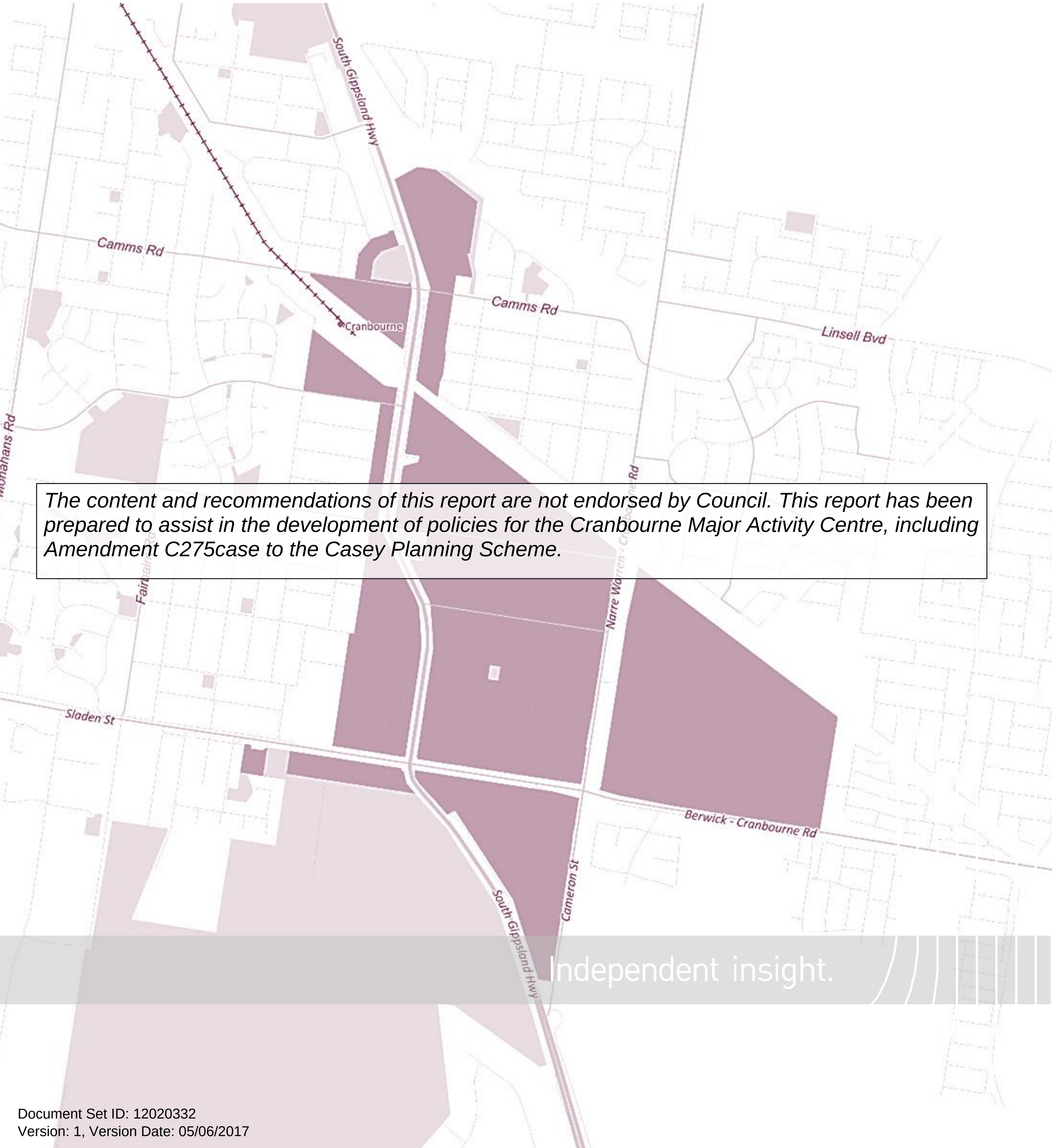
Cranbourne Town Centre: Economic Assessment

City of Casey

June 2017



The content and recommendations of this report are not endorsed by Council. This report has been prepared to assist in the development of policies for the Cranbourne Major Activity Centre, including Amendment C275case to the Casey Planning Scheme.

Independent insight.

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GLOSSARY AND ABBREVIATIONS

Term	Definition	Abbreviation
Activity Centre	A node with diverse retail, employment and residential land uses. Further defined in Appendix 1.	AC
Victorian Planning Provisions	A state-wide reference document or template from which planning schemes are sourced and constructed. It provides the framework, standard provisions and State planning policy.	VPP
State Planning Policy Framework	The State Planning Policies which apply to all land in Victoria	SPPF
Local Planning Policy Framework	Sets the local and regional strategic policy context for a municipality. It comprises the Municipal Strategic Statement and specific local planning policies and operates consistently with the SPPF.	LPPF
Municipal Strategic Statement	A statement of the key strategic planning, land use and development objectives for the municipality and the strategies and actions for achieving the objectives	MSS
Urban Growth Boundary	The long-term limits of urban development and where non-urban values and land uses should prevail in metropolitan Melbourne	UGB
Precinct Structure Plan	Falling under the purview of the Victorian Planning Authority, Precinct Structure Plans are master plans for greenfield sites that provide a long-term plan for the urban development of an area, and describe how and where services are planned to support development.	PSP
Retail	Stores selling to the public items for use or consumption rather than for resale. Includes supermarkets, specialty stores, department stores, large format retail and hospitality businesses. Further defined in appendix 2	
Higher order retail	Shops that predominantly sell high-priced goods that are bought on an infrequent basis. Furniture stores, electrical goods stores and travel agencies are examples of high order retail shops.	

EXECUTIVE SUMMARY

Project context

The Cranbourne Town Centre is located in the south of Casey's existing urban area. The Cranbourne Town Centre is Principal Activity Centre, and accommodates a diversity of uses including retail, commercial, institutional and residential activity.

The City of Casey (Council) is currently reviewing the *Cranbourne Town Centre Plan* (Structure Plan) and the planning controls that apply to the centre, particularly Schedule 1 to the Activity Centre Zone (ACZ1).

The current application of the ACZ1 for Cranbourne is extensive and covers residential land as well as a variety of commercial, industrial, education and public facility uses. The current planning framework for the centre is particularly complex, comprising a number of precincts and sub-precincts.

One of the drivers of Structure Plan Review is the need to address the complexity of the current planning framework surrounding the Cranbourne Town Centre (in terms of its size and number of precincts) and provide greater certainty to landowners, investors and the community.

To support the review of the Structure Plan, and building on the overarching *Retail and Other Commercial Floor Space Assessment,* this supplementary assessment *(the Cranbourne Town Centre Economic Assessment)* provides some further detail around retail and other commercial floor space requirements within the Cranbourne Town Centre specifically. It also provides advice on potential changes to the current planning framework as a result of these findings.

It should be noted this report comes from a retail and non-retail floorspace and economic perspective. Other background work and consultation is also being completed by Council to inform the development of the Structure Plan. These other perspectives (i.e. residential, traffic, urban design, etc) should be considered alongside the recommendations in this report.

Cranbourne Town Centre study area

The Figure below shows the definition of the Cranbourne Town Centre along with the 14 precincts within the centre that have been used to inform the analysis.

The identification of precincts has been informed by major land uses and activity across the precincts, with the aim of identifying functional areas which are similar in character and use. For example, precinct 6 groups land parcels which are zoned ACZ and PUZ due to them both having education uses.

CRANBOURNE TOWN CENTRE PRECINCT MAP

Source: SGS Economics and Planning

Analysis overview

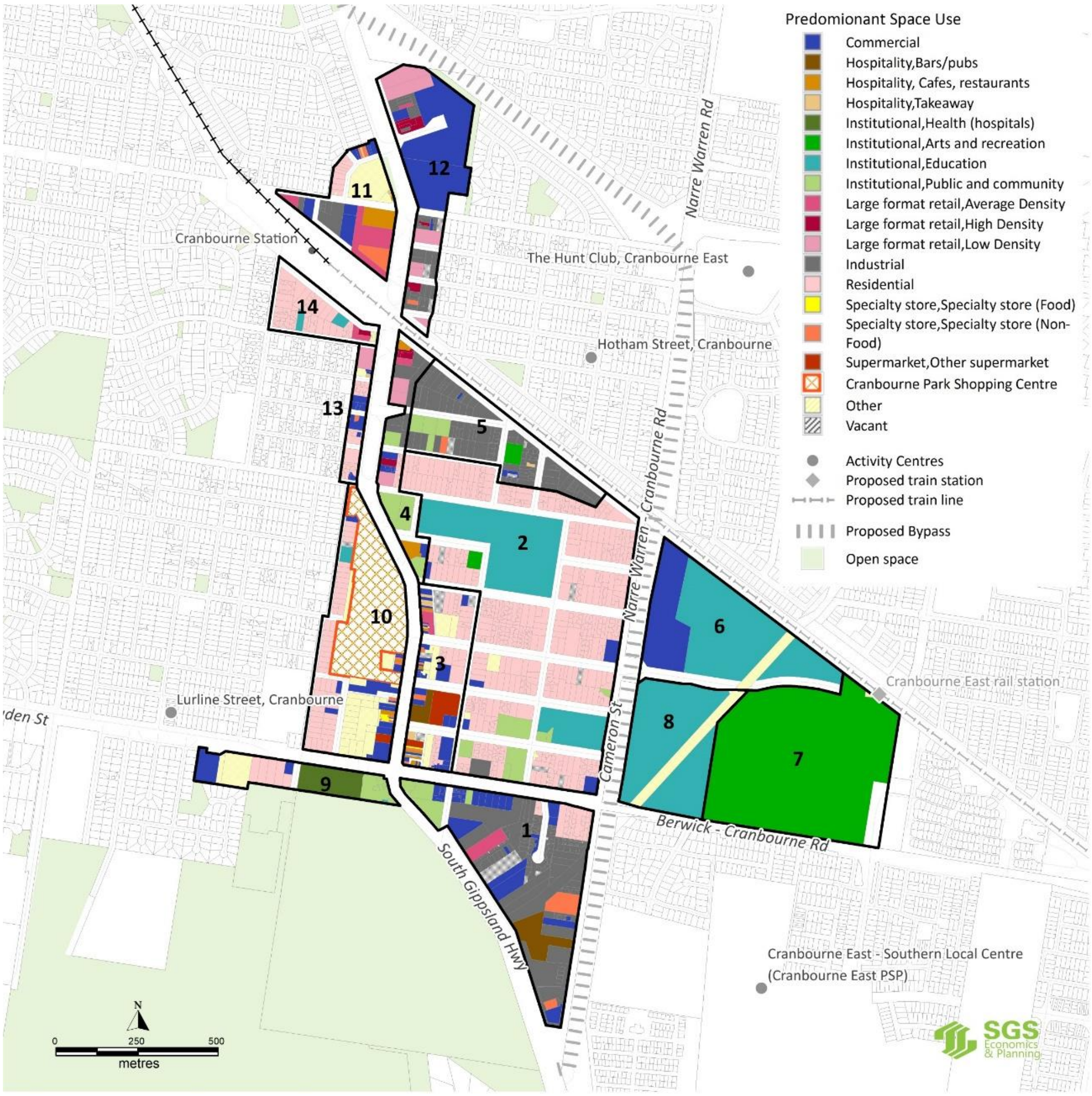
Supply assessment

A detailed land audit along with a site visit was completed for the centre. Results of this audit are presented in the figure below. This provided a comprehensive understanding of the 360,000 square metres of floorspace within the Centre. The following provides a snapshot of existing conditions in the Cranbourne Town Centre:

– Retail floor space is concentrated in the Cranbourne Park Shopping Centre Precinct with some small amounts also located in the Cranbourne Central and High Street North Precincts.
– Commercial land is largely in the Cranbourne Central precinct with a small amount also located in the Sladen Street – East and Cranbourne Park Shopping Centre Precincts. It is typically local service oriented commercial such as banks and accountants which act more like retail than large higher order operations.
– Education land uses are located only in the Chisholm TAFE Precinct (it should be noted there are primary and secondary schools in the area but they have been excluded from the assessment).

- Hospital floor space is located only in the Cranbourne Racecourse, Tourism and Entertainment Precinct. There are also number of local medical centres across the centre.
- The majority of the arts and recreation floor space is located in the Cranbourne community precinct and at the Casey Complex.
- Industrial land makes up the majority of the Sladen Street – East and Cameron Street precincts. There is also significant industrial floor space in Cranbourne Central and High Street North precincts.
- Almost half of the floor space in the Cranbourne Central precinct is residential

CRANBOURNE TOWN CENTRE, PREDOMINANT FLOOR SPACE BY LOT



Source: SGS Economics and Planning 2016

Note: Cranbourne Park shopping Centre includes a Kmart, Target, Coles, Safeway and over 100 speciality stores

Demand assessment

Overall demand for retail and commercial activity was identified for Casey, and then allocated to the activity centres, informed by the need to balance the growth of major centres with ensuring equitable access to goods and services at the local level, and the available capacity at the various centres.

As a result of this process, 103,100 square metres of floor space growth is needed at the Cranbourne Town Centre over the next two decades. Over 50 per cent of future floorspace demand is in non-retail sectors, primarily commercial floorspace. There is also strong demand for small scale retail within the centre, namely speciality stores and hospitality. Currently these are largely contained within the Cranbourne Park retail centre and will need to be spread across most precincts.

PROJECTED FLOORSPACE GROWTH BY USE, CRANBOURNE TOWN CENTRE

	Total at 2016 (sqm)	Total at 2026 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	7,650	7,650	10,650	3,000	39%
Other Supermarket	2,978	4,478	5,978	3,000	101%
Specialty Store	20,338	26,338	32,338	12,000	59%
Department Store	17,295	20,355	23,415	6,120	35%
Large Format Retail	17,931	23,931	29,931	12,000	67%
Hospitality	16,500	21,542	26,584	10,084	61%
Commercial	36,615	57,766	78,916	42,301	116%
Institutional	106,972	114,773	122,574	15,602	15%
Industrial	61,258	61,258	61,258	0	0%
Total	**287,537**	**338,091**	**391,644**	**104,107**	**36%**

Source: SGS Economics and Planning

This analysis indicates that Cranbourne has significant additional capacity that is not required over the next 20 years, given the municipal wide objectives.

Key issues and opportunities

Several key issues have been identified which have the potential to prevent or delay the achievement of the objectives of the Cranbourne Town Centre.

Planning controls

The ACZ1 covers the majority of the Cranbourne Town Centre. The Cranbourne Town Centre is significantly larger in area compared to other centres considered ‘Major’ or even ‘Metropolitan’ Activity Centres, as defined in Plan Melbourne. However, it is comprised of a number of precinct focused on residential, retail and other employment functions as detailed. This enables Council to take a holistic approach to the centre and focus growth and change as required.

Movement networks and access

While the Cranbourne Town Centre has good rail and bus access and is a high activity area, particularly along its High Street retail strip, the sprawling nature of the Cranbourne Town Centre, with unguided, low amenity pedestrian linkages, does little to promote active travel in the area.

The Centre’s low level of connectivity also has an impact on the functionality of the centre. The amenity and legibility across the site has the ability to influence community perception of the centre in regards to its role as a formal and informal meeting place, its sense of community identity and its inclusiveness. This can act as a barrier to promoting economic activity, vibrancy and sense of place across the centre.

Amenity

Amenity is not only important because it encourages walking and cycling (as discussed above) but it is also a necessary factor in attracting knowledge sector businesses and employment. These industries and their employees are attracted to quality urban environments and a high level of service provision.

Key assets

Cranbourne Town Centre’s key assets or sites of interest are not centred on the railway station, nor are they in close proximity to it. This is a key constraint to leveraging facilities to generate further retail, commercial or institutional activity.

Policy advice

The floorspace analysis identified that the Cranbourne Town Centre has sufficient capacity to accommodate future floor space demand. With retail demand largely driven by population growth, the critical issues for the Cranbourne Town Centre are therefore to ensure future retail floor space is appropriately located and to encourage non-retail uses to locate in the centre.

For Cranbourne to mature into a successful Principal Activity Centre it needs to further diversify the type of land uses within the centre (i.e. more commercial, small scale retail and institutional businesses) and the quality of the urban realm and connections. Rather than just getting bigger.

Recommendations

The table below presents a summary of SGS recommendations for the Cranbourne Town Centre.

TABLE 1 SUMMARY OF RECOMMENDATIONS

Spatial/Structural factors	Recommendations	Responsibility	Timeframe
1. Planning controls	1.1 *Maintain the current extent of the ACZ1* 1.2 *Use schedules to the ACZ1 to consolidate retail uses* 1.3 *Use schedules to the ACZ1 to concentrate higher density housing in strategic locations* 1.4 *Investigate the use of vertical zoning* *1.5 investigate subdivision controls*	Local government (with some state responsibilities)	Short-term
2. Movement networks and access	2.1 *Continued advocacy for train line extension* 2.2 *Continued advocacy for Cranbourne Bypass* 2.3 *Improved pedestrian access routes* 2.4 *Investigate implementation of coordinated public transport services*	Local and state government	Short to long-term
3. Amenity	3.1 *Review and optimise Council maintenance works* 3.2 *Increase residential and commercial densities (and Recommendations 1.2 and 1.3)* 3.3 *Redevelopment of Greg Clydesdale Square*	Local government	Short to long-term
4. Key assets	4.1 *Continued advocacy for train line extension* 4.2 *Integration of the Chisholm Institute into the region* *4.3 Investigate wayfinding and improved internal connections*		
5. Accommodation of non-retail jobs	6.1 *Facilitation of a business incubator*	State government	Short to medium-term

Source: SGS Economics and Planning

1 INTRODUCTION

1.1 Project context

The City of Casey (Council) is currently reviewing the *Cranbourne Town Centre Plan* (Structure Plan) and the planning controls that apply to the centre, particularly Schedule 1 to the Activity Centre Zone (ACZ1).

The context and process around the Structure Plan is discussed further in section 2.1.

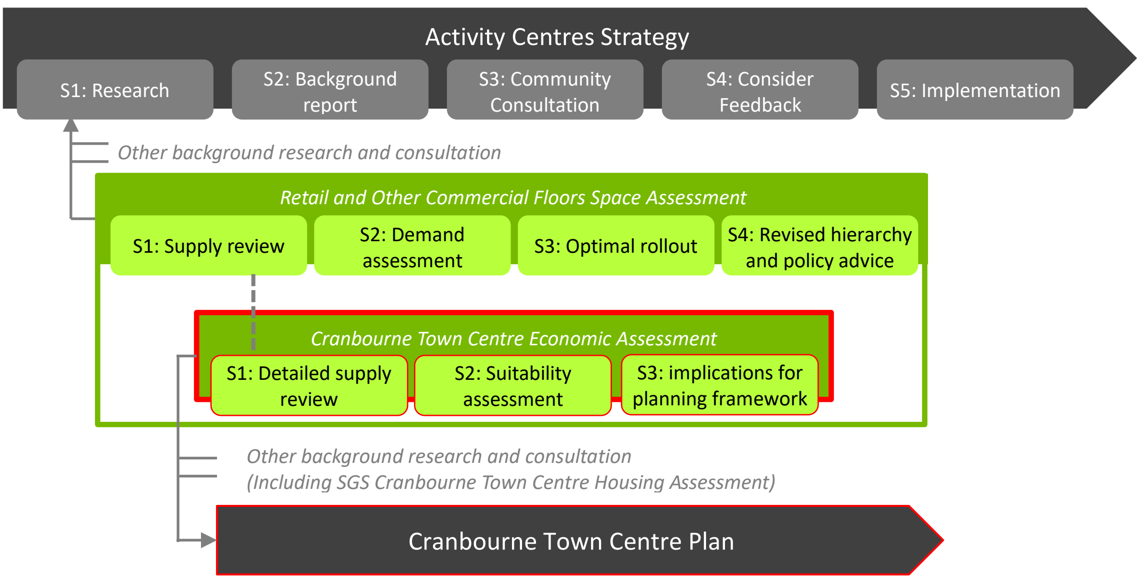
In addition, Council is developing a new *Activity Centre Strategy*. As part of the first stage of the new Activity Centres Strategy, SGS Economics and Planning (SGS) were engaged to prepare a *Casey Activity Centres: Retail and Other Commercial Floor Space Assessment* (referred to hereon in as the draft *Casey Activity Centres Assessment*). This broader study reviews the existing activity centres hierarchy, and, given up to date data and analysis, establishes whether any changes to the management framework for centres is required. This broader assessment is still in draft form.

To support the review of the Structure Plan, and building on the overarching *Retail and Other Commercial Floor Space Assessment,* this supplementary assessment *(the Cranbourne Town Centre Economic Assessment)* provides some further detail around retail and other commercial floor space requirements within the Cranbourne Town Centre specifically. It also provides advice on potential changes to the current planning framework as a result of these findings.

Other background work and consultation is also being completed by Council to inform the development of the Structure Plan. This includes the *Cranbourne Town Centre Housing Assessment* also being completed by SGS.

Figure 1 provides an overview of this assessment (highlighted red) within the broad project context.

FIGURE 1 PROJECT CONTEXT OVERVIEW



1.2 Scope of the Cranbourne Town Centre Economic Assessment

The *Cranbourne Town Centre Economic Assessment* is a supplementary report to the broader *Casey Activity Centres Assessment* and as such will reference back to this broader study. It primarily draws on the broader assessment, while includes the following additional/more detailed tasks:

- **Detailed supply assessment** – Drawing on the Casey wide supply assessment a further breakdown of the existing floorspace within Cranbourne Town Centre was completed. This more detailed assessment included a site visit and incorporated additional datasets and category breakdowns.
- **A suitability assessment** - was completed to better understand spatial constraints and opportunities across the centre (i.e. access to public transport).
- **Planning advice** – Based on the results of this additional work advice regarding potential changes to the planning framework specific to Cranbourne Town Centre were developed.

To assist the reader some aspects (such as the policy context and demand assessment) from the *Casey Activity Centres Assessment* have been included in this report and refined to the Cranbourne context specifically.

It should be noted this report is not intended to be a detailed structure plan, nor does it provide comprehensive planning framework advice or specific changes to statutory or non-statutory controls.

The report is intended to provide an enhanced understanding of retail and commercial floorspace witin Cranbourne Town Centre and in conjunction with other research will help inform the development of the Structure Plan being prepared by Council.

1.3 Report structure

The remainder of the report is structured as follows:

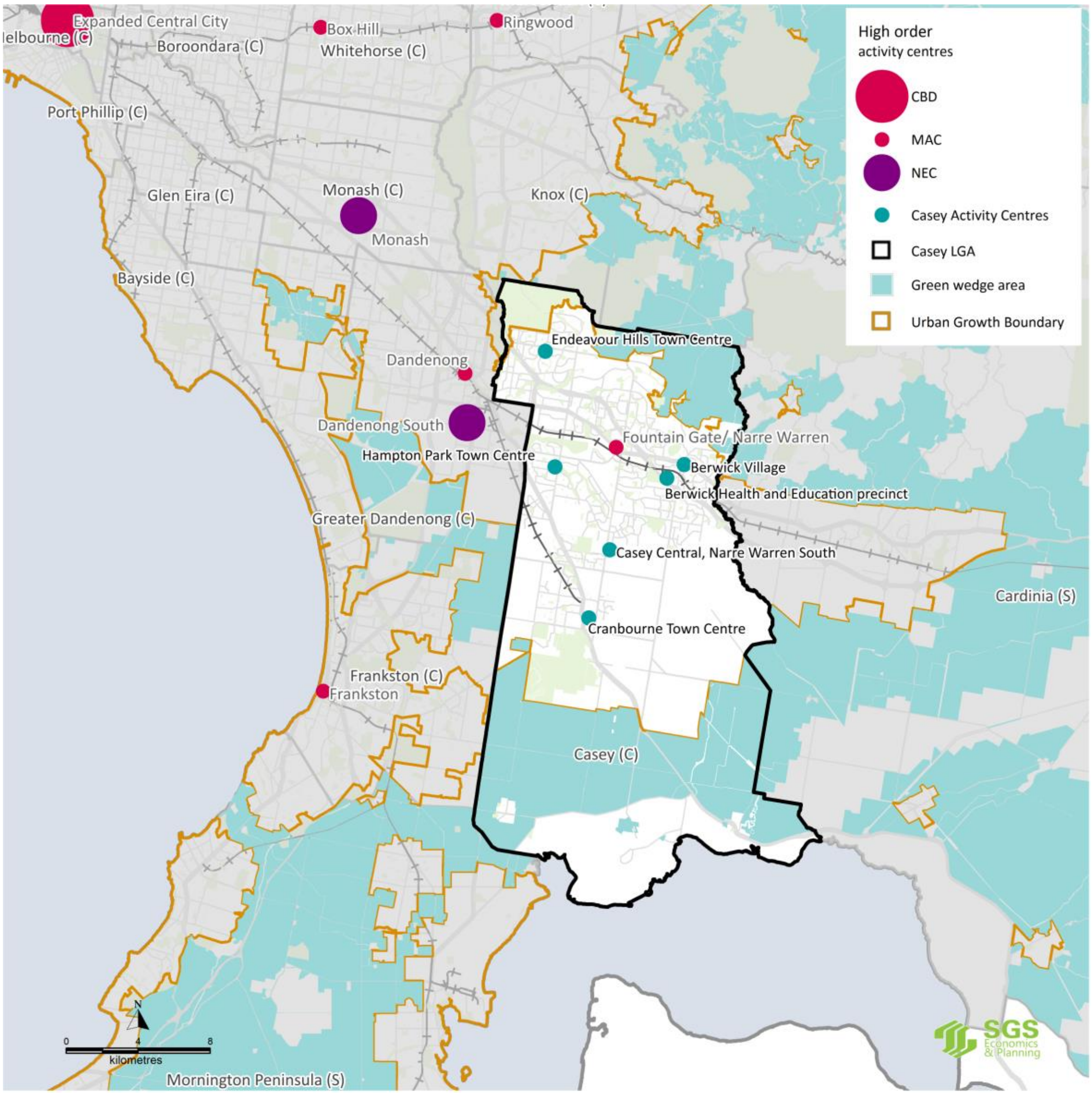
- **Chapter 1 Introduction** - the remainder of this chapter details the assessment study area.
- **Chapter 2 Policy context** - provides a policy context for retail and other commercial land (not including industrial and agricultural uses) relevant to Cranbourne Town Centre.
- **Chapter 3 Current floorspace** - profiles the current supply of retail, other commercial and residential land in the Cranbourne Town Centre.
- **Chapter 4 Floorspace demand and alignment -** profiles projected demand for retail and other commercial land in the Cranbourne Town Centre drawing on the *Casey Activity Centres Assessment* and the enhanced supply assessments from Chapter 3
- **Chapter 5 Issues and recommendations -** identifies the spatial constraints and opportunities for the Cranbourne Town Centre and outlines relevant policy implications.

1.4 Cranbourne Town Centre study area

The Cranbourne Town Centre is located in the south of Casey's existing urban area. Figure 1 shows the centre in the context of the municipality and metropolitan Melbourne.

It should be noted the activity centre designation is consistent with Plan Melbourne, which is slightly different to the designation adopted by Council.

FIGURE 2 REGIONAL CONTEXT WITH PLAN MELBOURNE CENTRES



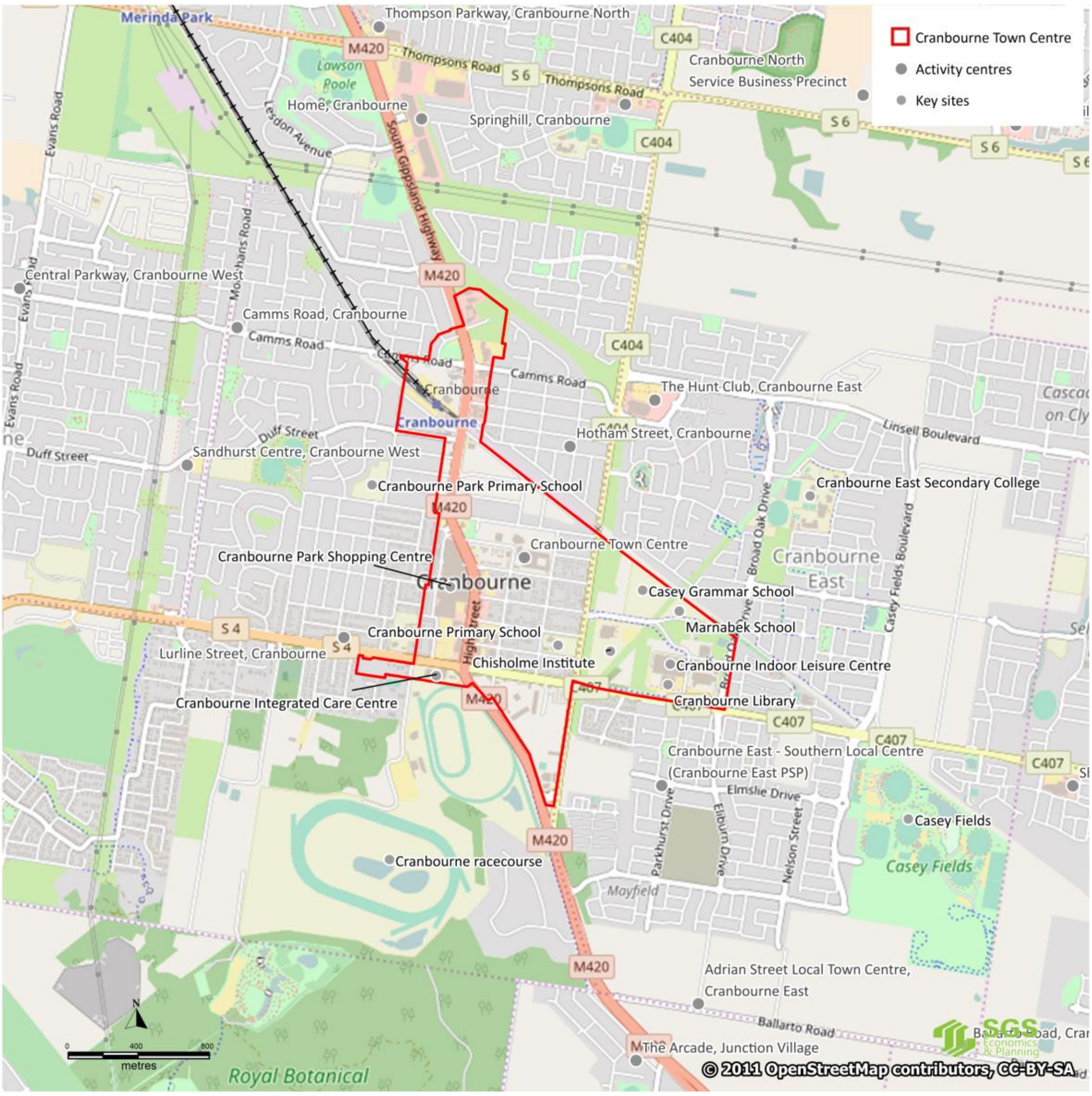
Source: SGS Economics and Planning 2015

The study area (see Figure 3) for this report is in general alignment with the August 2011 *Cranbourne Town Centre Structure Plan* and the Cranbourne Town Centre Framework Plan in Schedule 1 to the Activity Centre Zone. The study area excludes the Cranbourne Racecourse area as the racecourse area is considered under the *Cranbourne Racing Complex and Surrounds Investment and Development* (2015).

Cranbourne Town Centre study area includes the Cranbourne Railway Station and the Cranbourne Park Shopping Centre. The Cranbourne Racecourse and Royal Botanic Gardens (Cranbourne) can be found to the south west, and the sports and recreation facility Casey Fields to the south east. There are a number of planned growth areas to the south and east.

The Cranbourne Town Centre is also surrounded by a number of smaller centres in the region.

FIGURE 3 CRANBOURNE TOWN CENTRE AND LOCAL CONTEXT



Source: SGS Economics and Planning

Figure 4 shows the 14 precincts within the centre that have been used to inform the analysis. The identification of precincts has been informed by major land uses and activity across the precincts, with the aim of identifying functional areas which are similar in character and use. For example, precinct 6 groups land parcels which are zoned ACZ and PUZ due to them both having education uses.

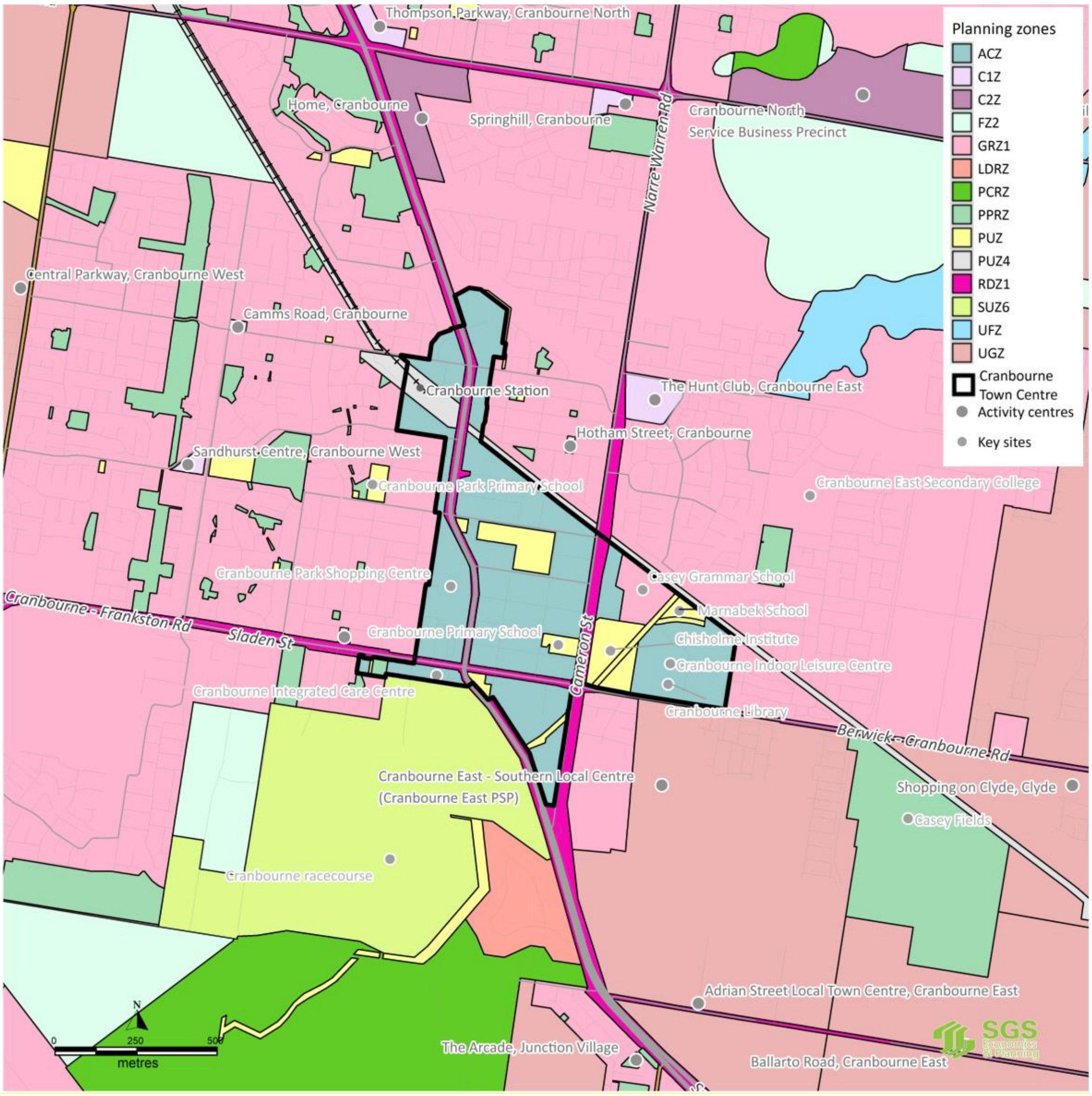
FIGURE 4. CRANBOURNE TOWN CENTRE, PRECINCT MAP

Source: SGS Economics and Planning

As seen in the land use zoning map (Figure 5) below, the study area is predominantly comprised of Activity Centre and Public Use zoning, with some Residential. It is predominantly surrounded by Residential Zoning, with some Special Use Zone (SUZ6) to the south east.

Land use zoning within the study area is further described in greater detail in Chapter 3.

FIGURE 5 CRANBOURNE TOWN CENTRE, PLANNING ZONES



SGS Economics and Planning from the Casey Planning Scheme

Figure 6 provides an aerial view of the study area. This highlights the surrounding residential suburbs. The Cranbourne Racecourse and Royal Botanic Gardens (Cranbourne) can be clearly seen to the south of the centre. Within the centre a variety of uses can be seen form residential housing to various employment uses. These are further discussed in Chapter 3.

FIGURE 6 CRANBOURNE TOWN CENTRE, AERIAL MAP

Source: SGS Economics and Planning

2 POLICY CONTEXT

This chapter provides an assessment of the existing state, regional and local policy context relevant to retail and commercial land in the Cranbourne Town Centre. An overview of the Cranbourne Town Centre Plan, which this report is seeking to inform, is provided first for context.

2.1 Overview of the Cranbourne Town Centre Plan process

The City of Casey is currently reviewing the Cranbourne Town Centre Plan (the Structure Plan) and the planning controls that apply to the centre, particularly Schedule 1 to the Activity Centre Zone (ACZ1).

The Structure Plan was adopted on 2 August 2011 and was given effect in the Casey Planning Scheme through the introduction of the Activity Centre Zone – Schedule 1 on 19 March 2015.

The current application of the ACZ1 for Cranbourne is extensive and covers residential land as well as a variety of commercial, industrial, education and public facility uses. The Structure Plan and planning provisions for the Cranbourne Town Centre quickly became outdated as rapid population growth encircles Cranbourne and development interest and activity intensifies within the Centre.

The current planning framework for the Centre is particularly complex, comprising a number of precincts and sub-precincts. Furthermore, existing controls have caused confusion in terms of applying use, height, setback and consolidation requirements. From Councils perspective it has become evident since the implementation of the ACZ1 that the planning provisions for the Cranbourne Town Centre are not achieving the objectives of the Structure Plan.

Council is currently undertaking a comprehensive review of the Structure Plan and planning provisions for the Cranbourne Town Centre. This review aims to:

- *Simplify the current planning framework for the Cranbourne Town Centre;*
- *Clearly articulate Council's strategic intent for the Cranbourne Town Centre and provide greater certainty to landowners, investors and the community regarding the type and intensity of development that can occur within the Cranbourne Town Centre*
- *Unlock millions of dollars in potential investment, facilitate housing diversity and generate local employment opportunities for residents; and*
- *Identify landscape, streetscape, parking and general capital works projects for Council land and facilities, with a supporting investment plan.*

In the interim Council is proposing to amend the Casey Planning Scheme to align areas that are predominately residential in the Cranbourne Structure Plan and Cranbourne Activity Centre Zone area with the Residential Growth Zone. The proposed amendment will implement the objectives and criteria set for Substantial Change Areas under Council's Housing Strategy (2016). To this end, on 6 September 2016 Casey City Council resolved to seek authorisation from the Minister for Planning to prepare and exhibit Amendment C204 to the Casey Planning Scheme and endorsed an updated Structure Plan for the purposes of exhibition.

2.2 State policy context

Plan Melbourne (2017)

Melbourne's metropolitan planning strategy, *Plan Melbourne 2017-2050*, was released by the Victorian Government in March 2017 to provide direction and guidance for city growth and change over the next 35 years. Plan Melbourne identifies eight priority sectors with the potential to attract and deliver significant growth and investment for Melbourne and Victoria. These are: medical technology and pharmaceuticals, new energy technologies, food and fibre, transport technologies, defence technologies, construction technologies, international education, professional services.

The City of Casey is located in the Southern subregion of Melbourne. Industries anticipated to be most relevant to this subregion over the next 15 years are retail trade, manufacturing, healthcare and social assistance, and education and training.

Plan Melbourne recognises Cranbourne Town Centre as one of 121 major activity centres in Melbourne.[1] One rung lower than metropolitan activity centres in the activity centre hierarchy, major activity centres are defined in the strategy as "suburban centres that provide access to a wide range of goods and services. They have different attributes and provide different functions, with some serving large subregional catchments".

Policy 1.1.7 of Plan Melbourne is to "Plan for adequate commercial land across Melbourne". It recognises that the increasing desire for activity centres and commercial areas to allow mixed-use development can lead to residential uses competing with commercial uses and employment opportunities. It states (p. 35):

> *"Once a commercial site is converted for a residential use, it is likely to be permanently lost to that market. Consideration needs to be given to ways in which commercial and residential development can be developed together. To ensure Melbourne maintains a competitive commercial market and is able to facilitate local access to employment, future commercial land requirements need to be quantified by region."*

This policy to ensure adequate preservation of commercial land into the future is highly relevant to the Cranbourne context, given the large amount of land designated for retail and other commercial uses within the Activity Centre Zone.

Plan Melbourne further identifies the need to develop a network of activity centres linked by transport (Policy 1.2.1). It states (p. 37):

> *"All activity centres have the capacity to continue to grow and diversify the range of activities they offer. Opportunities to partner with the private sector to enable future diversification, investment and employment growth should be explored and, where appropriate, facilitated through planning provisions.*
>
> *Diversification will give communities access to a wide range of goods and services, provide local employment and support local economies and the development of 20-minute neighbourhoods. In many activity centres, this growth will include housing, particularly at higher densities. To capture and to accommodate future growth opportunities activity centres will need greater flexibility in planning controls than surrounding residential areas."*

The question of allowing flexibility in planning controls in activity centres is very pertinent to Cranbourne Town Centre. A significant proportion of the Town Centre is zoned Activity Centre, with detailed provisions pertaining to each subprecinct.

[1] Plan Melbourne activity centre classifications differ from those in the City of Casey Planning Scheme.

Victoria Planning Provisions

The Victoria Planning Provisions (VPPs) act as the blueprint for all Victorian planning schemes. This includes the provision of land use zones, which designate the specific purpose for the use of land and are used to implement state and local planning policy, and overlays, which applies development restrictions on land with features of physical or strategic importance.

While Casey's activity centres are largely zoned Commercial, various other zones, including Mixed Use, Activity Centre and Comprehensive Development, have also been applied to these centres. Development and use in activity centres is guided by relevant structure plans and development plans that have been given effect in the municipal planning scheme. Specific zones and controls which apply to Cranbourne Town Centre are outlined in Section **Error! Reference source not found.**.

Changes made in 2013 to the zones in the VPPs, including the merging of five existing business zones into two new commercial zones, have allowed for new types of development within commercial zones. A major departure from the previous zones was the removal of restrictions on floor space thresholds in most instances in commercial zones.

The revision of the Commercial 1 Zone (C1Z) increased the range of Section 1 Uses (i.e. uses not requiring a planning permit) and removed floor area restrictions. In some cases, floor area restrictions were retained and converted into schedules to the Urban Growth Zone where precinct structure plans apply.

The revised Commercial 2 Zone (C2Z) permits office use, commercial businesses, restricted retail premises, trade supplies and some limited retail and hospitality activity. Floor area restrictions for all office and some retail uses were also removed. Small supermarkets (less than 1,800 sqm) are now allowed in the C2Z as-of-right, while larger supermarkets (greater than 1,800 sqm) can now also apply to locate in this zone.

The introduction of more as-of-right uses and the removal of floor space caps increases the ease with which businesses (particularly those requiring larger floor plates) can be set up. Given it may be more affordable for the 'big box' retail and larger office uses to locate in the C2Z, care needs to be given to the location and decision-making with regard to C2Z land to prevent out of centre development. Allowing commercial and retail uses to locate outside of activity centres may undermine strategic aims to achieve consolidated, vibrant centres, undermine investments in existing infrastructure and limit accessibility to a diversity of retail goods and services. Although requiring a permit, the establishment of larger supermarkets in out of centre locations may promote, attract and accelerate development in out of centre areas.

Changes to the VPP's residential zones may also serve to exacerbate potential out-of-centre commercial development. The range of retail and commercial uses allowed subject to a permit were increased in the reformed residential zones. The Residential Growth Zone permits some non-residential uses (several Shop and Office uses) within proximity to a commercial zone or Mixed Use Zone (subject to various conditions) without any planning permit. . While the RGZ is largely intended to be used in areas surrounding activity centres, allowing commercial uses within the zone to serve a complementary purpose, there is the risk that too great a degree of commercial development in this zone can weaken activity centre boundaries and result in non-consolidated, sprawling centres.

State Planning Policy Framework

The State Planning Policy Framework (SPPF) translates State Government land use policies, including *Plan Melbourne*, into statutory planning provisions. It is applied in all local planning schemes to provide the strategic framework for land use planning across Victoria.

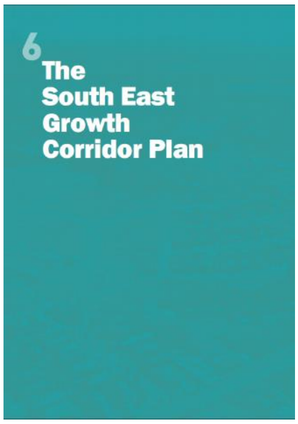
The SPPF highlights the role of strategic planning in identifying the use and development of land within and surrounding activity centres and provide a clear direction for investment in a range of land uses. Commercial development (including retail and office) is to be contained within existing or planned activity centres. Out of centre development is to be discouraged, as per Clause 17 of the SPPF, with proposals for commercial uses (including retail and office) within areas outside of activity centres to be subject to a net community benefit test.

In terms of planning for growth areas, Clause 11.02 encourages overall residential densities in growth areas of a minimum of 15 dwellings per net developable hectare. Significant amounts of local employment opportunities are also to be provided for.

To achieve diverse and affordable housing and reduce the cost of living, Clause 11.04 plans for the increase of housing supply near services and public transport. In order to achieve 'a more connected Melbourne', the SPPF recognises a need to improve transport infrastructure, services and affordability in the city's newer suburbs, and improve local travel options to increase social and economic participation. Clause 16.01 supports this need to ensure adequate access to services, promoting the location of new housing in or close to activity centres and employment corridors and encouraging higher density development on sites that are well located in relation to activity centres, employment corridors and public transport.

2.3 Growth area spatial strategies

Growth Corridor Plan



Growth Corridor Plans are high level integrated land use an d transport plans for Melbourne's growth corridors; the *South East Growth Corridor Plan* is one of these.

With a focus on manufacturing and technology, the economy of the wider south-east region features a high degree of employment and self-containment at the metropolitan scale, while being closely linked to the metropolitan area as a whole.

Given the strong reliance of residents in the South East Growth Corridor on jobs and services in established areas, a key objective of the Plan is improving the local self-containment of jobs in the area. Dandenong and the south eastern metropolitan suburbs are planned to be a continued focus for employment, services and facilities in the region, with emphasis placed on Pakenham, Thompsons Road and South Gippsland Highway for new job opportunities.

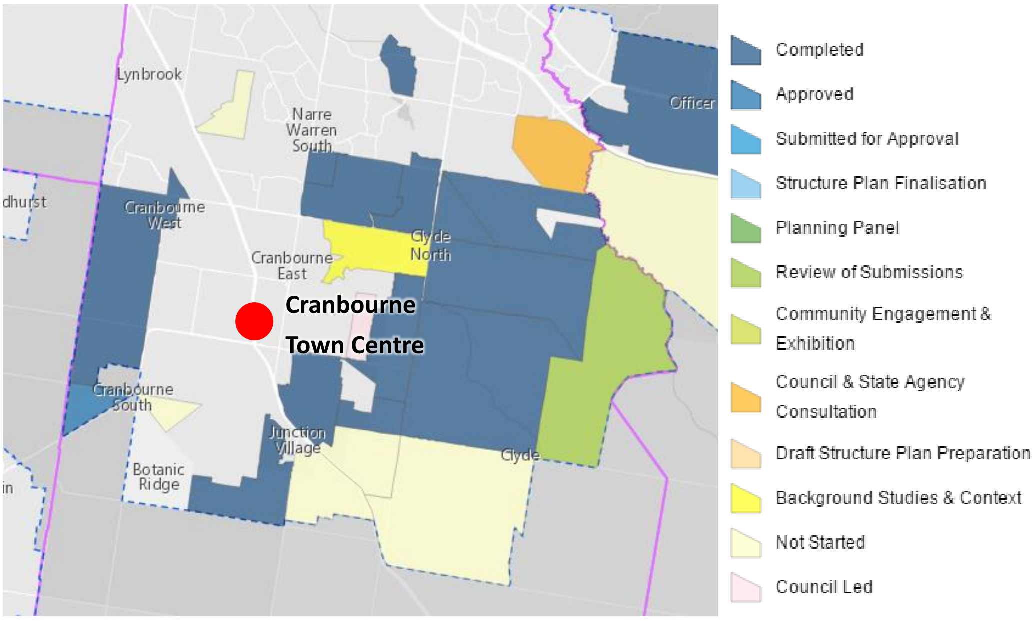
Cranbourne Town Centre is identified as a Principle Town Centre in the South East Growth Corridor Plan. The Centre plays an important role in the provision of regional community, health and education services and facilities, with a Chisholm Institute campus and an integrated care centre providing a range of day, outreach and aged care assessment services. The Plan advocates for more comprehensive and specialist education, health and community facilities to be located in Cranbourne/Cranbourne East and other higher order town centres.

Precinct Structure Plans (PSPs)

PSPs are master plans for greenfield sites that cater for between 10,000 to 30,000 people. Falling under the purview of the Victorian Planning Authority, they provide a long-term plan for the urban development of an area, and described how and where services are planned to support development.

The map below illustrates the PSPs relating to land in the vicinity of the Cranbourne activity centre.

FIGURE 7 PRECINCT STRUCTURE PLANS NEAR CRANBOURNE TOWN CENTRE



Source: VPA, MAY 2017. Retrieved from https://vpa.vic.gov.au/greenfield/interactive-status-map/

There are currently 14 PSPs that have been approved or are at completion in the City of Casey. These are summarised in the table below:

TABLE 2 PSPS AT APPROVAL OR COMPLETION STAGES IN THE CITY OF CASEY (AT MAY 2017)

PSP	Status	Forecast population	Forecast jobs
Cranbourne West	Completed	110,000	10,626-16,762
Brompton Lodge	Approved	4,157	369
Botanic Ridge	Completed	9,640	936
Cranbourne East	Completed	18,147	2,862
Casey Fields South Residential	Completed	4,100	130
Clyde Creek	Completed	38,400	7,471
Thompsons Road	Completed	18,200	8,920
Clyde North	Completed	18,500	Unknown
Cranbourne North (Stage 1)	Completed	5,600	Unknown
Cranbourne North (Stage 2)	Completed	5,821	Unknown
Casey Central Town Centre	Completed	5,790	5,219
Berwick Waterways	Completed	2,586	383

Source: Compiled by SGS Economics and Planning, 2017 from relevant Precinct Structure Plans

The location and development of future activity centres in growth areas is strongly governed by PSPs and Urban Design Frameworks, which provide more detailed guidance on the development and design of various precincts.

2.4 Local policy context

Casey C21 – Building a Greater City (2011)

Casey C21 – Building a Great City 2011 (Casey C21 BaGC) is a companion document to the original *Casey C21 – A Vision for our Future 2002*, a long-term strategic planning document for Casey.

The development of the Casey C21 Strategy arose from recognition by Council that a more holistic, longer-term vision needed to be created for the municipality than that offered by the existing MSS, which would complement and strengthen the key directions of the Council Plan. The central focus of the strategy is the building and strengthening of communities in terms of physical planning and community development. It is a 'whole-of- community' strategy incorporating social, economic and environmental needs, and encouraging community participation. This vision was created from the 'ground up', comprising strategic directions that are based on a detailed understanding of the values of the Casey community and how those values vary in a spatial sense.

Casey C21 identifies rapid population growth as one of Casey's defining features. An ageing population is another challenge for the municipality, along with vulnerability to mortgage stress and fuel price rises. Cranbourne is identified as a key area of socio-economic disadvantage in Casey, based on income, educational attainment and unemployment.

An objective to revitalise Cranbourne Town Centre is identified in the plan, with a view to achieving a wider goal of creating knowledge-based jobs in Casey. Casey C21 advocates for Cranbourne Town Centre to become one of the most active, attractive and accessible principal activity centres in Melbourne. Another objective is to build on Cranbourne's training and racing complex and its cluster of professional and recreational horse activities to create opportunities for business development and new jobs for the local community. The Cranbourne Botanic Gardens are also highlighted as a natural asset presenting strong tourism and commercial opportunity.

Casey Housing Strategy (2015)

The Casey Housing Strategy was developed in response to projected population growth, in order to enable Council to efficiently manage future housing supply to meet the community's needs.

The Strategy identifies areas suitable for different rates of housing change – minimal, incremental and substantial. More intensive development is to be directed to areas with easy access to existing services and public transport, as well as in-centre areas. Moderate development is to occur in areas with good access to activity centres and close to strategic transport routes, while change is to be minimised in areas that are more remote from public transport and services. Areas identified for substantial change are defined as being within a walkable catchment of 400 and 800 metres of an activity centre or public transport. The Strategy proposes that the new Residential Growth Zone be applied to these areas.

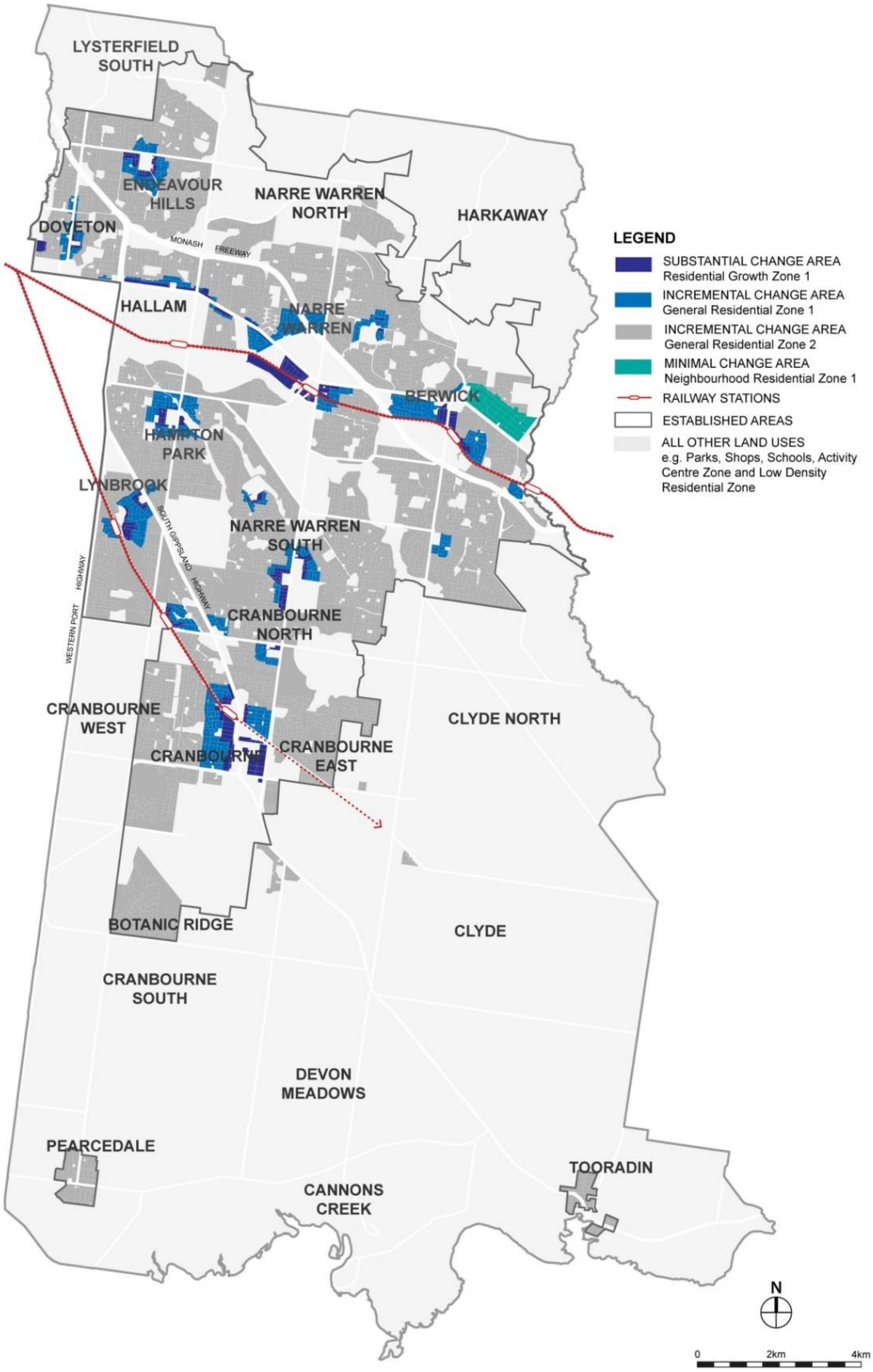
The Housing Strategy advocates for a greater diversity of housing across the municipality, and housing at higher densities within walkable distance to high frequency public transport and well-serviced activity centres. Opportunities for housing within activity centres are also identified, particularly higher order centres such as Cranbourne.

While the Housing Strategy has a focus on established areas, the document advocates for the provision of greater housing diversity in growth areas, with clearly defined objectives and specific areas identified for higher densities. The Strategy further advocates for Precinct Structure Plans (PSPs) to be marked in accordance with objectives and targets for the established areas of Casey, including supporting the development of higher residential densities within walkable distances to shops, services and public transport.

In accordance with the objectives and criteria set for Substantial Change Areas in the Housing Strategy, Council is proposing to amend the Casey Planning Scheme to introduce the Residential Growth Zone to land identified as predominately residential in the Cranbourne Structure Plan and Cranbourne Activity Centre Zone area. To this end, on 6 September 2016 Casey City Council resolved to seek authorisation from the Minister for Planning to prepare and exhibit Amendment C204 to the Casey Planning Scheme and endorsed an updated Structure Plan for the purposes of exhibition.

Figure 8 illustrates which areas are proposed to undergo change, and to what extent.

FIGURE 8 DETAILED CHANGE AREAS



Source: Casey Housing Strategy (Endorsed 6 September 2016)

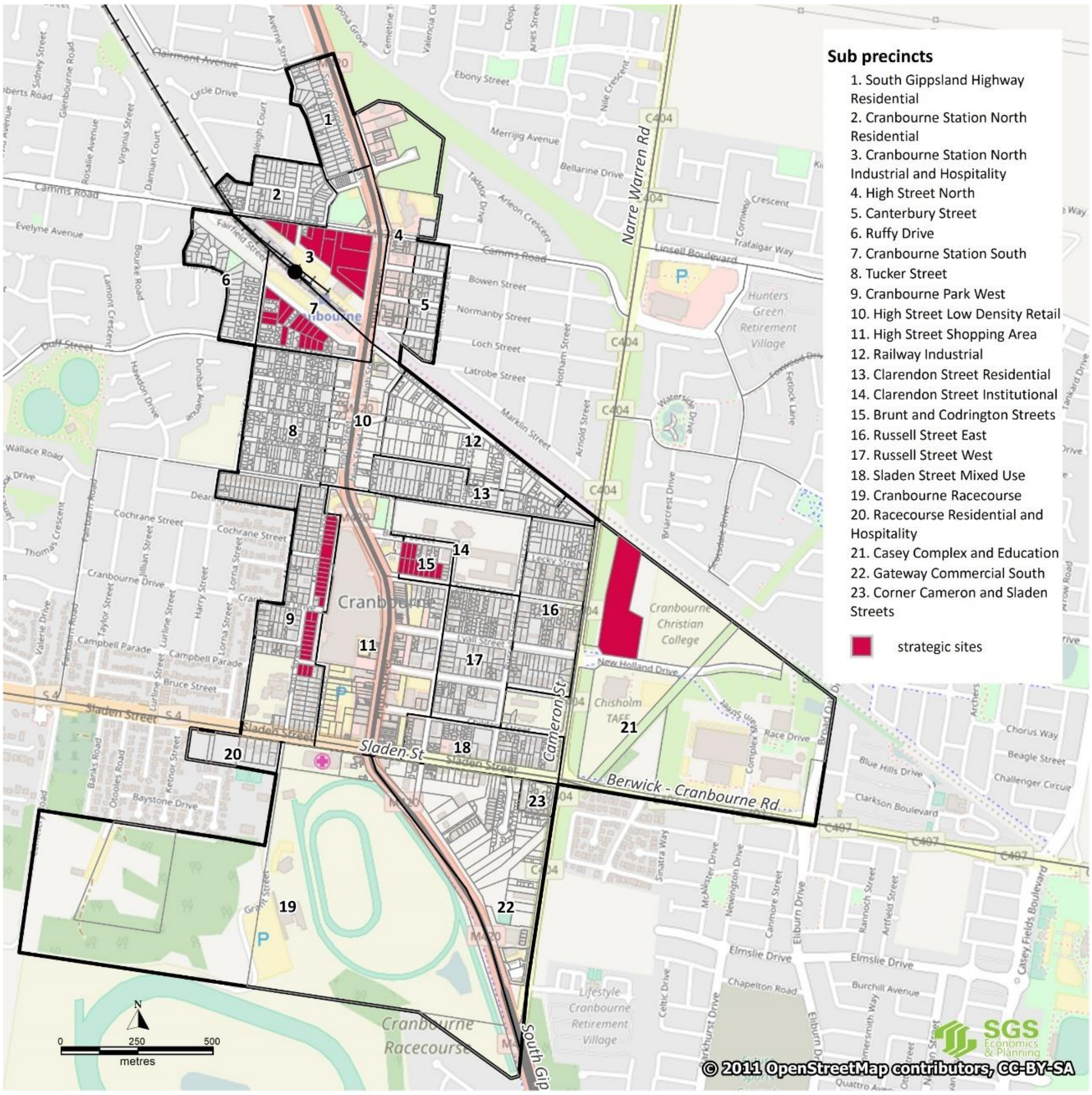
Cranbourne Town Centre Residential Demand Study (2017)

A residential demand study for the Cranbourne Town Centre is currently in draft form.

The aim of this study was to assess housing demand and capacity in the Cranbourne Town Centre to 2036. This was undertaken in light of the proposed Amendment C204 to the City of Casey Planning Scheme, which seeks to rezone land which is identified as primarily residential within the Cranbourne Activity Centre Zone (ACZ1) to Residential Growth Zone (RGZ) in line with the policy direction of the Casey Housing Strategy (2015).

This assessment found that current total dwelling capacity in the Town Centre exceeds total housing demand to 2036, but only in non-low density scenarios. Strategic sites for higher density development to be directed were identified as follows (see Figure 9 below).

FIGURE 9 STRATEGIC RESIDENTIAL SITES IN CRANBOURNE TOWN CENTRE



Source: SGS Economics and Planning, 2017, 'Cranbourne Town Centre Residential Demand Study'.

Municipal Strategic Statement

Casey's *Municipal Strategic Statement* (MSS) is located at Clause 21 of the Planning Scheme and contains the key strategic planning, land use and development objectives for the municipality, along with the strategies and actions required to achieve them. A new MSS was recently adopted into the Scheme in February 2017.

Cranbourne lies within the MSS' 'residential and commercial heart', along with the Fountain Gate-Narre Warren CBD. Cranbourne is recognised as the "urban focal point" of the southern half of the Casey, with its regional services role expected to grow over the next decade (Clause 21.01). The need for the provision of a broad range and high intensity of activities that maximise the future capacity of both Cranbourne and Fountain Gate-Narre Warren is also recognised in the MSS (Clause 21.05-3).

A major expansion of the retail core, which allows for a new discount department store and specialty shops, is also outlined (Clause 21.15-3). The MSS further encourages the growth and development of the High Street retail core, along with the consolidation and growth of the northern and southern approaches to the centre. The Cranbourne Local Area Map further highlights the need to expand and strengthen the Cranbourne Town Centre as a major service centre for the South Gippsland region and as a Principal Activity Centre within the South East Growth Corridor.

A further objective for Cranbourne in the MSS is to ensure that the centre can maintain its present role while serving the additional residential growth forecast for the area (Clause 21.15-2).

Local Planning Policy

The Local Planning Policies located at Clause 22 of the Planning Scheme provides the tools by which the Municipal Strategic Statement (MSS) is implemented, guiding development at a local level across the municipality and presenting specific guidelines in relation to strategic planning, land use and development objectives for Casey.

Clause 22.07 – Retail Policy

The LPPF's Retail Policy at Clause 22.07 presents the following policies:

- New retail and commercial development is to occur in designated activity centres, unless otherwise provided for in the policy;
- A structure planning process is to be used as the mechanism to ensure that floor space allocations achieve the best net community benefit outcomes. Allocation of floor space to activity centres is to be based on the intended role of the centres rather than the precise floor space to be provided;
- Floor space thresholds/limits for retail and commercial uses may be imposed on some centres/sites to ensure that the role of the centre is maintained and/or there is a balance activity centre system for the City;
- The subdivision of activity centres is to be done in a way that ensure flexibility for redevelopment and evolution over time, particularly in the face of pressure to subdivide centres into small units for individual sale;
- New retail and commercial development proposals are to make an appropriate contribution to infrastructure provision, including road and intersection works, streetscape upgrades, linking trails, community facilities, youth spaces, public art and other public spaces.

The Clause also establishes the municipality's activity centre hierarchy, based on the 2006 *Casey Activity Centre Strategy*. It is summarised as follows:

Classification	Description and key objectives	Examples
Metropolitan activity centres	Metropolitan Activity Centres provide municipal-wide and regional level retailing, commercial, entertainment and community functions to residents, workers and visitors to the City and the wider region. They serve a catchment of approximately 100,000+ persons and generally include a department store(s), discount department stores and a very diverse range of goods and services. Development is to be consolidated within the retail cores of Fountain Gate – Narre Warren CBD and the Cranbourne Town Centre so that these centres can service the north and south parts of the City respectively.	Fountain Gate – Narre Warren CBD Cranbourne Town Centre*
Major activity centres	Major Activity Centres provide a wide range of shopping, commercial and community goods and services to cater for day-to-day and weekly shopping and a range of discretionary needs. They serve a catchment of approximately 50,000 to 75,000 persons and generally include a discount department store(s), supermarkets and a wide variety of goods and services. The roles of these centres are to be strengthened to provide high levels of service and competition, a basis for small business growth and to assist in the development of an effective public transport system.	Berwick Village Casey Central Town Centre Endeavour Hills Town Centre Hampton Park Town Centre
Neighbourhood centres	Neighbourhood centres provide attractive locations to meet the day-to-day needs and most weekly shopping functions of households at locations that are convenient and provide easy access to the community. They serve a catchment of approximately 10,000 to 25,000 persons and generally include a supermarket(s), specialty shops and related goods and services. These are recognised as the “weakest link” in the retail hierarchy.	Amberley Park (Narre Warren South) Autumn Place (Doveton) Spring Square (Hallam) Eden Rise (Berwick)
Convenience centres	Convenience centres provide for essential day-to-day purchases of retail goods and some selected services, fulfilling an important social and community role in the City. They serve a catchment of approximately 2,000 to 4,000 persons and generally include a cluster of goods and services not anchored by a supermarket.	Bemersyde Drive (Berwick) Boulevard Collector Road (Cranbourne North) Box Street (Doveton)
Peripheral sales precincts	Peripheral sales precincts provide attractive and competitive environments for the display, storage and sale of bulky goods and services (generally defined as ‘restricted retail’ in the planning scheme). These roles are to play a greater role in the retail network in the future.	Home Centre (Cranbourne) Lyndhurst Business Park
Employment centres	Employment centres provide high quality environments for a range of business and advanced manufacturing activities that would traditionally be associated with an office park. They may also include residential, recreation and leisure activities, and retail uses commensurate with their size and related catchment. Activities in the centres may be integrated both horizontally and vertically. The development of a new, dense, mixed use employment precinct in Berwick known as the ‘Casey Technology Park’ is desired.	Casey Technology Park (part of Berwick Village)

*Note: The elevation of Cranbourne Town Centre as a Metropolitan Activity Centre in Clause 22.07 – Retail Policy was an error made in the processing of C157 in 2015 when the ACZ was applied to the Cranbourne Town Centre. It is not designated a MAC by Plan Melbourne. This error is proposed to be rectified in either Amendment C224 (Fountain Gate – Narre Warren CBD Amendment) or C250 (MSS review).

The Cranbourne Town Centre is identified as one of two regionally-significant activity centres in the City of Casey. The planning scheme's Retail Policy promotes the consolidation of development within the retail core of the Cranbourne Town Centre to facilitate its servicing of the southern part of the City, with the Fountain Gate-Narre Warren CBD servicing the north.

Cranbourne Town Centre's competitive advantages are recognised as its proximity to the racecourse, Royal Botanic Gardens, and its location along a premier tourist route. The Cranbourne Campus of the Chisholm Institute is also noted as the centre of an emerging knowledge precinct in the municipality. The need to improve access to this facility (and other facilities including the Royal Botanic Gardens in Cranbourne) is recognised in the planning scheme.

The long-term employment and development potential of the Cranbourne Town Centre is also to be realised. Cranbourne Town Centre is recognised as one of four main employment centres in Casey, with the scheme encouraging the facilitation of more local employment opportunities, including home-based businesses.

The hierarchy of activity centres is also to be strengthened, with major commercial, community and entertainment facilities to be directed to the Cranbourne and Fountain Gate-Narre Warren activity centres.

Clause 22.08 – Non Residential Uses in Residential and Future Residential Areas Policy

The scheme's Non-Residential Uses in Residential and Future Residential Areas Policy (Clause 22.08) highlights the need to establish complementary uses for the convenience of local residents, including new residential areas. In new and future residential areas, non-residential uses are to be clustered around planned activity centres.

Activity Centre Zone (ACZ)

The ACZ is the preferred Victorian State Government tool to guide and facilitate the use and development of land in activity centres.[2] It is generally applied to larger regional Activity Centres which demonstrate distinct 'CBD' type functions. The ACZ allows for centre-specific planning strategy to be implemented without the constraints of existing commercial or mixed use zones.

The purpose of the ACZ is:

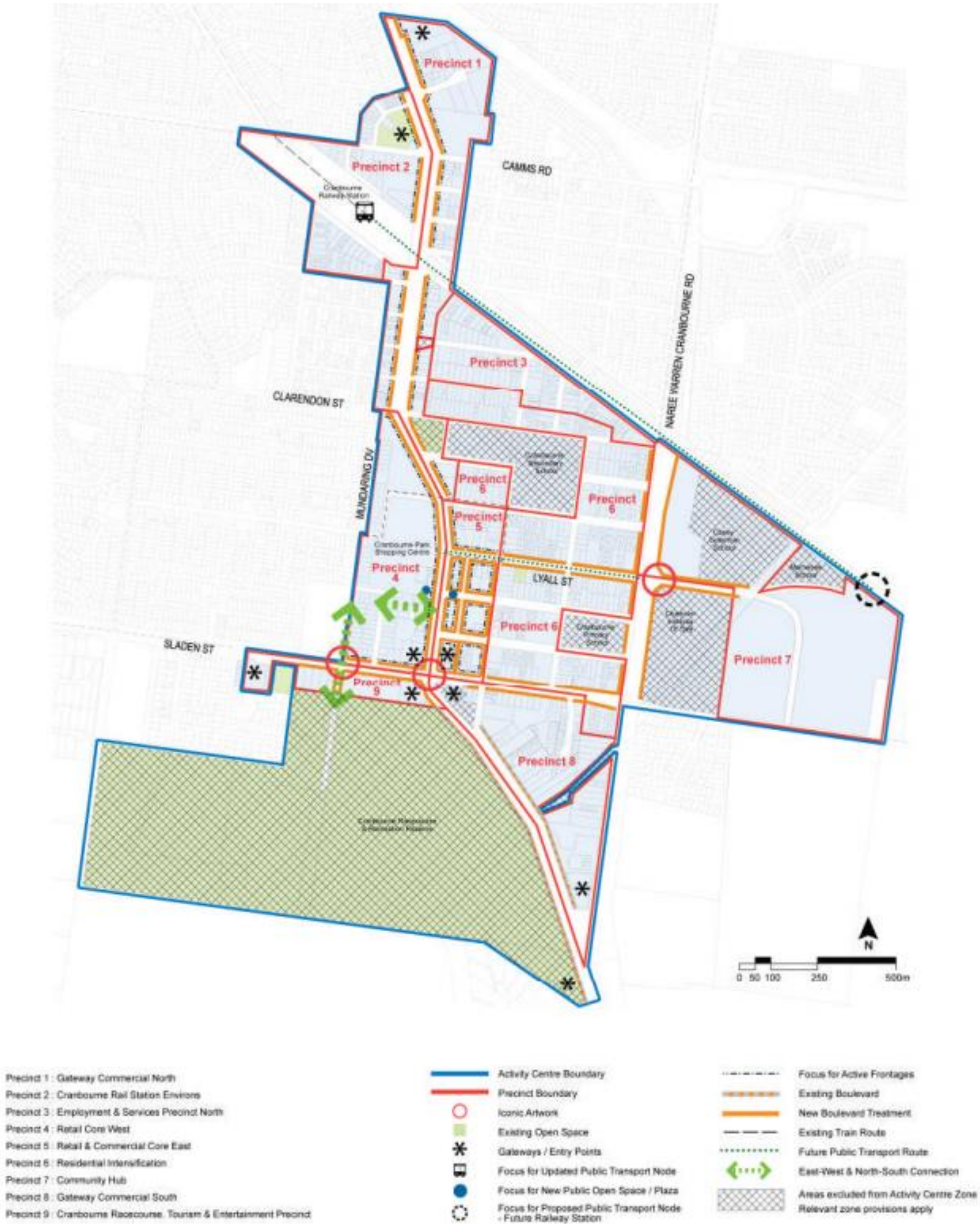
- To encourage a mixture of uses and the intensive development of the activity centre:
  - As a focus for business, shopping, working, housing, leisure, transport and community facilities
  - To support sustainable urban outcomes that maximise the use of infrastructure and public transport
- To deliver a diversity of housing at higher densities to make optimum use of the facilities and services
- To create through good urban design an attractive, pleasant, walkable, safe and stimulating environment.

Schedule 1 to the Activity Centre Zone (ACZ1) has been applied to the Cranbourne Town Centre to promote the implementation of many of the strategies outlined in the Municipal Strategic Statement and the Cranbourne Town Centre Plan (the Structure Plan).

Clause 1 of the ACZ1 illustrates the Cranbourne Town Centre Framework Plan (see Figure 7 below). This Plan organises the centre into nine distinct precincts, and sets out objectives, land use and development requirements and guidelines that should be achieved in order to realise the vision contained in the Structure Plan.

[2] State Government of Victoria (2015). Activity Centre Zone: Planning Practice Note 56.

FIGURE 10. CRANBOURNE TOWN CENTRE FRAMEWORK PLAN



Source: Cranbourne Town Centre Framework Plan

Some of the key objectives of the Cranbourne Town Centre Framework Plan are:

- To expand and revitalise the Cranbourne Town Centre so that it evolves as an active, attractive and accessible Activity Centre serving the local and wider community
- To ensure the continued vitality of the Cranbourne retail core
- To develop the Cranbourne Town Centre as a focus for contemporary, high-density residential development incorporating a mix of complementary retail, commercial, entertainment, employment, education and community uses
- To promote the Casey Complex as modern, high-standard, regional sporting and recreational facility with integrated uses and community services
- To promote the intensity of land uses around key transport nodes
- To provide for a vibrant mix of uses that support the strategic role of the Cranbourne Town CentreTo ensure mixed use development comprises flexible floor spaces to accommodate a range of uses

The ACZ1 permits various uses as-of-right, though largely with a condition. As-of-right uses include:

- Cinema (only in Precinct 4)
- Child care centre (only in Precincts 4, 5 or 7, or Sub-precincts 8A, 8B, 9A or 9B)
- Convenience shop (not in Precincts 3, 6, or 9, or Sub-precincts 2B, 2E or 8C; must also be at ground level)
- Food and drink premises, other than Hotel and Tavern (not in Precincts 3 or 6, or Sub-precincts 2B, 2E or 8C)
- Home occupation (no condition)
- Office (not in Precinct 6 or Sub-precincts 2B or 2E; other conditions relating to frontage also apply)
- Restricted retail premises (only in Sub-precincts 1A or 8D; must have a minimum leasable floor area of 1,000 sqm)
- Shop (only in Precincts 4 or 5 or Sub-precincts 1D-1F, 2D or 7C).

Various other uses are also allowed without a permit, and various uses (including some of the above) are allowed with a permit with various conditions.

On 6 September 2016, Council resolved to seek authorisation from the Minister for Planning to prepare and exhibit Amendment C204 to the Casey Planning Scheme. Amendment C204 proposes to rezone land identified as predominately residential in the Cranbourne Town Centre Structure Plan (2011) and Cranbourne Activity Centre Zone area to Residential Growth Zone. Amendment C204 is required to implement the objectives and criteria set for Substantial Change Areas under Council's new Housing Strategy (2016).

The next section provides an overview of each precinct within the ACZ1 and identifies areas proposed to be rezoned to RGZ through Amendment C204.

Precinct 1: Gateway Commercial North

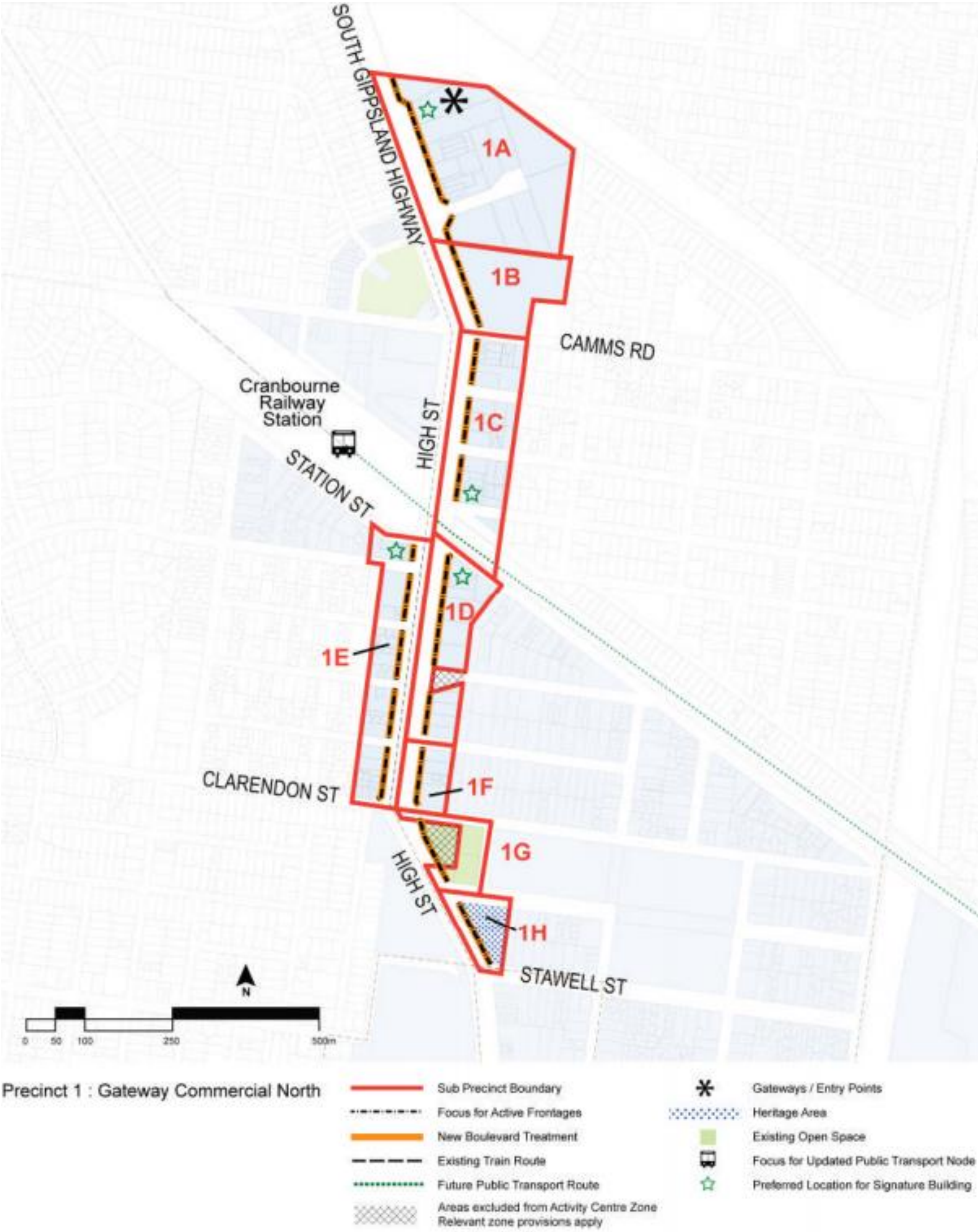
Precinct 1 is located east of Cranbourne Railway Station, terminus of the Cranbourne metropolitan train line. The precinct extends on the eastern side of South Gippsland Highway north of the train for 800m; south of the train line it extends along High Street to Clarendon Street on the west and Stawell Street on the eastern side of the street. It runs along High Street/South Gippsland Highway south of the railway on both the east and west side of the street 850 metres to Stawell Street, and 800 metres north of the line, sitting to the east along the same road.

The northern side currently has a large amount of open undeveloped land (1A and 1B), along with a significant industrial presence closer to the railway line (1C). The southern side is predominantly industrial to the east (1D, 1F, 1G and 1H) while the western side houses a mixture of commercial and residential.

The future objectives for this precinct are to increase the aesthetic appeal and quality of the area, considered to be the gateway to Cranbourne, by encouraging a diversity of employment and business opportunities. This is to be achieved by intensifying development in the area, bringing the built form closer to the roadside, moving car parking to the rear of properties, and providing a focal point for the local community and visitors alike.

Sub-precincts 1A, 1B, 1C, 1E and 1F have a preferred height of 14 metres with the same achievable for 1D in the case of significant buildings, though in all other scenarios urban form within sub-precinct 1D is to meet a preferred height of nine metres. Sub-precincts 1G and 1H have no specified height listed in the precinct requirements, nor is there a preferred setback for these localities. Sub-precincts 1C, 1D and 1F have a zero setback as the preferred option for the west boundary, 1C and 1F have a six metre setback to the east, as does 1B. 1A has a nine metre preferred setback to the east boundary, with no more than 21 for the South Gippsland Highway frontage, while 1B has a zero metre preferred setback for the same road and for the south boundary.

FIGURE 11. PRECINCT 1 - GATEWAY COMMERCIAL NORTH



Source: Casey planning scheme, 2015

Precinct 2: Cranbourne Railway Station Environs

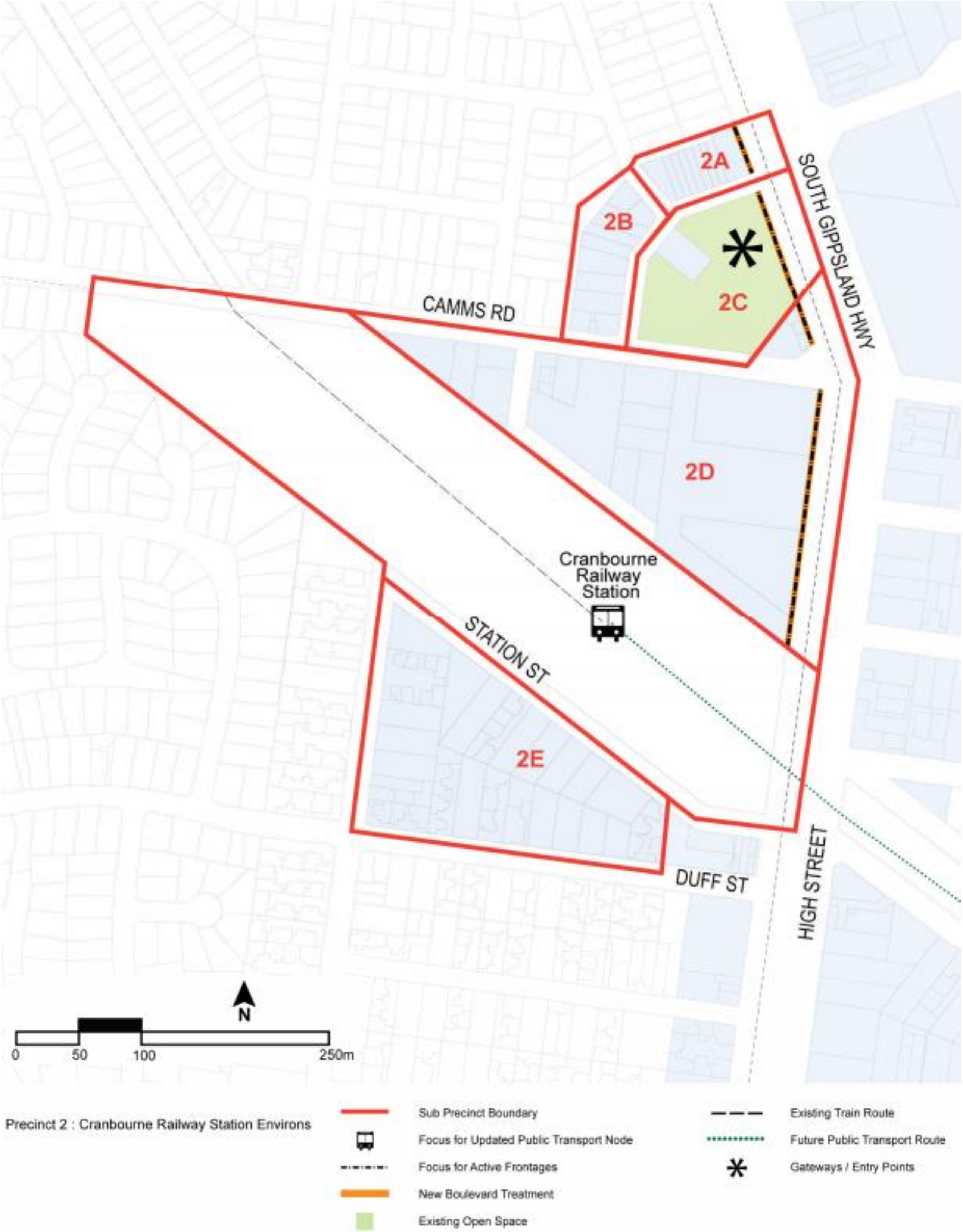
To the west of the South Gippsland Highway/High Street and adjacent to Precinct 1, Precinct 2 encompasses the area immediately around the Cranbourne Railway Station. Many of the objectives for the precinct are the same as for Precinct 1: to ensure development contributes positively to the areas amenity and presents an appealing entry into the town centre from the northern gateway.

There is an objective to encourage a mix of residential, retail and commercial uses within the Precinct, with residential development to take advantage of the proximity to the station and increase residential density and multi-level development. While the principle focus is on provision of a diversity of residential choice, developments are also to encourage a variety of employment and business opportunities. In this regard, a focus will be on building a range of smaller format commercial uses at ground floor level with accommodation above.

Of the sub-precincts in Precinct 2 all have a preferred setback of six metres to certain interfaces/boundaries, other than 2C and 2D, with 2C having none specified and 2D having a preferred setback of zero metres. The preferred height of 11 metres for all of 2A, 2B and 2D west of Ingamells Street. 2D has a 15 metre preferred height to the east of Ingamells and an allowance of 21 metres for buildings of significance, while 2E has a 12 metre preferred height with the possibility of a recessed fourth level. Sub-precinct 2C has no specified building height or setback preference.

Sub-precinct 2E is proposed to be rezoned to Residential Growth Zone via Planning Scheme Amendment C204 in accordance with the objectives and criteria set for Substantial Change Areas in the Housing Strategy.

FIGURE 12. PRECINCT 2 - CRANBOURNE RAILWAY STATION ENVIRONS



Source: Casey Planning Scheme, 2015

Precinct 3: Employment and Services

Running south of Station Street between the South Gippsland Highway and the Narre Warren – Cranbourne Road, Precinct 3 is to be redeveloped from the current mix of industrial uses that interface with existing residential development. The objective is to encourage business and employment opportunities ranging from small to medium sized industry and local service businesses. This is to be done in a manner that will create and promote attractive streetscapes with landscaped interfaces at the property frontages of new development. Sub-precinct 3A has a 14 metre preferred height and a three metre preferred setback, while 3B has an 11 metre preferred height and the same setback to the street and six metres on the adjoining residential boundary.

FIGURE 13. PRECINCT 3 - EMPLOYMENT AND SERVICES

Source: Casey Planning Scheme, 2015

Precinct 4: Retail Core West

Precinct 4 encompasses the Cranbourne Park Shopping Centre and the associated car park as well as residential land to the west. The objectives for the area are to allow for the expansion of the existing retail core providing more comprehensive retail and commercial uses to improve the viability and function of the Town Centre as regional retail facility. There are also objectives to improve the connection and interface with High Street, and to support the establishment of retail anchors and speciality shops on what is currently a Council owned car park in Sladen Street.

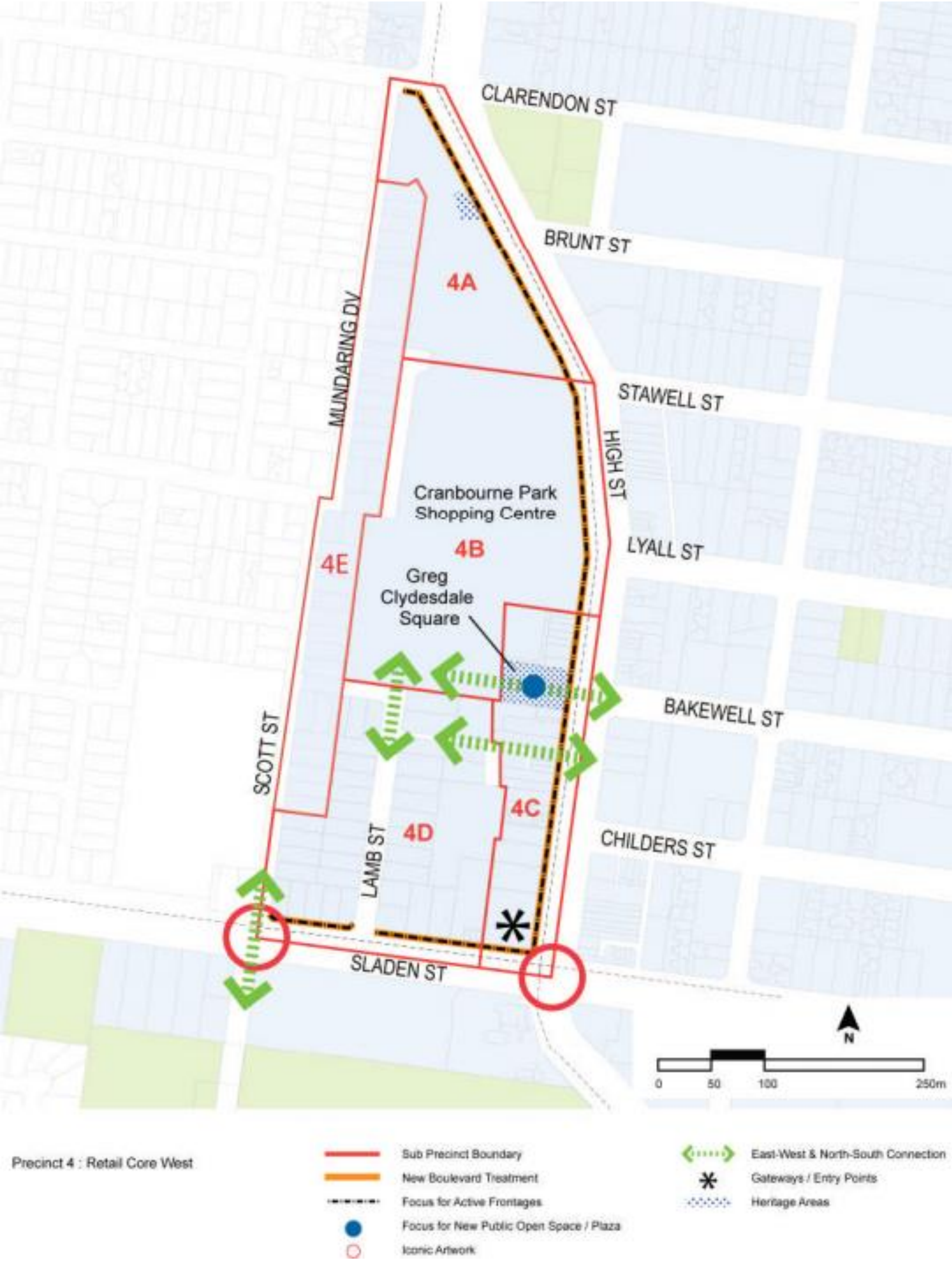
An additional mix of uses is to be encouraged and retail is to be granted extended hours of activity in the Town Centre, creating a focal point for the community with additional services available. The built form is to encourage active uses to be developed along the edges Greg Clydesdale Square, with a range of commercial uses at lower levels with accommodation above.

Other than sub-precinct 4E, all sub-precincts in Precinct 4 have a preferred podium height of 12m and a preferred overall height of 20 metres (4B has a preferred overall height of 20m on High Street). The preferred podium setback varies across these three sub-precincts, with the preferred setback above the podium at 6m above a 2 storey podium to High Street.

4E has a preferred overall height of 8m, with a preferred setback above podium at 3.25 to rear property line and 2m to front property line.

Sub-precinct 4E is proposed to be rezoned to Residential Growth Zone via Planning Scheme Amendment C204 in accordance with the objectives and criteria set out for Substantial Change Areas in the Housing Strategy.

FIGURE 14. PRECINCT 4 - RETAIL CORE WEST



Source: Casey Planning Scheme, 2015

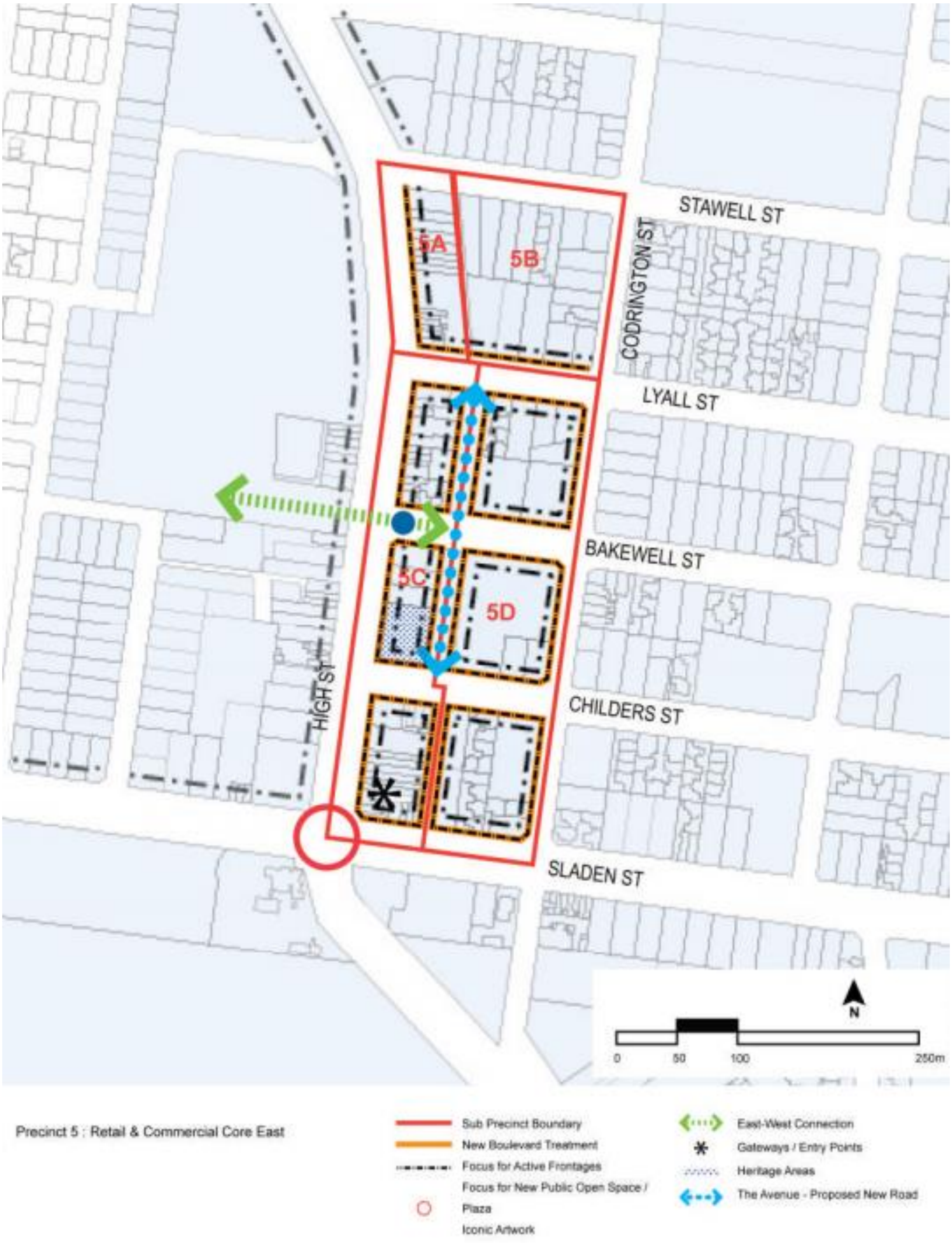
Precinct 5: Retail and Commercial Core East

Precinct 5 sits to the east of Precinct 4, on the other side of the south Gippsland Highway. At present, it is mixed commercial and retail along the Highway, predominantly single story with residential dwellings at the rear.

The objectives of this area are to create a new village destination ('The Avenue') for Cranbourne for the enjoyment of local residents by activating the eastern side of High Street to encourage a variety of commercial, shops and food and drink premises at ground level with office and higher density residential above. It is hoped that this will create a new central public space on Bakewell Street opposite to, and visually connected with, Greg Clydesdale Square with the potential to close off Bakewell Street to vehicle traffic.

All sub-precincts have a preferred podium height of 12.5 metres, with 5A and 5C having a preferred overall height of 17.5 metres with zero metre setbacks at ground level and six metres above a two storey podium. 5B and 5D having a preferred overall height of 14 metres, with 5B having a three metre setback to Stawell and Lyall Streets and six metres to Codrington Street and 5D having no setback to 'the Avenue', Lyall Street and Sladen Street and six metres to Codrington Street.

FIGURE 15. PRECINCT 5 - RETAIL AND COMMERCIAL CORE EAST



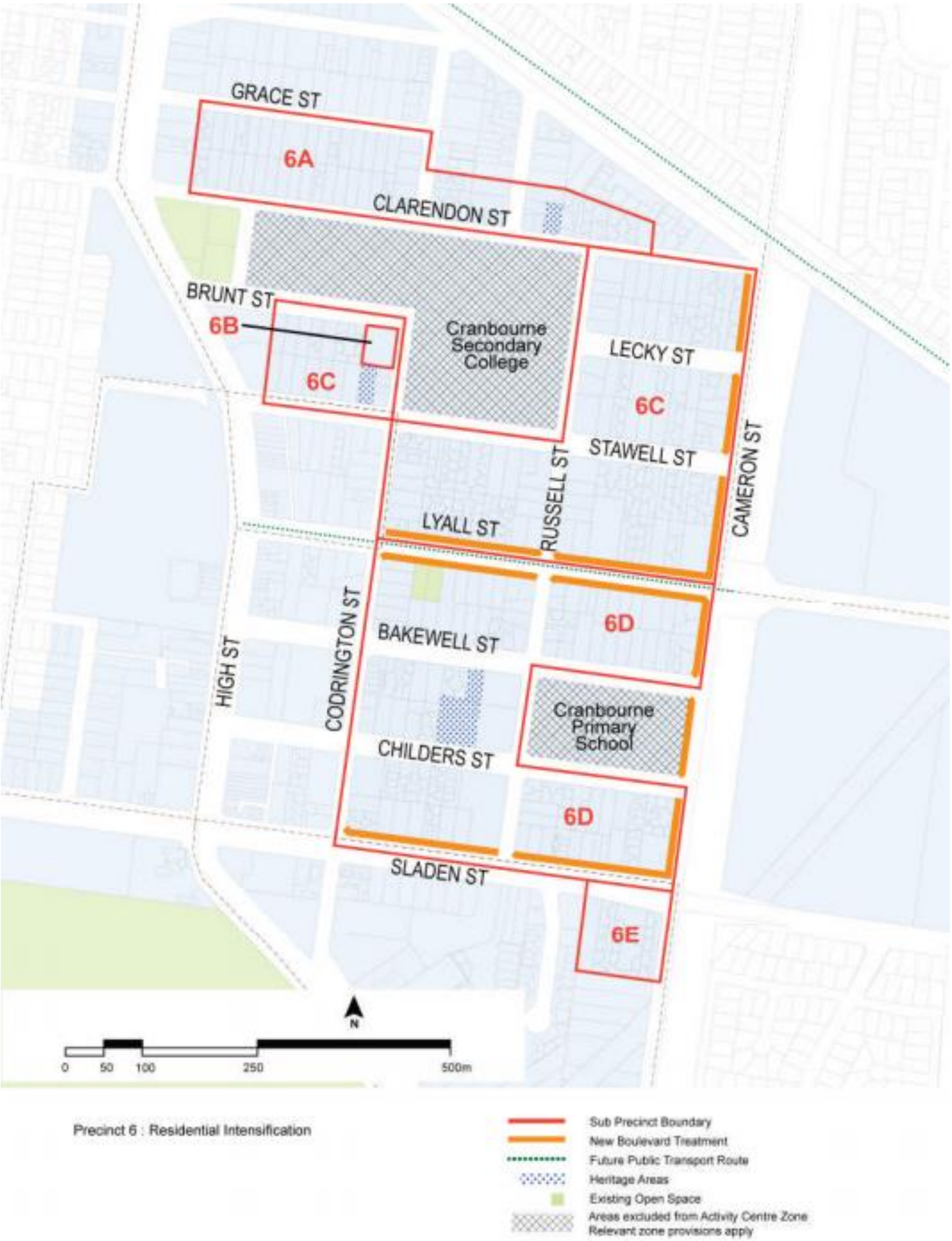
Source: Casey Planning Scheme, 2015

Precinct 6: Residential Intensification

Precinct 6 sits east of Precinct 5 and is largely residential. The precinct guidelines and objectives aim to move from traditional suburban dwellings towards higher density or more intensive residential development. All sub-precincts have a two metre setback at the front and a 3.25 metre setback to the rear. All sub-precincts have a preferred height of 11.5 metres barring 6B, which has a preferred height of 11 metres.

Precinct 6 is proposed to be rezoned to Residential Growth Zone via Planning Scheme Amendment C204 in accordance with the objectives and criteria set out for Substantial Change Areas in the Housing Strategy.

FIGURE 16. PRECINCT 6 - RESIDENTIAL INTENSIFICATION



Source: Casey Planning Scheme, 2015

Precinct 7: Casey Complex

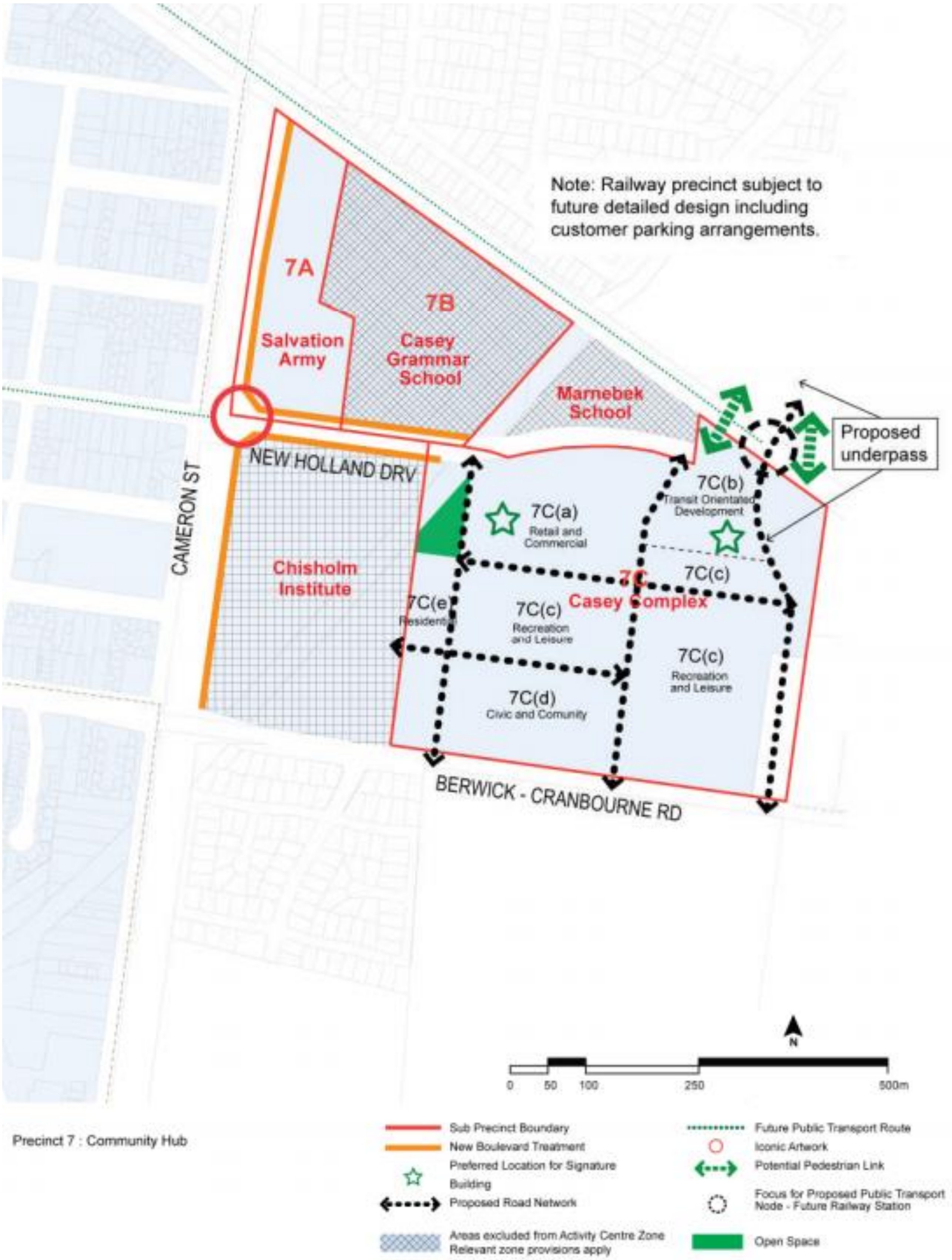
Situated to the north east of the intersection for the Narre Warren and Berwick – Cranbourne Roads, Precinct 7 largely comprises open space and playing fields associated with the Sports Complex and Casey Grammar School as well as a library and other associated public buildings. The objectives for the area are the promotion of a community hub for the Cranbourne Town Centre that provides for a mix of uses as well as civic and community facilities and services.

These guidelines were established with the proposed development of a new 'Cranbourne East Railway Station' to help in the promotion of an integrated transport interchange. In addition to upgrades to existing facilities, development exploiting the potential for Transport Oriented Development which encourages a range of retail, entertainment and commercial facilities was also sought. The timing and/or feasibility of this level of development may now need to be reconsidered given there are no plans in the immediate future to extend the Cranbourne railway line.

There are no specified height preferences for sub-precincts 7A and 7B, however in 7C there is a preference for ten metre heights in TOD and mixed use areas, eleven in civic and community areas and thirteen for all residential areas. The urban form in 7C is also to have zero setbacks.

The Casey Complex Structure Plan (2011) is also a reference document to the ACZ1 and relevant to consider in this area.

FIGURE 17. PRECINCT 7 - CASEY COMPLEX



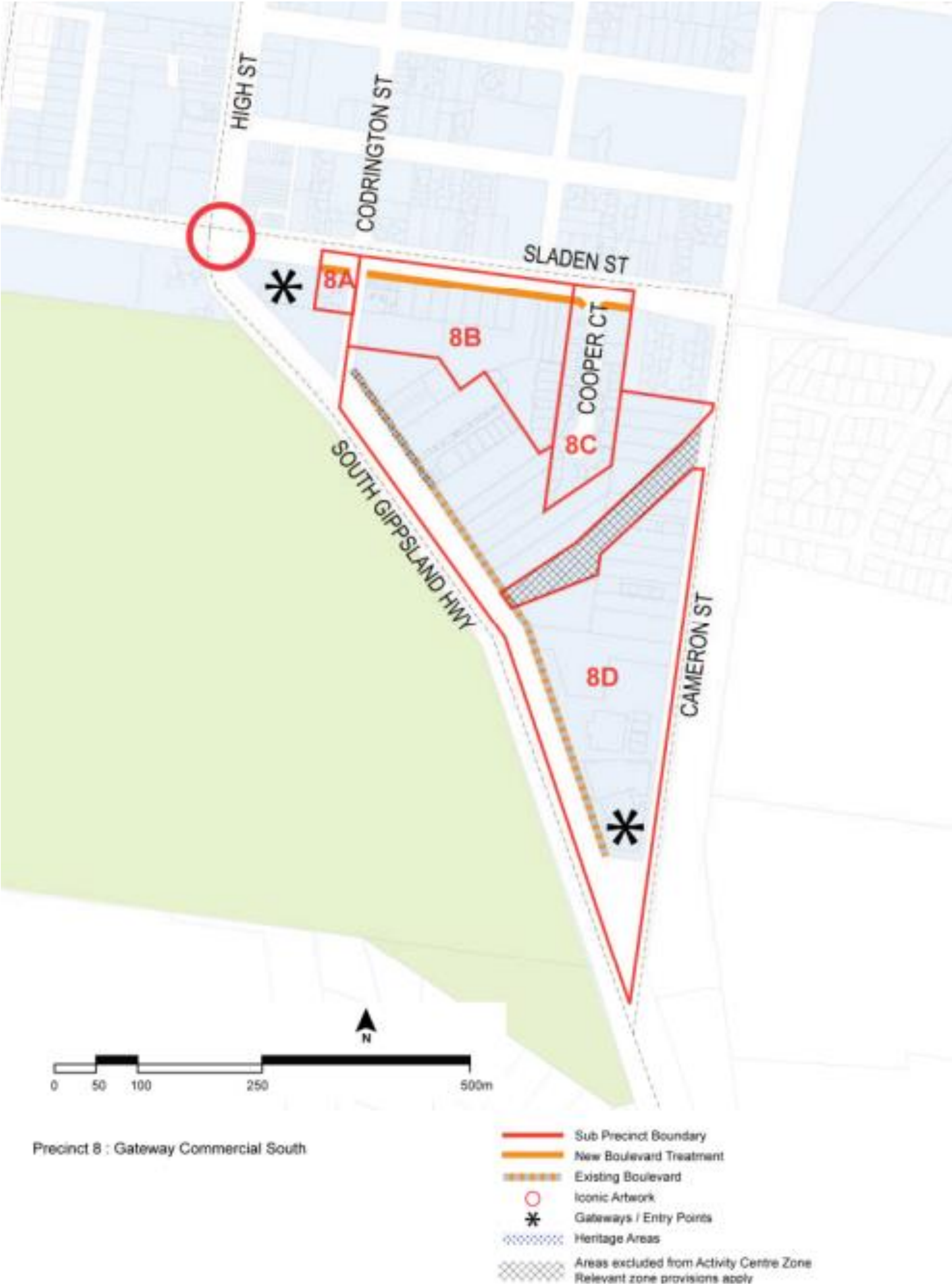
Source: Casey Planning Scheme, 2015

Precinct 8: Gateway Commercial South

Sitting to the south of Sladen Street, Precinct 8 is to take advantage of its location as a southern gateway to Cranbourne Central. Running diagonally along the South Gippsland Highway to the intersection of the Narre Warren–Cranbourne Road, the main objective is to improve the attractiveness of the streetscape. This is sought in conjunction with the objective to encourage continued business and employment opportunities ranging from small to medium-sized industry and local service businesses.

All sub-precincts are to have a twelve metre preferred height other than 8C at eleven metres. 8A has no specified preferred setbacks, 8B has zero to Sladen Street, 8C has three metres to the east, while 8D has no greater than 21 metres to South Gippsland Highway and Cameron Street, with six metres to the residential boundary.

FIGURE 18. PRECINCT 8 - GATEWAY COMMERCIAL SOUTH

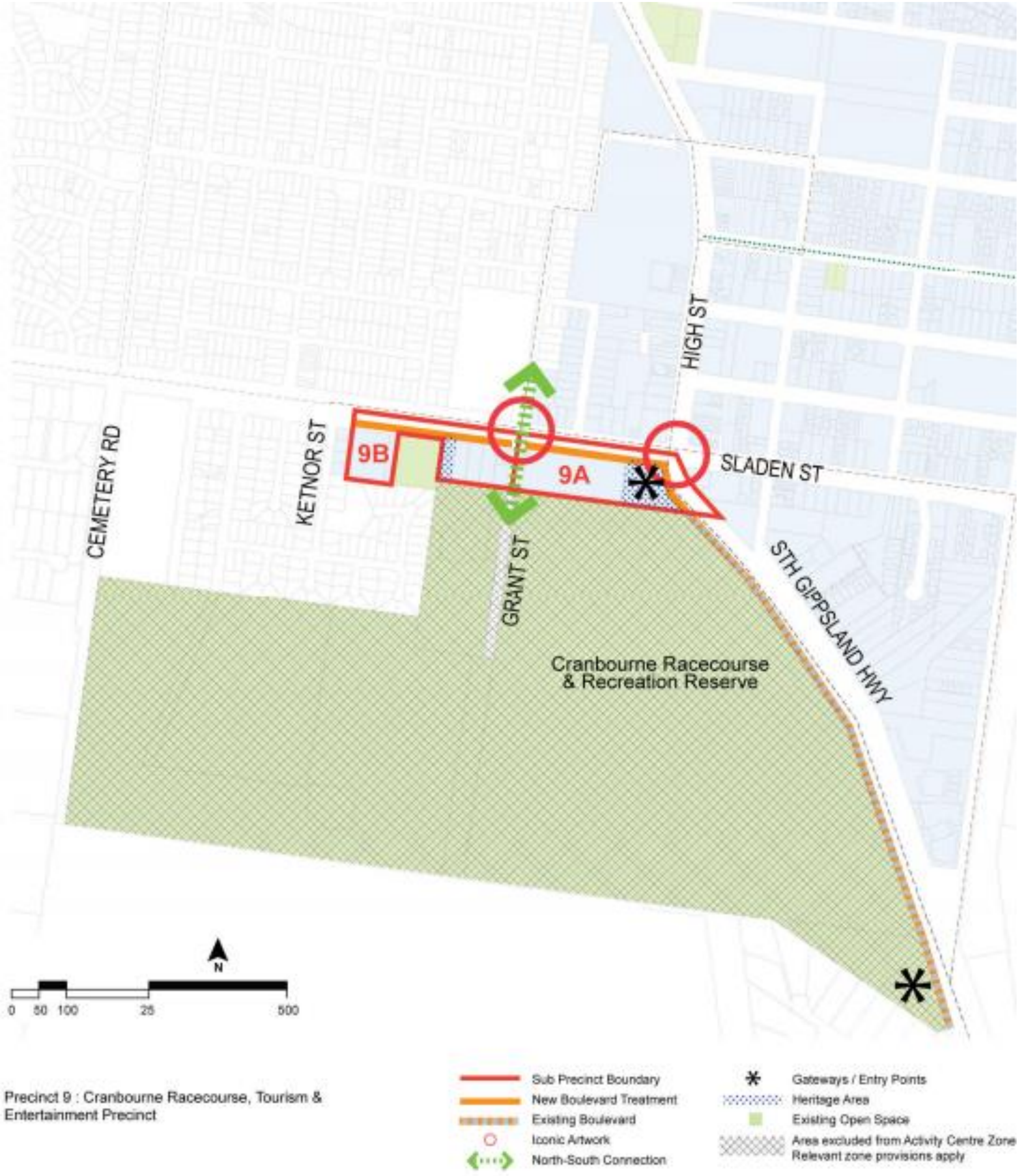


Source: Casey Planning Scheme, 2015

Precinct 9: Cranbourne Racecourse, Tourism and Entertainment Precinct

The objectives for the Cranbourne Racecourse are to align with the current usage and heritage values of the area. There is a focus on the area's tourism potential. Other growth potential is seen in the already established civic uses and community services based around the original Shire of Cranbourne offices. The preferred height in this precinct is twelve metres, with sub-precinct 9B having a preferred setback of three metres to the residential boundary.

FIGURE 19. PRECINCT 9 - CRANBOURNE RACECOURSE, TOURISM &ENTERTAINMENT



Source: Casey Planning Scheme, 2015

Cranbourne Town Centre Structure Plan (2011)

The City of Casey adopted the 'Cranbourne Town Centre Structure Plan' (the Plan) as a structure plan for the Cranbourne Town Centre in August 2011. The plan was established as a response to rapid and ongoing growth in the Cranbourne area, which has seen an evolution from a small country town in the 1980's to a regional business and shopping centre within one of the fastest growing areas in Australia.

It was recognised that Cranbourne's growth should develop in a logical and coordinated fashion, fulfilling the objective of establishing the area a Principal Activity Centre. In order to achieve this, a diverse range of retail and commercial uses, combined with an increased development of various built form solutions for housing and a growth in community, arts and recreation facilities is to be encouraged. It is recognised that this growth needs to occur in an aesthetically pleasing manner within an enhanced urban environment.

The Plan focuses on six major priorities:

- Activities and Land Use
- Built Form
- Public Environment
- Movement and Transportation
- Cultural and Environmental Values
- Making it Happen; guidance for each of the nine precincts that comprise the Cranbourne Town Centre.

Within the strategic response of 'activities and land use' is the intent to boost enterprise, retail and business activity. In achieving this the objective is to continue to develop the Cranbourne Town Centre as a regional shopping and service destination, economic incubator and employment hub that fosters a good cross section of businesses to meet local and regional needs and aspirations. To action this, the strategy looks for opportunities to attract anchor businesses, such as a Department Store, a second Discount Department Store, a cinema and large-scale office developments.

In order to activate the area, the Plan seeks to facilitate a vibrant retail core with active frontages, a diverse array of businesses, numerous entertainment options and extended hours of operation. This is to be achieved by actively encouraging a diverse range of businesses to locate in the Town Centre. Specifically, the Plan seeks to support small business development within the Town Centre, while discouraging industrial uses that are seen to have detrimental impacts on nearby land uses.

Further to this, the Plan examines options for raising revenue to facilitate public improvements within the centre to improve the amenity for the local community, as well as promoting commercial activity by taking advantage of well-located areas to increase office space in. To achieve this, the Plan seeks improvements to streetscapes, an improved interface with industrial and commercial areas, and inclusion of wider range of services. This is to be facilitated through partnerships, design guidelines and capital works initiatives. Examples of this include the development of Council's car park south of Centro Cranbourne to attract supportive business opportunities, and the redevelopment of Centro Cranbourne as a street based centre, including active frontages to High Street.

In terms of the built form, the objective of the Plan is to facilitate locally sensitive, appropriately scaled and original architecture and design that enhances Cranbourne's image, respects the local context and creates a comfortable environment for its citizens and visitors. To action this, the Plan guides a strategy to intensify the vertical built form, especially around transit nodes and within the retail core. This built form is to promote active uses fronting streets and human-scale public realm, particularly along High Street.

The Plan encourages strong gateway features, landmark urban design and signature buildings at the key entry points (Sladen Street & High Street, the Railway tracks and the South Gippsland Highway) and other prominent locations. In doing so, urban design is encouraged to replace current monotonous façades along main streets, while maintaining and reinforcing the role of the Avenue of Honour as a gateway feature to the Town Centre. By doing so, the Plan seeks to both protect heritage elements within the urban form, while also introducing place making through integrated public art and building design.

Another important element of the Plan is the objectives to enhance the local civic, cultural, community facilities and services. In order to develop and reinforce Cranbourne's role as a civic, cultural and recreational centre through the provision of diverse, fit for-purpose, regionally significant attractions, services and facilities that meet the needs of the local community and the region. The Plan specified actions to facilitate this, with one being the continued development of the Casey Complex area while attracting more sports, recreation and cultural facilities to the Town Centre as a whole.
Further to this, the Plan advocates for a new hospital to service the Cranbourne Community, and also to reinforce and promote community service agencies presence within the region. This is in keeping with the objective to promote the development of inter-generational multipurpose space for residents to engage with the community.

More broadly, the Plan includes objectives to promote diversity and inclusion through the centres uses, reflecting the centres regional importance and creating an inclusive community. The Plan seeks to achieve this through a range of businesses and employment opportunities, housing choices, community facilities and entertainment options. Actions include public realm improvements, creation of an environment that supports local businesses to facilitate a mix of services, retail outlets and office uses. There is to be a promotion of centre activity through actions such as extending opening hours. The built form is to prioritise housing choices to cater for a range of needs and price points, with increased density around transit nodes including the Cranbourne and future Cranbourne East Railway Stations.

On 6 September 2016, Council endorsed an updated Structure Plan to exhibit alongside proposed Amendment C204 to the Casey Planning Scheme. The updated Structure Plan removes preferred heights and setbacks applying to land identified as predominately residential. These updates are required to facilitate greater housing diversity and intensification, and to implement the objectives and criteria set for Substantial Change Areas under Council's new Housing Strategy (2016).

Cranbourne Town Centre Urban Design Framework (2011)

The Cranbourne Town Centre Urban Design Framework is a City of Casey document from August 2011 that outlines the built form design agenda for the area that is bound by High Street Cranbourne and the northern and southern South Gippsland Highway. The document provides detailed guidelines on how to best accomplish the vision for development of the Cranbourne Town Centre specifically focussing on the High Street that runs through the middle of the area. This document reflects the objectives found in the Cranbourne Town Centre Structure Plan which had previously been adopted for the centre. The framework was to be complemented with a 'Civic Improvement Plan' (CIP) which sets out the finer-grained design details as they relate to specific items for the public realm such as landscaping and planting initiatives.

The documents seeks to establish a roadmap to implementation of the general recommendations of the Cranbourne Town Centre Structure Plan. The objectives in order to achieve this include an emphasis specifically on the High Street as the main entrance and activity spine of the Cranbourne Town Centre. This was to be achieved through the creation of a pleasant pedestrian environment for shopping and dining with built form solutions that encouraged a mix of uses inclusive of residential, office and retail. It was an objective to incorporate sustainability principles such as sustainable building design and sustainable transport practices in to the urban form. The document outlines an objective to make the focal point of the town centre to be the Greg Clydesdale Square, with improved interaction between the eastern and western retail precincts. More broadly, an objective was to seek an active and vibrant streetscapes for the corridor, with specificity around improvement in the appearance and connectivity of the corridor between Clarendon Street and the Railway Station.

Cranbourne Complex Structure Plan (2011)

The Casey Complex Structure Plan is a Reference Document to the ACZ1 and its key directions have been integrated into the Cranbourne Town Centre Plan (2011)

The 'Casey Complex Structure Plan' deals specifically with lands owned by council with the purpose of providing a guideline for growth into the future. .This includes the management of any change to the physical environment and activities on land at the Complex. The Plan advocates development in an ordered manner, guiding future urban development of the site to facilitate the best and highest use of the land.

The intent is to create synergies between the current land uses while forging a range of new and more diverse intensified land uses to maximise economic and social benefits for the wider community. Defined in the Plan are the specific policy objectives for the area, with opportunities and strategies to realise those objectives identified. These objectives are the following;

- To provide a framework for intensive mixed use and transport oriented development that form synergies with the existing land uses within and adjacent to the Complex;
- To ensure the best and highest use of Council-owned assets to maximise financial and community benefits;
- To ensure a coherent, well-planned, coordinated and cost effective approach for the future development of the Complex
- To harness the advantages derived from Council's land ownership and use this advantage to deliver and showcase innovative and best practice examples of design and development and sustainability
- To deliver a liveable and sustainable community of the future
- To provide a basis for the assessment of proposals for use, development and subdivision

Casey Activity Centre Strategy (2006)

The 2006 Activity Centre Strategy has 7 main goals:

- To achieve best practice activity centre development;
- To consolidate Casey's commercial and residential settlement patterns;
- To consolidate the development of the Fountain Gate - Narre Warren CBD and Cranbourne Town Centre to ensure they are competitive regional centres in the metropolitan context;
- To substantially strengthen the tier of major activity centres;
- To develop a greater role for peripheral sales precincts;
- To develop robust local centres; and
- To provide proactive management of all activity centres and peripheral sales precincts within Casey, specifically the preparation of structure plans.

While the Strategy has been given effect in the Casey Planning Scheme (principally though the Retail Policy at Clause 22.07), its relevance to the fast-growing municipality is now limited, given not only the high rate of population growth, particularly in areas surrounding Cranbourne, but also the establishment of new commercial developments, including Cranbourne Park Shopping Centre.

Casey Activities Areas and Non-Residential Uses Strategy Volumes 1 & 2 (2012)

The 2012 Activity Areas and Non-Residential Uses Strategy is a review of the 2006 Casey Activity Centres Strategy, in a response to significant growth and changes to activity centres. It aims to ensure the provision of a range of non-residential uses throughout Casey with a focus on a diverse, robust and accessible activity areas network which meets community needs and expectations.

This Strategy has been adopted by Council but has not been given effect in the Casey Planning Scheme. Consequently, there is an inability to have regard to this Strategy in the preparation and assessment of planning permit applications.

Key issues identified in the development of the strategy were:

- Out-of-centre development pressures, including gymnasiums, medical centres and child care centres in residential areas, and ad-hoc retail and commercial facilities along arterial roads
- Lack of strategic justification for 'community activity clusters', defined as grouping of non-residential community focused activities (e.g. education facilities, multi-function community buildings and cultural, recreational and sporting facilities). This was found to be less of an issue in greenfields sites.
- Emerging uses, including the location of factory outlet centres, and the increasing number of home based businesses

The Strategy re-establishes the activities areas hierarchy and further develops a neighbourhood activities areas hierarchy. While this hierarchy is similar to the more recent retail hierarchy of the planning scheme, there are key differences, including the use of outdated *Melbourne 2030* classifications of activity centres.

A key objective of the Strategy is to consolidate the development of the Cranbourne Town Centre (and the Fountain Gate-Narre Warren CBD) to ensure they are competitive regional centres in the metropolitan context.

The role of the Cranbourne Town Centre and the Fountain Gate-Narre Warren CBD is to provide regional level retail, commercial, entertainment and community services to residents, workers and visitors to the City and the wider region. They also play a key role in the provision of office based employment. As such, the identification and facilitation of office precincts is an integral part of planning for these centres. These centres draw trade into the municipality, assisting in generating higher order retail expenditure and reducing escape expenditure.

The Strategy projects that the Cranbourne Town Centre, like the Fountain Gate-Narre Warren CBD, is likely to face increasing competition from areas located to the west of the City.

It advocates for the progressive development of the Cranbourne Town Centre into a multi-focus destination including retail, commercial, sporting, leisure and community activities at a regional scale. The integration of a shopping centre into the centre is supported by the Strategy, along with the incorporation of one or more department stores.

However, given population growth, commercial development, and changes in policy since the publication of this Strategy, projections for the demand and supply of retail and commercial floor space are likely to have changed.

Casey Cardinia Economic Development Strategy (2016)

The Casey Cardinia Economic Development Strategy sets out economic development actions that Casey and Cardinia Councils should undertake to facilitate investment, diversify the economy and increase local jobs. The Strategy aims to facilitate the local employment opportunities by supporting the growth of existing businesses and attracting new business to the Casey Cardinia Region.

The Strategy's four key principles are: be investment ready; business leadership; innovation, science and technology; and advocacy for business and economic growth.

Of relevance to this report, the Strategy advocates for a range of key infrastructure projects, including key east-west road connections (such as the Thompsons Road extension) and the extension of the Cranbourne railway line to unlock opportunities for business and economic growth.

The provision of industrial and commercial land is also considered vital to ensure that the current and future needs of local businesses can be met. In this regard, activity centres will contribute to the supply of employment land, in addition to proposed employment precincts (such Minta Farm and the Berwick Health and Education Precinct). The Strategy also seeks to enhance Council's role in investment facilitation through provision of a fast fast-track process for planning permit approvals.

Cranbourne East Development Plan (2014)

The Cranbourne East Development Plan came in in 2014 and superseded previous planning policy applying to both residential zones and for future urban development in Cranbourne East. It specifically pertains to land included in the Development Plan Overlay in the Casey Planning Scheme relating to the 'Hunt Club' Activity Centre at the corner or Lindsel Boulevard and Narre Warren Road.

The Cranbourne East Activity Centre is defined as a Neighbourhood Activity Centre. It is proposed to be a multi-purpose community focal point that comprises a broad range of retail goods and services based around a large supermarket. The role and function of this Centre is identified as follows:

- To provide an attractive location to meet the day-to-day and most weekly shopping needs of the community, and
- To serve a community function by providing places for people to meet and socialise.

In keeping with the development outcomes as set out in the Casey C21 Strategy from 2002, the overall objectives includes a range of residential lot sizes, development of neighbourhood activity centres, further development of Casey Fields area and other 'gateway areas.' Additionally, future development to meet the combined need of a primary and secondary learning centre, integrated with a district-level sports ground and community place. The model posited was to be composed of junior, middle and senior schools.

Additionally a desire to achieve a range of community facilities, to be developed over time, is noted as a necessary outcome. Council list the key components of this as:

- A centrally-located car parking area to service all development components

- Open space and associated pathway links to the site from the surrounding area
- Various sporting facilities
- Potential space for local-level convenience retailing facilities

Work on the Casey Trails Network to thoroughly extend throughout Cranbourne East is also a key outcomes registered. This was to be achieved with a link from the Casey Valley Parklands to the Royal Botanic Gardens Cranbourne, and through the Cranbourne Complex and the Cranbourne Racing and Recreation Precinct. Another link, to be aligned generally parallel with the transmission line easement between the rear of the Great Southern Home Centre, is also noted to create a link to the Casey Valley Parklands. Further links include from the east side of Narre Warren-Cranbourne Road running from Thompsons Road to the transmission line easement, and a link between Clyde Creek and the Casey Valley Parklands.

It is also a stated objective to follow best practice approaches to environmental management in addressing storm water management and re-vegetation measures.

Cranbourne Retail and Commercial Floorspace Requirements Study (2013)

The current SGS work in part updates a 2013 'Cranbourne Retail and Commercial Floorspace Requirements' study by Renaissance Planning (RP). The aim of the RP work was to forecast retail and commercial floorspace in and around the Cranbourne Town Centre based on projected growth scenarios to 2036.

Some of its key findings included:
- As new activity centres are built in the south east growth area Cranbourne Town Centre's market share will fall.
- The majority of retail growth identified to 2036 can be accommodated within Precincts 4 and 5 in the Cranbourne Town Centre. All other retail floorspace can be located within surround precincts with the CTC.
- A significant amount of non-retail floorspace will be required in the future, including professional and commercial offices, and education, recreation and community uses.
- Additional non-retail that cannot with located within the CTC should be located in new major activities areas in the growth areas.
- The boundary for the Cranbourne Town Centre should not be adjusted to accommodate nonretail uses.

In terms of future floorspace requirements, the study found that " … there is an existing over provision of floorspace but … in the next 14 years (2026) a large amount of retail floorspace will be required within the Cranbourne Town Centre". It identified that the net additional floorspace requirements for shopfront floorspace to 2036 was 38,210 qm gross leasable area (GLA), which equated to approximately 1,590 sqm GLA per annum.

This analysis by SGS has found that Cranbourne requires a total additional 32,443 sqm in retail floorspace to 2036. The slight discrepancy in forecasts may be attributed to the definition of 'shopfront' floorspace by Renaissance Planning, which includes use types categorised by SGS as lower order commercial uses as well as slight variations to data and trends since the Renaissance study was completed.

2.5 Summary and policy gaps

The policy framework advocates for the continued growth of Cranbourne Town Centre in its capacity as a principal activity centre servicing the southern part of the City of Casey, with acknowledgement of the increasing competition from areas to the west of the municipality.

There are objectives to revitalise the activity centre and develop a greater diversified and knowledge based economy. An emerging knowledge precinct around the Cranbourne campus of the Chisholm Institute is expected to support this.

However, while the framework identifies opportunities for the growth and development of the activity centre, there is a lack of detailed knowledge surrounding the existing supply of retail and other commercial floor space in Cranbourne Town Centre, and projected demand for these uses into the future. Without this, the potential for growth cannot be fully understood, and goals of sustainable economic development for the centre and the municipality as a whole may not be achieved. As such, this study aims to fill this knowledge gap and analyse the implications of supply and demand data on strategic outcomes for the centre.

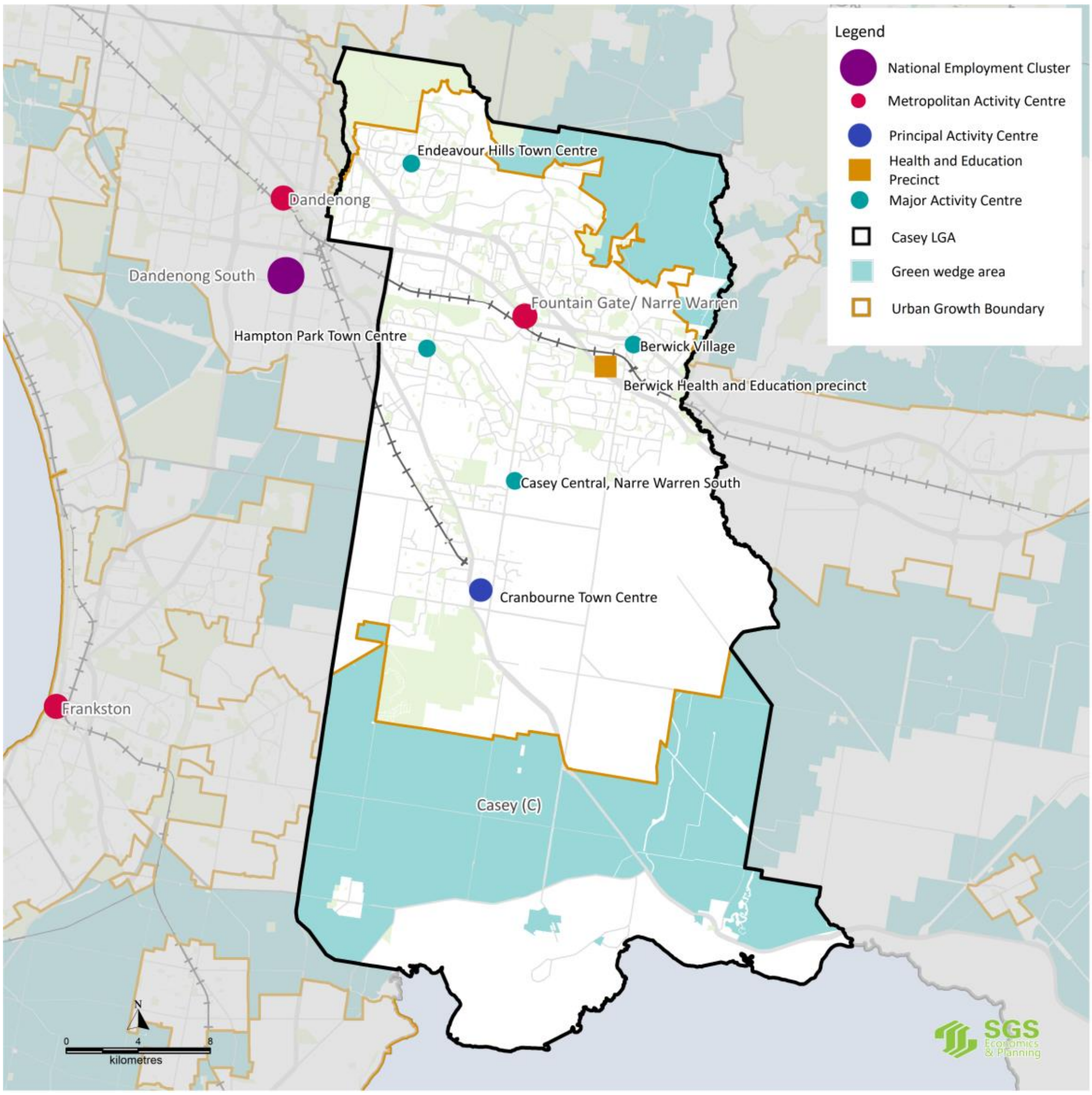
3 CRANBOURNE TOWN CENTRE PROFILE

This chapter provides a profile of Cranbourne Town Centre. It presents where Cranbourne sits in the broader hierarchy and then documents the amount and type of floor space within the centre.

3.1 Cranbourne Town Centre spatial context

The Cranbourne Town Centre is located in the south of Casey's existing urban area (see Figure 3). It is designated a Principal Activity Centre which sits at the top of the centre hierarchy. This position is shared with Fountain Gate-Narre Warren CBD designated a Metropolitan Activity Centre.

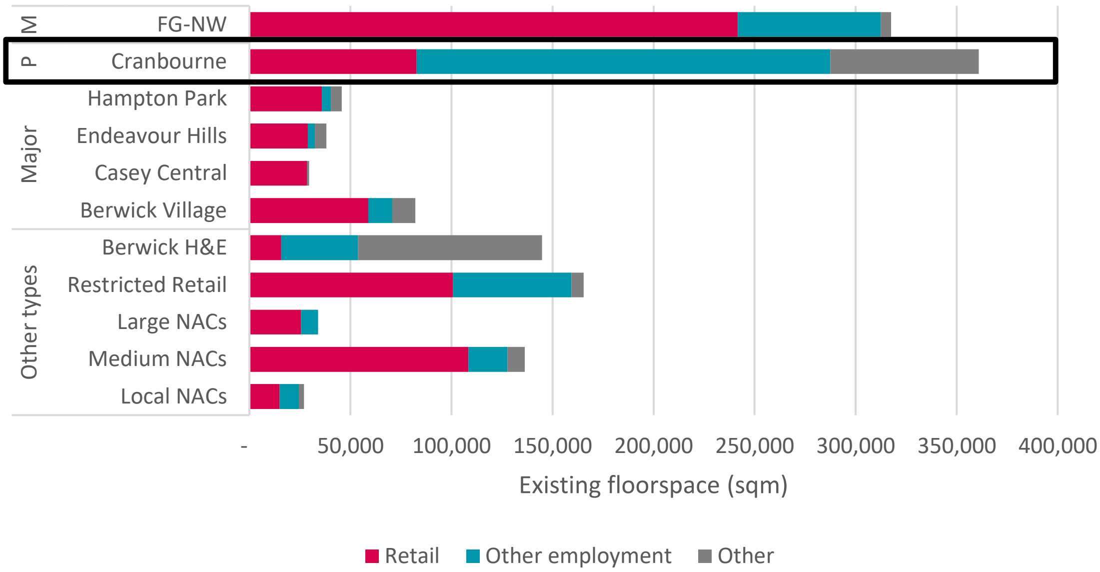
FIGURE 20. EXISTING ACTIVITY CENTRE LOCATION AND CLASSIFICATION



Source: SGS Economics and Planning

Cranbourne has 360,000 square metres of floorspace which is spread across 2.1 square kilometres of land. Figure 21 presents Cranbourne's floorspace in the context of the broader hierarchy. While Cranbourne has slightly more floorspace than Fountain Gate – Narre Warren CBD much of this includes residential and lower intensity employment uses (i.e. old industrial). As a results it is much more dispersed than Fountain Gate – Narre Warren CBD which occupies half the land area (1.2 skm).

FIGURE 21 CRANBOURNE AND OTHER CENTRE FLOORSPACE



Source: SGS Economics and Planning

The remainder of this section further unpacks the composition of land and employment floorspace within Cranbourne Town Centre. The *Casey Activity Centres Assessment* discusses the whole centre within the context of the broader hierarchy of centres.

3.2 Cranbourne current land use zoning and overlays

The Cranbourne Town Centres covers 2.1 square kilometres. Figure 22 presents the land use zoning context for the centre. It comprises land zoned Activity Centre, Public Use and General Residential.

Activity Centre Zone (ACZ)

The Cranbourne Town Centre is predominantly comprised of the Activity Centre Zone, which allows a wide mix of uses. As described in Section 2.3, however, Schedule 1 to the ACZ provides a prescriptive breakdown of the uses and built form controls encouraged in each.

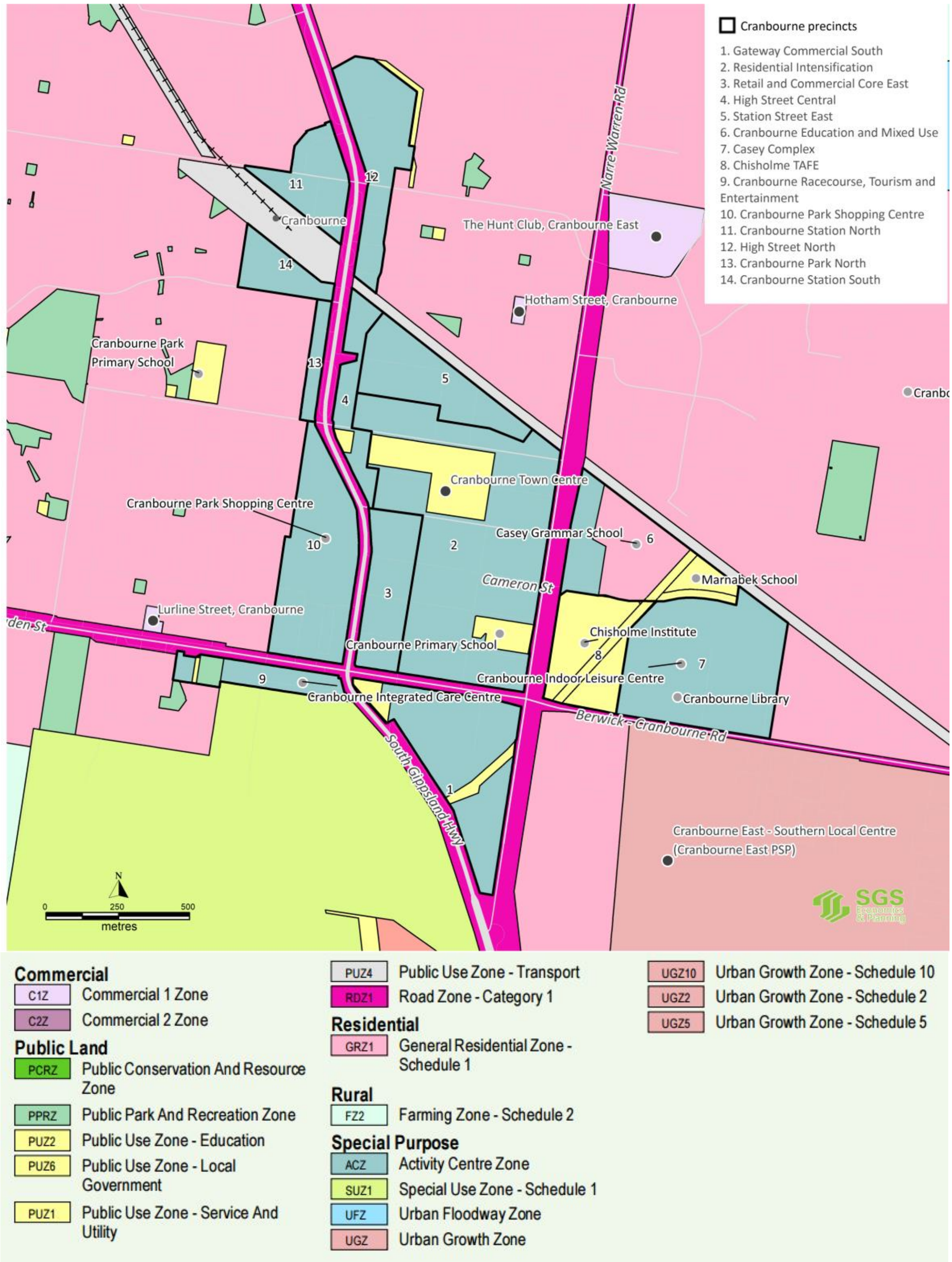
Public Use Zone (PUZ)

The Public Use Zone (PUZ) applies to various sites across the Cranbourne Town Centre, with the aim to recognise public land use for public utility and community services and facilities, or public land reservation. Land zoned for public use includes the locations of Cranbourne Secondary College, Cranbourne Primary School, the Chisholm Institute of TAFE, Marnebek School, and the Cranbourne Police Station.

General Residential Zone (GRZ)

A small area of the Cranbourne Town Centre is zoned General Residential (GRZ) (Schedule 1). While usually used for residential purposes, the GRZ also allows educational, recreational, religious, community and a limited range of other non-residential uses to serve local community needs in appropriate locations. Casey Grammar School is located in this zone.

FIGURE 22. CRANBOURNE TOWN CENTRE, PLANNING ZONES

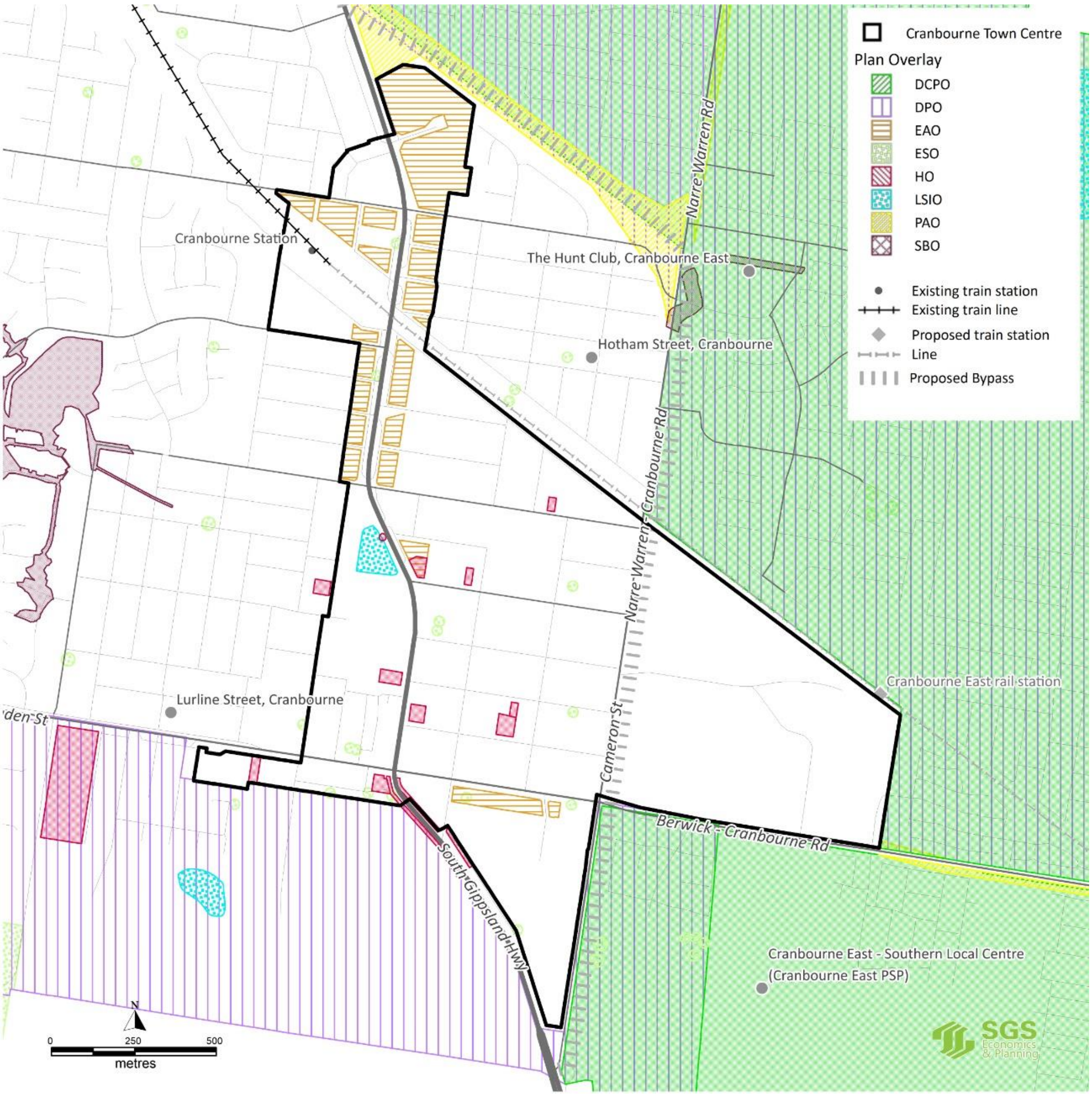


Source: SGS Economics and Planning from the Casey Planning Scheme

Figure 23 presents the relevant planning overlays that impact on the Cranbourne Town Centre. The key overlays that impact the centre includes Environmental Audit Overlay (EAO), Heritage Overlay (HO), Environmental Significance Overlay (ESO) and Land Subject to Inundation Overlay (LSIO).

Of these, the Environmental Audit Overlay (EAO) is most relevant to development capacity in the area. Concentrated around the Cranbourne Railway Station and south of the railway line along either side of High Street, the EAO restricts unsuitable uses on potentially contaminated land. Particular proposed uses require the undertaking of an environmental audit to proceed, with potential remediation implications.

FIGURE 23 CRANBOURNE TOWN CENTRE, PLANNING OVERLAYS



3.3 Current floor space within Cranbourne Town Centre

Cranbourne Town Centre currently has 360,000 square metres of floorspace spread across a number of precincts and land use types. The following sections provides a detailed breakdown of the current floorspace composition within the centre.

The definition of various land use types and their alignment with planning land use terms is included in the appendix.

Approach to estimating existing floorspace within the Cranbourne Town Centre

In the absence of a comprehensive land audit, a combination of various datasets along with a site visit to validate results was used to estimate the existing floor space by land use category across the centre.

An overview of the process is presented in Figure 24 below.

FIGURE 24 DEVELOPMENT OF EXISTING FLOOSPACE DATASET

The process leveraged a broader audit of all centres within Casey as part of the *Casey Activity Centres Assessment.* Additional information on lot level uses and more detailed land use types was extracted for Cranbourne as part of this study. The following datasets were used as part of the desktop review:

- 2016 Expanded Urban Development Program – Department of Environment, Land, Water and Planning. This provides specific total floorspace on a site by site level in selected locations. This was used to identify building footprints (i.e. total floorspace).
- This was supplemented by a number of datasets including
  - Council rates data, which provides additional information on uses within the floorspace.
  - Property Council of Australia (PCA) Retail database also provided information for enclosed malls – namely Cranbourne Park Shopping Centre.
  - For areas not covered by these data sets, (ie schools) aerial imagery and google maps was used to estimate floorspace and understand existing uses.

Once this base database was created, it was further refined and validated through a two-day site visit of the centre (in June 2016) and through review and feedback from Council.

Based on the project scope and information available at the time of the study, this process provides a robust understanding of the existing floorspace uses within the Cranbourne Town Centre.

Floorspace dataset limitations

It should be noted that retail and commercial uses increasingly operate on a continuum and, in some circumstances, it can be difficult to clearly assign to one category level. For example, a café might operate as bar in the evenings, or a school may also provide community services. In addition, it is important to remember that the centre is always evolving and uses are continuously changing.

These limitations should be considered when reviewing the results in this section.

Floorspace distribution overview

The following maps, charts and table provide a detailed overview of the current floorspace uses within the Cranbourne Town Centre. Note the definition of various land use types and their alignment with planning land use terms is included in the appendix.

Figure 25 maps the predominate land use type at a lot level. Where multiple uses occur on one lot (i.e. two shops in a building) the use with the most floorspace is presented. The lot containing the *Cranbourne Park Shopping Centre* has been highlighted separately given it includes a wide number of uses including Discount Department Stores (2), Supermarkets (2) and a range of specialty stores (100+).

Figure 28 to 37 isolate individual land use types to provide further clarity around various uses clusters.

Figure 26 and Figure 27 present a summary of the current floorspace composition by precinct and use. Unlike the maps, this incorporates various uses contained in the *Cranbourne Park Shopping Centre* and where multiple uses occur on one lot to provide a comprehensive understanding. Table 3 then provides a detailed breakdown of the information in tabular form by precinct and land use type.

The analysis highlights the diverse nature of the centre. Just under one third of the precinct is occupied by core retail[3] (18 per cent) and commercial (10 per cent) activities.

- Retail is concentrated in Cranbourne Park Shopping Centre (precinct 10) along with the Retail and Commercial Core East (precinct 3), High Street North (precinct 12) and Cranbourne Station North (precinct 11). Cranbourne Park Shopping Centre contains the only two discount department stores (Kmart and Target) along with two full line supermarkets (Coles and Woolworths). The third supermarket (ALDI) is located in the Retail and Commercial Core East precinct.
- Commercial uses are spread across many precincts with large amounts found in Gateway Commercial South (precinct 1), Retail and Commercial Core East (precinct 3) and Cranbourne Park Shopping Centre (precinct 10), High Street North (precinct 12) and Cranbourne park north (precinct 13). These are largely local service commercial activities (i.e. banks, accountants, local businesses) with no large scale commercial head offices or business parks located in the centre.
- A further 5 per cent is occupied by large format retailing largely concentrated in located in precinct 4, 12 and 10.

Over two thirds of the floorspace is occupied by Institutional[4] (30 per cent), (largely low density) residential (19 percent) and industrial (17 percent) land uses.

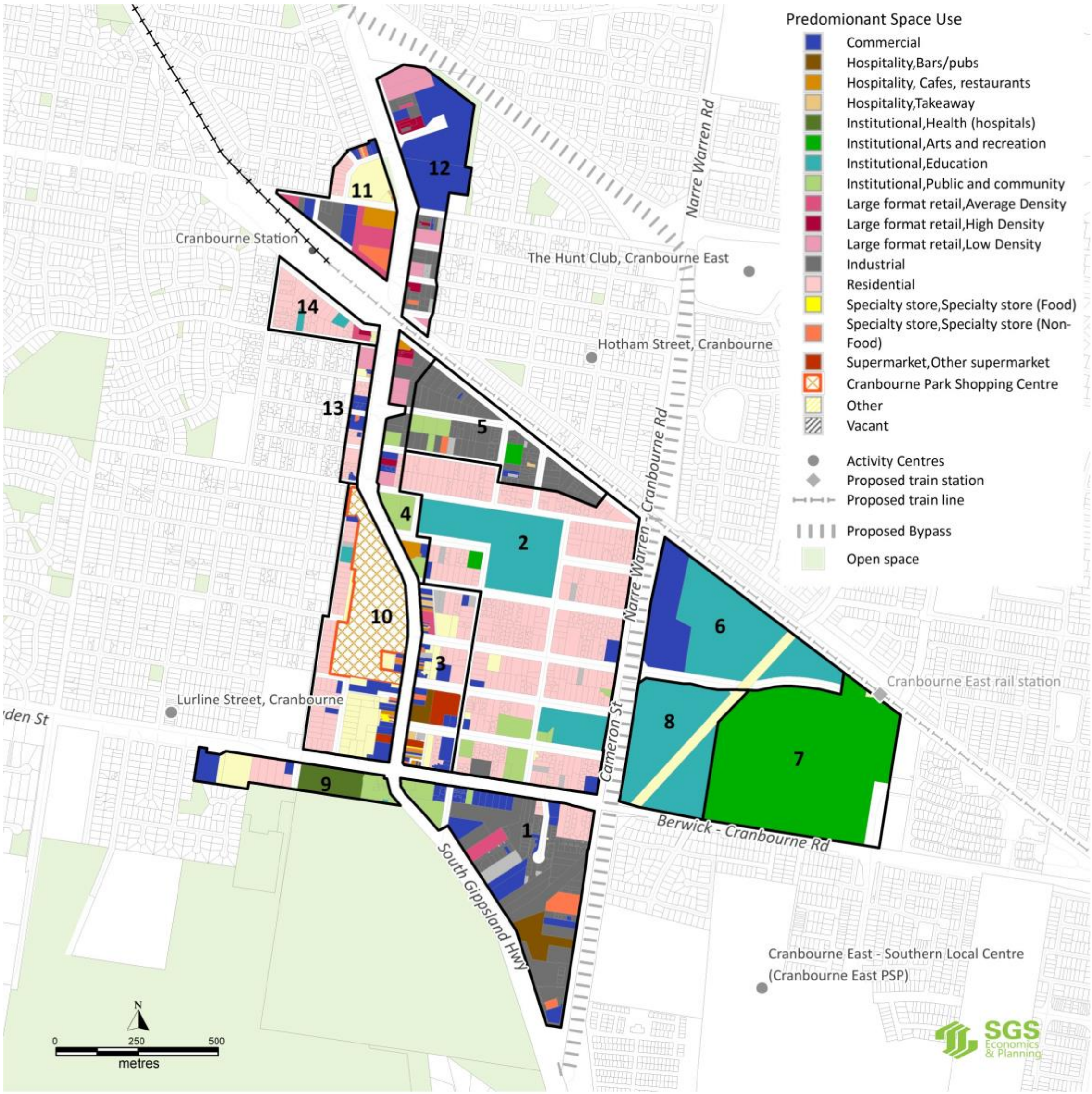
- A large portion of the institutional uses includes the Casey Complex (precinct 7) along with a number of schools, Chisholm TAFE (precinct 8) and other educational, health, arts, recreational and community facilities. A hospital is also located in Cranbourne Racecourse, Tourism and Entertainment (precinct 9).
- Industrial land makes up the majority of the Gateway Commercial South (precinct 1), Station Street East precincts (precinct 5) and High Street North precincts (precinct 12). These areas are typically fragmented with small lots and lower order industrial uses. Ultimately industrial uses should be transitioned out the centre into consolidated industrial precincts.
- The majority of residential floorspace is located in the Residential Intensification (precinct 2), the west edge of Cranbourne Park Shopping Centre (precinct 10), Cranbourne Station North (precinct 11), Cranbourne Station South (precinct 14) and Cranbourne Park North (precinct 13).

Just 1 per cent of the floor area was identified as vacant. This was largely identified within the retail/commercial core. However, if represented as a proportion of retail and commercial floorspace only it is still only 3 per cent. This is very low compared to other centres across Metropolitan Melbourne. A centre typically has a *base vacancy rate* of around 5 per cent to enable rotation of new/different stores in the centre. This indicates there is strong demand for floor space in Cranbourne Town Centre.

[3] All retail types excluding large format retailing

[4] It should be noted there are primary and secondary schools in the area but they have been excluded from the assessment

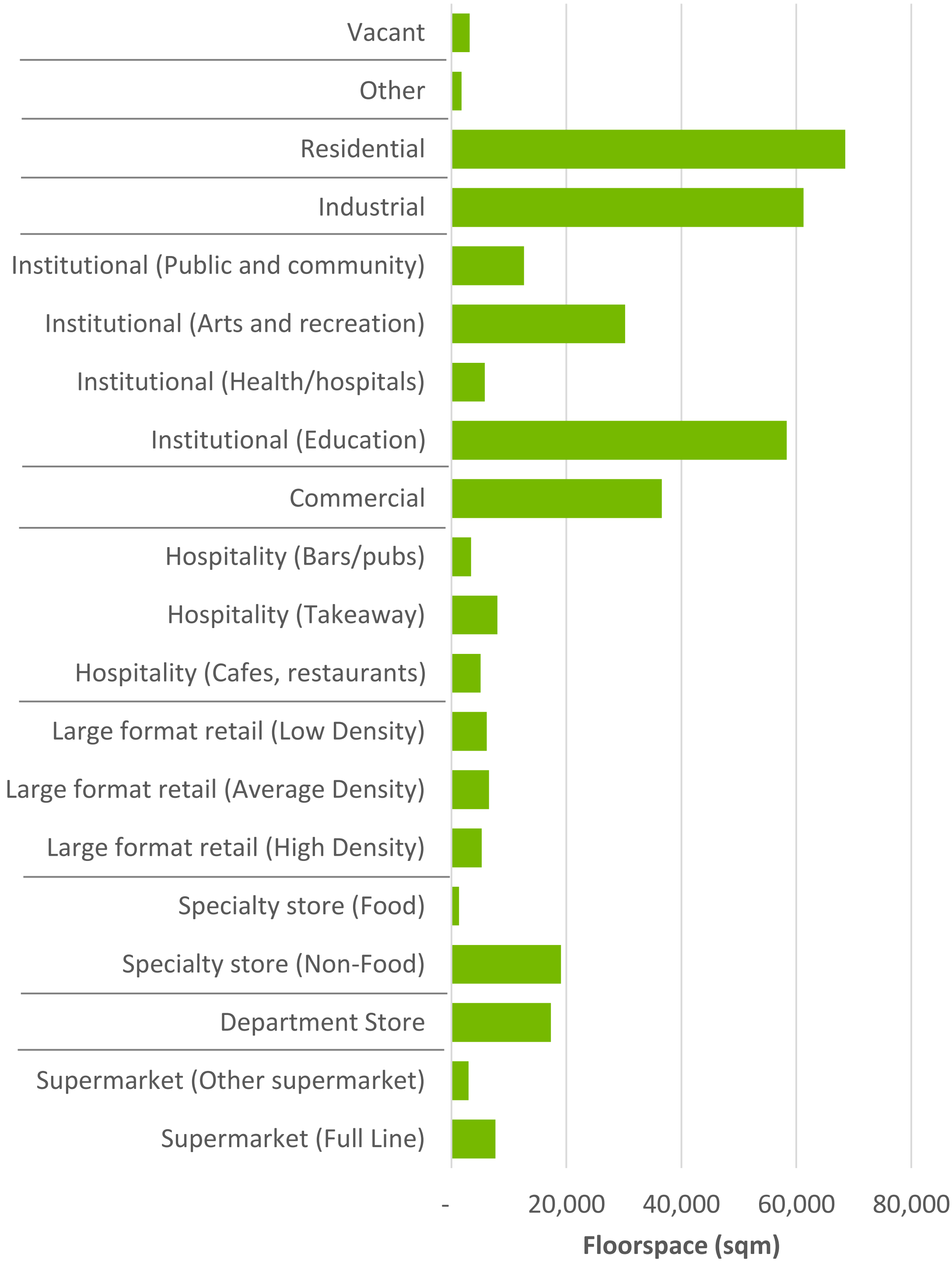
FIGURE 25. CRANBOURNE TOWN CENTRE, PREDOMINANT FLOOR SPACE BY LOT



Source: SGS Economics and Planning 2016

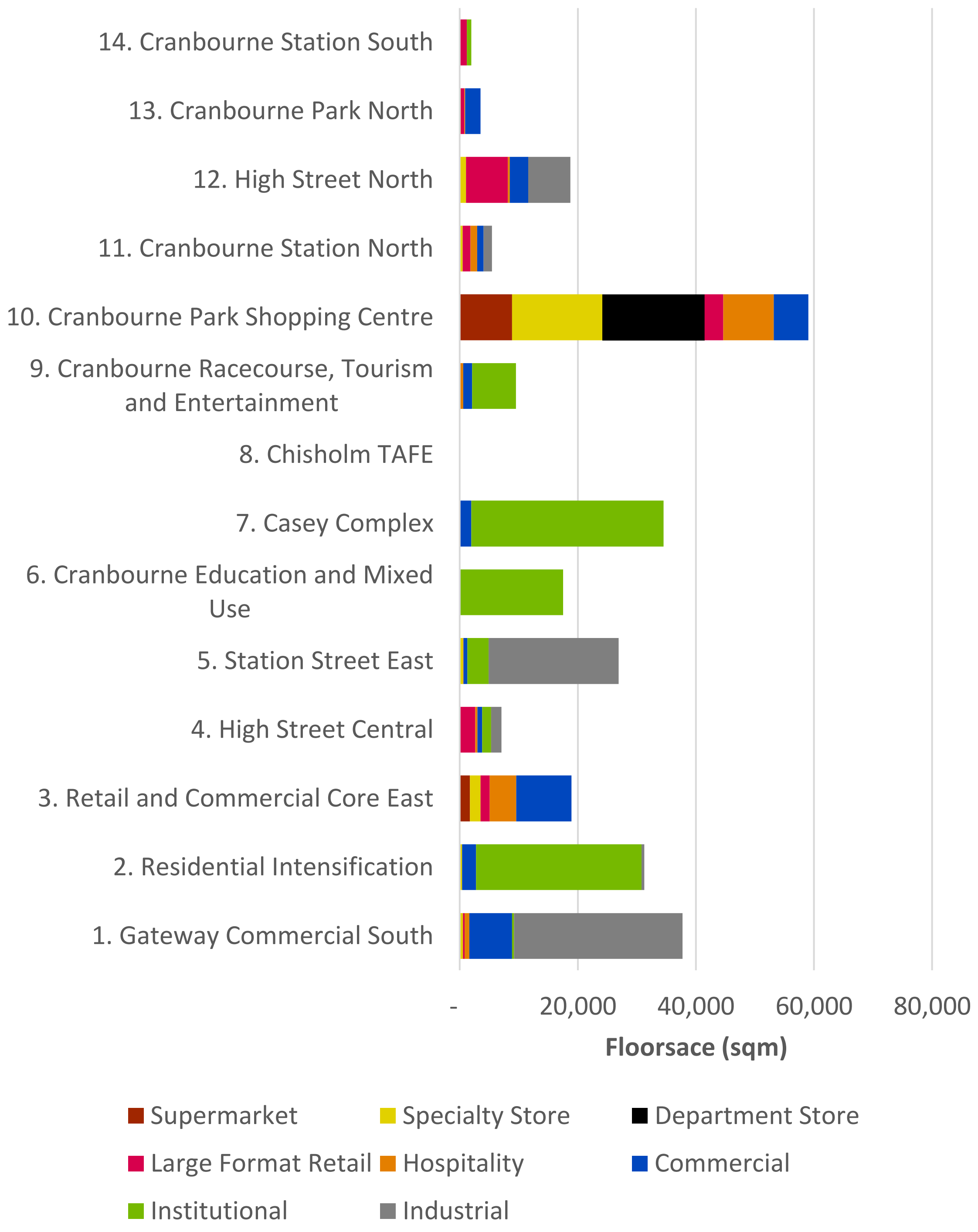
Note: Cranbourne Park shopping Centre includes a Kmart, Target, Coles, Safeway and over 100 speciality stores

FIGURE 26 CURRENT (2016) FLOOR SPACE BY LAND USE CATEGORY



Source: SGS Economics and Planning 2016

FIGURE 27 CURRENT (2016) FLOOR SPACE BY PRECINCT



Source: SGS Economics and Planning 2016
Note: this excludes vacant, 'other' and residential uses. Residential uses which are particularly dominate in precincts 2, 10, 11, 13 and 14.

TABLE 3. CURRENT (2016) FLOOR SPACE BY PRECINCT, DETAILED BREAKDOWN BY LAND USE CATEGORIES, SQM

	Retail												Institutional								
Precinct No. and Name	Supermarket (Full Line)	Supermarket (Other)	Department Store	Specialty store (Non-Food)	Specialty store (Food)	Large format retail (High Density)	Large format retail (Medium density)	Large format retail (Low Density)	Hospitality (Cafes/restaurants)	Hospitality (Takeaway)	Hospitality (Bars/pubs)	Commercial	Institutional (Education)	Institutional (Health/hospitals)	Institutional (Arts and recreation)	Institutional (Public and community)	Industrial	Residential	Other	Vacant	Total
1. Gateway Commercial South	-	-	-	534	-	-	315	-	-	-	786	7,225	-	-	-	337	28,535	1,930	1,105	391	**41,158**
2. Residential Intensification	-	-	-	397	-	-	-	-	-	-	-	2,359	24,257	-	1,661	2,128	455	48,180	102	-	**79,540**
3. Retail and Commercial Core East	-	1,744	-	1,567	233	-	1,469	82	1,107	917	2,473	9,319	-	-	-	-	-	3,103	220	876	**23,111**
4. High Street Central	-	-	-	-	-	710	1,012	887	412	-	-	780	-	-	-	1,524	1,753	578	77	-	**7,732**
5. Station Street East	-	-	-	571	-	-	-	-	-	81	-	661	-	-	1,222	2,363	22,016	-	26	999	**27,939**
6. Cranbourne Education and Mixed Use	-	-	-	-	-	-	-	-	-	-	-	133	17,390	-	-	-	-	-	-	-	**17,523**
7. Casey Complex	-	-	-	-	-	-	-	-	-	-	-	1,979	225	-	27,354	4,986	-	-	-	-	**34,544**
8. Chisholm TAFE	-	-	-	-	-	-	-	-	-	-	-	-	15,329	-	-	-	-	-	-	-	**15,329**
9. Cranbourne Racecourse, Tourism and Entertainment	-	-	-	-	-	-	-	-	574	-	-	1,527	351	5,808	-	1,260	-	1,145	-	-	**10,665**
10. Cranbourne Park Shopping Centre	7,650	1,234	17,295	14,570	730	2,191	986	-	1,972	6,573	-	5,843	-	-	-	-	-	5,641	-	-	**64,684**
11. Cranbourne Station North	-	-	-	520	-	-	1,322	-	855	271	-	1,081	-	-	-	-	1,403	1,202	-	-	**6,653**
12. High Street North	-	-	-	720	332	1,952	652	4,523	166	-	166	3,115	-	-	-	-	7,096	-	115	914	**19,750**
13. Cranbourne Park North	-	-	-	164	-	-	-	631	-	148	-	2,593	-	-	-	-	-	1,859	75	-	**5,471**
14. Cranbourne Station South	-	-	-	-	-	425	775	-	-	-	-	-	777	-	-	-	-	4,884	20	-	**6,880**
Total	**7,650**	**2,978**	**17,295**	**19,043**	**1,295**	**5,278**	**6,531**	**6,123**	**5,086**	**7,990**	**3,425**	**36,615**	**58,329**	**5,808**	**30,237**	**12,598**	**61,258**	**68,522**	**1,740**	**3,180**	**360,979**
% of total	*2%*	*1%*	*5%*	*5%*	*0%*	*1%*	*2%*	*2%*	*1%*	*2%*	*1%*	*10%*	*16%*	*2%*	*8%*	*3%*	*17%*	*19%*	*0%*	*1%*	*100%*

Source: SGS Economics and Planning 2016

Floorspace distribution by land use type

The following maps show the distribution of each of the land uses across the Cranbourne Town Centre.

Supermarkets

Figure 28 shows supermarket floor space. Two full line supermarkets (Coles and Woolworths) are located in the Cranbourne Park Shopping Centre Precinct and there is an ALDI supermarket located in the Retail and Commercial Core East Precinct.

FIGURE 28. DISTRIBUTION OF SUPERMARKET FLOOR SPACE

Source: SGS Economics and Planning 2016

Note: Cranbourne Park shopping Centre includes a Kmart, Target, Coles, Safeway and over 100 speciality stores

Department stores

Figure 29 shows the location of department store floor space. There are two discount department stores, Kmart and Target, both located in the Cranbourne Park Shopping Centre Precinct.

FIGURE 29. DISTRIBUTION OF DEPARTMENT STORE FLOOR SPACE

Source: SGS Economics and Planning 2016

Note: Cranbourne Park shopping Centre includes a Kmart, Target, Coles, Safeway and over 100 speciality stores

Large format retail

Figure 30 shows the location of large format retail floor space. This floor space is predominantly located in the north of the town centre along South Gippsland Highway, particularly in the Cranbourne Station North, High Street North and High Street Central precincts.

FIGURE 30. DISTRIBUTION OF LARGE FORMAT RETAIL FLOOR SPACE

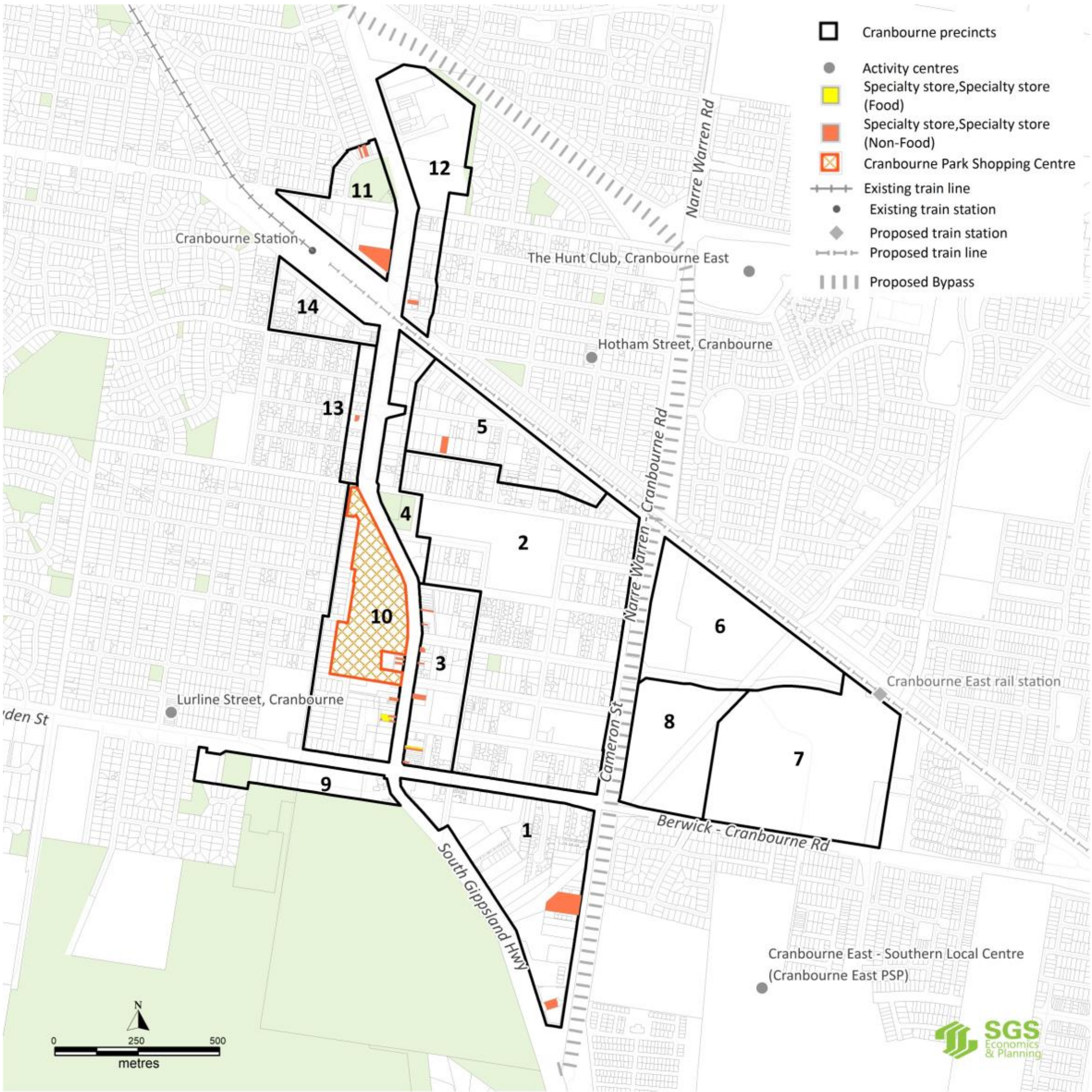
Source: SGS Economics and Planning 2016

Note: Cranbourne Park shopping Centre includes a Kmart, Target, Coles, Safeway and over 100 speciality stores

Speciality stores

Figure 31 shows specialty store floor space. Most specialty stores are non-food and located in the Cranbourne Park Shopping Centre Precinct. There is limited speciality stores located across the rest of the centre.

FIGURE 31. DISTRIBUTION OF SPECIALTY STORE FLOOR SPACE[KB1]



Source: SGS Economics and Planning 2016

Note: Cranbourne Park shopping Centre includes a Kmart, Target, Coles, Safeway and over 100 speciality stores

Hospitality

Figure 32 shows the distribution of hospitality floor space. The Cranbourne Park Shopping Centre Precinct has the majority of the floor space with both take away and cafes / restaurants located there. There is also hospitality floor space also located in the Retail and Commercial Core East Precinct, largely along High Street and a small amount in the Gateway Commercial South Precinct (the Cranbourne RSL), Cranbourne Station North and High Street North Precincts.

FIGURE 32. DISTRIBUTION OF HOSPITALITY FLOOR SPACE

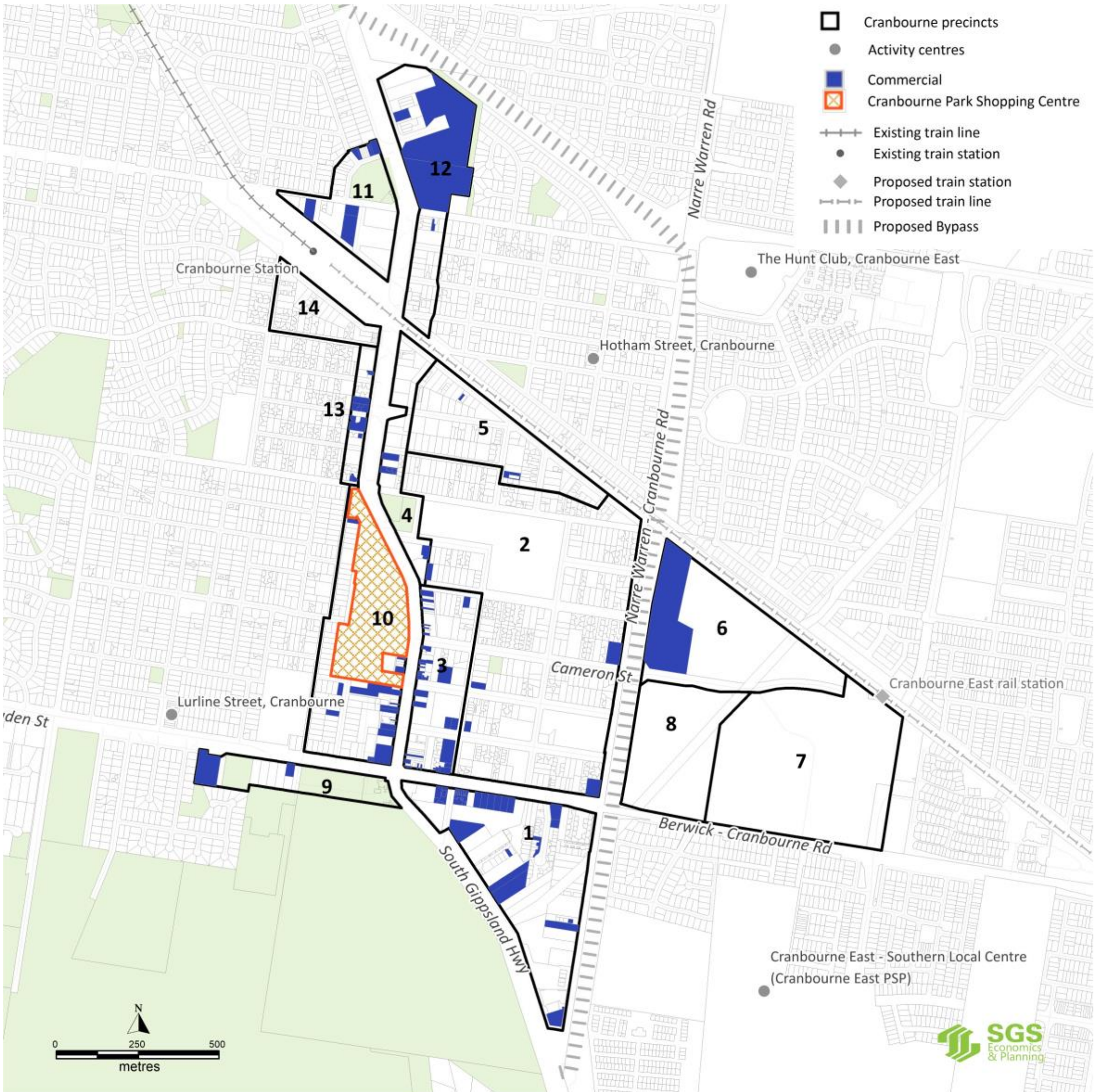
Source: SGS Economics and Planning 2016

Note: Cranbourne Park shopping Centre includes a Kmart, Target, Coles, Safeway and over 100 speciality stores

Commercial

Commercial floor space is distributed all through the Cranbourne Town Centre (see Figure 33). The biggest concentrations are in the Retail and Commercial Core East, Cranbourne Park Shopping Centre and Gateway Commercial South Precincts.

FIGURE 33. DISTRIBUTION OF COMMERCIAL FLOOR SPACE



Source: SGS Economics and Planning 2016

Note: Cranbourne Park shopping Centre includes a Kmart, Target, Coles, Safeway and over 100 speciality stores

Institutional

Figure 34 shows the distribution of institutional floor space. Arts and recreation floor space is concentrated in the Casey Complex Precinct. The Chisholm TAFE Precinct is almost completely comprised of educational floor space, and hospital floor space is located only in the Cranbourne Racecourse, Tourism and Entertainment Precinct.

FIGURE 34. DISTRIBUTION OF INSTITUTIONAL FLOOR SPACE

Source: SGS Economics and Planning 2016
Note: Primary and secondary schools have been excluded from the assessment

Industrial

Figure 35 shows concentrations of industrial floor space in the High Street North, Station Street East and Gateway Commercial South Precincts.

FIGURE 35. DISTRIBUTION OF INDUSTRIAL FLOOR SPACE

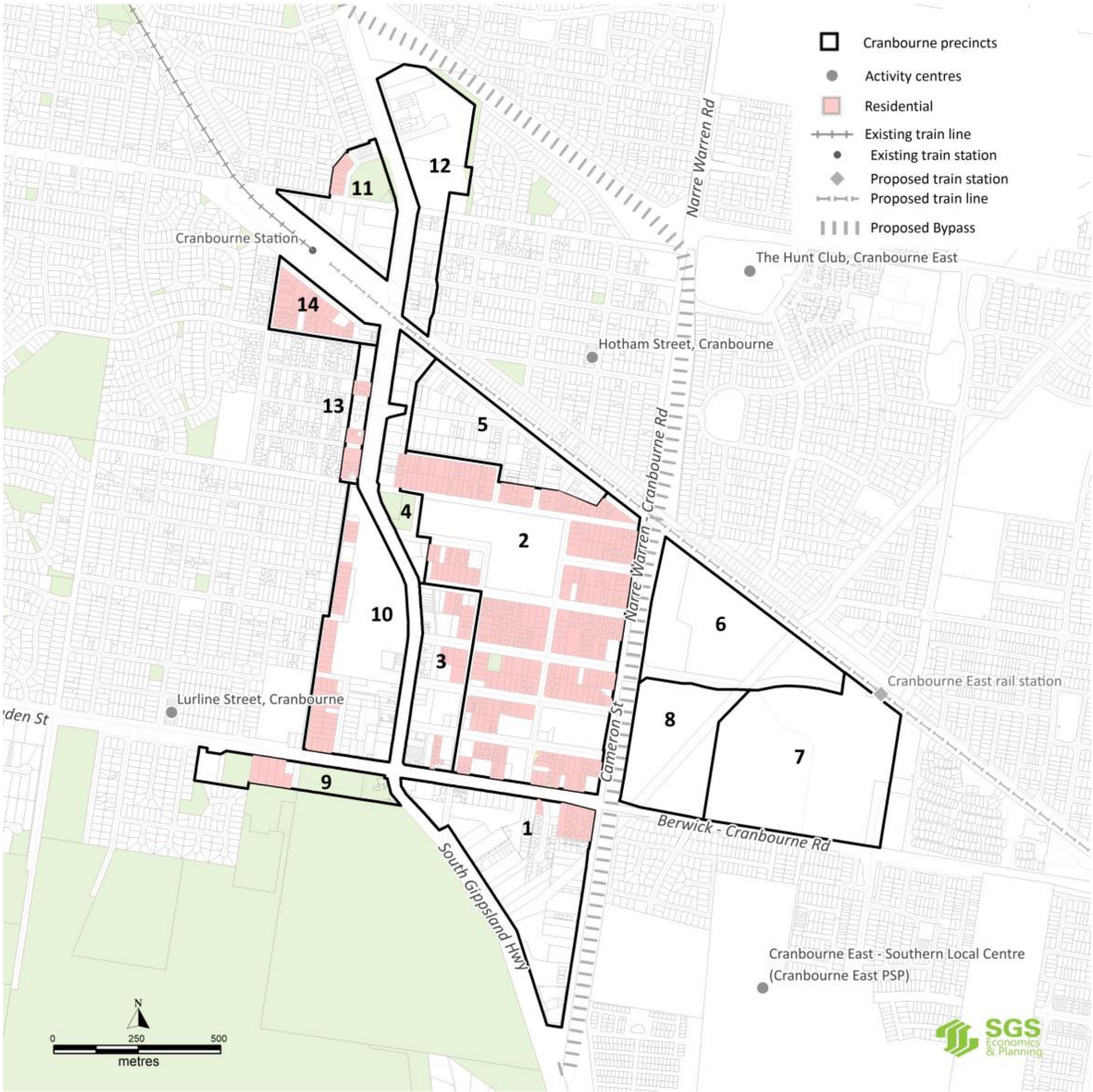
Source: SGS Economics and Planning 2016

Residential

Figure 36 shows the majority of residential floor space in the Cranbourne Town Centre is located in the Residential Intensification Precinct. This precinct is largely comprised of medium density housing and has high development potential, given its proximity to the main retail strip of the centre.

The figure also shows some residential land located in all precincts west of the South Gippsland Highway as well as the Commercial Gateway South Precinct.

FIGURE 36. DISTRIBUTION OF RESIDENTIAL FLOOR SPACE



Source: SGS Economics and Planning 2016

3.4 Planned development

The previous section has identified existing floor space; this section identifies where there are plans for potential additions to supply in the Cranbourne Town Centre.

Figure 37 maps proposed development projects that are yet to be constructed but are part way through the development or building application process. The majority of applications are for commercial and institutional developments with two large format retail, one specialty store and one hospitality development proposed, and are concentrated in the Retail and Commercial Core East.

FIGURE 37. PROPOSED DEVELOPMENT BY BROAD LAND USE CATEGORY

Source: Cordell Connect, 2016

3.5 Potential floorspace capacity estimate

As evident the in the previous sections, while there are some concentrations of activity, Cranbourne Town Centre is currently relatively dispersed and largely comprised of low intensity activities. While there is little vacant floorspace and few vacant lots across the centre, there is significant potential capacity through renewal and increased intensification of existing areas (including car parks, industrial land and other low scale development).

The following section provides a high level capacity assessment for the Cranbourne Town Centre.

Approach overview

The existing floor space to net land[5] ratio for the Cranbourne Town Centre is 0.24. That is, if all developments were single story buildings, only one quarter of the land would be occupied. This varies across the centre with precincts ranging between 0.12 (Cranbourne Station North) and 0.43 (Cranbourne Park Shopping Centre) and some individual sites being much more intensely developed.

For the high level potential capacity estimate it was assumed that an average floor space to net land area ratio of 0.6 could be reached across the centre. There were some exceptions to this rule:

- Precinct 2, the Residential Intensification precinct is predominantly comprised of residential uses and was therefore not included in the employment floorspace capacity assessment.
- Precinct 6, which has residential and education uses is assigned capacity based on ratio of 0.4.
- Precinct 9, Chisholm TAFE occupies a large portion of the precinct and was assigned a ratio of 0.4.

In addition, a number of precincts have significant non-core (i.e. industrial) activity centre uses. A high level qualitative assessment has been included to identify where precincts had potential to renew and better utilise existing floorspace. Precincts highlight orange have high potential and yellow have medium potential.

It should be noted this estimate of capacity is a **theoretical** capacity based on the assumptions outlined above. The assessment has not considered site level characteristics or constraints, if the development is feasible given current or future market conditions, or the likelihood of a planning permit being issued.

Potential capacity results

Table 4 shows the additional floor space that could be realised in each precinct. This highlights there is easily potential for the Cranbourne Town Centre to double in floorspace within the existing zoned footprint. The key locations with additional capacity are:

- Precinct 7 (Casey Complex), with 94,600 sqm
- Precinct 1 (Gateway Commercial South), with 57,200 sqm. In addition, existing floorspace is predominantly light industrial use with significant potential to be redeveloped over time.
- Precinct 12 (High Street North), with 38,000 sqm
- Precinct 10 (Cranbourne Park Shopping Centre), with 24,800 sqm

[5] Net land equals the total 'lot area' within each precinct. This excludes footpaths, roads and other similar uses.

TABLE 4. ADDITIONAL FLOOR SPACE BY PRECINCT, SQM

Precinct Name	Net Land	Existing Floorspace	Additional Floorspace	Qualitative assessment of intensification of existing floorspace
1. Gateway Commercial South	167,300	41,200	57,200	
2. Residential Intensification	347,800	79,500	-	
3. Retail and Commercial Core East	61,900	23,100	14,000	
4. High Street Central	41,500	7,700	17,200	
5. Station Street East	74,600	27,900	16,800	
6. Cranbourne Education and Mixed Use	130,700	17,500	37,200	
7. Casey Complex	215,300	34,500	94,600	
8. Chisholm TAFE	72,100	15,300	13,500	
9. Cranbourne Racecourse, Tourism and Entertainment	46,800	10,700	17,400	
10. Cranbourne Park Shopping Centre	149,200	64,700	24,800	
11. Cranbourne Station North	54,900	6,700	26,300	
12. High Street North	96,200	19,700	38,000	
13. Cranbourne Park North	17,500	5,500	5,000	
14. Cranbourne Station South	29,300	6,900	10,700	
Cranbourne Town Centre	**1,505,100**	**360,900**	**372,700**	

Source: SGS Economics and Planning

4 DEMAND FOR RETIAL AND OTHER FLOORSPACE

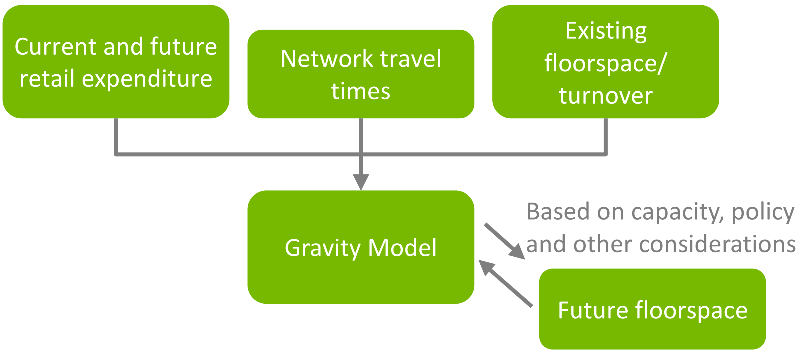
This section draws on the work of the broader draft *Casey Activity Centres Assessment* to provide more detail on the current and future demand for retail and non-retail floor space in the Cranbourne Town Centre. It also provides a summary of the centres core catchment area and local demographics.

4.1 Retail modelling approach overview

Forecasting retail and non-retail floorspace requirements in Cranbourne has been completed as part of a broader analysis looking at the whole of Casey and its surrounding context. SGS has used a *Gravity Model* approach to align underlying expenditure demand with current and future centres, including Cranbourne. The gravity model helps understand where demand will most likely be realised based on its location, existing behaviours and preferences.

Future floorspace requirements are then estimated based on results from the Gravity Model and an understanding of capacity, policy and other considerations. This holistic approach ensures forecasts consider both *pure* market forces and broader benefits realised through a well-defined and managed network hierarchy. A summary of the approach is detailed in Figure 38 below.

FIGURE 38 APPROACH TO RETAIL FORECASTING



Overall retail demand in Casey was allocated to the activity centres, informed by the following factors:

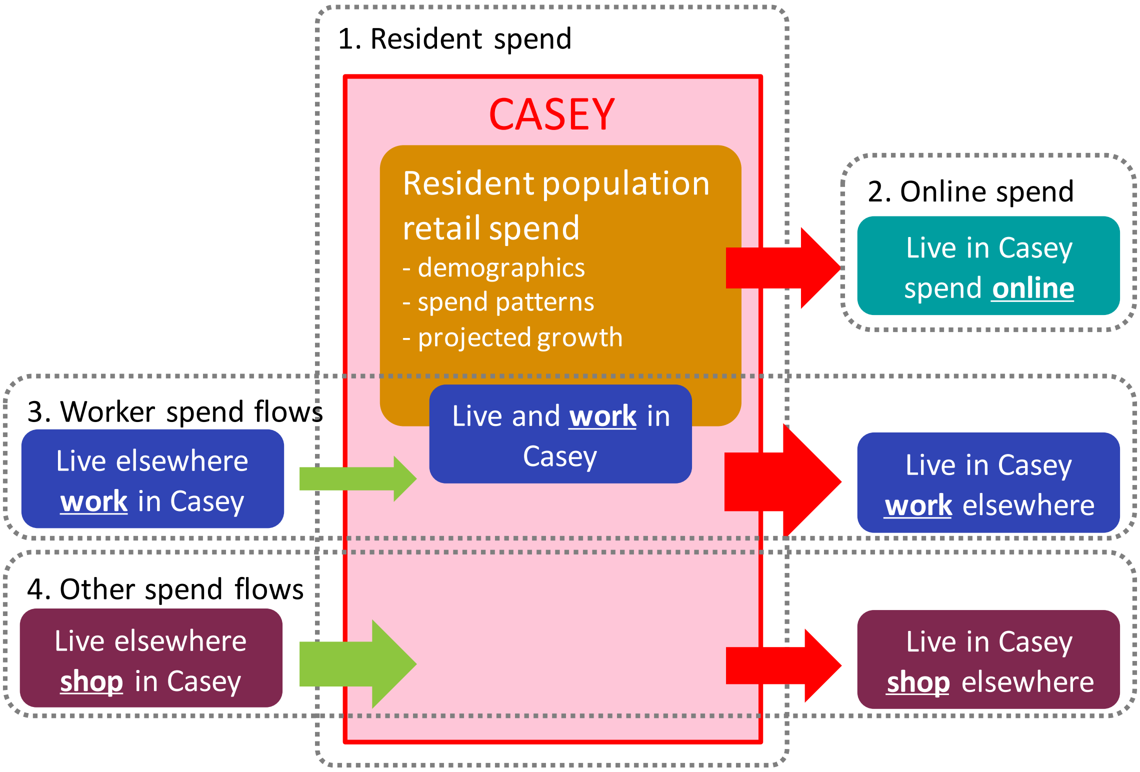
- Existing uses and capacity at existing centres
- The available capacity (based on PSPs) in proposed centres
- A **strategic assessment** of the centres hierarchy, to gain an understanding of the optimal retail size and function of each centre across the network (e.g. the need to balance the growth of major centres, including Fountain Gate-Narre Warren CBD and Cranbourne Activity Centre, with ensuring equitable access to goods and services at the local level)
- The desired non-retail functions of each centre based on its position in the hierarchy
- The spatial location of retail demand and its alignment with floorspace supply as estimated through the retail gravity model

The approach to estimating retail expenditure and the gravity model are further discussed below.

Current and future retail expenditure

Retail demand is primarily driven by growth in the local resident population. However, there are number of other factors that vary this level of spend (see Figure 39). These additional factors are considered when current and future retail expenditure is estimate at a small area level across the municipality.

FIGURE 39 RETAIL EXPENDITURE ANALYSIS



Source: SGS Economics and Planning

The following steps are taken to estimate underlying retail expenditure demand[6]:

1. The total residential expenditure 'pool' by small area zone[7] is calculated based on the population projections from id consulting, and estimates of annual per capita spend data from MarketInfo (industry standard for average spend per person by commodity types, reported at an SA1 level)
2. Adjustments are made to account for the online expenditure
3. Adjustments are made to account for workers in/out flows
4. Expenditure is then input into the gravity model and aligned with local floor space and turnover estimates to understand likely net flow of expenditure in/out of the trade area for other reasons (i.e. preferences/local visitation/etc)
5. Finally, a forecast of retail demand (accounting for the introduction of new centres) is estimated.

A detailed description of methodology is presented in the *Casey Activity Centres Assessment.*

[6] Detailed description of methodology is presented in the Casey Activity Centres Assessment

[7] Small area zones are defined as ABS Statistical Areas 1 (SA1) further disaggregated around growth areas and centres.

Retail gravity model

The SGS Retail Model is built upon previous research as well as the extensive experience SGS has gained conducting many retail studies. The SGS retail model takes the following approach:

$$\text{Propensity to shop at a centre} = \frac{\text{“Attractiveness” of centre} \times \text{Floorspace of shopping centre}}{\text{Travel time to the shopping centre}^{n}}$$

This formula essentially means **you are more likely to go to more ‘attractive’ and larger centres and less likely to go to centres that are further way.**

The ‘attractiveness’ of a shopping centre is a value that represents external attributes such as the centres appearance or design layout. Unlike other gravitational models, the SGS model does not attempt to measure the effects of design layout or product mix explicitly. Instead, it uses the shopping centre’s current turnover and the distribution of current demand as a basis to find the current ‘attractiveness’ value. This current attractiveness value is then used to forecast how the shopping centre will perform in the future given changes to floor space (in either that centre or surrounding ones) and demand.

The rate at which travel times affect propensities (n) is calibrated to ensure realistic catchments. This is to account for consumers going to alternative shopping centres that are based along major freeways or restricted to others based on natural barriers such as bays and rivers.

Why use a Gravity model?

Other approaches have such as survey based assessments are very expensive and data intensive and only consider the current population and behaviour. Simplified ‘shift-share’ approaches typically focus on one/a few centres and heavily rely on judgement based catchments with exaggerated market share thresholds.

Where as gravity models consider

- all spending across the retail system and ensure it is accounted for once, and only once.
- Catchments are data driven, not judgement based
- Catchments are continuous and dynamic, based on changing demand/supply/transport

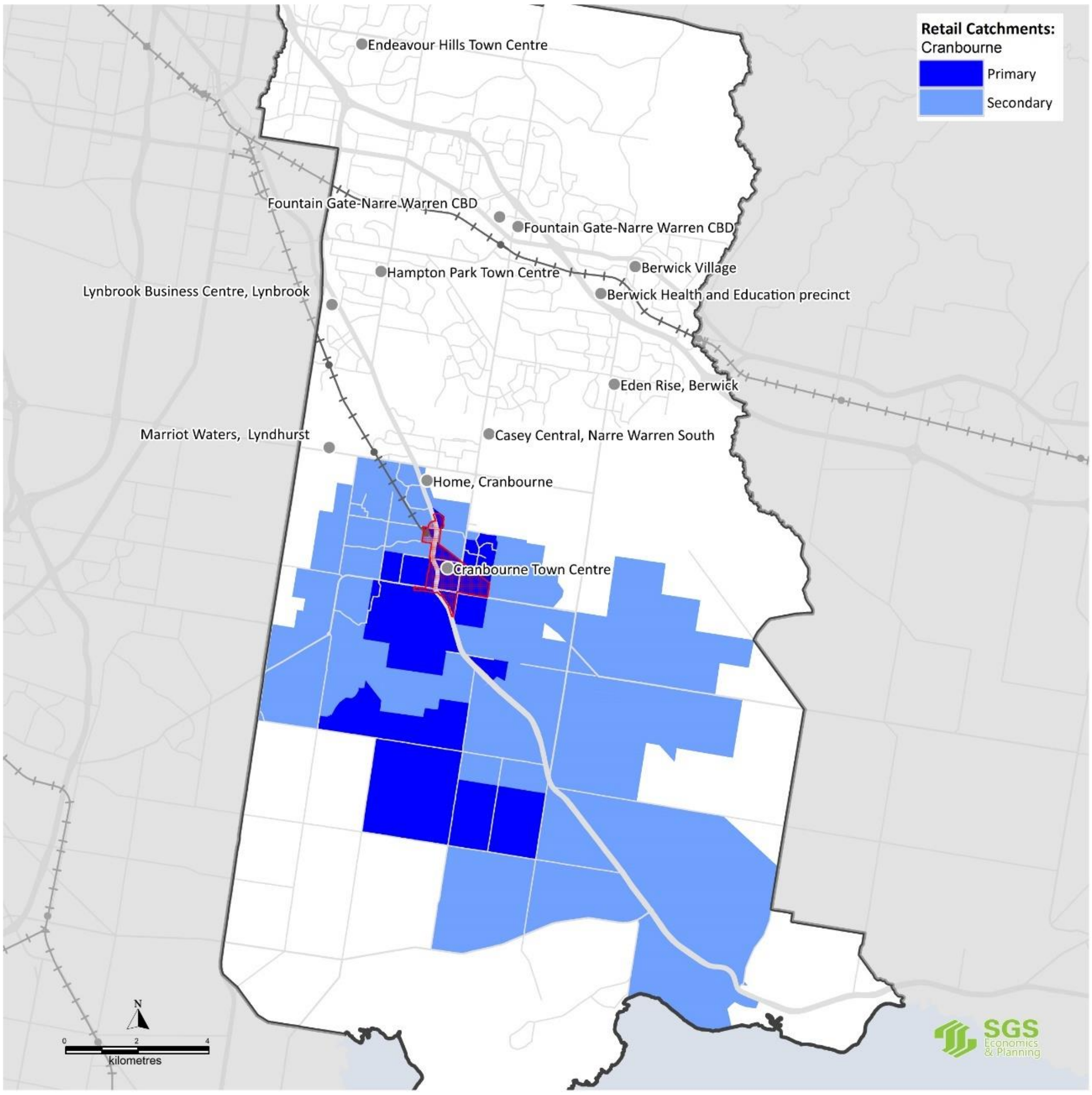
4.2 Cranbourne Town Centre retail catchment

Trade catchments work on a continuum, and there is no clearly defined line at which preferences to shop at a centre shift. However, it is still useful to simplify this complex behaviour into primary and secondary catchments to understand a centres key 'areas of influence'. For this purpose a primary and secondary trad area (PTA and STA) have been defined as follows:

- PTA is the catchment of the Cranbourne Town Centre in which residents spend more than 50 per cent of their 'on-the-ground' (i.e. non-online) retail expenditure at the Cranbourne Town Centre.
- STA is the catchment where residents spent between 25 to 50 per cent of their retail spend at the centre.

Using the SGS retail gravity model which simulates the expenditure flows between residents and centres simplified PTA and STA for the Cranbourne Town Centre created and illustrated in Figure 40.

FIGURE 40. CRANBOURNE TOWN CENTRE CATCHMENT AREA (2016)



Source: SGS Economics and Planning

This highlights that the centre plays a significant role in the Council as expected for a higher order activity centre. The catchment largely extends south of the centre as Fountain Gate-Narre Warren CBD in the north of Casey is likely capturing demand serviced by higher order activity centres in the northern half of the municipality. This highlights Cranbourne Town Centre key role in predominantly serving the southern parts of the municipality.

The map also shows an interruption of the primary catchment area around Botanic Ridge. This is likely a result of there being activity centres in the area that provide ready access to nearby residents but are less accessible to those further south.

4.3 Cranbourne catchment population demographic

Casey is experiencing rapid rates of growth, with the population in Casey set to increase by almost 200,000 people between 2016 and 2041 (Forecast id 2015). This equates to a 66 per cent growth over the 25 year period, compared to a 52 per cent growth over the same period across Greater Melbourne[8].

This means that by 2041, the City of Casey is expected to be home to almost 500,000 residents. A large proportion of this growth is located in the south and south-east of the municipality and within Cranbourne Town Centres catchment area as defined in Section 4.2.

The demographic profile of the Cranbourne Town Centre catchment (PTA and STA) will also have an impact on the demand for retail and commercial floorspace in the area. Higher income households typically have increased discretionary income and therefore increased retail spend. Other demographics can impact the amount and type of retail spend also. For example, larger family households typically spend more in supermarkets and homewares, while small professional households spend more on restaurants and entertainment. The follows seeks to provide a brief snapshot of some key demographics driving demand patterns in the catchment area.

The median weekly **income** of households in the catchment area is $1,490. Table 5 shows a greater proportion of households in the catchment area occupy the lower income brackets than in wider Casey. In comparison to Greater Melbourne, there is a higher percentage of households in the middle income brackets in the catchment area.

TABLE 5 WEEKLY HOUSEHOLD INCOME, CRANBOURNE TOWN CENTRE CATCHMENT AND COMPARATOR AREAS (2011)

	Cranbourne catchment	Casey	Greater Melbourne
Negative/Nil income	1%	1%	2%
$1-$599	19%	16%	20%
$600-$1,249	31%	29%	26%
$1,250-$1,999	25%	26%	21%
$2,000-$2,999	17%	20%	19%
$3000 or more	6%	8%	12%

Source: ABS Census, 2011

Of those in the labour force (i.e. those either employed or seeking employment) in the catchment area, 40 per cent have 'blue collar' jobs, 52 per cent have 'white collar' jobs, and 7 per cent are unemployed. Comparatively, the unemployment rate across Melbourne is approximately 5.7 per cent.

Lower the average income and above average unemployment are likely to lead to below average retail spend rate. Consumers will also be more price sensitive and will have limited demand in discretionary sectors.

[8] DELWP 2016

4.4 Future demand for floor space in Cranbourne

Future retail and non-retail floorspace demand for the Cranbourne Town Centre has been extracted from the *Casey Activity Centres Assessment* to provide a detailed understand of the implications relevant Cranbourne Town Centre specifically.

Cranbourne Town Centre retail needs

Analysis of floor space demand at the municipal level across City of Casey (presented in the draft *Casey Activity Centres Assessment*) identifies that with a large degree of population growth expected across municipality, particularly towards the south-east, a combination of adding more floor space to existing centres and bringing new centres online will provide sufficient access to retail in the next two decades.

Retail floor space demand at Cranbourne Town Centre specifically will depend on two primary factors.

– the quantum and spatial distribution of population growth and associated expenditure demand across the municipality; and
– the supply of floor space in surrounding existing and future centres.

Both these factors have been considered (as detailed in section 4.1) when estimating future retail floorspace demand at Cranbourne Town Centre. Table 6 presents the results of this analysis.

This indicates there is potential for Cranbourne Town Centre to increase its retail floorspace by 56 per cent over the next two decades. This level of growth ensures there is still sufficient demand for surrounding local and major centres to expand and service their local areas.

This includes demand for two additional supermarkets (potentially one full-line and one other supermarket) and one/two additional department stores. Over 50 per cent of demand is comprised of specially stores and hospitality which will be critical to the centre realising its higher order role.

TABLE 6. PROJECTED RETAIL FLOORSPACE, CRANBOURNE TOWN CENTRE

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	7,650	7,650	7,650	10,650	10,650	3,000	39%
Other Supermarket	2,978	2,978	4,478	4,478	5,978	3,000	101%
Specialty Store	20,338	23,338	26,338	29,338	32,338	12,000	59%
Department Store	17,295	18,825	20,355	21,885	23,415	6,120	35%
Large Format Retail	17,931	20,931	23,931	26,931	29,931	12,000	67%
Hospitality	16,500	19,021	21,542	24,063	26,584	10,084	61%
Total	**82,692**	**92,743**	**104,294**	**117,345**	**128,896**	**46,204**	**56%**

Source: SGS Economics and Planning

Cranbourne Town Centre non-retail floor space needs

As a Principal Activity Centre, the Cranbourne Town Centre needs to have a diverse range of uses. The centre should therefore also capture a significant portion of non-retail employment floor space demand.

In particular, it is assumed that Cranbourne will begin to accommodate a larger share of Casey's commercial floorspace (moving from a current share of 19 per cent to accommodating 25 per cent of aggregate demand). This is based on a review of aggregate demand and a qualitative analysis of comparative strengths and weakness of other centres in the Casey network. It has also been assumed that industrial floorspace will remain stable in aggregate, while some existing industrial floorspace may be consolidate to realise other employment uses.

TABLE 7. PROJECTED NON-RETAIL FLOORSPACE, CRANBOURNE TOWN CENTRE

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Commercial	36,615	47,190	57,766	68,341	78,916	42,301	116%
Institutional	106,972	110,872	114,773	118,673	122,574	15,602	15%
Industrial	61,258	61,258	61,258	61,258	61,258	-	0%
Total	**204,845**	**219,320**	**233,797**	**248,272**	**262,748**	**57,903**	**28%**

Source: SGS Economics and Planning

Cranbourne Town Centre retail and non-retail floorspace needs

The floorspace allocation process identified that there is sufficient capacity in Cranbourne Town Centre to accommodate future floorspace requirements at Cranbourne. Based on the high level capacity analysis only 28 per cent (104,000 square metres) of the Cranbourne Town Centre's approximate 372,000 square metres of 'additional capacity' is expected to be developed by 2036 for employment uses. This is based on population growth, realistic limits to retail turnover demand at the centre and attraction of non-retail floorspace.

A breakdown of projected total floorspace by 2036 is given below. The analysis indicates Cranbourne Town Centres needs to further diversify its employment mix. Over 50 per cent of future floorspace demand is in non-retail sectors, primarily commercial floorspace. There is also strong demand for small scale retail within the centre, namely speciality stores and hospitality. Currently these are largely contained within the Cranbourne Park retail centre and will need to be spread across most precincts.

TABLE 8. PROJECTED FLOORSPACE GROWTH BY USE, CRANBOURNE TOWN CENTRE

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	7,650	7,650	7,650	10,650	10,650	3,000	39%
Other Supermarket	2,978	2,978	4,478	4,478	5,978	3,000	101%
Specialty Store	20,338	23,338	26,338	29,338	32,338	12,000	59%
Department Store	17,295	18,825	20,355	21,885	23,415	6,120	35%
Large Format Retail	17,931	20,931	23,931	26,931	29,931	12,000	67%
Hospitality	16,500	19,021	21,542	24,063	26,584	10,084	61%
Commercial	36,615	47,190	57,766	68,341	78,916	42,301	116%
Institutional	106,972	110,872	114,773	118,673	122,574	15,602	15%
Industrial	61,258	61,258	61,258	61,258	61,258	0	0%
Total	**287,537**	**312,063**	**338,091**	**365,617**	**391,644**	**104,107**	**36%**

Source: SGS Economics and Planning

4.5 Indicative future floor space needs by precinct

This section provides a further breakdown of the future floor space needs by precinct. **This level of specification should be seen as indicative only. There a multiple ways that the aggregate centre floorspace could be realised and it is crucial to allow, and support, flexibility in the market. This simply presents one possible future allocation to support future planning work.** It should not be seen to restrict alternative distributions per say. Rather core 'guiding principals' around the vision of the centre should be used to direct growth. These should be supported by analysis from this report (including recommendations in Section 5) along with other studies on the dynamics of dwellings, community facilities, traffic, parking, open space, amenity, urban design and other factors.

Aggregate centre floorspace needs has been allocated down to individual precincts based on a review of existing floorspace mix, potential capacity, policy and spatial attributes (i.e. themes in the ACZ and proximity to transport and other key assets).

A summary of the precinct level allocation is presented in Table 9. Significant growth has been directed toward Cranbourne Park Shopping Centre (precinct 10), High Street North (precinct 12), High Street Central (precinct 4) and Gateway Commercial South (precinct 1). Precincts 2, 11 and 12 have seen limited growth as they will be the focus of significant residential intensification. There is still significant capacity in the Casey Complex (precinct 7) which will likely be largely developed post 2036.

TABLE 9 FLOORSPACE NEEDS BY 2036 BY PRECINCT

	Net Land*	Existing Floorspace	Additional Floorspace Capacity	Take up by 2036
1. Gateway Commercial South	167,293	41,200	57,200	16,374
2. Residential Intensification	347,842	79,500	-	-
3. Retail and Commercial Core East	61,851	23,100	14,000	5,975
4. High Street Central	41,516	7,700	17,200	15,751
5. Station Street East	74,627	27,900	16,800	-
6. Cranbourne Education and Mixed Use	130,669	17,500	37,200	6,297
7. Casey Complex	215,288	34,500	94,600	7,588
8. Chisholm TAFE	99,643	15,300	13,500	3,290
9. Cranbourne Racecourse, Tourism and Entertainment	46,844	10,700	17,400	6,108
10. Cranbourne Park Shopping Centre	149,177	64,700	24,800	20,206
11. Cranbourne Station North	54,867	6,700	26,300	1,500
12. High Street North	96,211	19,700	38,000	18,000
13. Cranbourne Park North	17,457	5,500	5,000	2,317
14. Cranbourne Station South	29,263	6,900	10,700	700
Total	**1,532,548**	**360,900**	**372,700**	**104,107**

Source: SGS Economics and Planning

The following tables further breakdown each precinct by land use type out to 2036. Some key findings across these tables include:

- Precinct 10 (Cranbourne Park Shopping Centre) can support an additional 1,500 sqm of supermarket floorspace, which would serve population growth in the immediate surrounds. This would represent a supermarket provision similar to that of the Fountain Gate – Narre Warren CBD. There is also the opportunity for an additional department store to locate in this precinct.
- Similarly, precinct 11 could also accommodate 1,500 sqm of supermarket floorspace. As a location that is suitable for residential intensification, supermarket provision as part of a mixed use development would provide local convenience (but will not impact the retail core of Cranbourne Town Centre).
- A single full-line supermarket will likely be required post-2031, as the residential development in the North of Cranbourne (e.g. precincts 14 and 11) intensifies. Precinct 12 (High Street North) represents a suitable location for such a development.

- While the Cranbourne Town Centre already accommodates a significant amount of commercial floorspace, this is largely comprised uses that have characteristics similar to retail use in terms of their built form and employment outcomes. Such uses include hair dressers and travel agents, which can benefit from active, street level frontages and high levels of foot traffic in a similar manner to retail uses. Higher order commercial uses particularly office uses have the potential to attract a more highly skilled workforce, draw greater levels of activity to the centre and contribute to the local economy. Future higher order commercial floorspace is expected to locate in areas of high amenity and close to the retail and hospitality core, in proximity to any existing higher order commercial activity.
- Precincts 1, 3, 4, 9, 10 and 13 have the highest potential for commercial activity. The Council-owned car park at Sladen Street in Precinct 10 (Cranbourne Park Shopping Centre) is well-positioned to be redeveloped to accommodate future commercial (and retail) use. There is already evidence of the potential for commercial redevelopment at Precinct 1 (Gateway Commercial South), which predominantly comprises light industrial uses at present (see Section 3.4). While Precinct 3 (Retail and Commercial Core East) has little net capacity at present, it does have potential for shop top office activity.

TABLE 10. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 1

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	534	534	534	534	534	-	0%
Department Store	-	-	-	-	-	-	-
Large Format Retail	315	315	315	315	315	-	0%
Hospitality	786	1,038	1,290	1,440	1,440	654	83%
Commercial	7,225	11,155	15,085	19,016	22,946	15,720	218%
Institutional	337	337	337	337	337	-	0%
Industrial	28,535	28,535	28,535	28,535	28,535	-	0%
Total	**37,732**	**41,914**	**46,097**	**50,177**	**54,107**	**16,374**	**43%**

Source: SGS Economics and Planning

TABLE 11. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 2

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	397	397	397	397	397	-	0%
Department Store	-	-	-	-	-	-	-
Large Format Retail	-	-	-	-	-	-	-
Hospitality	-	-	-	-	-	-	-
Commercial	2,359	2,359	2,359	2,359	2,359	-	0%
Institutional	28,046	28,046	28,046	28,046	28,046	-	0%
Industrial	455	455	455	455	455	-	0%
Total	**31,257**	**31,257**	**31,257**	**31,257**	**31,257**	**-**	**0%**

Source: SGS Economics and Planning

TABLE 12. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 3

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	1,744	1,744	1,744	1,744	1,744	-	0%
Specialty Store	1,800	2,538	3,288	4,038	4,775	2,975	165%
Department Store	-	-	-	-	-	-	-
Large Format Retail	1,551	1,551	1,551	1,551	1,551	-	0%
Hospitality	4,497	5,297	6,097	6,897	7,497	3,000	67%
Commercial	9,319	9,319	9,319	9,319	9,319	-	0%
Institutional	-	-	-	-	-	-	-
Industrial	-	-	-	-	-	-	-
Total	**18,912**	**20,449**	**21,999**	**23,549**	**24,887**	**5,975**	**32%**

Source: SGS Economics and Planning

TABLE 13. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 4

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	-	-	-	-	-	-	-
Department Store	-	-	-	-	-	-	-
Large Format Retail	2,609	2,609	2,609	2,609	2,609	-	0%
Hospitality	412	912	1,412	1,664	1,916	1,504	365%
Commercial	780	3,236	7,166	11,096	15,026	14,246	1826%
Institutional	1,524	1,524	1,524	1,524	1,524	-	0%
Industrial	1,753	1,753	1,753	1,753	1,753	-	0%
Total	**7,078**	**10,034**	**14,464**	**18,646**	**22,828**	**15,751**	**223%**

Source: SGS Economics and Planning

TABLE 14. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 5

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	571	571	571	571	571	-	0%
Department Store	-	-	-	-	-	-	-
Large Format Retail	-	-	-	-	-	-	-
Hospitality	81	81	81	81	81	-	0%
Commercial	661	661	661	661	661	-	0%
Institutional	3,585	3,585	3,585	3,585	3,585	-	0%
Industrial	22,016	22,016	22,016	22,016	22,016	-	0%
Total	**26,914**	**26,914**	**26,914**	**26,914**	**26,914**	**-**	**0%**

Source: SGS Economics and Planning

TABLE 15. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 6

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	-	-	-	-	-	-	-
Department Store	-	-	-	-	-	-	-
Large Format Retail	-	-	-	-	-	-	-
Hospitality	-	100	200	300	600	600	-
Commercial	133	624	1,115	1,606	2,098	1,965	1482%
Institutional	17,390	18,323	19,256	20,189	21,122	3,732	21%
Industrial	-	-	-	-	-	-	-
Total	**17,523**	**19,047**	**20,571**	**22,095**	**23,819**	**6,297**	**36%**

Source: SGS Economics and Planning

TABLE 16. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 7

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	-	-	-	-	-	-	-
Department Store	-	-	-	-	-	-	-
Large Format Retail	-	-	-	-	-	-	-
Hospitality	-	100	200	300	600	600	-
Commercial	1,979	1,979	1,979	1,979	1,979	-	0%
Institutional	32,565	34,312	36,059	37,806	39,553	6,988	21%
Industrial	-	-	-	-	-	-	-
Total	**34,544**	**36,392**	**38,239**	**40,086**	**42,133**	**7,588**	**22%**

Source: SGS Economics and Planning

TABLE 17. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 8

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	-	-	-	-	-	-	-
Department Store	-	-	-	-	-	-	-
Large Format Retail	-	-	-	-	-	-	-
Hospitality	-	-	-	-	-	-	-
Commercial	-	-	-	-	-	-	-
Institutional	15,329	16,151	16,974	17,796	18,619	3,290	21%
Industrial	-	-	-	-	-	-	-
Total	**15,329**	**16,151**	**16,974**	**17,796**	**18,619**	**3,290**	**21%**

Source: SGS Economics and Planning

TABLE 18. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 9

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	-	-	-	-	-	-	-
Department Store	-	-	-	-	-	-	-
Large Format Retail	-	-	-	-	-	-	-
Hospitality	574	574	574	574	574	-	0%
Commercial	1,527	2,019	3,296	4,670	6,043	4,516	296%
Institutional	7,419	7,817	8,215	8,613	9,011	1,592	21%
Industrial	-	-	-	-	-	-	-
Total	**9,520**	**10,409**	**12,084**	**13,856**	**15,628**	**6,108**	**64%**

Source: SGS Economics and Planning

TABLE 19. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 10

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	7,650	7,650	7,650	7,650	7,650	-	0%
Other Supermarket	1,234	1,234	2,734	2,734	2,734	1,500	122%
Specialty Store	15,300	17,513	19,763	22,013	24,225	8,925	58%
Department Store	17,295	18,825	20,355	21,885	23,415	6,120	35%
Large Format Retail	3,177	3,177	3,177	3,177	3,177	-	0%
Hospitality	8,545	8,962	9,631	10,650	11,319	2,774	32%
Commercial	5,843	6,334	6,530	6,630	6,730	888	15%
Institutional	-	-	-	-	-	-	-
Industrial	-	-	-	-	-	-	-
Total	**59,043**	**63,694**	**69,839**	**74,738**	**79,249**	**20,206**	**34%**

Source: SGS Economics and Planning

TABLE 20. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 11

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	1,500	1,500	-
Specialty Store	520	520	520	520	520	-	0%
Department Store	-	-	-	-	-	-	-
Large Format Retail	1,322	1,322	1,322	1,322	1,322	-	0%
Hospitality	1,126	1,126	1,126	1,126	1,126	-	0%
Commercial	1,081	1,081	1,081	1,081	1,081	-	0%
Institutional	-	-	-	-	-	-	-
Industrial	1,403	1,403	1,403	1,403	1,403	-	0%
Total	**5,451**	**5,451**	**5,451**	**5,451**	**6,951**	**1,500**	**28%**

Source: SGS Economics and Planning

TABLE 21. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 12

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	3,000	3,000	3,000	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	1,052	1,052	1,052	1,052	1,052	-	0%
Department Store	-	-	-	-	-	-	-
Large Format Retail	7,127	10,127	13,127	16,127	19,127	12,000	168%
Hospitality	332	332	332	332	332	-	0%
Commercial	3,115	3,865	4,615	5,365	6,115	3,000	96%
Institutional	-	-	-	-	-	-	-
Industrial	7,096	7,096	7,096	7,096	7,096	-	0%
Total	**18,721**	**22,471**	**26,221**	**32,971**	**36,721**	**18,000**	**96%**

Source: SGS Economics and Planning

TABLE 22. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 13

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	164	214	214	214	264	100	61%
Department Store	-	-	-	-	-	-	-
Large Format Retail	631	631	631	631	631	-	0%
Hospitality	148	400	400	400	400	252	170%
Commercial	2,593	4,558	4,558	4,558	4,558	1,965	76%
Institutional	-	-	-	-	-	-	-
Industrial	-	-	-	-	-	-	-
Total	**3,536**	**5,803**	**5,803**	**5,803**	**5,853**	**2,317**	**66%**

Source: SGS Economics and Planning

TABLE 23. PROJECTED EMPLOYMENT FLOORSPACE GROWTH BY USE, PRECINCT 14

	Total at 2016 (sqm)	Total at 2021 (sqm)	Total at 2026 (sqm)	Total at 2031 (sqm)	Total at 2036 (sqm)	Growth 2016-2036 (sqm)	% Growth 2016-2036
Full-line Supermarket	-	-	-	-	-	-	-
Other Supermarket	-	-	-	-	-	-	-
Specialty Store	-	-	-	-	-	-	-
Department Store	-	-	-	-	-	-	-
Large Format Retail	1,200	1,200	1,200	1,200	1,200	-	0%
Hospitality	-	100	200	300	700	700	-
Commercial	-	-	-	-	-	-	-
Institutional	777	777	777	777	777	-	0%
Industrial	-	-	-	-	-	-	-
Total	**1,976**	**2,076**	**2,176**	**2,276**	**2,676**	**700**	**35%**

Source: SGS Economics and Planning

5 ISSUES AND RECOMMENDATIONS

This chapter identifies and discusses the current challenges for the Cranbourne Town Centre and provides recommendations on how to ensure it continues to fulfil its role as Principal Activity Centre.

The analysis in Chapter 4 identified that the Cranbourne Town Centre has sufficient capacity to accommodate future floor space demand. With retail demand largely driven by population growth, the critical issues for the Cranbourne Town Centre are therefore to ensure future retail floor space is appropriately located and to encourage non-retail uses to locate in the centre.

5.1 Key spatial and structural factors

The following provides a better understand spatial constraints and opportunities along with advice regarding potential changes to the planning framework relevant to the retail and no-retail floorspace needs analysis. It should be noted this advice is not intended to be a detailed structure plan, nor does it provide comprehensive planning framework advice or specific changes to statutory or non-statutory controls. It should help inform the development of the Structure Plan and be read alongside other relevant background reports.

Planning controls

The ACZ1 covers the majority of the Cranbourne Town Centre. As seen in Figure 40, the Cranbourne Town Centre is significantly larger in area compared to other centres considered ‘Major’ or even ‘Metropolitan’ Activity Centres, as defined in Plan Melbourne. However, it is comprised of a number of precinct focused on residential, retail and other employment functions as detailed in section 2.4.

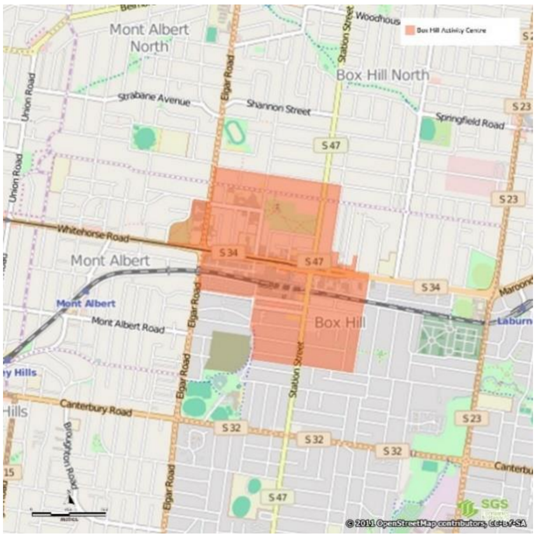
Vacancy rates in the Cranbourne Town Centre are low, however, indicating strong demand for floor space in the centre. The ACZ moreover offers greater flexibility at Council’s end, allowing land use planning to reflect changing needs into the future.

FIGURE 41. COMPARATIVE CENTRE SIZE

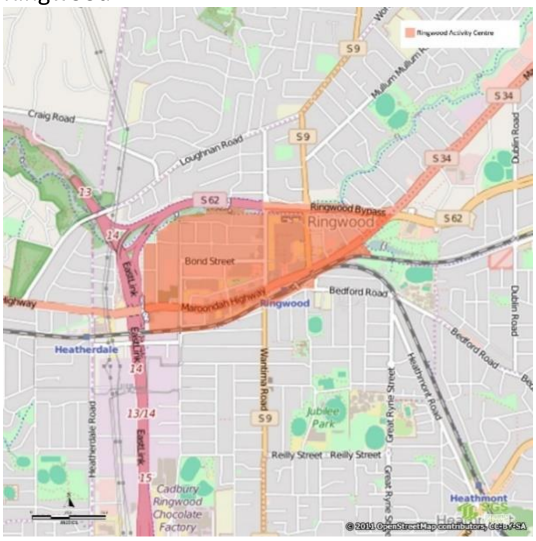
Cranbourne

Dandenong

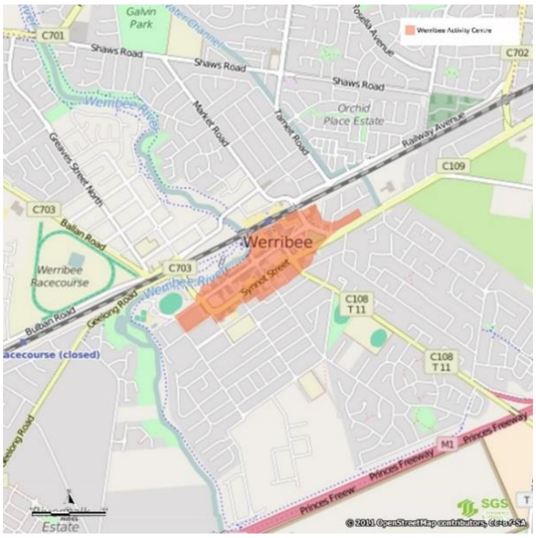
Box Hill



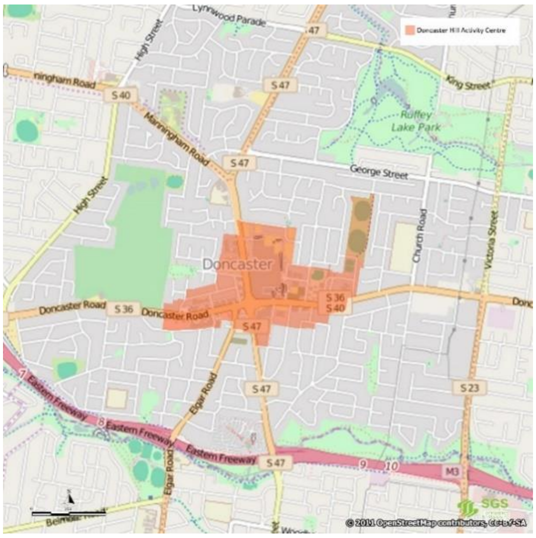
Ringwood



Werribee



Doncaster



Source: SGS Economics and Planning

Planning controls - Recommendations

In regards to planning controls, SGS recommends the following:

Maintain the current extent of the ACZ1

Low vacancy rates across the Cranbourne Town Centre at present indicates strong demand for retail and commercial floorspace in the centre. Separate precincts enables Council to take a holistic approach to land uses across the centre. The current ACZ1 boundaries should thus be maintained.

Use schedules to the ACZ1 to consolidate retail uses

To maintain the retail core of the Cranbourne Town Centre and its ongoing role as a Principal Activity Centre, retail should be consolidated. Council should review the schedules of the zone to consolidate retail predominantly into Precincts 3 and 10, with some hospitality-based retail growth in Precinct 4. Large format retail should be concentrated in Precinct 12, given its high level of visibility along the highway.

Use schedules to the ACZ1 to concentrate higher density housing in strategic locations

Strategically located higher density housing can not only support and enhance the role of the Cranbourne Town Centre as a Principal Activity Centre, but moreover ensure population growth in Cranbourne is accommodated within easy access of infrastructure and services. Council should review the schedules of the zone to enable higher density housing as per the Cranbourne Town Centre Residential Demand Study (2017), which identifies Precincts 2, 6, 10, 11 and 14 as strategic sites for higher density housing.

Investigate the use of vertical zoning

As a Principal Activity Centre, the Cranbourne Town Centre must have a diverse range of uses, including non-retail employment. For Cranbourne to begin accommodating a larger share of Casey's commercial activity, the Cranbourne Town Centre must attract and accommodate a significant level office floorspace. Vertical zoning is a mechanism used to prescribe different uses *within* buildings, across different levels, often with retail at ground floor and office floorspace above. Council should investigate the use of vertical zoning for particular precincts where development of office *and* retail are desired, such as Precinct 13.

Investigate the use of lot subdivision controls

Lot size and subdivision patterns vary significantly across the Cranbourne Town Centre. Increased fragmentation can limit future growth potential and undermine future employment growth once demand materialises. Council should look to embed subdivision controls that limit fragmentation of lots and support the consolidation of lots. This preserves the opportunity for higher density development and more adaptable uses in the future. This should be considered in precincts 6, 10, 11 and 14.

Movement networks and access

The physical size of the centre makes access a particular challenge for the Cranbourne Town Centre.

There are several issues with the access, including:

- Distances for walking and cycling
- Amenity for walking and cycling
- Location of public transport

Public transport

Figure 42 illustrates the public transport network and lot fragmentation at the Cranbourne Town Centre.

While the Cranbourne train line provides access to the centre, the Cranbourne Railway Station is located at the northern end of the centre, rather than in the core retail activity area. The substantial geographical spread of the Cranbourne Town Centre means that walking from the railway station to Cranbourne Park Shopping Centre or the adjacent High Street retail strip (Precincts 10 and 3) is approximately a 20 minute walk.

Walking from the railway station to the community, sports and recreation facilities in the Casey Complex (Precinct 7) to the east of the activity centre is more than a half hour's walk. While a Cranbourne East Railway Station (proposed in the late 1990s and again in the late 2000s) could provide greater choice and accessibility for visitors to the Complex (and to and from the Casey Fields sporting complex further afield), there are no current plans to extend the Cranbourne rail line.

The bus network is reasonably extensive in the Cranbourne Town Centre, complementing the access offered by the railway line to provide a more local level public transport option. As a road-dependent transport mode, however, its efficient function is subject to traffic conditions, and as a non-fixed mode of transport its routes can be more easily altered. This provides flexibility but also limits the extent to which it can attract transit-oriented development. Bus routes run to locations such as Frankston and Dandenong Stations.

The bus interchange at Lyall Street (corner of High Street) is a highly active area, particularly at peak hours.

Pedestrian and cycling amenity

Thus, while the Cranbourne Town Centre has good rail and bus access and is a high activity area, particularly along its High Street retail strip, the sprawling nature of the Cranbourne Town Centre, with unguided, low amenity pedestrian linkages, does little to promote active travel in the area.

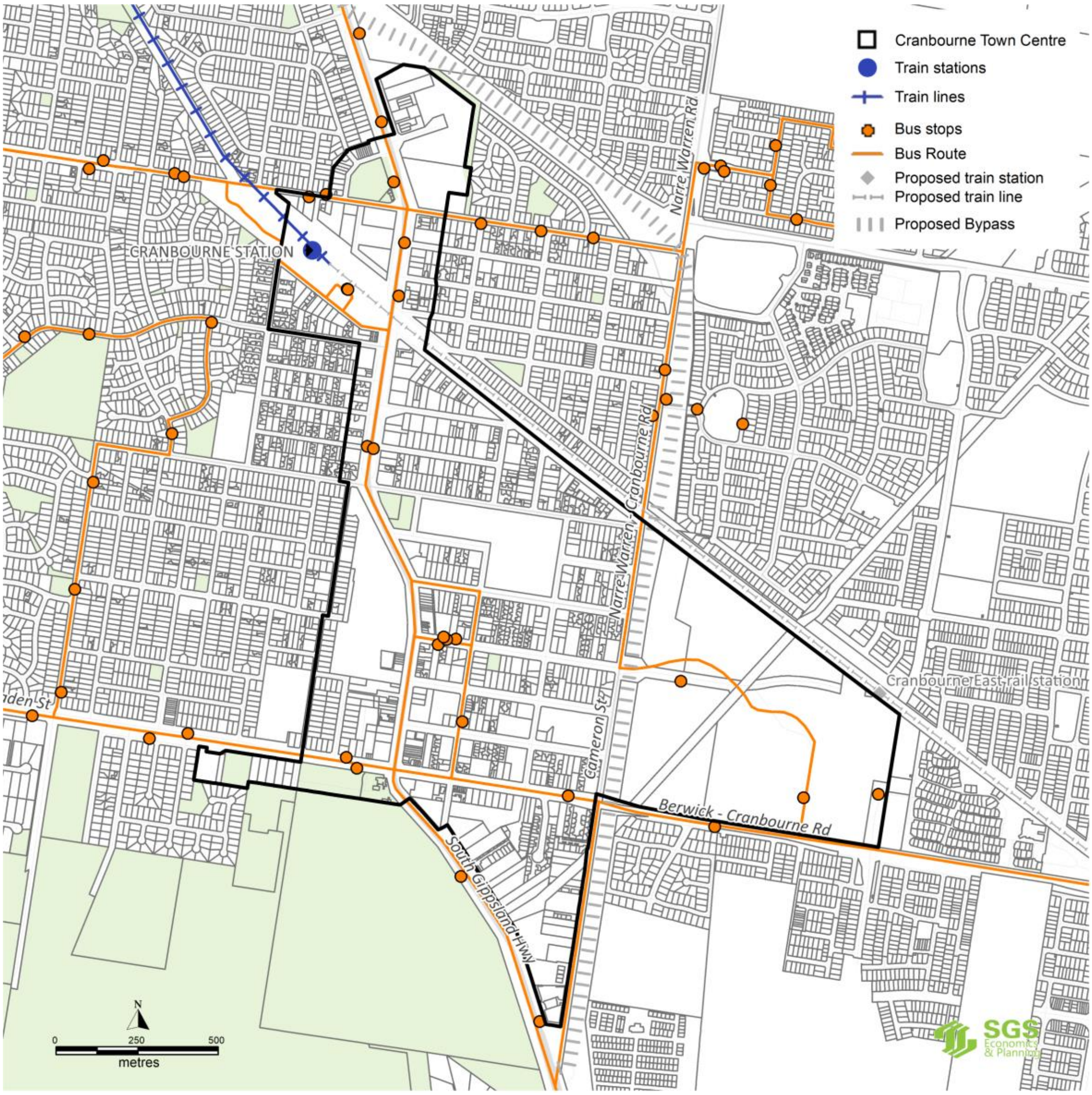
A significant portion of the pedestrian environment which is along the low amenity, coarse-grain streetscape of the South Gippsland Highway. At a precinct level, while the footpaths and town square in Precincts 3 and 10 are relatively active and walkable (see Figure 43), the high-traffic environment of High Street also reduces amenity in the area, along with east-west connectivity. The presence of the South Gippsland Highway sees a six lane road running through the middle of the Town Centre.

There are significant opportunities to improve the amenity of the activity centre, some of which is in council's control and some of which they will have to continue to advocate to other levels of government to help address. These include:

- Council-led streetscape improvements, installation of street furniture and the revitalisation of the Greg Clydesdale Square, and
- Continued Council advocacy for the Cranbourne Bypass.

The centre's low level of connectivity also has an impact on the functionality of the centre. The amenity and legibility across the site has the ability to influence community perception of the centre in regards to its role as a formal and informal meeting place, its sense of community identity and its inclusiveness. This can act as a barrier to promoting economic activity, vibrancy and sense of place across the centre.

FIGURE 42. PUBLIC TRANSPORT NETWORK AND LOT FRAGMENTATION



Source: SGS Economics and Planning

Movement networks and access - Recommendations

In regards to movement networks and access, SGS recommends the following:

Continued advocacy for train line extension
The extension of the Cranbourne train line to Cranbourne East would improve accessibility to a number of assets, including the sports and recreation and community facilities of Casey Complex and various educational institutions. Council should continue to advocate for the extension of the train line.

Continued advocacy for Cranbourne Bypass
South Gippsland Highway is a major north south highway that runs through the activity centre, dividing it into two sections. Redeveloping this street into an urban boulevard and changing transport hierarchies/priorities from cars to people would improve access, safety and amenity within the activity centre.

Improved pedestrian access routes
Improved pedestrian access routes would help improve integration across the Cranbourne Town Centre. A comprehensive pedestrian network should be designed and established to improve permeability and pedestrian safety, as well as to link landmarks, public transport nodes, employment areas and open space. This should be supported by a coordinated pedestrian and public transport signage system.

Due to the size of the area, in the short term this may involve integration of particular precincts within the centre as opposed to trying to integrate the entire area. There is particular opportunity to improve connections between the train station and Cranbourne Park Shopping Centre.

Investigate implementation of coordinated public transport services
While the Town Centre is generally well-serviced by the bus network, investigation into the provision of regular bus services, coordinated with train arrivals and departures, should also be undertaken. Frequent bus connections, particularly at peak hours, can go a long way to improving access to the retail and commercial core (Precincts 3 and 10, and 1 in the future).

Amenity

Amenity is not only important because it encourages walking and cycling (as discussed above) but it is also a necessary factor in attracting knowledge sector businesses and employment. These industries and their employees are attracted to quality urban environments and a high level of service provision.

Amenity - Recommendations

In regards to amenity, SGS recommends the following:

Review and optimise Council maintenance works
Council should ensure suitable provision and maintenance of parks and gardens, good urban design, and good waste management.

Increase residential and commercial densities
Increasing residential and commercial densities in the centre will have a positive impact on the operations of local business, the provision of community services and facilities, the character of the centre, and the quality of civic and public life. Implementing the changes to the ACZ1 identified in the Cranbourne Town Centre Residential Demand Study (2017) to enable higher density housing in strategic locations would attract a more diverse population and make the centre more vibrant. This should be done through measures recommended above in the 'Planning controls' section.

Redevelopment of Greg Clydesdale Square
The Greg Clydesdale Square presents a significant opportunity for a public space within the core retail area of the Cranbourne Town Centre, to contribute to the amenity and vibrancy of the precinct. Council should investigate opportunities for the revitalisation of this Square.

FIGURE 43. PEDESTRIAN ENVIRONMENT, CRANBOURNE TOWN CENTRE HIGH STREET

Source: SGS Economics and Planning; photo taken June 2016

Key assets

Figure 44 depicts the key assets in and around the Cranbourne Town Centre. The centre accommodates, or is in close to, several community, sports and recreation facilities. These include not only the facilities at the Casey Complex, but beyond that the regionally significant sporting facilities at Casey Fields.

FIGURE 44. KEY ASSETS, CRANBOURNE TOWN CENTRE

Source: SGS Economics and Planning

To the south west of the centre is the Cranbourne Racecourse and Recreation Reserve, along with the Cranbourne Swimming Pool. These facilities, particularly Casey Fields and the Cranbourne Racecourse, attract a range of community members, from not only Casey but from other municipalities, including athletes, trainers, families and spectators. The retail and hospitality offer at Casey is well-positioned to attract these visitors, and also leverage off these activities in terms of the type of goods sold.

Further afield, to the south-west, are the Cranbourne Royal Botanic Gardens (RBG). A state-significant attraction, the Cranbourne RBG presents a key opportunity to extend tourist visitation Casey to the Cranbourne Town Centre. The gardens, along with the environmental science facilities Cranbourne campus of the Chisholm Institute, may also have the potential to attract commercial or 'R&D' activity in the environmental science field. This would need to be further investigated in consultation with the managers of both facilities.

Analysis of the map highlights that Cranbourne's key assets or sites of interest are not centred around the railway station, nor are they in close proximity to it. This is a key constraint to leveraging these facilities to generate further retail, commercial or institutional activity.

Key assets - Recommendations

In regards to key assets, SGS recommends the following:

Continued advocacy for train line extension
As recommended above, the extension of the Cranbourne train line to Cranbourne East would improve accessibility to a number of key assets, including the sports and recreation and community facilities of Casey Complex and various educational institutions. Council should continue to advocate for the extension of the train line.

Integration of the Chisholm Institute into the region
Integrating the Chisholm Institute into the region through the establishment of links to nearby businesses and development of synergies between the courses taught at Chisholm and institutions and organisations located in Cranbourne. This could include establishing relationships with nearby secondary schools, hospitals.

Investigate wayfinding and improved internal connections
Key assets within and near the Cranbourne Activity Centre are currently quite separate. There is little integration between each which undermines their shared benefit. Council should investigate ways to improve awareness and improve internal connections (activity, public and private mode connections) between various key assets.

Accommodation of non-retail jobs

Accommodating non-retail jobs requires a range of suitable floorspace types. Some of the different types of accommodation include home office or low rent offices/shop fronts

Micro and small businesses, especially new start-ups, are establishing across the urban landscape in home offices. Low rent offices and shop fronts in suburban locations are also a very common location for micro and small businesses. People that establish companies in fields like design, marketing, software development, health and consultancy advice drive this activity.

As businesses grow, and especially as new staff are added, many firms will seek to move from the home office to a conventional office in their local area.

Small firms in such a growth trajectory will be wary of risks associated with long-term leases and high rents, many having paid no rent in the home office. The first move into the commercial office market will therefore be a cautious step to relatively cheap accommodation until the business model can sustain higher rents. The target is therefore low-grade flexible office space and residual shop fronts.

Business incubators linked to health and education precincts can also help foster local employment activity and high order employment uses

Given the Cranbourne Town Centre currently has low commercial vacancy rates, micro businesses and start up companies may struggle to locate in the centre.

Accommodation of non-retail jobs - Recommendations

In regards to the accommodation of non-retail jobs, SGS recommends:

Facilitation of a business incubator
To increase the attractiveness of the Cranbourne Town Centre for small businesses, local government could consider establishing a business incubator. Business incubators are facilities that promote the development of businesses in the early stages of operation when they are most vulnerable to failure. Small businesses are supported through their start-up period in the hope and expectation that they will grow to become employers of local labour and generators of wealth within the local economy. Incubators create networking opportunities and can include a mentoring service. There are also opportunities to access training seminars and workshops.

5.2 Summary of recommendations

The table below presents a summary of SGS recommendations for the Cranbourne Town Centre.

TABLE 24 SUMMARY OF RECOMMENDATIONS

Spatial/Structural factors	Recommendations	Responsibility	Timeframe
1. Planning controls	1.1 *Maintain the current extent of the ACZ1* 1.2 *Use schedules to the ACZ1 to consolidate retail uses* 1.3 *Use schedules to the ACZ1 to concentrate higher density housing in strategic locations* 1.4 *Investigate the use of vertical zoning* *1.5 investigate subdivision controls*	Local government (with some state responsibilities)	Short-term
2. Movement networks and access	2.1 *Continued advocacy for train line extension* 2.2 *Continued advocacy for Cranbourne Bypass* 2.3 *Improved pedestrian access routes* 2.4 *Investigate implementation of coordinated public transport services*	Local and state government	Short to long-term
3. Amenity	3.1 *Review and optimise Council maintenance works* 3.2 *Increase residential and commercial densities (and Recommendations 1.2 and 1.3)* 3.3 *Redevelopment of Greg Clydesdale Square*	Local government	Short to long-term
4. Key assets	4.1 *Continued advocacy for train line extension* 4.2 *Integration of the Chisholm Institute into the region* *4.3 Investigate wayfinding and improved internal connections*		
5. Accommodation of non-retail jobs	6.1 *Facilitation of a business incubator*	State government	Short to medium-term

Source: SGS Economics and Planning

APPENDIX 1: ACTIVITY CENTRE TERMINOLOGY

The following provides a summary of both Plan Melbourne and City of Casey centre definitions:

TABLE 25 ACTIVITY CENTRE TERMINOLOGY

Term	Definition	Abbreviation
Plan Melbourne (2017)		
Metropolitan Activity Centre	Higher-order centres with diverse employment options, services and housing stock, supported by good transport connections. Fountain Gate-Narre Warren CBD is defined as a Metropolitan Activity Centre	
National employment and innovation clusters	Designated concentrations of employment distinguished by a strong core of nationally significant knowledge sector businesses and institutions that make a major contribution to the national economy and Melbourne's positioning in the global economy	NEIC
Health and Education Precinct	Locations to cluster synergistic health and/or education services to improve access to integrated service provision, improve outcomes, develop the health and education workforce and deliver economic benefits (such as innovation and job creation). These precincts may provide solely health, solely education, or a combination of health and education services.	HEP
Major Activity Centre	Suburban centres that provide access to a wide range of goods and services. They have different attributes and provide different functions, with some serving larger subregional catchments. Plan Melbourne identifies 121 major activity centres. Cranbourne is defined as a Major Activity Centre.	
City of Casey		
Metropolitan Activity Centre	As per Plan Melbourne	
Principal Activity Centre		PAC
Health and Education Precinct	As per Plan Melbourne	HEP
Major Activity Centre		MAC
Large Neighbourhood Activity Centre		Large NAC
Medium Neighbourhood Activity Centre		Medium NAC
Local Neighbourhood Activity Centre		Local NAC
Restricted Retail Precinct		RRP

APPENDIX 2: LAND USE DEFINITIONS

The following provides additional detail regarding the definition of each land use term.

TABLE 26 SGS LAND USE DEFINITIONS

Term	Definition
Supermarket (Full line)	Self service retail shop selling a full range of food and other household goods including packaged groceries, fresh meat, bakery and deli departments, fresh fruit and vegetables and frozen foods. For example, Coles and Woolworths.
Supermarket (Other)	Self service retail shop selling food and other household goods but with a more limited range. For example, Aldi, Foodworks, Woolworths Metro and IGA.
Specialty store (food)	A retail business that focuses on a specific category of food products. Includes butchers, bakeries and delis.
Speciality store (non-food)	A retail business that focuses on a specific category of non-food products. Includes newsagents, service stations and clothing stores.
Department store	A large retail store selling an extensive rage of goods. For example Myer, David Jones, Harris Scarf and Target.
Large format retail (low density)	Sometimes called bulky goods stores or restricted retail, these are typically characterised by large single storey floor plates, located on major road ways, surrounded by large parking lots and usually owned by national or multi national chains. Low density large format retail businesses are generally over 5,000sqm. Examples of low density large format retail businesses are car and boat yards.
Large format retail (medium density)	Sometimes called bulky goods stores or restricted retail, these are typically characterised by large single storey floor plates, located on major road ways, surrounded by large parking lots and usually owned by national or multi national chains. Medium density businesses are generally between 2,000 and 5,000sqm. Examples of medium density businesses are furniture shops and Bunnings warehouses.
Large format retail (high density)	Sometimes called bulky goods stores or restricted retail these are typically characterised by large single storey floor plates, located on major road ways, surrounded by large parking lots and usually owned by national or multi national chains. High density businesses are generally between 1,000 and 2,000sqm and sell smaller goods that can be carried out of the store. Examples of high density businesses are JB Hi-Fi and Spotlight. High density large format retail can often also be found in shopping centres, not just bulky goods stores or homemaker centres.
Hospitality (Bars/pubs)	Licensed venue for the sale and consumption of alcoholic beverages. May also offer meals and entertainment.
Hospitality (Cafes/restaurants)	Food and beverage businesses serving meals and drinks which can be consumed on the premises. Can be licensed or unlicensed.
Hospitality (Takeaway Food)	Food and beverage businesses where food is prepared on site for consumption elsewhere.
Commercial	Commercial activity includes professional services and office based businesses including lawyers, accountants and financial planners as well as

Term	Definition
	hair dressers, beauty salons, medical centres, fitness centres or gyms, private childcare centres, aged care homes, cinemas and accommodation businesses.
Institutional (Education)	An institution that provides courses of study, e.g. primary and secondary schools, Technical and Further Education (TAFE) institutions and universities.
Institutional (Arts and recreation institutions)	Arts, cultural and sports facilities including theatres and sports clubs. These are predominantly Council or government owned or managed. However, could include private facilities such as a cinema.
Institutional (Hospitals)	Health care institutions that provide inpatient facilities and deliver medical, nursing and related services 24 hours per day, seven days per week. Smaller/non-hospital health and medical services are included under commercial (non-retail). *Note small medical centres/doctors offices sit within the Commerical land use category.*
Institutional (Public and community services)	Council and government owned or managed facilities including libraries, kindergarten and maternal health care services and neighbourhood houses.
Industrial	Consists of heavy or light manufacturing businesses, including warehousing.
Residential	Consists of private and rental dwellings.
Other Land Use	Ancillary floorspace uses (eg. utilities infrastructure, such as sub-stations, telecommunications, drainage reserves)
Vacant	Existing floor space that is vacant (e.g. vacant shops). Does not include vacant land that has not been developed.

APPENDIX 3: CONCORDANCE OF LAND USE TERMS

The following table provides a concordance of land use terms used by SGS in this work with groups of land use terms in Clause 75 of the Victoria Planning Provisions (VPP).

VPP LAND USE TERMS			SGS LAND USE TERMS																				
			Supermarket – full line	Supermarket – other	Department store	Specialty store (non-food)	Specialty store (food)	Large format retail – high density	Large format retail – medium density	Large format retail – low density	Hospitality (cafes, restaurants)	Hospitality (Take-away)	Hospitality (Bars, pubs)	Commercial	Institutional – education	Institutional – health (hospitals)	Institutional – arts & recreation	Institutional – public & community	Industrial	Residential	Other	Vacant	Not included
ACCOMMODATION GROUP																							
Camping and caravan park														x									
Corrective institution																		x					
Dependent person's unit																				x			
Dwelling	Eg.																			x			
	Bed and breakfast													x									
	Caretaker's house																			x			
Group accommodation																				X			
Host farm																				x			
Residential building	Eg.																			x			
	Backpackers' lodge													x									
	Boarding house																			X			
	Hostel													x									
	Nurses' home																			x			
	Residential aged care facility	Eg.												x									
		Nursing home												x									
	Residential college														x								
	Residential hotel	Eg.												X									
		Motel												x									
Residential village																				X			
Retirement village																				x			
CHILD CARE CENTRE GROUP																							
Child care centre	Eg.													X									
	Kindergarten														X								
EDUCATION CENTRE GROUP																							
Education centre	Eg.																						
	Business college													X									
	Employment training centre													x									
	Primary school														X								
	Secondary School														X								
	Tertiary institution														X								

VPP LAND USE TERMS			SGS LAND USE TERMS																			
			Supermarket – full line	Supermarket – other	Department store	Specialty store (non-food)	Specialty store (food)	Large format retail – high density	Large format retail – medium density	Large format retail – low density	Hospitality (cafes, restaurants)	Hospitality (Take-away)	Hospitality (Bars, pubs)	Commercial	Institutional – education	Institutional – health (hospitals)	Institutional – arts & recreation	Institutional – public & community	Industrial	Residential	Other	Vacant	Not included
INDUSTRY GROUP																						
Materials recycling																			x			
Refuse disposal																			X			
Research and development centre														x								
Rural industry	Eg.																				X	
	Abattoir																				X	
	Sawmill																				x	
Service industry	Eg.													X								
	Car wash													X								
	Dry cleaner													X								
	Motor repairs	Eg.																	X			
		Panel beating																	X			
Transfer station																			x			
LEISURE AND RECREATION GROUP																						
Major sports and recreation facility	Eg.													X								
	Race course													x								
Minor sports and recreation facility	Eg.													X (Privately owned or high revenue raising)				x (Publically owned or community-serving)				
	Indoor recreation facility	Eg.												x				x				
		Dancing school												x				x				
	Informal outdoor recreation																				x	
	Open sports ground																	x				
	Outdoor recreation facility													x								
	Restricted recreation facility													X (Gyms, fitness centres, bowling etc.)				X (Publically owned or community-serving eg. sports clubs)				
Motor racing track														x								
OFFICE GROUP																						
Office	Eg.													X								
	Bank													X								
	Electoral office													X								
	Medical centre													X								
	Real estate agency													X								
	Travel agency													x								

VPP LAND USE TERMS		**SGS LAND USE TERMS**																				
		Supermarket – full line	Supermarket – other	Department store	Specialty store (non-food)	Specialty store (food)	Large format retail – high density	Large format retail – medium density	Large format retail – low density	Hospitality (cafes, restaurants)	Hospitality (Take-away)	Hospitality (Bars, pubs)	Commercial	Institutional – education	Institutional – health (hospitals)	Institutional – arts & recreation	Institutional – public & community	Industrial	Residential	Other	Vacant	Not included
PLACE OF ASSMEBLY GROUP																						
Amusement parlour													X									
Carnival													X									
Cinema													X									
Circus													X									
Drive-in theatre													X									
Exhibition centre	Eg.												X (variable)			X (variable)						
	Art gallery															X						
	Museum															x						
Function centre	Conference centre												X									
	Reception centre												X									
Hall													X (variable)				X (variable)					
Library																	X					
Nightclub	Cabaret												X									
Place of worship																	x					
Restricted place of assembly													X (variable)				X (variable)					
UTILITY INSTALLATION GROUP																						
Minor utility installation	Eg.																			X		
	Water retarding basin																			X		
Reservoir																				x		
Telecommunications facility																				x		
WAREHOUSE GROUP																						
Commercial display area													X									
Fuel depot	Eg.																	X				
	Liquid fuel depot																	X				
	Solid fuel depot																	X				
Mail centre																		x				
Milk depot																		x				
Store	Eg.																	X				
	Boat and caravan storage																	X				
	Freezing and cool storage																	X				
	Rural store																	X				
	Shipping and container storage																	X				
	Vehicle store																	x				

VPP LAND USE TERMS			SGS LAND USE TERMS																				
			Supermarket – full line	Supermarket – other	Department store	Specialty store (non-food)	Specialty store (food)	Large format retail – high density	Large format retail – medium density	Large format retail – low density	Hospitality (cafes, restaurants)	Hospitality (Take-away)	Hospitality (Bars, pubs)	Commercial	Institutional – education	Institutional – health (hospitals)	Institutional – arts & recreation	Institutional – public & community	Industrial	Residential	Other	Vacant	Not included
RETAIL PREMISES GROUP																							
Food and drink premises	Eg.										X	x											
	Convenience restaurant										X												
	Hotel										X												
	Restaurant										X												
	Take away food premises											X											
	Tavern										X												
Gambling premises	Eg.													X									
	Betting agency													X									
	Gaming premises													X									
Landscape gardening supplies	Eg.							X															
	Garden supplies							X															
	Plant nursery							X															
Manufacturing sales																			X				
Market	Eg.													X (if land used solely for this purpose)									
	Community market													X									
	Trash and treasure market													X									
Motor vehicle, boat or caravan sales	Eg.									X													
	Car sales									X													
Postal agency						X																	
Primary produce sales																					x		
Shop	Adult sex bookshop					x																	
	Beauty salon													X									
	Bottle shop						X																
	Convenience shop						X																
	Dry cleaning agent													X									
	Department store				X																		
	Hairdresser													X									
	Laundromat													X									
	Restricted retail premises	Eg.						X (varies)	X (varies)	X (varies)													
		Equestrian supplies						X															
		Party supplies						X															
	Supermarket		X Greater than 2,500 sqm	X 1,000-2,500sqm																			
Trade supplies	Eg.							X (varies)	X (varies)	X (varies)													
	Timber yard								x														

VPP LAND USE TERMS	SGS LAND USE TERMS																				
	Supermarket – full line	Supermarket – other	Department store	Specialty store (non-food)	Specialty store (food)	Large format retail – high density	Large format retail – medium density	Large format retail – low density	Hospitality (cafes, restaurants)	Hospitality (Take-away)	Hospitality (Bars, pubs)	Commercial	Institutional – education	Institutional – health (hospitals)	Institutional – arts & recreation	Institutional – public & community	Industrial	Residential	Other	Vacant	Not included
LAND USE TERMS THAT ARE NOT NESTED																					
Art and craft centre												X (variable)			X (variable)						
Brothel																			x		
Car park																			x		
Cemetery																			x		
Cinema based entertainment facility												x									
Crematorium																			X		
Display home												X									
Emergency services facility																X					
Freeway service centre																X					
Funeral parlour												X									
Helicopter landing site																			X		
Home occupation																		X			
Hospital														X							
Natural systems																					x
Research centre												X									
Saleyard																			X		
Service station				X																	
Tramway																					x
Veterinary centre												x									
Winery																			x		

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