replaced by another nearby facility, such as a convenience store attached to a service station, it would be appropriate to facilitate the development of other uses on the redundant site, such as residential.

On the other hand, the decline of some local centres is primarily related to poor management and presentation, particularly associated with “passive landlords” who often own the real estate in these centres without investing in the ongoing maintenance and appearance of the centre. This is often difficult for Council to influence; however, minimum standards of presentation and appearance should be enforced, where possible.

In contrast, if owners or developers are keen to take a pro-active approach to the redevelopment of a local centre, then this should be encouraged by Council and the potential for a mix of uses (retail, commercial and residential) should be considered.

It is important to recognise that the above comments are made in relation to urban areas of Wyndham, small local retail and services nodes are located in the rural localities of Werribee South and Little River that have a very different locational context. In the future, these two local centres will continue to meet the basic needs of local residents and visitors to Werribee

South and Little River. This may include provision of additional retail and commercial floorspace, subject to local demand conditions.

A7 Homemaker Retail and Trade Supplies

The retail floorspace recommendations for activity centres described in Table 2 do not include reference to homemaker retail or other non-traditional retail formats. At present, most of these retail activities in Wyndham are concentrated in the Old Geelong Road strip at Hoppers Crossing.

Over coming years, significant further growth in demand for homemaker retailing is forecast for Wyndham. New residential development is a key driver of homemaker spending generally, and this is evidenced by the rapid growth of homemaker retailing along Old Geelong Road.

At present rates of homemaker floorspace provision per capita, demand would exist for approximately 240,000m^2 of homemaker retail floorspace in Wyndham once a long-term population capacity of approximately 495,000 people has been reached (see this Strategy Section B3.2).

<u>Old Geelong Road and Williams Landing</u>

Advantages are associated with the present situation where the homemaker retail offer in Wyndham is located in a relatively self-contained strip, thus avoiding fragmented development and avoiding conflicts with adjacent land uses. The Old Geelong Road strip is now a major retail destination in its own right, and is well-placed to serve the growth areas located to the north, south and west, as well as potentially serving a wider catchment, including parts of Hobsons Bay and even Geelong.

Some additional capacity for further homemaker development exists along the strip, particularly east of Skeleton Creek. Opportunities also exist to improve the integration between the existing components through improvements to service road access between developments and, where appropriate, improvements to pedestrian links and more effective landscaping.

Furthermore, as the Old Geelong Road Strip approaches capacity, potential will emerge for further homemaker development to occur directly to the east, at Williams Landing.As a result of these locational development-related aspects, the Old Geelong Road Strip should maintain its role as the key homemaker retail destination in Wyndham, with new development opportunities encouraged in the approximate area between the Federation Trail crossing in the west and Williams Landing in the east.

Overall retail floorspace capacity in the Old Geelong Road precinct is estimated at approximately 120,000m^2.

<u>Alternative Sites</u>

As the population of Wyndham expands, capacity constraints are likely to impact on the development of additional homemaker retail in the Old Geelong Road strip, while expanding market demand for the provision of new homemaker retail development will be experienced elsewhere in the municipality, particularly in the growth areas in the west and north of Wyndham which are more distant from the Old Geelong Road/Williams Landing locality.

It is therefore appropriate to consider the potential location of a future homemaker retail precinct (or precincts) serving the western and north-western growth areas of Wyndham. Any identified homemaker retail precinct would be expected to require a total floorspace provision of at least 20,000m^2, which is sufficient to allow the location of major anchor tenants and create the sense of "destination" which is important to any homemaker retail offer. This excludes floorspace devoted to trade supplies and non-retail showroom floorspace which often locates adjacent to homemaker retail.

At present, in view of the lack of detail in relation to future patterns of urban development, no specific new site suitable for a major homemaker precinct has been identified in this Strategy (with the exception of the potential for homemaker retail at Williams Landing).

Wyndham Activity Centres Strategy 2016 identifies a clear preference for homemaker development at an edge-of-centre location, most likely (although not necessarily) associated with a Principal or Major Activity Centre. This has regard for the principles expressed in strategic land use policies, including the Wyndham Planning Scheme.

Homemaker, or other large format development in Wyndham, has a clear preference for either activity centre locations or the identified homemaker precincts determined by PSPs and other appropriate local planning strategies. The Tarneit, Manor Lakes, Riverdale and the potential North West Major Activity Centre are possible locations for significant homemaker retail development, and this should be carefully considered in strategic planning for these centres.

New homemaker retail development should be required to meet best-practice design criteria, including the outcomes of the Retail Policy Review and other appropriate policy directions. When determining a location for homemaker retail development, recognition will need to be given to the commercial realities associated with the homemaker retail industry, including:

- The need for a relatively flat and unencumbered site which is easily developable
- A large site of sufficient size to accommodate the considerable retail floorspace and car parking and ingress/egress requirements
- The need for good exposure to a large regional catchment
- Excellent regional access arrangements, with a preference for a site with frontage to a main arterial road in or adjacent to a Principal or Major Activity Centre.

A failure to recognise the commercial realities of homemaker retail in this process may result in an under-utilised and poorly-performing homemaker retail sector.

A8 Mixed Use Activity Centre Development

A8.1 Mixed Use Development Principles

Although retail facilities remain the key activity generators in most activity centres in outer suburban areas such as Wyndham, and are – in most cases – the key determinants of a centre's function, this Strategy promotes the provision of an appropriate range of non-retail commercial and community functions in all activity centres, particularly those identified as a Principal or Major Activity Centre.

Alternative functions considered important components of activity centres include:

- **Commercial Office Space** – both public and private sector
- **Community Services** – health, higher education, places of worship, sport and health facilities
- **Entertainment** – cinemas, galleries, pubs/clubs etc.
- **Business Services** – Hotel/Motel, conference/reception centre
- **Residential** – units and apartments.

Where possible, Council policies should aim at facilitating the development of these uses in activity centres (subject to the principles of good design etc.) and, where appropriate, in specialised centres such as the East Werribee Employment Precinct. The type and extent of such development will be influenced by consideration of the type and size of activity centre involved. For example, higher-order facilities (such as significant office development or a conference centre or cinemas) would likely locate in Principal and Major Activity centres.

An important consideration in the formulation of policies relating to mixed-use activity centres is that many of the proposed new centres are likely to be developed under a single ownership model by a single developer. It will therefore be important that land owners and developers are aware of their obligations in terms of delivering an appropriate mix of land uses in activity centres, and that consideration of this is demonstrated when preparing development schemes. Equally, the planning authorities need to ensure that no unreasonable restraints are placed on creating a mix of uses in activity centres.

A8.2 Commercial Office Space

At present, the commercial office market in Wyndham is largely concentrated in the Werribee City Centre, where the major regional commercial and administrative functions are located. Werribee City Centre currently incorporates approximately 25,000m^2 of commercial office space, plus an additional 30,000m^2 floorspace occupied by a range of government and private services including the City of Wyndham Municipal Offices.

In the balance of the municipality, the commercial office market is largely restricted to limited lower-order service functions such as real estate agents and clerical services, accountants, solicitors, medical clinics etc., plus public agencies such as VicRoads and Victoria Police.

A concentration of public sector agencies and institutions is located in the Werribee Employment Precinct, including the Werribee Mercy Hospital, and campuses for the University of Melbourne, Victoria University, and CSIRO. At present, only limited private investment has located in the Employment Precinct, largely due to its minimal availability of land or buildings for sale or lease.

As Wyndham expands, opportunities for further development of the office market are likely to include a range of government services that will be required to serve the increasing numbers of residents and businesses, as well as accommodating regional and secondary offices of medium and large private and public sector organisations. Furthermore, the Werribee Employment Precinct could potentially be the catalyst for a range of high value-added office functions locating in Wyndham, both in the precinct and in other activity centres. Continuing demand for local businesses serving the resident population of Wyndham is anticipated, as is currently the case.

Office development in activity centres in Wyndham should be encouraged due to the important benefits that such development will generate, including:

- Improving the diversity of economic activity and employment in the municipality
- Increasing accessibility to employment by local residents
- Improving the range of services available to the community
- Reducing travel demand
- Expanding the white-collar employment base.

Typically, the commercial office component of smaller activity centres (i.e., neighbourhood and local activity centres) will primarily comprise local business services, such as real estate, medical services and the like. This office space can be readily accommodated in small tenancies, either specifically dedicated to office use, or alternatively in traditional specialty shop tenancies. Most small activity centres have at least one or two non-retail commercial tenants which are easily integrated into the retail functions of the centre. Typically, approximately 10% or more of leasable floorspace in Neighbourhood Activity Centres is used for non-retail functions such as offices and other businesses.

The higher-order government and private sector commercial office functions are most appropriately located in Principal and Major Activity Centres which are best able to accommodate the larger floorspace requirements of these uses, as well as providing the appropriate supporting infrastructure relating to retail uses, car parking, accessibility, public transport services etc.

Werribee City Centre and the broader “Transit Cities” precinct, which includes the Hoppers Crossing centre, are well-placed to increase their extent and range of major commercial office functions, and such development is supported in this Strategy.

The East Werribee Employment Precinct is also anticipated to attract extra commercial office space as development proceeds over coming years, and this location presents an excellent opportunity to attract such space in view of the locality’s high degree of accessibility and visibility, and its potential to generate a high-amenity environment. This is also true for the Williams Landing site on the former Laverton airfield and the business services precinct proposed at Truganina.

Werribee Plaza, which has a Major Activity Centre classification, currently has only a limited commercial office presence. As this centre further develops, opportunities should emerge to integrate commercial office space into the precinct. This Strategy makes no specific commercial floorspace “allocation” to the Werribee Plaza centre; however, any major redevelopment at the centre should demonstrate that it has explored the potential for mixed-use development, consistent with the principles of the Strategy.

It is also important to note the support in the Western Region Employment and Industrial Development Strategy (WREIDS) for the development of a commercial office presence at the Tarneit MTC. This centre represents a significant opportunity to ensure access to white collar employment for future residents in Wyndham North.

The Major activity centres being developed or planned at Manor Lakes, Riverdale, Point Cook Town Centre and Williams Landing are also likely to be potential locations for commercial office development beyond the provision of basic local business services. It is anticipated that PSPs and other centre-based planning processes will identify the ways in which commercial office development can be effectively integrated into these centres.

A8.3 Community Services

Community services are accommodated in a wide range of private and public sector facilities, many of which are suited to an activity centre location. For example, in a metropolitan-wide context, facilities which are typically located in an activity centre environment include libraries, community centres, child care centres, performing and visual arts facilities, churches, hospitals, education facilities, law courts and associated facilities, and sport and recreation facilities.

Werribee City Centre also has the City’s major concentration of these facilities, occupying over 15,000m^2 of floorspace.

In terms of planning for the provision of these community facilities and services, Council is well-placed to liaise with major service providers in order to identify and provide for the requirements of the existing and future residential population. Overall, Council’s strategy is to provide key community facilities and services on development sites which are located in, or adjacent to, Principal and Major Activity Centres.

In this Strategy, a proactive approach is advocated in attracting community facilities and services to activity centres. This will ensure that a wide range of community needs are met in centres, and that the intentions of activity centre policy in Wyndham are taken into account. Developers involved in Principal and Major Activity Centres, as well as those involved in relevant neighbourhood centres, should be kept fully informed of the community facilities and services that are required so that these components can be appropriately integrated into these localities. Similarly, where reasonable, the City of Wyndham will ensure that relevant Council facilities and services are integrated into activity centres rather than located in out-of-centre locations.

A8.4 Entertainment

Entertainment and leisure facilities are an increasingly important component of many activity centres and are a key feature of many major new developments in larger activity centres in Melbourne and nationally. Cinemas, pubs, clubs, restaurant and café precincts, galleries etc. are important activities that can effectively locate in activity centres and generate synergies with the other retail and non-retail functions in these centres. Of course, some centres will be more appropriate than others for these types of entertainment uses, with Principal and Major Activity Centres being the main locations.

In some instances, certain entertainment functions can be accommodated most effectively outside designated activity centres, either due to the activity's relatively large size requirement (e.g., zoos, fun parks) or potential amenity conflicts with other activity centre functions (e.g. go- kart tracks). Where this is demonstrated to be the case, such uses may be appropriately located outside the defined activity centre network, subject to other strategic and statutory planning considerations being met. However, regard should be taken to ensure that any alternative location utilises existing infrastructure, meets requirements relating to accessibility, and is appropriate in relation to surrounding land uses.

A8.5 Business Services

Business services are an important component of activity centre development in the context of the ability of these services to complement retail and other commercial services in a centre. For example, conference and reception centres, as well as hotel/motel accommodation and serviced apartments, have all been successfully integrated into activity centres.

Although the development of business services in activity centres is encouraged and supported, circumstances can exist in which these uses may suitably be accommodated in out-of-centre locations which generate a net community benefit. For example, it is appropriate for a conference/reception centre to locate as part of a golf course development, thus contributing in a positive way to the function of an existing recreation or visitor focus.

Where business services seek to locate outside activity centres, they should clearly establish that the proposed location:

- Is suitable for the proposed use
- Meets criteria relating to accessibility
- Complements surrounding land uses

- Utilises existing infrastructure, and
- Will not unduly impact on existing similar uses located within activity centres.

These uses would also need to conform to other relevant planning strategies and policies, as required.

A8.6 Residential

At present, a market for high-density residential development is not apparent in Wyndham. However, a medium- to high-density residential market can be expected to develop in Wyndham as average household sizes continue to fall, and as housing preferences change and as policy instruments exert influence over time. This form of higher-density residential development can be expected to take place in and around the larger Principal and Major Activity Centres. The benefits from higher-density residential development relate to an increased level of pedestrian activity and centre vitality, as well as the (usually small) additional retail market generated by such development. The population located in activity centres also benefits from close proximity to the wide range of activities, services and infrastructure available at these locations, and their "greenhouse" footprint should be reduced by lower private travel demand.

Opportunities to incorporate residential development in activity centres typically need to be encouraged through planning policy, which is strongly supported by the Wyndham Activity Centres Strategy 2016.

A8.7 Home-Based Businesses

Home-based businesses can already be established on a restricted basis in residential areas, without requiring planning consent. However, these uses are generally prohibited if they exceed specified floor areas and other limits.

Increasing experimentation in purpose-built dwellings for home-based businesses is evident in North America and Australia. Typically, most of the ground floor, or a sub-basement, is designed for business use, with living areas above. Home-based businesses are considered complementary to activity centres and this Strategy encourages their presence, both in and adjacent to existing and proposed centres in Wyndham.

A9 Assessing Retail Land Use and Development Applications

A9.1 Introduction

Retail Planning Assessment Criteria have been prepared as a reference point for Council officers when assessing land use and development proposals for new or expanded provision of retail floorspace. The criteria can also be used by developers for guidance in terms of information they should provide to Council in order to facilitate the planning approvals process.

The criteria consist of two components:

- A listing of information which an Applicant should provide to Council in order to facilitate the planning approvals process, and
- A listing of issues to be considered by Council in assessing the need for a retail development.

Application of the assessment criteria will assist in monitoring the progress of retail and activity centre development in Wyndham, and provide support to Council in ensuring the principles and directions outlined in this Strategy are implemented. These criteria are not intended to slow down or impede development that is appropriate in the context of the Strategy. On the contrary, they should foster investor confidence by increasing certainty about the permitted scope of development and the hierarchical context of planned centres. However, it is important that Council has accurate and regularly updated access to relevant information in terms of activity centre development in the municipality, and these assessment criteria are expected to also assist that process.

A9.2 When does a Retail Proposal need a Planning Approval?

A Planning Scheme Amendment will normally be needed to create or expand the retail component of an activity centre if:

- The Planning Scheme or an applicable Precinct Structure Plan (PSP) do not currently provide for an activity centre, "town centre" or shops on the subject land; or
- The proposal would locate or extend the retail proposal, or its access, parking or other ancillary areas, onto land whose zoning, or overlays or other planning provisions preclude the proposal or regulate it or the site in a manner that would not allow the proposal to proceed; or

The proposal would exceed any express limit on retail floor space identified in the Planning Scheme or PSP, or exceed any guidance in either to a degree that significantly revises the centre's role and function. A Town Planning permit will be needed in any case where the Planning Scheme or relevant PSP requires such approval.

A9.3 Retail Floorspace Guidance

This Strategy provides high level strategic guidance on Council's preferred hierarchy of activity centres. It is not intended to impede land use proposals that are "Section 1 – Permit not required' but rather provide guidance for the exercise of discretion in decision making where this is required.

Council considers that it is important to provide high level strategic guidance on its preferred hierarchy for planned activity centres particularly within the growth area context in which it is located. This is seen as important to foster investor confidence and achieve a distribution of centres best able to respond to community needs and demands for both retail and non-retail land uses in high quality, mixed use and employment generating activity centres.

A9.4 Information Applicants must provide when Seeking Planning Approval for a Retail Proposal

1. Address of the subject site and Title particulars
2. Details of any proposed retail component:
   - Amount of retail floorspace (in m^2)
   - Number of retail tenancies and sizes
   - Type of retail floorspace (e.g., supermarket, discount department store, specialty stores, etc.)
   - Car parking (e.g., number of spaces, at-grade and grade separated components).
3. Details of any other (non-retail) component, including floorspace to be used for offices, community facilities, entertainment uses, residential components, open space, landscape areas, etc., and a description of how these non-retail uses contribute to the mixed-use principles for activity centre development identified in Sections A: 4 and A:9 of this Strategy and comply with any planning policy, structure plan or similar requirement, or agreement under Section 173 of the Act. Where Council considers strategic policy directions are not being met, or it is unclear that they are met, justification can be sought from applicants (see Section A: 9 of this Strategy)
4. The application must meet any other site planning and other requirements specified in the planning scheme and in other planning policy documents with statutory effect.
5. An economic impact report may be required for new retail developments, if a planning scheme amendment or permit for the use are required. The need for such a report in this circumstance is entirely at the discretion of Council. In general terms, any required economic impact report should provide the following information:
   - Supporting evidence of market demand
   - Assessment of any likely impact (adverse or positive) on existing or proposed activity centres
   - Description of anticipated benefits to the community (measurable and non-measurable)

- Estimated net contributions to employment (in the attraction of retail, non-retail jobs and services), and noting the creation of indirect jobs (although these generally accrue to a wide area, including the State and national economies)
- Overall contribution to net community benefit

Council will decide on the extent of supporting economic impact information required of the applicant on the basis of the size of the floorspace component for which approval is being sought. While a brief statement is sufficient for a development of up to around 3,000m^2 (and depending on the context of the proposal in terms of activity centre classification and retail function), Council would require a more detailed economic impact assessment if:

- The proposal involves the development of a major shopping facility such as a neighbourhood shopping centre, sub-regional centre or a large homemaker retail outlet or centre that is not currently explicitly envisaged by strategic land use policy, or
- Extension of the commercial zone or town centre site where economic or community benefits may need to be weighed against other impacts.

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

The proposal should be accompanied by an analysis of the development in the context of the policies presented in this Strategy, including (where relevant):

- How the proposal meets the strategic policy directions presented in Section A: 4, including those measures relating to defined activity centre roles, retention of spending, mixed-use development and so on,
- The extent to which the proposal is an appropriate development for the centre in which it is located, in the context of the activity development framework (Section A: 5 to 8).

The proposal should show that it meets or exceeds accepted standards of urban design, including the provisions contained in State Planning Policy Framework (SPPF) Clause15 Built Environment and Heritage, related provisions in the Municipal Strategic Statement, (MSS), and the urban design elements of Section A: 9.3, below.

A9.5 Considerations in the Assessment of Planning Applications for Retail Development

The following considerations are provided as guidance to Council in assessing applications for retail development in Wyndham. These considerations are provided also as guidance to proponents in terms of the level of information required to support major development applications. Note that the level of information required to support an application will be at the discretion of Council (see Section A 9.3, points 5 and 6 above).

1 Accessibility and urban design

Activity centre design in Wyndham is to be informed by:

- The relevant sections in the SPPF and MSS
- The relevant sections in this strategy
- The Precinct Structure Plan Guidelines (Growth Areas Authority, 2009)
- Any relevant provisions in precinct structure plans, and
- State Government Urban Design Guidelines.

Council should be satisfied that the proposed centre is consistent with the following community development issues:

1.1 Demonstrate that the proposed centre would be an accessible focal point for the community to be served, and consistent with any relevant structure plan or development plan for the area

1.2 Indicate the extent to which the proposal is to be transit-based, and the extent to which it is suitably integrated with public transport and is accessible by cycling and walking

1.3 Integrate architecturally and functionally into the surrounding urban areas

1.4 Ensure that, where commercially viable, any retailing is integrated with a range of non-retail commercial and community facilities and activities, and

1.5 Include opportunities to promote residential development within or adjacent to existing and proposed activity centres.

2 Retail Demand

Council should be satisfied that the economic analysis accompanying the proposal:

2.1 Shows an existing or imminent need or demand for new or expanded retail floorspace provision to serve an identified catchment

2.2 Indicates the current catchment population level, and the current and forecast population and retail spending growth rate for the next 5 and 10 years

2.3 Shows the extent to which the proposal will draw trade from beyond the catchment, or from passing trade

2.4 Indicates how the new retail provision supports the planned activity centre network for the area

2.5 Shows, for homemaker retail proposals, the extent to which they are also supported by the demands of the business or trade community, as well as by household shoppers.

3 *Retail Supply*

Council should be satisfied that the economic analysis accompanying the proposal:

3.1 Indicates the existing supply of retail floorspace serving the catchment

3.2 Provides details of any other proposals for new or expanded retail development in the catchment or beyond, and which could have an effect on the viability or appropriate timing of what is presently proposed

3.3 Indicates the main features of the activity centres which serve (or are intended to serve) the catchment and show how the proposed development is consistent with activity centre planning for the area

3.4 Demonstrates that the proposal is consistent with the longer-term objectives of the Activity Centre Strategy and that it does not compromise the ability of other activity centres to meet their designated roles in the activity centre network serving Wyndham

3.5 Indicates any existing retail gaps in merchandise/services which the proposal will fill

3.6 Identifies clearly, where a site is proposed which is an alternative to that identified in the activity centre network, the extent to which the proposal represents a preferred site and does not impact on the objectives of the Activity Centre Strategy.

4 *Associated Planning Control and Policies*

4.1 Council must ensure that the Wyndham Planning Scheme's provisions in relation to activity centres, including those in the State Planning Policy Framework, Municipal Strategic Framework, applicable precinct structure plans, and the relevant zone provisions are complied with. This Strategy cannot over- ride any conflicting provisions in the Planning Scheme, but does guide their interpretation, especially on the distribution, size, retail function and activity mix in activity centres.

4.2 Council should be satisfied that the activity centre distribution, size, retail function and activity mix are consistent with the high level guidance provided by this Strategy, in planning and considering both structure plans (or similar documents) and permits.

4.3 In providing or directing Activity Centre design, Council should note that this Strategy generally defers to any relevant structure plans and Council or State documents that provide design guidance.

SECTION B: ECONOMIC ANALYSIS

B1 Introduction

Section B of the Wyndham Activity Centres Strategy 2016 presents the economic analysis which informed the policies for activity centre development described in Section A of this Strategy.

The economic analysis comprises the following components:

- Analysis of historical and forecast population trends in the City of Wyndham
- Summary of the socio-demographic features of the population
- Assessment of the population capacity of Wyndham based on land available for urban development
- Preparation of an economic profile of the City of Wyndham, and assessment of the economic outlook for the City
- Estimates and forecasts of retail spending in the City of Wyndham
- Description of existing activity centres operating in the City of Wyndham, including a summary of each centre’s role and function
- Calculation of the extent to which retail spending currently “escapes” from the City of Wyndham, and a forecast of likely retail floorspace growth in the City of Wyndham over the period to 2030 and beyond
- Consideration of development opportunities for non-retail commercial, residential and community uses in activity centres over the period to 2030 and beyond.

B2 Resident Population of Wyndham

B2.1 Historic and Current Population Growth

In 2014 the City of Wyndham had a resident population totalling approximately 204,980 residents. This represents a considerable increase in resident numbers compared with the situation approximately 20 years earlier in 1991 when the municipality only had a population of approximately 63,420 residents. However, the distribution of population growth in Wyndham on a geographic basis has not been even over that period, as noted below in Table 3.

Table 3 City of Wyndham - Population Growth by Local Area, 2001 to 2014

	2001	2006	2011	2014	Change 2001-2014
Population (no.)					
North	44,940	54,400	78,600	93,460	+48,520
South	11,820	24,830	44,220	55,480	+43,660
West	34,420	40,340	48,520	56,040	+21,620
Total Wyndham	**91,180**	**119,570**	**171,340**	**204,980**	**+113,800**
Average Annual Growth (no.)					
North		1,890	4,840	4,950	+3,730
South		2,600	3,880	3,750	+3,360
West		1,180	1,950	2,510	+1,660
Total Wyndham		**5,680**	**10,350**	**11,210**	**+8,750**
Average Annual Growth (%)					
North		3.9%	7.6%	5.9%	5.8%
South		16.0%	12.2%	7.9%	12.6%
West		3.2%	3.8%	4.9%	3.8%
Total Wyndham		**5.6%**	**7.5%**	**6.2%**	**6.4%**

Source: ABS Estimated Resident Population, Essential Economics

In geographic terms, the City of Wyndham can be broadly divided into local areas defined as Wyndham North, Wyndham South and Wyndham West. These local areas are shown in Map 2.

Wyndham North comprises a mix of established areas including Hoppers Crossing a, as well as the developing areas of Truganina and Tarneit in the north of the municipality. Wyndham South includes all the areas to the south of the Princes Freeway, including Point Cook, as well as parts of Werribee south of the railway line. Wyndham West includes the largely rural areas in the west of the municipality, including Little River, as well as the urban growth areas of Wyndham Vale and most of Werribee.

Since 2001, Wyndham North and Wyndham South have accounted for a combined 81% of total population growth in Wyndham.

The rate of population growth in all three defined local areas has been increasing in recent years. In 2014, the estimated population growth of 11,210 persons in Wyndham is generally equivalent to the entire population of the city of Colac in western Victoria – this high rate of population growth highlights the importance of new infrastructure including the provision of an appropriate network of activity centres.

B2.2 Forecast Population Growth

Official population projections for Victoria were prepared by the former Department of Planning and Community Development (DPCD) in the *"Victoria in Future – 2014"* publication.

These projections include an upward revision of forecast population growth rates for Wyndham compared with previous official forecasts, and are based on Wyndham's classification as a "growth area" and the recent high rates of new residential growth. Population projections for Wyndham have also been prepared by .id Consulting and they show continued strong population growth over the next 25 years.

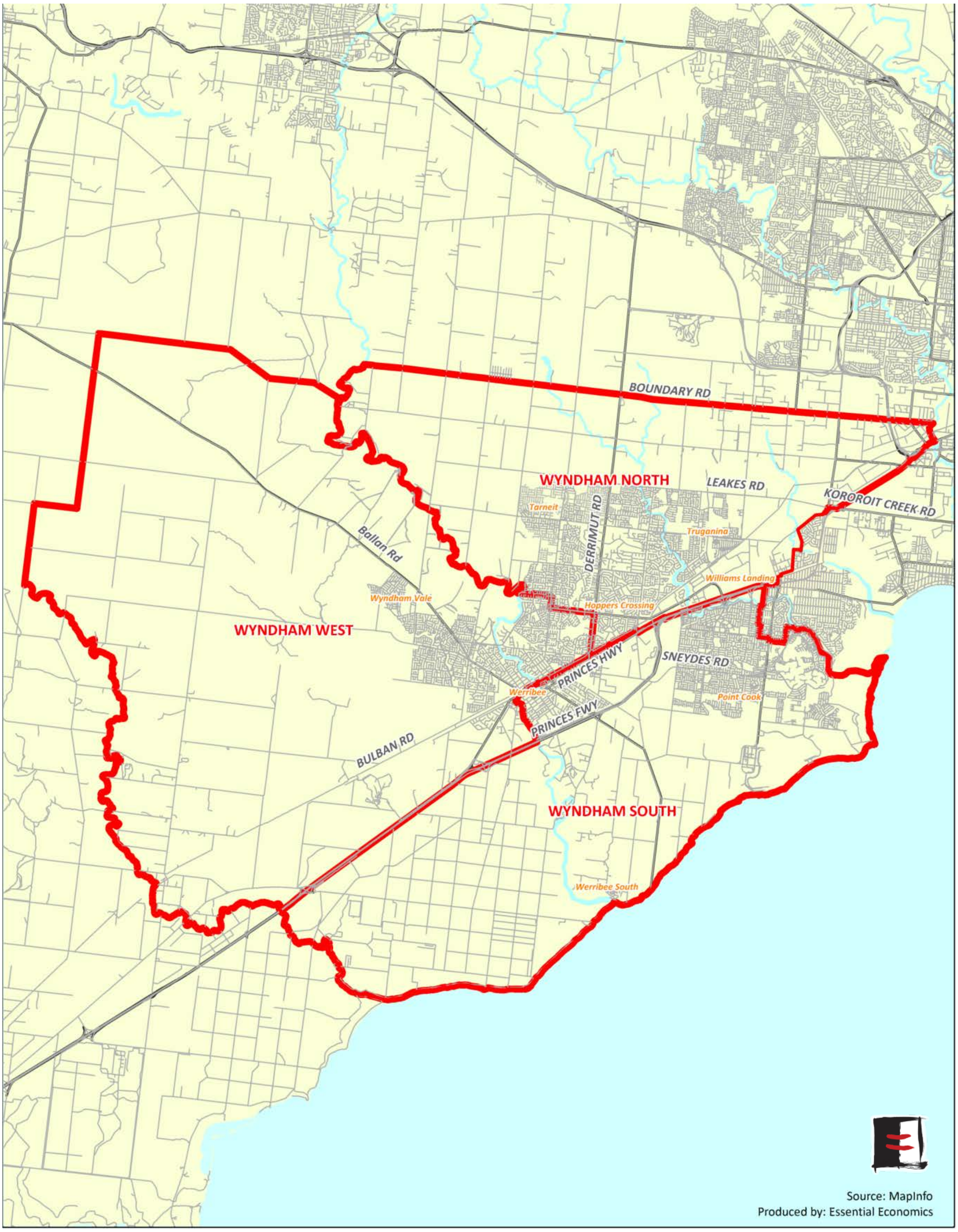
The *Victoria in Future 2014* forecast growth rates have been applied to the latest ABS estimates of resident population (dated May 2014).

By 2030, the population of Wyndham is expected to increase to approximately 350,680 persons, approximately 145,000 persons higher than the current population level. These population forecasts are summarised in Table 4.

Table 4 Population Forecasts for Wyndham, 2001 to 2030

Statistical Local Area	2001	2014	2017	2021	2026	2030
Population Level						
North	54,400	93,460	105,510	120,350	142,100	162,410
South	24,830	55,480	63,750	68,430	70,140	71,590
West	40,340	56,040	64,910	79,030	100,170	116,680
Total Wyndham	**119,570**	**204,980**	**234,170**	**267,810**	**312,410**	**350,680**
Change Per Annum (No.)						
North		+3,000	+4,020	+3,710	+4,350	+5,080
South		+2,360	+2,760	+1,170	+340	+360
West		+1,210	+2,960	+3,530	+4,230	+4,130
Total Wyndham		**+6,570**	**+9,740**	**+8,410**	**+8,920**	**+9,570**
Average Annual Growth (% p.a)						
North		4.3%	4.1%	3.3%	3.4%	3.4%
South		6.4%	4.7%	1.8%	0.5%	0.5%
West		2.6%	5.0%	5.0%	4.9%	3.9%
Total Wyndham		**4.2%**	**4.5%**	**3.4%**	**3.1%**	**2.9%**

Source: ABS Estimated Resident Population, DPCD *"Victoria in Future 2014"*; Essential Economics



Map 2 Local Areas

Wyndham Local Areas

Selected Suburbs

Wyndham North is expected to have a population of 162,410 persons in 2030, representing an increase of +68,950 persons on the current 2014 population. Wyndham West is expected to reach 116,680 persons, while Wyndham South is forecast to reach 71,590 residents by 2030.

It is important to recognise that the actual population growth rates achieved over the period to 2030 will be the key determinant of the timing of activity centre development in the municipality.

In view of the uncertainty associated with forecasting population growth in rapidly developing areas such as Wyndham, the long-term population forecasts shown in Table 4 should be considered indicative. Actual growth is likely to be influenced by a range of factors, including prevailing economic conditions, success of urban consolidation policies elsewhere in Melbourne, rates of migration to Australia, and so on.

B2.3 Socio-Economic Characteristics

This section examines the main socio-economic characteristics of residents of the City of Wyndham, based on data from the 2011 ABS Census of Population and Housing.

Income

Wyndham has a number of suburban localities that exhibit high median household incomes compared with the Melbourne average. Point Cook and almost all of the suburbs south of the Princes Freeway show above-average incomes, as do the rural areas in the north and west of the municipality. A large proportion of Hoppers Crossing also exhibits above-average incomes, particularly in the relatively recently-developed north. By comparison, Werribee tends to exhibit a lower average income profile, particularly in the areas surrounding the town centre, south of Werribee Plaza and in Wyndham Vale.

In Wyndham, the median household income per capita is 4% below the Melbourne average as shown in Table 5. Average incomes are particularly high in Wyndham South ($31,500), with lower relative per capita income levels in Wyndham North ($24,450) and Wyndham West ($23,000).

Table 5 Wyndham Median Household Income Per Capita, 2011

Local Area	Median Household Income Per Capita ($)	Var'n from Melb. Average (%)
North	$24,450	-8%
South	$31,500	+19%
West	$23,000	-13%
Total Wyndham	**$25,480**	**-4%**
Melbourne Average	*$26,560*	-

Source: ABS, Essential Economics

Age Distribution

Residents of Wyndham have an age profile significantly younger than that for Melbourne, with 56% of the municipality's population aged under 35 years, compared with 48% at the metropolitan level.

The proportion of the population in the municipality aged 0-4 years (9.2%) is well above the metropolitan level (6.5%), while a much smaller proportion of Wyndham's population is aged 65+years (6.8%) compared with the metropolitan average (13.1%).

Table 6 Wyndham Age Distribution, 2011

Age Distribution	Wyndham	*Melbourne*
0-4 years	9.2%	*6.5%*
5-19 years	20.9%	*18.3%*
20-34 years	25.5%	*22.9%*
35-64 years	37.5%	*39.1%*
65-84 years	6.1%	*11.3%*
85 years and over	0.7%	*1.8%*
Median Age	31 years	*36 years*

Source: ABS, Essential Economics

Place of Birth

The proportion of Wyndham's population born in Australia (64%) is below the metropolitan average (67%). Further to this, the proportion of the population in Wyndham born in Major English Speaking Countries (MESC) is slightly above that for Melbourne. The highest proportion of the population born in Australia is in Wyndham West (72%), while the lowest share is in Wyndham South (61%). This indicates that the more recently developed areas of Wyndham have a higher share of their population born overseas.

Car Ownership

Car ownership levels in the City of Wyndham are well above the Melbourne average and reflect the car dependency that is prevalent in outer metropolitan suburban locations. Table 7 shows that only 4.7% of households in Wyndham are without a car, and this is well below the 9.4% Melbourne average, while a total of 60.9% of households in Wyndham have two or more cars compared with 54.5% for the metropolitan area overall.

Table 7 Wyndham Private Motor Vehicles Per Household, 2011

Number of Cars	Wyndham	*Melbourne*
None	4.7%	*9.4%*
One	34.4%	*36.1%*
Two	42.3%	*38.0%*
Three of more	18.6%	*16.5%*

Source: ABS, Essential Economics

Dwelling Type

The proportion of occupied private dwellings in Wyndham that are detached housing (90%) is well above the metropolitan Melbourne average (72.7%). Just 4.3% of occupied dwellings in Wyndham are units/apartments, with most of these concentrated around Werribee City Centre and in longer established estates generally. In contrast, 15.3% of dwellings in metropolitan Melbourne are units/apartments, and this share is expected to increase further over coming years.

Despite the emphasis on detached housing development in Wyndham, current trends in the residential sector have an increased emphasis on medium-density living in the municipality, in areas where adequate lot sizes and freedom from prohibitive covenants permit. Higher dwelling densities are being achieved in new housing estates within the municipality, and the development of some higher density housing formats on the fringe of new activity centres in Point Cook.

Household Size

In Wyndham the average household size is 2.88 persons, which is 10% above the metropolitan Melbourne average of 2.62 persons and reflects the area's importance as a location for young families. This is summarised in Table 8.

Table 8 Wyndham Average Household Size, 2011

Local Area	Average Household Size (No.)
North	2.96
South	2.90
West	2.76
Total Wyndham	2.88
Melbourne Average	*2.62*

Source: ABS, Essential Economics

B3 Wyndham Growth Area Population Capacity

B3.1 Urban Growth Boundary

A representation of the UGB and the location of key transport and other infrastructure, is shown in Map 3.

B3.2 Wyndham Growth Area Population Capacity

The population capacity of Wyndham under currently identified residential growth areas is estimated at approximately 495,170 people. This figure is based on lot supply calculations prepared the City of Wyndham which take into account latest inputs from PSPs, other housing estate planning, and long-term population capacity forecasts derived by the consultant and the City. Table 9 shows the forecast population capacity by local area.

Table 9 Wyndham – Long Term Population Capacity

Local Area	Population Capacity (persons)
North	223,250
South	99,250
West	172,670
Total Wyndham	**495,170**

Source: Essential Economics and City of Wyndham

The population capacity analysis takes into account a declining average household size in Wyndham over the forecast period, as identified in the *Victoria in Future 2014* population projections.

Existing evidence points to a decline in household size in the more-established areas of Werribee, where average household sizes are significantly smaller than those in newly-developed residential precincts.

The analysis of population capacity also reflects the increased residential densities being achieved in new residential areas of Wyndham, with housing densities of greater than 15 dwellings per hectare regularly achieved.

B3.3 Wyndham Population Growth and Capacity

The forecast population in Wyndham of 350,680 in 2030 is approximately 145,000 persons below the total estimated population capacity. Thus, beyond 2030 considerable scope exists for continued population growth in Wyndham.

On the basis of currently forecast rates of population growth, population capacity in Wyndham is unlikely to be reached before 2045.

Note on Uncertainty of Population Capacity and Yearly Forecasts

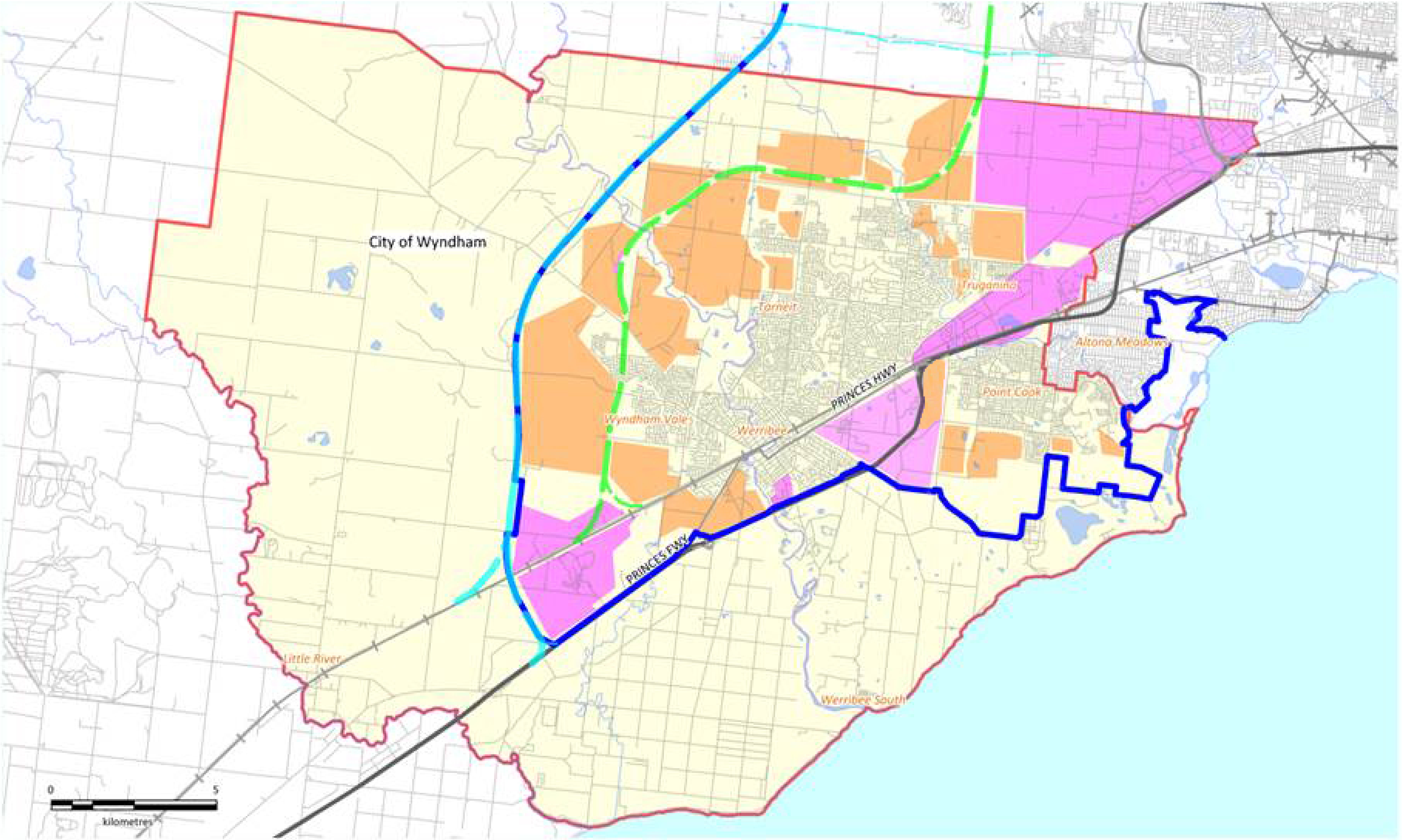
The analysis of population capacity and yearly forecasts for the City of Wyndham described in Section B: 2 and 3 of the Strategy will be impacted by a range of outcomes that are impossible to accurately predict in advance, including:

- Any future minor revisions to the UGB (only if such change is to occur)
- Current uncertainty related to the final extent of land to be reserved for native grasslands
- Current uncertainty related to the final extent of land to be reserved for employment land
- Possible residential development of land on parts of the Werribee Employment Precinct (particularly the area located east of the Princes Freeway)
- Federal Government policies related to rates of immigration
- Trends in international student numbers.

On this basis, the population analysis in this Strategy should be considered a reflection of current policy and population growth expectations.

In reality it is reasonable to expect that actual residential development and population outcomes will differ, to at least some small degree, from those identified in the Strategy.

Where this has implications for activity centre planning, it is the role of local policy mechanisms, including the application of the retail assessment criteria, to generate activity centre planning and development outcomes consistent with the achievement of net community benefit.



Map 3 Wyndham Long Term Development Framework

Source: City of Wyndham, GAA
Produced by: Essential Economics with MapInfo

Urban Growth Boundary
Outer Metropolitan Transport Corridor
Regional Rail Link
City of Wyndham
Future Residential Growth Area
Employment Area
Investigation Area
East Werribee Employment Precinct

B4 Economic Profile and Outlook

This Section provides an overview of Wyndham's main economic indicators which are of relevance to the Activity Centres Strategy 2016, including reference to resident labour force size, employment creation forecasts, jobs located in the municipality, residential spending forecasts, and the outlook for key economic sectors in Wyndham.

B4.1 Employment

Labour Force

In recent years the size of Wyndham's resident labour force has expanded significantly as the population in the municipality has increased. Wyndham's labour force consisted of approximately 46,080 persons in the September 2003 Quarter and increased to approximately 109,154 persons in the September 2014 Quarter, representing an increase of more than 5,730 persons per annum over the 11 year period. These statistics are taken from the Department of Education, Employment and Workplace Relations and are summarised in Table 10.

Wyndham's workforce is increasingly more "white collar" (about 65%) than "blue collar", but the job supply has a "blue collar" bias towards transport, storage, manufacturing and construction.

Unemployment

The number of unemployed persons living in Wyndham increased from approximately 2,440 persons in September 2003 to approximately 7,169 persons in September 2014. This is reflected in a current unemployment rate of 6.6% in Wyndham which is equal to the unemployment rate across the metropolitan area of approximately 6.6%.

Growing unemployment in Wyndham highlights the importance of promoting investment in businesses and infrastructure in activity centres throughout the municipality, thus assisting in employment creation.

Table 10 Wyndham Labour Force and Unemployment Trends, Sep 2003 to Sep 2014

Category	September 2003	September 2006	September 2010	September 2014
Resident Labour Force	46,080	50,210	71,030	109,154
Unemployed Residents	2,440	2,680	4,580	7,169
Resident Unemployment Rate	5.3%	5.3%	6.4%	6.6%
Melb Unemployment Rate	5.8%	4.8%	5.2%	6.6%

Source: Department of Employment 'Small Area Labour Markets' publication

Forecast Employment Requirements

At development capacity in Wyndham, an estimated 105,000 new jobs will need to be created in order to achieve an unemployment rate for Wyndham residents of 5%. It is vitally important that activity centres in Wyndham make a significant contribution towards achieving the employment growth required to achieve this outcome. This is particularly the case in terms of the potential for activity centres to generate additional white-collar jobs that can be occupied by local residents.

B4.2 Jobs in Wyndham

Employment structure by industry in the City of Wyndham differs significantly from the metropolitan Melbourne average, according to data from the 2011 Census of Population and Housing. Industries comprising a high share of employment in Wyndham include trade and blue-collar categories such as construction and manufacturing. Professional and personal service-based industries, such as finance and insurance, are generally under-represented in the municipality.

Industries in Wyndham that comprise a higher-than-average share of employment relative to metropolitan Melbourne overall, as shaded green in Table 11 include:

- Manufacturing: 6,160 jobs (or 14% of all jobs)
- Retail trade: 5,850 jobs (13%)
- Transport/Postal and warehousing: 4,970 jobs (11%)
- Education and Training 4,100 jobs (9%)
- Construction: 3,340 jobs (8%)
- Wholesale trade: 3,220 jobs (8%)
- Public Administration and Safety: 2,590 jobs (6%).

Based on ABS Census place of employment data, approximately 43,400 jobs were located in Wyndham in 2011, with 26,150 jobs or 60% filled by residents of Wyndham. The balance of these jobs in Wyndham are filled by non-Wyndham residents, including people living in other parts of metropolitan Melbourne and in regional areas such as Geelong.

The large inflow and outflow of workers in the City of Wyndham, in part, reflects the imbalance between a high share of residents employed in ‘white collar’ occupations, and the relatively high proportion of trade and ‘blue-collar’ employment positions within the City, noted above.

ABS *Journey to Work* data shows that approximately 76,400 residents of Wyndham were in employment at the time of the 2011 Census; however, only 26,150 (35%) of these people were actually employed in Wyndham. This represented an outflow of approximately 50,250 residents who commute from Wyndham to work in other areas, mainly in metropolitan Melbourne and the CBD.

Table 11 Wyndham Employment by Industry, 2011

Industry	Total Wyndham		Melbourne
	No.	%	%
Agriculture, forestry and fishing	480	1%	0%
Mining	50	0%	0%
Manufacturing	6,160	14%	11%
Electricity, gas, water and waste services	280	1%	1%
Construction	3,340	8%	6%
Wholesale trade	3,220	7%	5%
Retail trade	5,850	13%	11%
Accommodation and food services	2,260	5%	6%
Transport, postal and warehousing	4,970	11%	5%
Information media and telecommunications	360	1%	2%
Financial and insurance services	490	1%	5%
Rental, hiring and real estate services	670	2%	2%
Professional, scientific and technical services	1,410	3%	9%
Administrative and support services	1,230	3%	3%
Public administration and safety	2,590	6%	5%
Education and training	4,100	9%	8%
Health care and social assistance	3,580	8%	11%
Arts and recreation services	530	1%	2%
Other services	1,410	3%	4%
Other Industry	450	1%	1%
Total	**43,430**	**100%**	**100%**

Source: 2011 ABS Census of Population and Housing

B4.3 Per Capita Retail Spending

Estimates of per capita retail spending by residents of the City of Wyndham have been prepared using *MarketInfo*, a micro-simulation model utilising data from the ABS Household Expenditure Survey (HES, 2008/09), ABS Census of Population and Housing (2011), and a range of other socio-economic indicators. The MarketInfo retail spending model is prepared by MDS Pty Ltd and is an industry standard for measuring retail spending on a small area basis. The model is used nationally by a wide range of consultants, property developers, retailers and shopping centre owners.

All spending figures used in this report are shown in 2014 dollars and inclusive of GST.

Estimates of per capita retail spending in Wyndham by local area are shown in Table 12 an compared with the Melbourne metropolitan average.

Table 12 Wyndham Per Capita Retail Spending, 2014 ($2014)

Statistical Local Area	Food	Non-Food	Services	Total Retail
Per capita Spending ($2014)				
North	$6,870	$5,610	$470	$12,950
South	$7,740	$7,070	$590	$15,400
West	$7,090	$5,820	$480	$13,390
Total Wyndham	**$7,170**	**$6,070**	**$510**	**$13,750**
Melbourne Average	*$7,370*	*$6,230*	*$570*	*$14,170*
Variation from Melbourne Average				
Wyndham	-2.7%	-2.6%	-10.5%	-3.0%

Source: MarketInfo, Essential Economics

Per capita food spending in Wyndham is approximately 2.7% below the Melbourne average, while non-food spending is only 2.6% below average. Services spending is 10.5% below average. Overall, per capita retail spending in Wyndham of $13,750 is 3% below the Melbourne average of $14,170.

This situation reflects a number of factors, including Wyndham's income profile, the outer suburban nature of the area, and the strong presence of young, establishing families in new housing estates.

However, average total retail spending in Wyndham South, which includes Point Cook, is 8.6% above the Melbourne average. This, in part, reflects higher incomes in this part of the municipality.

B4.4 Existing and Forecast Retail Spending

Forecasts of retail spending in Wyndham have been prepared using the estimates of per capita retail spending provided by MarketInfo in Table 12, and combining these figures with the population estimates and forecasts described in Table 4. The forecast retail spending figures include an allowance for real growth in average per capita retail spending based historical rates of growth as measured in the ABS Australian National Accounts since 1976 and adjusted by the consultant to reflect more recent trends. Overall, real per capita spending growth of approximately 1.3% per annum is forecast for the period to 2030. All dollar values for the period 2013 to 2030 are expressed in constant 2013 prices, i.e. excluding price inflation.

Retail spending by residents of the City of Wyndham in 2014 is estimated at $2,815.8 million, comprising $1,469.0 million in food spending, $1,243.2 million in non-food spending and $103.5 million in services spending, as shown in Table 13.

Wyndham North is estimated to have a retail spending market of $1,210.9 million in 2014. This is substantially larger than the $854.6 million of retail spending generated by residents of Wyndham South, while retail spending is estimated at $750.3 million in Wyndham West.

Taking into account population projections (see Table 4) and real growth in per capita retail spending, the retail spending generated by residents of the City of Wyndham to 2030 is shown in Table 13.

Table 13 Wyndham Existing and Forecast Retail Spending, 2014 to 2030 ($2014m)

Retail Category	2014	2017	2021	2030	Growth per annum (%)
Wyndham North					
Food	$642.3	$736.0	$852.7	$1,192.0	4.1%
Non-Food	$524.4	$621.3	$764.2	$1,222.7	5.6%
Services	$44.2	$51.6	$63.0	$99.5	6.8%
Total	**$1,210.9**	**$1,408.9**	**$1,680.0**	**$2,514.1**	**4.7%**
Wyndham South					
Food	$429.6	$501.1	$546.8	$593.6	2.2%
Non-Food	$392.4	$473.0	$547.2	$678.0	3.7%
Services	$32.6	$38.7	$44.5	$54.5	5.7%
Total	**$854.6**	**$1,012.8**	**$1,138.5**	**$1,326.1**	**2.9%**
Wyndham West					
Food	$397.1	$466.9	$577.4	$883.1	5.3%
Non-Food	$326.4	$396.8	$520.9	$911.7	6.8%
Services	$26.7	$32.0	$41.8	$72.1	8.9%
Total	**$750.3**	**$895.7**	**$1,140.1**	**$1,866.9**	**6.0%**
Wyndham					
Food	$1,469.0	$1,704.0	$1,976.9	$2,668.7	3.9%
Non-Food	$1,243.2	$1,491.0	$1,832.4	$2,812.4	5.3%
Services	$103.5	$122.3	$149.4	$226.0	5.7%
Total Retail	**$2,815.8**	**$3,317.3**	**$3,958.6**	**$5,707.0**	**4.5%**

Source: Marketinfo, Essential Economics

Forecasting retail spending over a period of 20 years is difficult when considering the changes in circumstances and economic conditions that may occur over this time (such as the implications from the Global Financial Crisis, exchange rate fluctuations, trends to on-line shopping, and so on).

This means that the longer-term figures shown in Table 13 should be treated with an appropriate degree of caution and considered only as long-term indicative forecasts. Nevertheless, these long-term spending forecasts take into account historical trends as well as likely outcomes having regard for all available information, and are a useful analytical tool.

Retail spending by residents of the City of Wyndham is forecast to increase to $5,707.0 million by 2030, including $2,668.7 million of food spending, $2,812.4 million of non-food spending and $226.0 million of retail services spending. This represents overall real retail spending growth in Wyndham of 4.5% per annum over the period 2014 to 2030.

The growth of retail spending by Wyndham residents over the next 20 years (involving a 103% increase in total expenditure compared with 2014 levels) will support the provision of new and expanded activity centres over this period. An examination of the existing context for this development potential is presented later in Chapter B.5.

B4.5 Economic Outlook for Wyndham

An important consideration for activity centres policy in Wyndham is an understanding of the long-term economic outlook for the City, and the implications for activity centre policy.

It is critical that activity centres in Wyndham develop in a way which supports local economic development and generates land use outcomes which create growth in employment and income for residents and for the business sector. The following points describe the key economic issues relevant to the development of the Wyndham Activity Centres Strategy 2016.

1. East Werribee Employment Precinct

The East Werribee Employment Precinct occupies a site of approximately 775 hectares in proximity to the Werribee City Centre and Hoppers Crossing. According to the recently completed PSP, the precinct has significant potential to accommodate a wide-range of new industries and commercial businesses. A total of 356 hectares of land for employment uses has been identified, as well as approximately 143 hectares for residential development.

The growth and development of the precinct as an employment hub of metropolitan significance is expected to be driven by factors including:

- Proximity to the Princes Freeway and railway line
- Availability of large development sites
- Land is flat and easily developable
- Strong, long-standing policy support for investment and development on the site
- Synergies with existing uses and on-site infrastructure
- Classification as an emerging National Employment Cluster.

At full development, the precinct is expected to accommodate up to 60,000 jobs and accommodate over 15,000 residents.

2. Werribee City Centre

The Werribee City Centre remains an important opportunity to create a location that represents a functional and symbolic 'heart' of the Wyndham community. Council has invested substantial public infrastructure in the city centre, including social and cultural facilities, and in the future substantial opportunities for more intensive retail, commercial and residential development have also been identified.

With appropriate policy support, the Werribee City Centre has excellent prospects for making a valuable contribution to the liveability of people living across Wyndham, by creating a true mixed-use city centre environment in a transit oriented location. Investment and employment benefits for the local economy would be associated with this outcome.

3. Provision of Employment Land

Growth area planning for Wyndham has identified significant new areas of employment land at strategic locations.

The Melbourne West Growth Corridor Plan identifies an 110ha site for a Major activity centre around the proposed Tarneit railway station on the Regional Rail Link. Uses expected to be accommodated at the centre include retailing, homemaker retail, community facilities, offices, entertainment, health, education and other community facilities, plus higher density housing formats.

The Melbourne West Growth Corridor Plan also identifies approximately 340 hectares of employment land in Werribee West, while an additional 1,000 hectares of new industrial land is also identified in Tarneit and Truganina. Development of this industrial land will consolidate the role of Wyndham as a location of national importance for manufacturing, transport and logistics.

4. Development of New Transit Corridors

Growth area planning for Wyndham includes:

- The development of the Regional Rail Link (currently under-construction) providing commuter rail services along a new rail line connecting Wyndham Vale and Deer Park
- A new outer metropolitan transit corridor, expected to include a major road link and freight rail line along the western edge of urban development in Wyndham.

Each of these new transit corridors will facilitate the movement of both people and goods through Wyndham, and enhance the attractiveness of the City as a location for new residents and businesses.

5. Growth of Professional and Personal Service Industry

Strong population growth in Wyndham over coming decades will support a wide range of professional and personal services in the City to meet the needs of residents and the business sector. These uses are diverse in nature but include:

- Accountants and tax agents
- Financial planning services
- Finance brokers
- Consultants
- Information Technology (IT) sales and services
- Architects, designers and other ‘creative’ services

- Para legal and medical services such as property conveyance, massage therapy etc.

It is important that the growth of these service industries is supported by policy so that the personal and professional needs of the population of Wyndham are met. Just as importantly, the liveability and sustainability of Wyndham will be supported where these services are met locally so that the travel needs of residents and business are minimised.

For activity centre policy this means supporting a network of centres which contain, or have the potential to contain, professional and personal services in locations that are appropriate and accessible. Where these service industries locate in activity centres, they should generate synergies with other land uses, such as retail and community facilities.

6. Support for Value-Adding

An opportunity exists for investment and economic growth in Wyndham which creates 'value-adding' and serves markets located outside the City (including the balance of Victoria, as well as inter-state and overseas). Such an outcome will create significant benefits for the Wyndham economy which can be expected to be reflected in higher employment, wages and investment in the City relative to economic activity otherwise dominated by service industry growth.

Activity centre policy has a role to play in this value-adding context by creating a network of centres which:

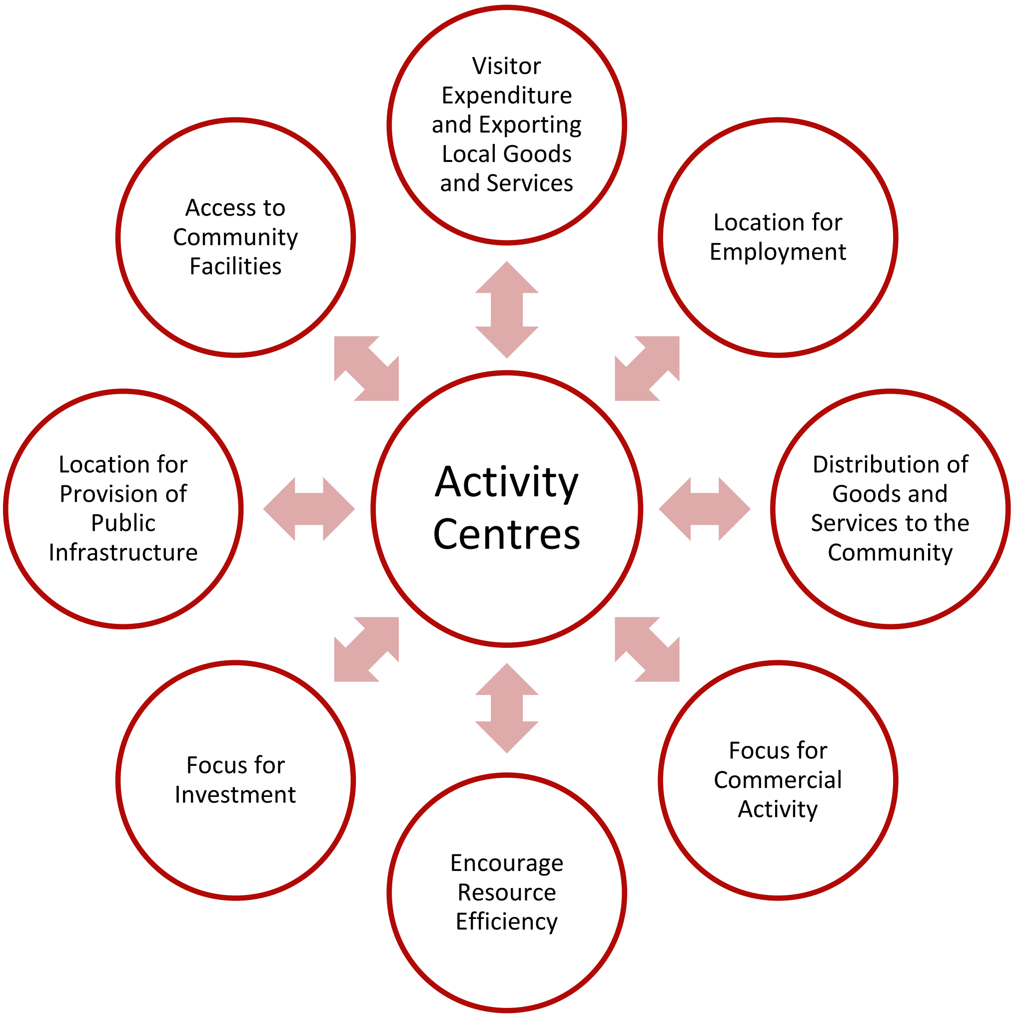
- Support higher-order commercial activities
- Encourage the establishment and growth of education and research and development activities
- Support entrepreneurship and can accommodate small and start-up businesses
- Fully utilises available infrastructure (such as transport and community infrastructure)
- Have the capacity to accommodate growth and change associated with economic, social and technological trends.

7. Promoting Economic Self-Sufficiency

An important policy objective of growth area planning for Wyndham is the creation of a high level of economic self-sufficiency which reduces commuter travel demand and supports local employment and investment. This is reflected in Plan Melbourne, which aims to reduce the reliance of the metropolitan area on central Melbourne for employment, and Wyndham's own target to achieve one job per resident worker.

Activity centres in Wyndham will have an important role to play in meeting this objective due to their importance as locations for a wide range of economic activities, and their influence and interaction with the broader regional economy. Linkages between activity centres and the economy are summarised in Figure 2.

Figure 2 Relationship Between Activity Centres and the Economy



B5 Wyndham Activity Centres

As discussed in Section A5, the Wyndham Activity Centres Strategy 2016 identifies activity centres according to an activity centres network classification that describes their priority as a focus for public and private sector investment, as well as a description of their current and intended retail function.

B5.1 Activity Centre Classification

In terms of the classification of centres, the following centres are currently operating in Wyndham:

- **Principal Activity Centre** (Werribee City Centre)

  These centres are intended to be a focus for higher-order shopping facilities, major entertainment venues, office and commercial activities, community and government functions, etc. These centres are a high priority for private and public sector investment.

- **Major Activity Centre** (Werribee Plaza, Manor Lakes, Hoppers Crossing, Point Cook Town Centre, Williams Landing)

  These centres have similar characteristics to Principal Activity Centres, including a wide mix of retail, business, community and other uses, but typically serve smaller catchments and are a lower priority than Principal Activity Centres for private and public sector investment.

- **Specialised Activity Centre** (East Werribee Employment Precinct)

  Are important economic precincts that play a vital role in metropolitan Melbourne's economy.

- **Neighbourhood Activity Centres** (numerous)

  Are lower-order centres offering a range of local convenience services and are ideally located adjacent or near to community infrastructure such as schools, community centres, etc. These centres should be connected to the public transport network and encourage walking and cycling in the communities they serve.

B5.2 Retail Function

An important objective of the Wyndham Activity Centres Strategy is the development of a vibrant and sustainable retail sector in Wyndham. This component of the strategy is important due to factors including:

- The important role that retail has in providing the community with the goods and services required for everyday living

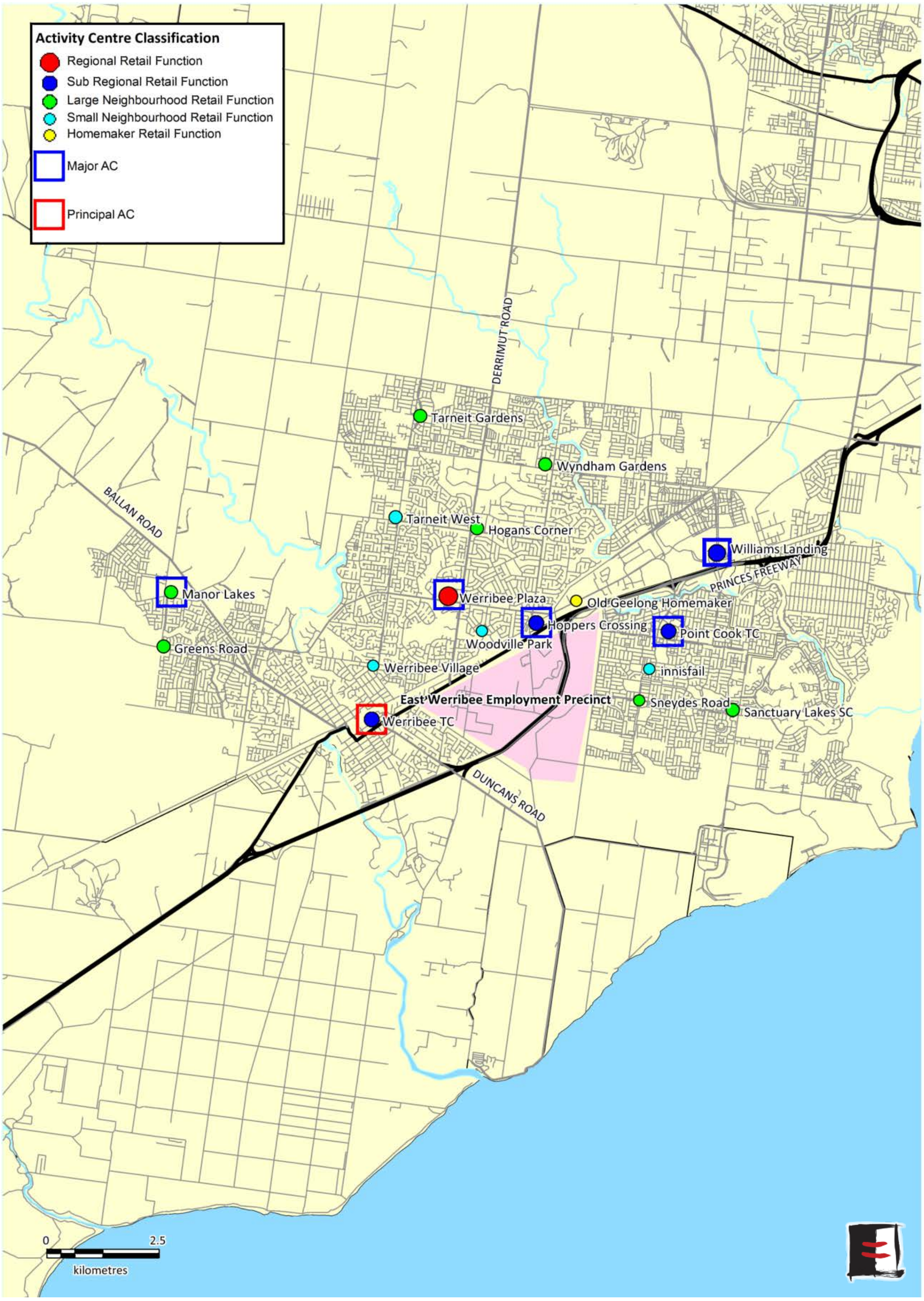
- The need to provide the community with a retail sector which meets their need for accessing goods and services in an efficient and sustainable manner (noting that less than half of household spending is typically on retail goods and services)
- The importance of retail as an employer (approximately 13% of total employment in Wyndham at present)
- The ability of retail to generate significant private sector investment
- The importance of retail as a generator of activity and visitation in most centres.

At the local-level (i.e., non-metropolitan level), the retail sector operates with its own distinct patterns of supply and demand that mean an analytical structure within which to assess the relationships between centres, in retail terms only, is required. This need for an analytical framework for retail which is tailored to localised or regionalised, rather than metropolitan-wide, conditions is not a move away from the broad objectives for centres policy identified in the SPPF, but is necessary for retail analytical purposes.

For the purposes of analysing the retail sector in Wyndham as input to activity centre policy, a conventional retail classification has been adopted. The components are as follows:

- **Regional**: This is a large centre serving a wide regional catchment, typically containing a department store as well as at least one discount department store (DDS), and a large range of supporting higher-order retail and non-retail functions.
- **Sub-Regional**: This is a medium-sized centre serving a broad catchment, typically comprising a wide range of retail functions, including at least one full-line supermarket and a substantial number of specialty stores trading across most non-food retail categories. Mostly, although not always, this type of centre contains one or more DDSs. Sub-regional centres can also include a range of non-retail commercial and community-based functions.
- **Neighbourhood:** A neighbourhood activity centre primarily serves its surrounding residential neighbourhood with grocery and other day-to-day or regular convenience retail needs. Most neighbourhood centres are located in residential areas. They may be defined as Large or Small Neighbourhood centres.
    - **Large neighbourhood** centres are anchored by one or more full-line supermarkets and contain a comprehensive food and grocery offer, as well as some basic non-food products (e.g., chemist, hairdresser etc.). A full-line supermarket is generally larger than 3,000m^2 in floorspace and includes the full range of products available in a traditional supermarket, including fresh food, delicatessen and seafood. Increasingly, consumers prefer to shop at centres containing full-line supermarkets, mainly due to the additional product range available in these stores.
    - **Small neighbourhood** centres are typically anchored by a limited range supermarket of up to 3,000m^2 and serve a smaller catchment than a large neighbourhood centre. Small neighbourhood centres tend to serve a day-to-day convenience or top-up shopping role for the surrounding area.

Map 4 Wyndham Existing Activity Centres 2015



Source: City of Wyndham
Produced by Essential Economics with MapInfo

- **Local**: This centre typically comprises a small strip of shops (say, 4 or 5 shops) or a corner store. It serves day-to-day convenience needs (milk, paper, etc.) and meets a household's top-up or emergency shopping needs. Local centres are typically under 1,000m2 in size and lack the presence of an anchor tenant, such as a supermarket, which generate the significant levels of customer traffic present in larger centres.

5.3 Description of Existing Activity Centres in Wyndham

Wyndham's existing activity centres are summarised in Table 14 and shown in Map 3.

A summary of the existing activity centres located in Wyndham is provided in the following pages. This summary includes an estimate of the gross leasable floorspace components of each centre.

Table 14 Wyndham Existing Activity Centres, March 2015

Classification	Current Retail Function	Retail Floorspace[1]	Non-Retail Floorspace[2]
Principal			
Werribee City Centre[3]	Sub-Regional	35,000m^2	45,000m^2
Major			
Werribee Plaza	Regional	65,000m^2	15,000m^2
Hoppers Crossing	Sub-Regional	18,000m^2	3,000m^2
Point Cook Town Centre	Sub-Regional	35,000m^2	70,000m^2
Manor Lakes	Large N'hood	6,000m^2	1,500m^2
Other			
Wyndham Gardens	Large N'hood	14,000m^2	2,500m^2
Sanctuary Lakes	Large N'hood	14,000m^2	1,000m^2
Hogans Corner	Large N'hood	7,000m^2	200m^2
Williams Landing (partly open)[4]	Large N'hood	(6,000m^2)	(1,000m^2)
Tarneit Gardens	Large N'hood	6,000m^2	200m^2
Tarneit West	Large N'hood	5,000m^2	100m^2
Greens Road	Large N'hood	5,000m^2	200m^2
Werribee Village	Large N'hood	3,500m^2	300m^2
Woodville Park	Small N'hood	3,000m^2	200m^2
Innisfail	Small N'hood	2,500m^2	200m^2
Assorted	Local	4,000m^2	
Old Geelong Road Strip[5]	Homemaker	100,000m^2	30,000m^2
Specialised			
East Werribee Employment Precinct[6]			75,000m^2

Source: Essential Economics
1. Excludes vacant floorspace and non-retail uses
2. Excludes non-commercial and community uses
3. Leasable area excludes a range of community and municipal uses identified in Werribee City Centre Structure Plan
4. Centre not completed and fully tenanted at time of writing
5. Includes Masters at Williams Landing
6. Includes University, high school and primary industry research facilities

Note that the floorspace figures exclude community uses such as churches, libraries and other public facilities which are not "leasable" in commercial terms, yet are important components of many centres.

Principal Activity Centre

Werribee City Centre

The Werribee City Centre is Wyndham's most diversified activity centre. The centre provides a vital administrative, commercial and community role, and has previously been classified as a Principal Activity Centre in State planning policy and a Transit City. At present, Plan Melbourne identifies Werribee City Centre as an 'Activity Centre', although the opportunity exists for the centre to be upgraded to 'Metropolitan Activity Centre' status. This outcome would reflect the potential for Werribee City Centre to be a true mixed-use and transit oriented city centre for the surrounding region.

In order to achieve Council's objectives for the Werribee City Centre, the Activity Centre Zone (ACZ1) has been applied to the centre which implements the Werribee City Centre Framework Plan. The framework plan is based on the principles and objectives established in the Werribee City Centre Structure Plan (2011).

The town centre contains approximately 35,000m^2 of retail floorspace, including Woolworths, Coles and ALDI supermarkets, Officeworks, and approximately 160 other specialty traders. The town centre is in a traditional strip format and the stretch along Watton Street, in particular, presents attractively with a wide range of specialty traders, low vacancy levels and a pleasant streetscape. The town centre also integrates well with the Werribee railway station. A number of vacant retail tenancies are located on the fringe of the centre.

An important trend in recent years has been the development of a small entertainment and leisure precinct at the western end of the strip which includes the well-known Bridge Hotel and has been enhanced by the development of the . This area, part of which backs onto the Werribee River, is particularly popular in summer.

The town centre also incorporates a wide range of non-retail shopfront functions including banks, professional services, real estate agents, trade supplies etc. An area incorporating a number of automotive sales and services traders is located at the western edge of the centre.

The Werribee City Centre also incorporates the only major concentration of commercial office space in Wyndham, with some 25,000m^2 of dedicated office space, and much of this located to the south of Watton Street and extending east to the municipal offices. The quality of this office space is mixed, with some buildings appearing relatively run-down and containing vacant floorspace, while others are relatively well-maintained and fully tenanted.

A wide range of community, cultural and recreational facilities is also represented in the Werribee City Centre. This includes the Wyndham Community facility, library, Cultural Centre, churches, clubs, gymnasiums and other recreation services. The Wyndham City Offices are located on the eastern edge of the town centre. These uses account for approximately 20,000m^2 of floorspace.

In terms of overall retail, commercial and community functions, Werribee City Centre easily has the most diverse land use patterns and mix of uses of any activity centre in Wyndham.

Retail Floorspace: *35,000m^2*

Non-Retail Floorspace: *45,000m^2*

> *Note: A floorspace survey undertaken by Council in 2008 identified over 130,000m^2 of floorspace in the Werribee City Centre, including a wide range of municipal, community, recreational and other land uses not traditionally incorporated in an activity centre floorspace analysis. This research highlighted the importance of the Werribee City Centre to the community of Wyndham and the role of the centre as a genuine mixed-use and transit-oriented Principal Activity Centre.*

Major Activity Centres

Pacific Werribee

Pacific Werribee is classified as a Major Activity Centre and is the largest retail centre in Wyndham.

The *Wyndham Activity Centres Strategy 1998* defined Werribee Plaza as a “Regional” centre in order to reflect the centre’s dominance as the largest retail complex in the City of Wyndham and the high levels of visitation that the centre generates. This role has been consolidated with the ongoing redevelopment of the centre which has seen total leasable floorspace increase to approximately 70,000m^2 (including 65,000m^2 of retail floorspace).

The centre is currently undergoing a $370 million refurbishment which will increase the total floorspace by 35,000m^2. The redevelopment will include a new Myer, Target and an addition 120 speciality shops. A fresh food precinct and ALDI is also proposed for the centre.

Pacific Werribee's importance as a regional retail destination for residents of Wyndham is also strengthened by the presence of important non-retail community/leisure functions such as Wyndham Library, a 10-screen cinema complex, and a large health and medical centre.

The centre contains a Myer mini-department store, two discount department stores (Kmart and Big W) and two supermarkets (Coles and Woolworths), mini-majors and extensive specialty floorspace.

This is primarily an internalised shopping centre, with carparking surrounding the centre. A new bus interchange is integrated with the shopping centre. Pacific Werribee is one of the most high profile locations in Wyndham and would be regularly accessed by most residents of the municipality.

An increasing range of community services are located in the areas immediately adjacent to Werribee Plaza, including churches, a child care centre, health clinics and business services. These uses benefit from the exposure to activity generated by Werribee Plaza and can be considered part of a broader activity centre precinct.

Retail Floorspace: *65,000m^2 (major expansion underway)*

Non-Retail Floorspace: *15,000m^2 (including adjacent areas)*

Hoppers Crossing

Hoppers Crossing is a Major Activity Centre located adjacent to Hoppers Crossing railway station. The centre serves a sub-regional retail function due to Target, Woolworths and a range of other retail stores located in the shopping centre, located directly north of the railway station.

At the eastern end of the centre, a complex adjoining the Hoppers Crossing Shopping Centre includes a large Spotlight store and comprises a further 3,000m^2 of retail floorspace. Including this adjacent property and a strip of shops located on the western side of Old Geelong Road, a total of approximately 18,000m^2 of retail floorspace is located at the Hoppers Crossing centre.

The centre also includes some limited non-retail functions including The Tigers Clubhouse licensed venue and a VicRoads office. An area of light industrial uses including car yards and trade supplies is located directly north of the centre.

Retail Floorspace: *18,000m^2*

Non-Retail Floorspace: *3,000m^2 (excluding light industrial area to north)*

Point Cook Town Centre

Point Cook Town Centre is located on the corner of Dunnings Road and Boardwalk Boulevard. Opened in late 2008, the centre is a nominated Major Activity Centre and operates as a sub-regional retail centre in terms of retail function.

The centre has been developed in a modern, street-based format which promotes outdoor activity and integration with adjacent uses. Major tenants include Coles and ALDI supermarkets, Target DDS, Harris Scarfe, Dan Murphy's and a range of specialty shops and mini-majors. Total retail floorspace is estimated at approximately 35,000m^2.

The centre also incorporates a range of non-retail functions including serviced office space, banks, a medical centre, veterinary clinic and the Point Cook Community Learning Centre.

Retail Floorspace: *35,000m^2 (former cap 45,000m^2)*

Non-Retail Floorspace: *7,000m^2*

Manor Lakes

The Manor Lakes centre has Major Activity Centre status. The centre opened in late 2006 and is currently anchored by a Coles supermarket and adjacent specialty shops, and also includes a medical centre and child care centre. Total occupied retail floorspace is estimated at approximately 6,000m^2. A limited non-retail component is also present at the centre.

Manor Lakes is located on the Regional Rail Link alignment and is currently the most important centre serving the Werribee West and Wyndham Vale area.

Retail Floorspace: *6,000m^2*

Non-Retail Floorspace: *1,500m^2*

Specialised Activity Centres

East Werribee Employment Precinct

The Werribee Employment Precinct is a Specialised Activity Centre and includes a range of education, health, and agriculture and food research-related facilities. Specific uses include the Werribee Mercy Hospital and campuses for the University of Melbourne and Victoria University.

With the exception of the Mercy Hospital and education facilities, the East Werribee Employment Precinct contains facilities primarily devoted to animal and food research. It incorporates mixed research and industry hubs in biotechnology, including veterinary applications, agribusiness and environmental sustainability.

In late 2011 the selective entry Suzanne Cory High School was opened, further consolidating the role of the East Werribee Employment Precinct in research and education.

Recent Developments include:

- Wyndham Private Medical Centre
- Wyndham Private Psychiatric Hospital
- Victoria Inter-professional Training Clinic
- University of Notre Dame
- Proposed St. Vincent's Private Hospital

The East Werribee Employment Precinct PSP was released in October 2013 and provides a framework for substantial investment and development within the precinct over coming decades.

A reflection of the economic opportunities associated with the East Werribee Employment Precinct is its status as an emerging National Employment Cluster in the Plan Melbourne metropolitan strategy.

Non-Retail: *75,000m² (including Department of Primary Industry research facilities, high school and university campus)*

Other Centres

Wyndham Village

Wyndham Village was opened in 2005 and is located on the north-west corner of Sayers Road and Morris Road in Tarneit. The centre serves the new residential areas on the current northern fringe of the Wyndham growth area, as well as more established suburbs to the south. The centre includes Coles and ALDI supermarkets and a range of specialty shops, totalling 11,000m² of retail floorspace.

Wyndham Village operates as a large neighbourhood activity centre to the surrounding area, providing a comprehensive range of grocery and convenience retailing facilities. At present, the centre is dominated by retail functions, although it also includes a medical centre and is located opposite a child care centre.

On the south-east corner of Sayers Road and Morris Road is a mix of strip shops, office space and a service station. Located on the south-west corner is a medical centre and pharmacy. These uses have little functional relationship with the Wyndham Village shopping centre, despite that centre's proximity.

For the purposes of this Strategy, the broader precinct around the intersection of Sayers Road and Morris Road has been included in the Wyndham Village centre.

Retail Floorspace: 14,000m²

Non-Retail Floorspace: 2,500m²

Sanctuary Lakes Shopping Centre

Sanctuary Lakes Shopping Centre is a neighbourhood shopping centre located at the corner of Point Cook Road and Jamieson Way, opposite the main entry to the Sanctuary Lakes Resort residential development.

The centre was recently expanded to incorporate a new Kmart, ALDI and specialty shops. Sanctuary Lakes Shopping Centre also contains a small number of medical practitioners and offices.

Retail Floorspace: 14,000m²

Non-Retail Floorspace: 1,500m²

Hogans Corner

Hogans Corner is located on the north-east corner of Derrimut Road and Hogans Road in Hoppers Crossing. The centre is anchored by a Woolworths supermarket and contains a small strip of specialty stores, a Dan Murphys, as well as car park pad sites that include McDonalds and Red Rooster outlets, and a service station. Total retail floorspace at the centre is approximately 7,000m^2.

Retail Floorspace: 7,000m^2

Non-Retail Floorspace: 200m^2

Tarneit Gardens

The Tarneit Gardens centre opened in December 2013 and is located on the eastern side of Tarneit Road and fronting Wickford Road. The centre is anchored by a Woolworths supermarket and approximately 20 specialty shops including a small internal mall. Total retail floorspace in the centre is approximately 6,000m^2.

Retail Floorspace: 6,000m^2

Non-Retail Floorspace: 200m^2

Tarneit West

Tarneit West activity centre is located on the north-west corner of Tarneit Road and Hogans Road. Anchored by a Cole supermarket and a total of nine specialty tenancies, Tarneit West serves a basic neighbourhood-level retail function to surrounding residents.

Retail Floorspace: 5,000m^2

Non-Retail Floorspace: 200m^2

Greens Road

Greens Road is a neighbourhood activity centre which opened in late 2009 and serves the rapidly developing area of Wyndham Vale.

Anchored by Woolworths and ALDI supermarkets, the centre is currently trading moderately, although trading levels are expected to increase as urban development proceeds in the surrounding area. Provision exists for some limited future expansion of the centre.

Retail Floorspace: 5,000m^2

Non-Retail Floorspace: 100m^2

Werribee Village

Werribee Village is located in the established suburbs north of the Werribee City Centre at the corner of Tarneit Road and Shaws Road. The centre is anchored by a Sims supermarket and contains some 18 specialty shops. The centre has approximately 3,500m^2 of retail floorspace and primarily serves a convenience retail role.

Retail Floorspace: *3,500m^2*

Non-Retail Floorspace: *300m^2*

Woodville Park

Woodville Park is a small neighbourhood centre anchored by an independent supermarket and contains approximately 3,000m2 of retail floorspace. The centre has a poor location that limits its potential catchment and role as an activity centre. A number of specialty vacancies exist, although the presence of the small supermarket generates a modest amount of customer traffic.

Retail Floorspace: *3,000m^2*

Non-Retail Floorspace: *200m^2*

Innisfail

Innisfail is a small neighbourhood activity centre anchored by an IGA supermarket containing approximately 3,000m^2 of retail floorspace. The centre serves the convenience retail needs of surrounding residents and is adjacent to a 7-Eleven petrol station.

Retail Floorspace: *3,500m^2*

Non-Retail Floorspace: *2,000m^2*

Williams Landing (partly open)

The Williams Landing shopping centre opened in late 2014 including a large Woolworths supermarket (4,200m^2) and an allowance for up to 18 specialty shops. At the time of writing, the centre is not fully tenanted and is still undergoing final building works.

Sneydes Road (under construction)

The Sneydes Road (Featherbrook) centre anchored by a Woolworths supermarket and incorporating approximately 12 specialty shops was in the final stages of construction at the time of writing. This centre has not been included in the retail floorspace figures shown in Table 14.

Local Centres

A number of small strip centres and individual stores exist to serve a traditional local convenience retailing role in Wyndham. Some of the centres in established areas of Wyndham have experienced high vacancy rates over previous years.

A number of new local centres have also been developed in new residential areas, primarily located on prominent intersections with high degrees of access and exposure. These new local centres are sometimes associated with the development of adjacent service stations.

Experience in Wyndham and elsewhere nationally indicates that the standards expected by residents from their small local shopping centres have increased over time. These standards need to be met in order for the facilities to be supported by the general public and for the centres to trade in a commercially viable manner.

Homemaker

Old Geelong Road, east of Heaths Road, contains a major concentration of homemaker retailing and light industrial functions. Many major homemaker retailers are represented along the strip and operators appear to be benefiting from the clustering of other homemaker retailers in this precinct.

The major tenants include Bunnings, Mitre 10, Harvey Norman, Snooze and Fantastic Furniture. In 1998 the bulky retail floorspace component of the strip was estimated at 30,000m^2, and this has increased to approximately 85,000m^2 at present (excluding trade-based outlets).

Old Geelong Road is now one of the largest concentrations of homemaker retailing in Melbourne, similar in size to the Nunawading "Golden Mile" along the Maroondah Highway.

The development of light industrial uses (particularly motor vehicle-related) is also apparent along this strip and in the streets running off Old Geelong Road.

The Old Geelong Road strip is not defined as an activity centre in view of the lack of genuine integration between traders and the fact that traders are scattered along a 2.5km stretch of road. Nonetheless, the precinct plays an important role in serving the needs of Wyndham and residents of the broader region, for bulky merchandise and other homemaker goods. The area is also an important location for a variety of trade-based operators serving the business sector operating from shopfront tenancies.

A Masters hardware store has recently opened at Williams Landing on the eastern edge of the future Williams Landing town centre. This store comprises approximately 13,500m^2 of floorspace.

Total Homemaker Retail Floorspace: 100,000m^2

Trade-based Shopfront Floorspace: 30,000m^2 (excludes light industry)

B6 Wyndham Retail Floorspace Potential

This chapter presents a forecast of the potential for future retail development in the City of Wyndham.

B6.1 Escape Spending

Escape spending from the City of Wyndham in 2014 is estimated at $1.1 billion, or approximately 39% of total available retail spending by Wyndham residents, as shown in Table 15.

This level of escape spending has increased in recent years due to significant rates of population growth which has not been matched by the rate of new retail development. Nonetheless, this is considered to be primarily due to the timing of new retail development investment, rather than any land use planning impact, noting:

- The Williams Landing recently opened (early 2015)
- The Sneydes Road centre recently opened (late 2014)
- A major expansion of Werribee Plaza is currently underway
- Other new retail proposals are in pre-application discussions with Council and are anticipated for formal planning application in 2015.

In combination, the above developments have the potential to reduce escape spending towards 30%.

The existing level of escape spending represents a reasonable outcome for an outer suburban area of metropolitan Melbourne, although the rate of escape spending is expected to decline significantly over coming years as the network of activity centres in Wyndham continues to develop.

Table 15 Estimated Escape Spending from Wyndham, 2014 ($2014)

	Retail
Floorspace (m^2)	332,100m^2
Average Sales ($/$m^2$)	$5,436/$m^2$
Total Sales ($M)	$1,805m
Shares Attributable to Residents (%)	95%
Sales Attributable to Residents ($M)	$1,714.9m
Available Retail Spending ($M)	$2,815.8m
Escape Spending ($M)	$1,100.8m
Escape Spending (%)	***39%***

Source: ABS Retail Census 1991/92, ABS Retail Industry Australia 1998/99, Essential Economics, derived from detailed analysis for individual centres

Table 15 shows the analysis of escape spending, and the methodology is as follows:

1. Use the updated estimates of retail floorspace provision in Wyndham (Table 14)
2. Provide estimates of total retail sales in Wyndham, based on typical average sales per m^2 and various published sources
3. Allow for retail sales generated for spending by visitors to Wyndham, including sales at locations such as Old Geelong Road, the Point Cook Town Centre, Werribee City Centre and other locations where sales are generated by non-residents

Escape spending is estimated as total available retail spending by Wyndham's residents, less the amount of sales at Wyndham's retail outlets that is estimated to be attributable to the spending of Wyndham residents. The residual, or balance, is the amount of spending by Wyndham residents that is directed to retail facilities located outside the municipality (note that this amount includes internet sales from locations outside Wyndham).

Importantly, for an outer suburban area such as Wyndham, a significant degree of escape spending is always likely, with a share of spending directed, in particular, to the Melbourne CBD and other large retail centres located in the inner and middle suburbs of Melbourne.

This situation reflects the fact that in many respects Wyndham is a dormitory or commuter area of metropolitan Melbourne, with a substantial proportion of the municipality's working population travelling outside the municipality to work. Many commuters undertake their regular household spending while on their journey to/from work and in centres that are located close to their places of work. As the Journey to Work data shows, most Wyndham residents work in metropolitan Melbourne, so this is where a considerable share of their escape spending would be directed. As the work-related journey is typically 'in-board', the Wyndham residents take the opportunity to shop at larger, higher-order centres in these well-established inner and middle suburban centres and the CBD.

In view of the nature of the Wyndham urban area (with its location on the outer western fringe of Melbourne) and its relationship with the balance of the metropolitan area, it is likely that escape spending by Wyndham residents will continue into the future.

It is not a realistic expectation of activity centre and planning policy to expect to fully eliminate escape spending from Wyndham. Nonetheless, very real benefits to the local economy and community are associated with minimising the magnitude of escape spending, and these benefits are taken into account in subsequent analysis.

B6.2 Retail Floorspace Requirements

An estimate of total supportable retail floorspace in Wyndham over the period 2014 to 2030 and beyond can be made with reference to the population and retail spending forecasts described previously.

Two main methods for determining future supportable retail floorspace apply:

1. **An average floorspace provision method** which uses rates of retail floorspace provision per capita to forecast overall retail floorspace requirements.

2. **A retail spending method** which forecasts retail spending, and measures supportable retail floorspace according to the extent to which available spending can support an expanded provision of retail floorspace.

Application of both provides an indicative range of likely retail floorspace outcomes that takes into account the degree of uncertainty associated with forecasting over such long time periods.

<u>Average Floorspace Provision Model</u>

In the *Wyndham Activity Centres Strategy 1998* the average per capita retail floorspace provision in Wyndham of 1.35m^2 per capita was taken from the 1991/2 ABS Retail Census and applied to forecast population levels for Wyndham in order to gain an understanding of future supportable retail floorspace across the municipality.

Since the 1998 strategy, substantial retail development has occurred in Wyndham and this has increased the retail floorspace provision to approximately 1.62m^2 per capita. This is a reflection of the increased maturity of the retail sector in Wyndham and the presence of a far wider range of retail facilities available to local residents over time.

Nationally, it is estimated that retail floorspace provision is approximately 2.2m^2 per capita. It is not unusual for outer-suburban areas such as Wyndham to have an average floorspace provision lower than this, reflecting the tendency for retail spending flows to be inward bound to the CBD and other well-established higher-order centres in inner city areas.

Over time, it reasonable to expect that as the activity centre network in Wyndham is continues to develop, the provision of floorspace per capita in Wyndham will continue to increase.

Table 16 presents an analysis of supportable retail floorspace based on the updated population projections and application of average per capita floorspace provision as follows:

- The existing 2014 retail floorspace provision of approximately 1.62m^2
- The potential for an increase in the retail floorspace provision to a level of 2.0m^2 which is at the upper end of achievable expectations for Wyndham.

Table 16 Indicative Supportable Retail Floorspace in Wyndham - Average Floorspace Provision

Year	Population	Current Retail Floorspace Ratio (m^2)	Potential Retail Floorspace Ratio (m^2)
2014	204,980	332,100	332,100
2017	234,170	379,400	468,300
2021	267,810	433,900	535,600
2026	312,410	506,200	624,800
2030	350,680	568,200	701,400
Capacity	**495,170**	**802,300**	**990,300**
Floorspace Per Capita Ratio (m2)		*1.62*	*2.00*

Source: Essential Economics

If the existing average per capita provision of retail floorspace of 1.62m^2/capita is maintained, a total of approximately 568,200m^2 of retail floorspace will be supportable in Wyndham by 2030 and 802,300m^2 at population capacity within the UGB, as shown in Table 16 above.

Total retail floorspace in Wyndham is forecast to increase to 701,400m^2 in 2030 and 990,300m^2 by development capacity if the average floorspace provision increases to 2.0m^2 per capita.

Based on this analysis, the long-term provision of retail floorspace at population capacity in Wyndham is up to three times higher than the existing provision of 332,100m^2.

Retail Spending Growth Model

An alternative approach to determining growth in supportable retail floorspace is to use a retail spending growth method. This approach uses forecasts of available retail spending to determine supportable retail floorspace, and typically results in a long-term increase in per capita retail provision above existing benchmarks as more retail spending becomes available over time through growth in population and in per capita retail spending.

Evidence in Australia and overseas supports the conclusion that, over time, a combination of growth in these two variables leads to an increase in per capita retail floorspace provision.

In the retail spending model, net escape spending is an important determinant of the total supportable retail floorspace in a region; a lower level of escape spending (i.e., a higher retention of retail spending by residents in Wyndham) leads to an increase in the supportable retail floorspace in Wyndham. Escape spending is associated with spending at retail outlets located outside Wyndham, including internet sales.

As the population of Wyndham expands and as the activity centre network in the city develops and matures, net escape spending is expected to decline over time, although the extent of this decline is difficult to predict with accuracy.

A sensitivity analysis has been prepared on the basis of escape spending at the following levels:

- 39% - reflecting existing levels
- 30% - expected escape spending with currently proposed or recently opened retail developments
- 20% - achievable long-term policy objective.

However, not all additional retained retail spending will be spent at new retail facilities; instead, a share of additional spending will support improved performance at existing stores.

In this analysis 20% of this spending is estimated to be directed to existing retail floorspace at centres such as Pacific Werribeeand the Werribee City Centre, with the balance of 80% supporting new centre development. This recognises the expectation that the performance of existing centres and retail floorspace will improve over time as the population and spending capacity of the region grows.

Table 17 Indicative Retail Floorspace in Wyndham – Retail Spending Model ($2014)

Factor	**2014-2030**	**2014-2030**	**2014-2030**
Retail Spending - 2030	$5,707m	$5,707m	$5,707m
Share of Escaped Retail Spending	**39%**	**30%**	**20%**
Retained Retail Spending 2030	$3,476m	$3,995m	$4,566m
Increase in Retained Retail Spending 2014-2030	$1,761m	$2,280m	$2,851m
Share of Retained Spending Spent at New Floorspace	80%	80%	80%
Retail Spending Available to New Floorspace	$1,409m	$1,824m	$2,281m
Average Required Floorspace Productivity	$6,000/m^2	$6,000/m^2	$6,000/m^2
Supportable New Retail Floorspace	234,790m^2	304,000m^2	380,090m^2
Total Supportable Retail Floorspace	**566,890m^2**	**636,100m^2**	**712,190m^2**
Retail Floorspace Per Capita	1.6m^2	1.8m^2	2.0m^2

Source: MarketInfo; Essential Economics

According to the sensitivity analysis, supportable retail floorspace in Wyndham would increase by between 235,000m^2 and 380,000m^2 over the period 2014 to 2030.

According to the retail spending model, total supportable retail floorspace in Wyndham in 2030 would be between 567,000m^2 and 712,000m^2.

<u>Summary</u>

Using a combination of the retail floorspace provision and the retail spending methods, it is possible to prepare an indicative range of forecast future retail floorspace requirements in Wyndham.

According to these two approaches, supportable retail floorspace in Wyndham at 2030 is forecast to be in the order of between 567,000m^2 to 712,000m^2. This represents growth in retail floorspace of between 235,000m^2 and 380,000m^2 over existing levels.

At population capacity retail floorspace of approximately 990,000m^2 is forecast, according to the retail floorspace provision model, although this is an indicative estimate only.

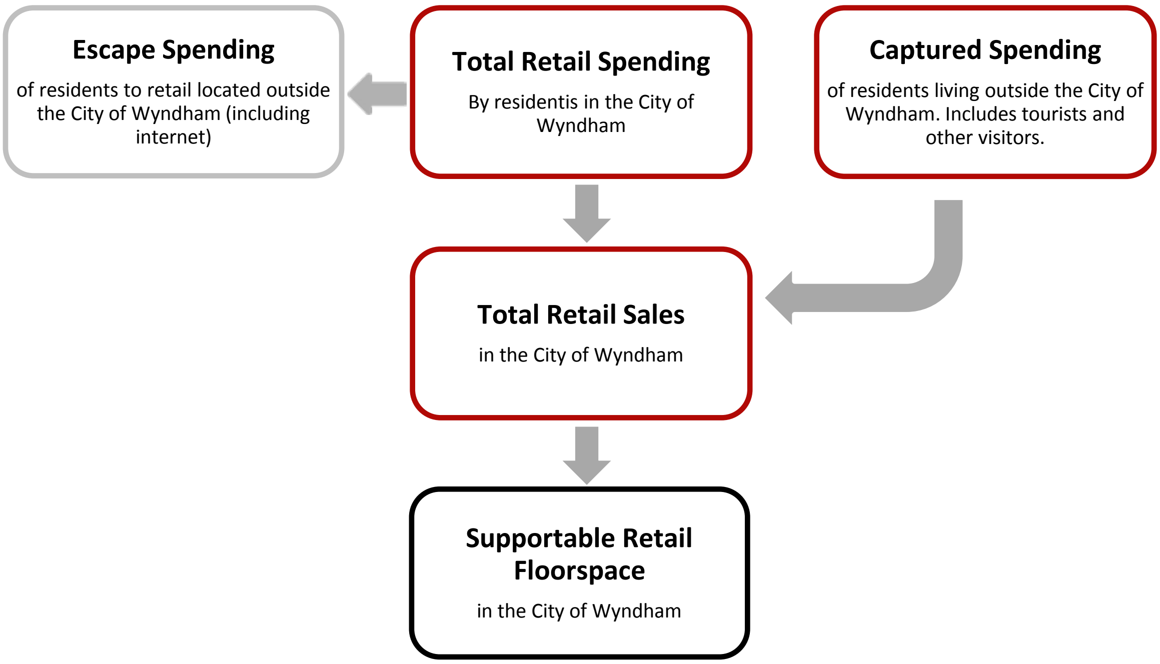
It is important to note that although these retail floorspace forecasts are useful in guiding activity centre policy in Wyndham and understanding the likely magnitude of change which planning policies will need to accommodate in the future, the floorspace forecasts will vary if any of the underlying variables alter over this period. Therefore, these retail floorspace forecasts should be seen as indicative figures to guide the Planning Scheme, but not as specific floorspace limits or caps.

Furthermore, more detailed retail-economic analysis will be required in undertaking centre planning at the precinct or local level, through the preparation of precinct strategic plans or local strategic plans.

Summary of Retail Spending Flows

In order to assist in understanding the analysis in this Chapter, Figure 3 shows a summary of the spending flows that are relevant to the retail sector in the City of Wyndham and the forecasts of supportable retail floorspace.

Figure 3 Summary of Retail Spending Flows



B 7 Commercial Floorspace Analysis

In addition to the retail floorspace forecast for Wyndham (and which will need to be accommodated by the Strategy), it is also appropriate to consider in more general terms the potential for non-retail commercial floorspace. This forecast includes office and showroom type uses that are encouraged in activity centre locations, but excludes industrial and non-commercial functions (such as churches, community halls, libraries etc.).

On an indicative basis only, information from published sources indicates that it may be reasonable to set an "aspirational" target for commercial floorspace in Wyndham of $1m^2$ per capita (about double the present ratio). This would represent a sufficient level of floorspace to provide a comprehensive range of business services to the resident population of Wyndham, as well as imply the location of higher-order commercial development serving the broader Victorian economy (such as at the Werribee Employment Precinct).

Based on the forecast population in Wyndham, a total provision of approximately $500,000m^2$ is an aspirational level of commercial floorspace, at the upper end of reasonable expectations. It is expected that a large share of this floorspace will be accommodated in the activity centre network serving Wyndham, with a particular emphasis on Principal, Major, Specialised and Large Neighbourhood activity centres.

The achievement of this forecast rate of commercial development will be influenced by the ability of Wyndham to attract businesses (relative to alternative locations in metropolitan Melbourne), and through the development of the local business sector. As such, the economic development policies of Council and the State Government are particularly relevant in creating the conditions necessary for a vibrant commercial property sector to develop in Wyndham.

B 8 Other Land Uses in Activity Centres

In addition to retail and commercial components of activity centres, a wide range of community, cultural and administrative functions will be located in activity centre locations. This is already the case in centres such as the Werribee City Centre which contains facilities such as:

- City of Wyndham Municipal offices
- Werribee Library
- Wyndham Community and Education Centre
- Wyndham Cultural Centre
- Werribee Learning Centre (Deakin University and The Gordon)
- Medicare
- Werribee Bowling Club
- Werribee RSL.

It is important that planning for activity centres takes into account the need for sufficient land to accommodate these uses, recognising that planning for the provision of these uses is best undertaken on a centre-by-centre basis which takes into account local needs relevant to that particular location.

Opportunities also exist for activity centres to be the location for higher-density residential formats. Assuming just 2% of the population growth in Wyndham over the period to 2030 is located within activity centres, this represents approximately 1,500 new dwellings accommodated in a mix of shop-top housing and medium/high density residential formats.