

Activity Centres Strategy Background Paper

2019

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1. Introduction

1.1. Purpose of this Paper

This background paper reviews the issues facing Casey's activity centres and identifies opportunities for improved activity centre planning policy. The paper builds on the Retail and Other Employment Floorspace Assessment recently completed by SGS Economics & Planning Pty Ltd for the City of Casey (Employment Floorspace Assessment). The paper, together with the Employment Floorspace Assessment, detail the strategic justification for the directions of the 2019 Casey Activity Centres Strategy and Action Plan where that justification is not set out in the Strategy itself.

Casey's Activity Centres Strategy articulates Council's vision for a network of activity centres in Casey and provides guidance on how to accomplish this vision through clear policy direction on the location, size, and design of non-residential use and development across the municipality. It builds on existing local activity centres and retail policies, consistent with the Plan Melbourne activity centres planning framework. Once implemented into Casey's Planning Scheme, this work will provide a strategic basis for the assessment of statutory planning applications, rezoning requests, and other strategic planning related to retail, commercial, and most other non-residential land uses in Casey.

1.2. Background to Project

Casey's most recent activity centres strategies were prepared in 2006 and 2012 and have provided the municipality with a comprehensive framework for activity centres planning. The 2006 strategy was given effect in the Casey Planning Scheme's Retail Policy, while the 2012 strategy was not. A review and update of the strategies and retail policy is now necessary to respond to rapid growth, economic trends, and changes in State policy. Specifically, some major components of this review include:

- A focus on job creation within activity centres with specific emphasis on the role of non-retail employment within centres, which has been lacking in previous strategies.
- An update the hierarchy of centres to conform with the latest Metropolitan Planning Strategy, Plan Melbourne.
- Policy direction to balance the need for new/expanding centres to cater for significant growth in greenfield areas and preserving the integrity of existing centres.
- Planning strategy that responds to the ascendance of online retailing and large format discount retail.
- A new Health and Education Precinct (HEP) and Restricted Retail Precinct (RRP) classification types included in the activity centre hierarchy.

1.3. Policy Context

State and local planning policies support the activity centres and 20-minute neighbourhood concept and provide a firm policy basis and planning framework for Casey's Activity Centres Strategy. The following key policy documents at the State and local level are relevant to this work.

State

Victoria Planning Provisions (VPP) and Planning Policy Framework (PPF)

Defines the tools and overarching planning policy framework for all local governments. New commercial and residential zones have been created since the last Casey Activity Centres Strategy was adopted.

Plan Melbourne

The current State Government strategic plan for metropolitan Melbourne, which is adopted into the

PPF. This is the document that determines the location of Metropolitan and Major Activity Centres throughout Melbourne.

Growth Corridor Plans

Growth Corridor Plans are high level integrated land use and transport plans for Melbourne's growth corridors. Casey is within the area covered by the South East Growth Corridor Plan. Activity centres are shown on these plans.

Southern Regional Land Use Framework Plan

Plan Melbourne calls for the creation of Regional Land Use Framework Plans to promote efficient and coordinated regional planning throughout Melbourne in a similar manner to the Regional Land Use Plans that cover regional Victoria. The Southern Metro Region includes the local government areas (LGAs) of Casey, Cardinia, Greater Dandenong, Frankston, Kingston, and Mornington Peninsula. The Southern Regional Land Use Framework Plan addresses common regional planning issues that these six metropolitan LGAs face. This shared vision provides a basis for greater consistency in local and regional decision making to provide certainty for investment. The Southern Regional Land Use Framework Plan is consistent with the vision for land use and activity centres set forth in Plan Melbourne.

Precinct Structure Plans (PSP)

PSPs are master plans created by the Victorian Planning Authority in coordination with local councils, which cover greenfield sites inside Melbourne's Urban Growth Boundary that cater for between 10,000 to 30,000 people. There are approximately 12 PSPs that have been approved and several more proposed in the City of Casey. The locations of new activity centres in greenfield areas are decided through the PSP process.

Urban Design Guidelines for Victoria 2017

Statewide urban design guidelines, which include design guidance for activity centres.

Local

Casey C21 - A Vision for our Future (2002), Building a Great City (2011), and Creating A Great City (2017)

Present a long-term vision and council plan for Casey as a whole. The important role of activity centres to support economic growth is supported by the various iterations of the C21 vision and plans. Part of this vision for Casey to become "Australia's most liveable city."

Municipal Strategic Statement (MSS)

The MSS contains the key strategic planning, land use and development objectives for the municipality, along with the strategies and actions required to achieve them.

Retail Policy (Casey Planning Scheme, Clause 22.07)

Details the existing retail centres hierarchy and adopted local policies related to activity centres. The strategic basis for Clause 22.07 is the 2006 Activity Centres Strategy. The relevance of the 2006 Activity Centres Strategy is limited because it aligns with the now outdated Melbourne 2030 policy framework.

2012 Activity Areas Strategy and Non-Residential Uses Strategy

A review and update of the 2006 Casey Activity Centres Strategy, in response to significant growth and changes to activity centres. The updated strategy has been adopted by Council but has not been given effect in the Casey Planning Scheme. It also aligns with the now outdated Melbourne 2030 policy framework.

Non-Residential Uses in Residential and Future Residential Areas Policy (Casey Planning

Scheme, Clause 22.02)

Casey's planning policies on non-residential uses in residential areas, which generally encourages non-residential uses to group around activity centres and provides standards for the location of such uses within residential areas. Includes specific guidance for appropriately locating certain uses in residential areas, such as medical centres and places of assembly/places of worship. This policy is informed by the 2006 Activity Centres Strategy and several earlier policy documents, such as the City of Casey Medical Centres Policy (1996) and the City of Casey Places of Assembly/Worship Policy (2004).

Casey Housing Strategy

Adopted in 2015 and updated in 2017. The Housing Strategy recommends higher density residential zoning for certain established residential areas surrounding activity centres and public transportation routes to provide diverse and needed housing types throughout Casey

Casey-Cardinia Economic Development Strategy

A strategy for council's economic development activities, in coordination with adjacent Cardinia Council. Sets forth recommended actions to stimulate investment and the growth of local jobs, with emphasis on job growth in activity centres.

Casey Parking Strategy 2018

Sets Council's direction for parking management and planning, especially within activity centres.

Casey Municipal Health and Wellbeing Plan

A plan to analyse and prioritise the community's health and wellbeing goals. Objective 2.1 states: "Design and activate neighbourhoods to facilitate physical activity in daily life." This objective is achieved in large part through the creation of a walkable citywide network of activity centres. Food security and access to healthy food is also discussed in this plan.

"Streets Ahead" Integrated Transportation Strategy

Casey's Integrated Transportation Strategy plans for all modes of transportation in conjunction with land use planning. It focuses on the 20-minute neighbourhood concept and network of activity centres.

1.4. Public Consultation Process

Community Consultation

In November and December 2016, Council Officers conducted a community engagement program concerning Council's activity centres. The program sought to understand how the community used and accessed the activity centres within Casey, what the community found to be the biggest problems and how the activity centres could be improved. Surveys were conducted online and face to face at 15 activity centres throughout the municipality. The survey asked people questions about what centres they use the most, what they use the centre for (e.g. shopping, eating out, work, meeting friends, etc.), and what could be improved in their local activity centre (e.g. needs more variety of shops, better parking, better public amenities, etc.). A complete summary of the results of this community consultation is included as Appendix A. – Resident Consultation Summary Report.

Some highlights of the community consultation feedback include:

- People use their activity centres mostly for grocery shopping, other retail shopping, medical clinics, and eating out/going to cafes
- Driving is the most common way people get to their centres in Casey, followed by walking

Industry Consultation

In May 2017, Council Officers held in-depth interviews with ten key industry stakeholders to ask about how Casey's activity centres and centres policies were working and how they could be improved. The industry stakeholders included commercial property developers, supermarket operators, shopping centre managers, and major land owners. A complete summary of the results of this community consultation is included as Appendix B. – Industry Consultation Summary Report.

Some highlights of the industry consultation feedback include:

- Industry stakeholders are generally aware of Casey's existing activity centres strategy and understand its value in preventing ad hoc and inefficient development patterns
- Some industry stakeholders think the activity centres strategy should offer greater flexibility for larger developments and be more responsive to emerging retail trends

1.5. Economic Assessment of Retail and Other Employment Floorspace

A recent analysis was completed by SGS Economics & Planning Pty Ltd for the City of Casey, which assessed retail and other employment floorspace demand and supply for the community (Employment Floorspace Assessment). The assessment looked at the composition and distribution of retail and other employment uses in Casey's existing activity centres, reviewed the most recent Activity Centres Strategy and hierarchy of centres, and modelled the current demand for and supply of employment floorspace in the municipality. The main recommendations of the assessment are an updated activity centres hierarchy, aspirational classifications for some centres recognising their desired future roles in the region, and the optimal rollout of activity centre floorspace across the municipality. This assessment informs the updated activity centres hierarchy used in the updated strategy.

Key facts and findings of the assessment:

- Casey's activity centres contain two per cent of the municipality's land area, 39 percent of the jobs, and 0.7 per cent of the dwellings.
- The activity centres hierarchy forms a network of 48 existing and 32 planned activity centres in Casey.
- There are no significant gaps in Casey's network of existing and planned activity centres, based on a 20-minute neighbourhood concept for each neighbourhood. In the yet to be planned growth areas, the assessment recommends several additional neighbourhood centres to fill network gaps.
- Restricted Retail Precincts and out-of-centre retail uses, which are usually car-dependent areas along main roads away from where people live, such as homemaker centres and big box retail sites, can undermine the centre hierarchy if they're not well regulated. Conventional retail uses (i.e. not restricted retail) ought to be kept within the activity centres network to maintain the viability of the 20-minute neighbourhood concept.

Additionally, the assessment identified and considered the following policy gaps and concerns in terms of activity centre planning in Casey:

- The need for further employment diversification to promote self-sufficiency within Casey. This can be promoted by ensuring a sufficient level of commercial (non-retail) floorspace is available in Casey's activity centres, particularly in Metropolitan and Major Activity Centres.
- Encouraging diverse retailing formats, particularly smaller format and discount department stores.
- The need for more activity centre floorspace to be planned for and kept available in PSP areas to ensure that an adequate level of retail growth can occur in these areas.

- The need for more supermarket floorspace to be planned for the municipality.
- The need for Medium and Local Neighbourhood Activity Centres to provide convenient and walkable access to local services and facilities to all residents in Casey.
- The need to discourage ad hoc establishment of restricted retail across the municipality.

2. Activity Centres Network

2.1. Proposed Hierarchy of Centres

A revised network of activity centres and hierarchy of centre types is needed to bring Casey's planning policies into conformance with the Metropolitan Planning Strategy, Plan Melbourne. The SGS Employment Floorspace Assessment provides a floorspace demand analysis, walkable catchments analysis, and other local economic data underpinning this new hierarchy. There are several updates to specific centre's classifications proposed in the revised hierarchy. Restricted Retail Precincts and Health and Education Precincts are included in the new hierarchy, which is also further explained in the Employment Floorspace Assessment. The proposed hierarchy is summarised in the following figure.

Centre Type	Employment Floorspace range	Key functions									Key objectives
		Spmkt FL/SF	DS / DDS	Spec	Hosp	RR	Major Ent	Emp Com	Major H&E	Res	
Metropolitan activity centre	More than 100,000 sqm	2+ FL 2+SF	1+ DS 2+ DDS	-	-						- To play a key regional role in the metropolitan economy, providing a diverse range of employment opportunities for the region. - To provide excellent access to higher order services that serve the north (Narre Warren-Fountain Gate CBD) and south (Cranbourne Town Centre) of the municipality. - To provide a broad mix of higher-order activities, including a department store and discount department stores, entertainment, and attract a significant level of visitation.
Major activity centre	20,000 up to 100,000 sqm	2+ FL 1+SF	1-2 DDS								To serve a subregional catchment, providing a range of retail, employment, community, health and education facilities and services, and housing options.
Neighbourhood activity centre (medium)	5,000 to 20,000 sqm	1-2 FL 1+SF									To provide for the day-to-day and weekly retail and service needs at a neighbourhood level.
Neighbourhood activity centre (local)	Up to 5,000 sqm	1 SF									
Health and education precinct	-	-	-	-		-					To continue to grow as a significant health and education based employment precinct in Casey and surrounding municipalities.
Restricted retail precinct	5,000 to 50,000 sqm	-									To provide convenient access to a comprehensive range of bulky goods across the municipality.

Low focus

Medium focus

Strong focus

Low focus

Medium focus

Strong focus

Figure 1 - Activity Centre Hierarchy (SGS Employment Floorspace Assessment)

Aspirational Centre Classifications

The Employment Floorspace Assessment identifies two centres having potential to change to a higher designation in the hierarchy, due to their size, function, and potential for growth. This includes Cranbourne Town Centre (currently a Major), which has the potential to be designated a Metropolitan Activity Centre. Eden Rise Medium NAC is also identified having the potential to include the nearby Berwick Springs retail developments to form a single Major Activity Centre to be called Berwick South Central. In the meantime, Eden Rise and Berwick Springs are proposed to be designated as two separate Medium NACs. These aspirational designations are not proposed in the new hierarchy but are recommended as future advocacy items to include to the next update of Plan Melbourne and future updates to Casey's Activity Centres policies.

2.2. Walkable Catchments Analysis

Victorian State Government strategic planning policy recognises the essential role that a network of walkable and thriving activity centres plays in the liveability of Metropolitan Melbourne. Plan Melbourne envisions a city built upon the '20-minute neighbourhood' concept, which it defines as 'the ability to meet most everyday (non-work) needs locally, primarily within a 20-minute walk, cycle or local public transport trip of home'.

The SGS Employment Floorspace Assessment assessed the walkable coverage of Casey's activity centres using a 1.5km simple buffer from all centres, which reflects a 20-minute walk at 5kph. An additional analysis was completed by Council Officers using an 800-metre buffer from all centres in the network based on only existing public footpaths, which shows more gaps than the 1.5km buffer analysis, but still covers much of the established and greenfield areas of the municipality. 800 metres is the generally recognised walkable catchment distance used by the State Government for "20-minute neighbourhood" network walkability analyses. As Casey's growth areas continue to build out and additional streets and paths are constructed, the catchments of each centre will grow, and the gaps shown in the 800 metre existing footpaths catchment map will be reduced in size.

While there are some walkability gaps in the network of centres, it is important to note that this level of walkable coverage is typical of outer suburban areas. The Casey Housing Strategy has also planned for greater population densities in the immediate vicinity of Casey's larger activity centres to support a walkable 20-minute neighbourhood concept. In some cases, there are low density residential areas and unpopulated areas such as landfills and golf courses in some of the gaps unserved by activity centres. In other cases, there are existing out-of-centre convenience store/milk bars located in the gaps that provide a basic level of walkable retail services and neighbourhood amenity where a centre has not been formally designated.

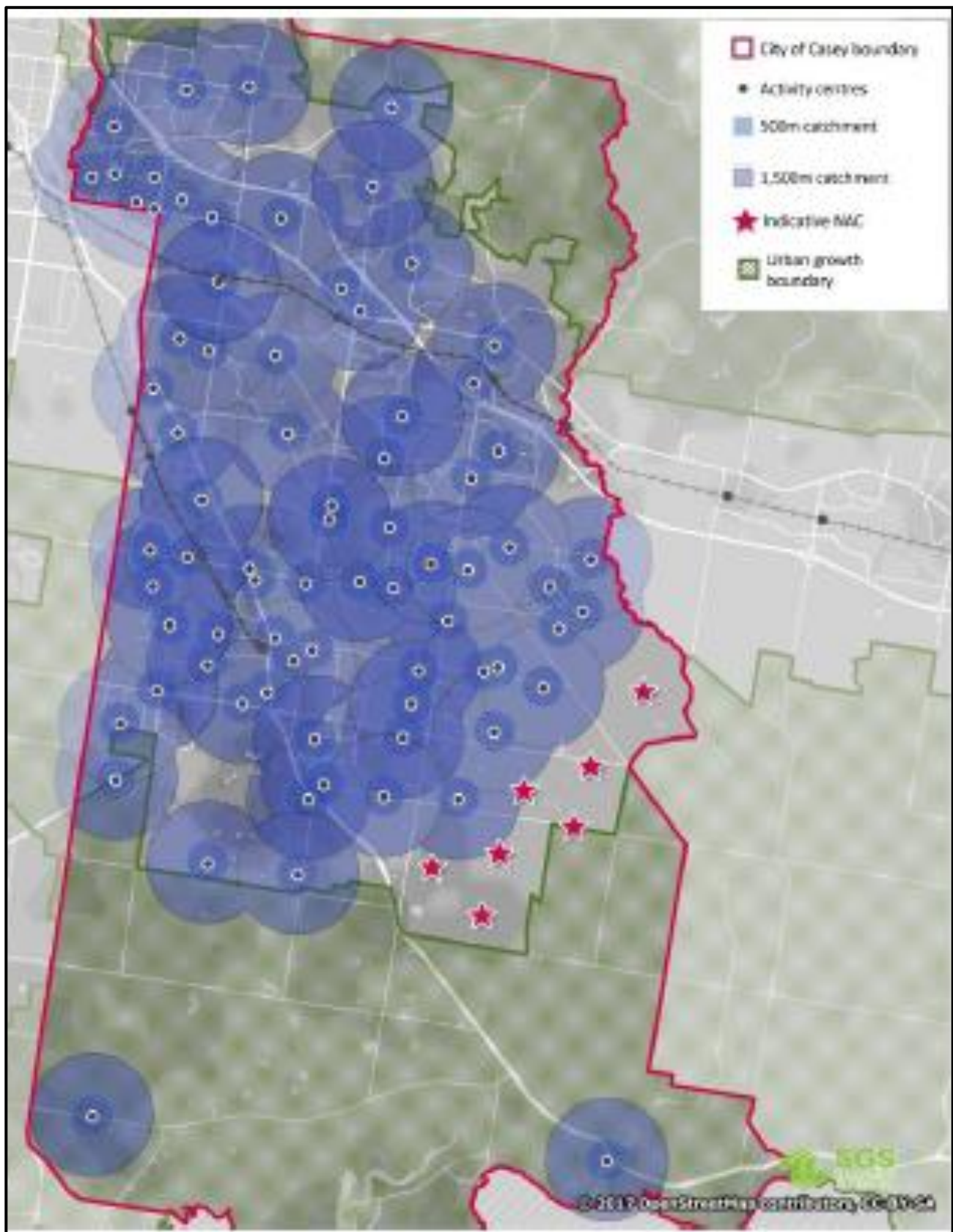


Figure 2 - 1.5km Walkable Catchments (Using Simple Buffers – SGS Employment Floorspace Assessment)

2.3. Profiles of Specific Centres

The City of Casey is Victoria's largest municipality and contains 81 designated activity centres of various sizes that are either existing or planned. Profiles of Casey's metropolitan and major activity centres are included below, which examine and outline the role of these important centres as part of a network of activity centres in Casey.

Fountain Gate-Narre Warren CBD (Metropolitan Activity Centre)

Fountain Gate-Narre Warren CBD is at the very heart of the City of Casey and the broader sub-region it services. Long established as a major retail destination and civic centre; it is now transitioning into the next growth phase. Over the next twenty years, with a strong focus on economic investment, job creation and residential growth, the CBD will mature into a truly diverse centre to serve the rapidly growing South East Growth Corridor.

The Activity Centre Zone currently applies to the centre, which implements the vision set forth in the Fountain Gate-Narre Warren CBD Structure Plan and Plan Melbourne.

The centre has a total of approximately 255,776 square metres of employment building floorspace (i.e. retail, office, institutional, industrial, but not residential). Over the next 20 years, there is a forecast demand for the centre to grow to approximately 368,630 square metres in total employment floorspace.

The objectives of the Fountain Gate-Narre Warren CBD are:

- To play a key regional role in the metropolitan economy, providing a diverse range of employment opportunities for the region.
- To provide excellent access to higher order services that serve the north of the municipality.
- To provide a broad mix of higher-order activities, including a department store and discount department stores, entertainment, and attract a significant level of visitation.
- To develop an accessible, high amenity and high connectivity centre, with consideration for adequate transport provision, walkability, safety, and attractive environments.

The future focus of the Fountain Gate-Narre Warren CBD should be the attraction and fostering of higher order commercial activity to play a greater role in the provision of a diverse range of local employment opportunities in Casey.

In addition, the centre should seek to further diversify the range of facilities and services which are available, including community, social, community, cultural and entertainment activities. The co-location of these activities with retail and commercial activity are more likely to result in multi-purpose trips, reducing overall transport demand. Improvements to centre amenity, walkability and the broadening of the offer in the centre will also support the development of higher density housing and employment-generating uses.

Cranbourne Town Centre

Cranbourne Town Centre is a key established activity centre within a rapidly growing and changing surrounding context. Cranbourne Town Centre is the next largest activity centre in the City of Casey after Fountain Gate-Narre Warren CBD. Its position in the southern part of Casey's urban area means that it should serve the daily needs of the local population but also provide higher-order employment, open space, recreation and entertainment facilities and community services for a larger catchment area. This is currently designated as a Major Activity Centre but is aspiring to a future metropolitan activity centre status to recognize its full potential as Casey's southern metropolitan activity centre serving a regional catchment.

The Activity Centre Zone currently applies to the centre, which implements the vision set forth in the Cranbourne Town Centre Structure Plan.

The centre has a total of approximately 268,816 square metres of employment floorspace. Over the next 20 years, there is a forecast demand for the centre to grow to approximately 348,056 square metres in total employment floorspace.

The objectives of the Cranbourne Town Centre are:

- To play a key regional role in the metropolitan economy, providing a diverse range of employment opportunities for the region.
- To provide a broad mix of higher-order services and activities in the south of the municipality, including a department store and discount department stores, entertainment, and attract a significant level of visitation.
- To develop an accessible, high amenity and high connectivity centre, with consideration for adequate transport provision, walkability, safety, and attractive environments.

The future focus of the Cranbourne Town Centre should be the attraction and fostering of higher order commercial activity to play a greater role in the provision of a diverse range of local employment opportunities in Casey.

Berwick Village

Berwick Village has a special character with its traditional English village 'feel', vibrant street life, mix of retail and commercial office activities, heritage buildings, and distinctive tree plantings.

The core of the centre is zoned Commercial 1 (C1Z) and is within a Development Plan Overlay that gives effect to the Berwick Village Structure Plan.

The centre has a total of approximately 73,240 square metres of non-residential building floorspace (i.e. retail, office, institutional). Over the next 20 years, there is a forecast demand for the centre to grow to approximately 93,500 square metres in total non-residential floorspace.

Berwick Village has little additional capacity. While it is an active, vibrant, street-based centre with fine-grained retail typology, its pedestrian accessibility could be improved to promote walkability across, to and from the centre.

As a major activity centre, the Berwick Village Activity Centre serves a subregional catchment, providing a range of retail, employment, local entertainment, community, health and education facilities and services, and housing options. Its future focus should be to continue in this Major Activity centre role, protect its unique 'village character' and the prominence of High Street, while complementing the growth and development of the nearby Berwick Health and Education Precinct.

Casey Central

Casey Central is a Major Activity Centre located in Narre Warren South. It is currently developed in a typical suburban, car-oriented layout, with buildings set back from the street and large surface car parks. A planned street-based mixed-use town centre will be integrated to the south over time as part of the proposed Casey Central Town Centre PSP.

The centre has a total of approximately 29,000 square metres of floorspace. Over the next 20 years, there is a forecast demand for the centre to grow to approximately 52,000 square metres in total floorspace.

The Centre's future growth to the south can leverage its location on Narre Warren-Cranbourne Road, its proximity to public transport, and the existing activity in the developed northern area of the centre. The new development will be mixed use, with a core retail function (including leisure and lifestyle, health and wellbeing, entertainment and hospitality uses), along with a significant commercial offer, including a multi-storey office, medical and commercial developments. A portion of the undeveloped land will be dedicated to restricted retail uses, with opportunity to transition to a larger traditional retail, employment and civic precinct.

Endeavour Hills Town Centre

While population in Endeavour Hills has been stable, or gradually declining, there has been reasonable levels of population growth projected for the surrounding north-west corner of Casey. Some degree of the anticipated regional activity centre demand in this area is expected to be absorbed by the Dandenong Town Centre. However, some growth is expected in the Endeavour Hills Town Centre.

The centre has a total of approximately 37,570 square metres of building floorspace. Over the next 20 years, there is a forecast demand for the centre to grow to approximately 53,670 square metres in total non-residential building floorspace.

Endeavour Hills Major Activity Centre is unique for its mostly internalised mall design and lack of an adopted structure plan. A Council Community Hub facility exists on the south side of the centre, which adds some public open space and “human scale” walkable design elements to its otherwise car-oriented centre. The public consultation revealed that Endeavour Hills Activity Centre is highly used and valued by the local community for shopping and dining. There is a need to better integrate the Endeavour Hills Shopping Centre with the Endeavour Hills Community Hub and diversify the uses within the Centre.

Hampton Park Town Centre

The Hampton Park Town Centre is expected to grow only moderately in coming years, given limited population growth projected in the area. The centre needs investment to improve amenity and the quality of offer, rather than an increase in floorspace. The primary challenge facing the centre is a fragmented development patterns and disjointed access through the centre. The Hampton Park Central Development Plan was recently updated. This plan establishes a high amenity mixed-use and street-based vision for the future of the centre. There are community facilities on the west side of the centre, which Council is planning to redevelop and revitalise soon.

The centre has a total of approximately 45,248 square metres of floorspace (e.g. retail, office, institutional, industrial space). Over the next 20 years, there is a forecast demand for the centre to grow to approximately 61,586 square metres in total building floorspace.

Over time, Hampton Park Town Centre will need to expand retail and commercial uses within and improve access and legibility and support a thriving community hub and ensure the long term viability of the centre.

Hardy’s Road Major Town Centre (Proposed) and Clyde Major Town Centre (Proposed)

Casey’s two growth area proposed major activity centres, Hardy’s Road (Clyde North) and Clyde Town Centre, are both anticipated to come online in 2026, given the significant population growth forecasted for these areas at this time. Nearby growth is expected to be absorbed by Cranbourne and other existing or 2021-proposed centres. Both are to initially be anchored by a single supermarket and will grow to sub-regionally significant centres. Hardy’s Road is to service both the Thompsons Road PSP area as well as the Clyde Creek PSP area, while the Clyde Town Centre will service the Clyde Creek PSP area and the Casey Fields South Residential PSP area.

Eden Rise and Berwick Springs Neighbourhood Activity Centres

The Eden Rise centre is a significant Medium Neighbourhood Activity Centre located at the southern end of Berwick. It is on the larger end of the spectrum for a Medium NAC, with approximately 15,000 square metres floorspace currently and the market catchment that provides the potential to grow to approximately 32,000 square metres in floor area by 2036. Berwick Springs is an ad-hoc grouping of retail developments to the northwest of Eden Rise. This development is currently not designated as an activity centre and has been established over time through a series of discretionary planning permit approvals on residential zoned land due to its locational attributes at the intersection of two arterial roads and its close proximity to Eden Rise.

The Employment Floorspace Assessment provides strategic justification for the future establishment of a Berwick South Central Major Activity Centre in Plan Melbourne. This would be a consolidation of the Eden Rise and Berwick Springs Medium Neighbourhood Activity Centres into a single Major Activity Centre. This aspirational Major designation is not proposed in the new hierarchy but is recommended as future advocacy item to include in the next update of Plan Melbourne. In the meantime, Eden Rise and Berwick Springs are proposed to be designated as two separate Medium NACs.

2.4. Urban Design Guidelines

The design and appearance of activity centres should emphasise community values and local identity. A growth area council like Casey must work harder to create and foster this sense of place and unique identity in its many growing town centres. Without a focused effort on design and identity the default will be an “any town” generic look and feel driven by the corporate preferences of franchises and supermarkets, which thrive on consistency instead of interesting local differentiation.

In the face of rapid technological disruption, well-designed and vibrant activity centres provide sorely needed quality gathering places for face-to-face social interaction. This is essential to community health in an online age where people are increasingly connected only through digital social networks that are impersonal and placeless. The design of centres is therefore critical to attracting consumers and creating a successful sense of place in activity centres and boosting a community’s social health.

The updated activity centres strategy includes design guidelines for the overall layout or ‘structure’ of activity centres, including the public open space, streets and pathways, public transport connections, and building design. These guidelines provide consistent citywide policy direction for activity centre design. They are intended for use in both strategic-level planning decisions when creating new activity centre structure plans, and in permit-level site planning decisions in activity centres with no adopted specific design guidance in a structure plan, urban design framework or development plan.

The design guidelines are largely based on the Urban Design Guidelines for Victoria, but are customised for Casey’s context, focusing on urban design best practice in an outer suburban context.

3. Job Creation in Activity Centres

3.1. Planning Provisions to Boost Jobs in Centres

Casey’s 2017 population was 326,820, an increase of 14,031 people over the previous year, at a growth rate of 4.49 percent. This substantial growth is the pre-eminent characteristic of Casey and will have a significant impact on planning and land use decision-making over the next two to three decades as the city continues to be one of the fastest growing municipalities in Australia.

There are approximately 69,700 jobs in Casey, with 27,500 (or 39 per cent) of these jobs located within existing activity centres. While there has been strong growth in employment over the last few decades this has not fully kept pace with population growth. In the Casey-Cardinia Region local employment self-containment is approximately 33 percent, which is typical of outer metropolitan growth areas. This means that almost 70 per cent of locals who work are still leaving the area to go to work each day at places such as Dandenong and the Melbourne CBD.

Currently, the largest employment sectors in the city are retail and hospitality (primarily within activity centres), healthcare and social assistance, construction, and education.

Within the activity centres, employment is now predominantly comprised of retail and commercial services with significant institutional employment in Cranbourne and the Berwick Health and Education Precinct. A key aspiration of the City of Casey is to increase the provision of local high-wage jobs, with a greater emphasis being placed on facilitating local employment in activity centres close to where people live.

Many of Casey's growth area Precinct Structure Plans (PSP) include floorspace targets for non-retail uses such as commercial office. The 2019 Activity Centres Strategy update includes policy directions to increase non-retail floorspace in all of Casey's activity centres through non-retail floorspace targets and minimum building height targets. These strategies aim to discourage stand-alone single storey retail developments, which make inefficient use of valuable activity centre land and create few high-wage jobs for the community.

3.2. Non-Retail Floorspace and Building Height Targets

Increasing non-retail employment floorspace (i.e. office, institutional) and building heights in Casey's activity centres to accommodate more local knowledge-based higher wage job opportunities is consistent with Plan Melbourne Policy 1.1.7 to "plan for adequate commercial land across Melbourne" and Direction 1.2 to "improve access to jobs across Melbourne and closer to where people live." It is also consistent with Objective 2 of the Casey Council Plan, which envisions "a thriving economy with local jobs, investment and new industries." Casey Council Plan. The Employment Floorspace Assessment recommends exploring a "ratio for retail compared to commercial floorspace, in higher order centres" and "Increase ratio of non-retail employment activity using zoning and policy."

Non-Retail Floorspace Targets

The following factors were considered when determining appropriate non-retail floorspace targets for each centre type in the new activity centre hierarchy: 1) the SGS Employment Floorspace Assessment's "Optimal Centre Rollout" projections, 2) comparable precinct-level non-retail floorspace targets developed by the State Government in Casey's growth areas and other relevant metropolitan area strategic work, and 3) industry stakeholder consultation. The results of this analysis and the recommended floorspace targets are explained below.

Non-Retail Floorspace Assessment "Optimal Centre Rollout"

The Employment Floorspace Assessment projects the demand for retail and non-retail floorspace in each of Casey's activity centres through 2036. This is referred to as the Optimal Centre Rollout and it presents the ideal delivery of floorspace across the network based largely on a business-as-usual job growth scenario using past population and employment trends, but also assumes small increases in Casey's share of regional employment growth due to some modest policy intervention and investment. This is considered a targeted and modest job growth scenario. The percentage of non-retail floorspace projected at the 2036 horizon year provides a helpful snapshot of a modest job growth future floorspace breakdown for Casey's activity centres. It offers a good starting point (i.e. baseline level of job growth) when determining an appropriate non-retail floorspace target for each centre type in local planning policy. The Optimal Centre Rollout data is summarised in Table 1.

Comparable Precinct Structure Plan Floorspace Targets

The Victorian Planning Authority (VPA) has a target to accommodate one job per household over time in growth areas.¹ There are 18 activity centres in eight Growth Area Precinct Structure Plans in Casey that have adopted non-retail floorspace targets. These are expressed as commercial office floorspace targets within the Town Centre section of the PSPs. The VPA and its predecessor agencies set these targets, which are adopted into the Casey Planning Scheme through the Urban Growth Zone Schedules. The review of comparable floorspace targets from Casey's PSPs is attached in Appendix C and summarised in Table 1.

Comparable Metropolitan Area Strategic Planning Work

In addition to Precinct Structure Plan floorspace targets, the strategic planning work of other municipalities also provides a helpful guide for what may be appropriate non-retail floorspace targets in Casey. The City of Melton recently adopted a new Activity Centres Strategy, which was subsequently adopted into their Municipal Strategic Statement. Melton is a growth area Council with

¹ VPA Strategic Plan 2017-2020 and Growth Corridor Plans: Managing Melbourne's Growth, 2012

some similar local economic characteristics to the City of Casey. The Melton Activity Centres Strategy says regarding Major Activity Centres, “as a target the non-retail floor space of a fully developed [major] activity centre should be 40% of the total floor area”, and regarding Neighbourhood Activity Centres, “as a target the non-retail floor space of a fully developed neighbourhood centre should be at least 30% of the total floor area.”

Brimbank Council provides another good example for Casey, as it was recently considered a growth area but is now maturing. Brimbank now has 1.7 square metres of commercial space to every square metre of retail space citywide². Over time, as Casey’s property market matures and population densities increase, Casey will need to plan for and provide a greater amount of non-retail floorspace.

Centre Type	Metropolitan Activity Centre ³	Major Activity Centres	Neighbourhood Activity Centres
2016 Non-Retail Activity Centre Floorspace	50%	18%	20% (Medium) 35% (Local)
2036 Projected Non-Retail Activity Centre Floorspace (“SGS Optimal Centre Rollout”) ⁴	53%	21%	15% (Medium) 27% (Local)
Average Non-Retail Activity Centre Floorspace Targets in Casey’s PSPs	NA	50%	21% (Medium and Local)
Melton Activity Centres Strategy non-retail floorspace targets	NA	40%	30%
Recommended Non-Retail Floorspace Target	At least 40%	At least 30%	At least 25%

Table 1 - Non-Retail Floorspace Targets Analysis and Recommendations

Recommended Non-Retail Employment Floorspace Targets

Neighbourhood Activity Centres (NAC) – NACs are the most common activity centre type. They serve an essential role in providing walkability to otherwise car-dependent neighbourhoods. The SGS Optimal Floorspace Rollout projected 2036 non-retail floorspace demand in NACs is 15% of total centre employment floorspace in Medium NACs and 27% in Local NACs. This represents a targeted and modest employment growth scenario in Casey. PSP non-retail floorspace targets on average sit at 21% of the total floorspace in NACs. This relatively small percentage dedicated to non-retail is to be expected since most NACs focus on daily “top-up” retail shopping needs and not office uses. There are some NACs that currently have a larger commercial services and offices function, and there is potential to grow that role slightly across most NACs in the network. Therefore, a target of at least 25% non-retail is recommended to encourage slightly more of these non-retail floorspace across Casey’s vast network of NACs. This will encourage more local jobs closer to where people live.

Major Activity Centres – Majors are significant town centres that provide sub-regional population catchments with higher order retail such as discount department stores along with grocery stores, and a full range of office, retail, and community facilities. The projected 2036 non-retail floorspace share according to the SGS Optimal Floorspace Rollout in Major Activity Centres will be 21% and the PSP non-retail floorspace targets for Casey’s two planned growth area Majors is 50%. Majors provide

² Brimbank Development Contributions Plan, November 2016

³ Based on SGS Employment Floorspace Assessment “Optimal Centre Rollout by Sector” data, which included Fountain Gate-Narre Warren CBD and Cranbourne Town Centre under Metropolitan due to the aspiration to designate Cranbourne TC as a Metropolitan Activity Centre in future Metropolitan Planning Strategies.

⁴ 2036 Projected Non-Retail Floorspace excludes proposed growth area centres because growth area PSPs contain centre-specific non-retail floorspace targets which have been considered separately.

significant opportunities for high wage local jobs in Casey. Therefore, a target of at least 30% non-retail floorspace across all of Casey's Majors is recommended.

Metropolitan Activity Centre – The Fountain Gate-Narre Warren CBD Metropolitan Activity Centre is Casey's primary activity centre, serving a regional catchment and including a broad range of uses, including a significant business park. The projected 2036 non-retail floorspace demand for Metropolitan ACs provided by the SGS Optimal Floorspace Rollout data is 53%, although that assessment placed Cranbourne Town Centre in the Metropolitan category because it is an aspirational Metropolitan Activity Centre. The 2036 projected non-retail floorspace demand is less than 53% when only considering the Fountain Gate-Narre Warren CBD alone. Based on stakeholder interviews with key property owners and retailers at Fountain Gate-Narre Warren CBD, a target of at least 40% non-retail is recommended for the centre. This target is reasonable and will encourage more local higher wage jobs in Casey's largest centre.

Minimum Building Height Targets

Single storey retail developments such as stand-alone supermarkets are an inefficient long-term use of valuable activity centre land. Single storey development also is less likely to incorporate non-retail commercial office and institutional floorspace. The single storey stand-alone retailer development model was more common in the past. It is less likely to be developed in much of Melbourne today where high home prices and demand for other commercial uses make multi-storey mixed-use development a viable option. In outer suburban areas such as Casey there is still pressure to develop single storey stand-alone retail in and out of activity centres.

Single-storey development is appropriate for local neighbourhood activity centres, such as a small format grocery store anchoring related storefront retail and commercial tenant spaces. In medium neighbourhood and major activity centres, at least two storeys should be developed in most cases to provide opportunities for more local non-retail businesses. Most Major Activity Centres will have buildings exceeding two storeys, such as offices and apartments. Metropolitan activity centres such as Fountain Gate-Narre Warren CBD, and aspiring metropolitan centres such as Cranbourne, should aim for at least three storeys, and in many cases more than three storeys.

These targets are consistent with the urban design frameworks already adopted for Casey's various activity centres. The height targets will provide activity centres a better chance at satisfying the non-retail floorspace targets to achieve more high-wage job opportunities for the municipality.

Stakeholder Interviews

Stakeholder interviews with shopping centre managers, property developers, and supermarket stakeholders were conducted throughout late 2018 and early 2019, where the proposed non-retail floorspace and building height targets were discussed. There was general agreement about the value of the targets to boost higher wage jobs and diversity of uses on a centre-wide level. There were mixed views about the viability of the targets when applied to individual development proposals in the short term, but broad acceptance of the targets' if applied as discretionary planning policy, where individual site conditions and project staging could be considered on a case-by-case basis at time of planning permit.

Application of the Targets

The non-retail floorspace and building height targets are intended to guide structure planning in activity centres and apply at time of planning permit for larger development proposals. In the case of a planning permit, development proposals the size of a typical small format grocery store (1,000 sqm) or greater are encouraged to incorporate a quantum of non-retail floorspace that matches the centre target (i.e. at least 25% for NAC, 30% for Major, or 40% for Metropolitan) and satisfy the applicable minimum building height requirement. The floorspace and building height targets are discretionary planning policies and not prescriptive standards.

Both the non-retail floorspace and minimum building height targets are minimums (i.e. "at least") and in many cases additional non-retail floorspace or building height above these targets would be

welcome planning outcomes, depending on the centre type, building design, parking needs, and community support.

Where non-retail floorspace and/or building height controls of PSPs, structure plans, or UDFs apply, only the controls of those more specific plans will apply.

DRAFT

Appendices

Appendix A. Community Consultation Summary

DRAFT

City of Casey Activity Centre Strategy Review 2017 Resident Consultation Summary

Prepared by the City of Casey February 2017

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Introduction

In November and December 2016 (14/11-8/12) the City of Casey (Casey) ran a community engagement program concerning the Council's activity centres. The program sought to understand how the community used and accessed the activity centres within Casey, what the community found to be the biggest problems and how the activity centres could be improved.

Surveys were conducted online and face to face by City of Casey staff at the following 15 activity centres¹:

- Casey Central, Narre Warren South
- Shopping on Clyde, Clyde
- Cranbourne Park Shopping Centre, Cranbourne
- Lurline Street, Cranbourne
- Eden Rise, Berwick
- Berwick Village, Berwick
- Pearcedale Township, Pearcedale
- Tooradin Village, Tooradin
- Hampton Park Town Centre, Hampton Park
- Spring Square, Hallam
- Marriot Waters, Lyndhurst
- Endeavour Hills Town Centre, Endeavour Hills
- Linden Place, Eumemmerring
- Fountain Gate, Narre Warren
- Main Street, Narre Warren North

810 surveys were completed, providing important information about the community's perception, use and hopes of/for Casey's activity centres. The information from this program will be used to inform the current review of Council's Activity Centre Strategy and Non Residential Uses Policy.

Limitations/Observations

- Face to face surveys were carried out during the working week within working hours; limiting the sample population/participants.
- It is possible people either completed both the short and long surveys or completed a survey twice doubling responses.
- Many responses to questions like "Is there anything that you would improve to your Centre?" or "Are there services that you would like in your Centre that are currently not provided?" were "all good", "no" or a similar variant of said responses. This may reflect a high community satisfaction with activity centres and was not expressed in the survey/summary of survey.
- Conducting the survey was recognized as improving the relationship between Council and the public, providing a sense of participation and self-governance for the people.
- The face-to-face surveys provided a way for sections of the community without or with limited access to; the internet, a way to contribute to important Council data collection.

¹ Appendix 1: Copies of the surveys

Methodology

Short Surveys

- Responses from the completed survey 'post cards' were copied into Microsoft Excel and translated into relevant planning terminology where necessary.
- Responses were then copied into 'Tagul', an online program, which counted the number of responses.²
- Responses were categorised and grouped together dependent on their themes.
- Excel was used to display this data in the below charts and graphs.

Long Surveys

- Responses were collated through Survey Monkey and the data downloaded into Microsoft Excel and translated into relevant planning terminology where necessary.
- Responses were categorised and grouped together dependent on their themes.
- Excel was used to display this data in the below charts and graphs.

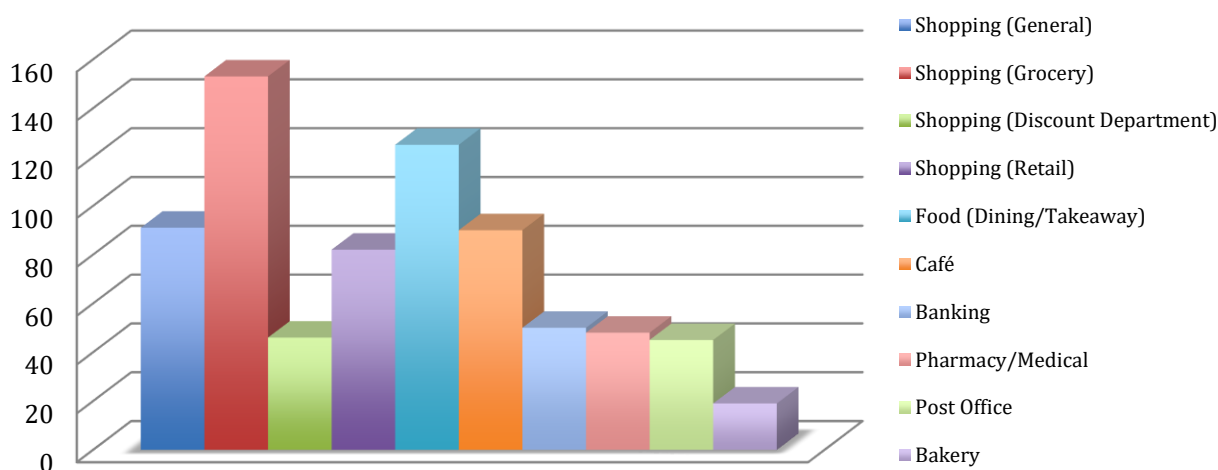
² <https://tagul.com/>

Question 2: What are the three main activities you carry out at your nominated shopping centre?

Summarised below are the top nine activities carried out at Casey's Activity Centres according to this survey.

As reflected by the retail makeup of many centres the key drawcards were supermarkets used for grocery shopping totalling 20% of responses. Other shopping styles made up 30% (which would likely include some grocery shopping), services such as banking, doctor and post office made up 22% and food and café over 29%.

What are the three main activities you carry out at your nominated shopping centre?



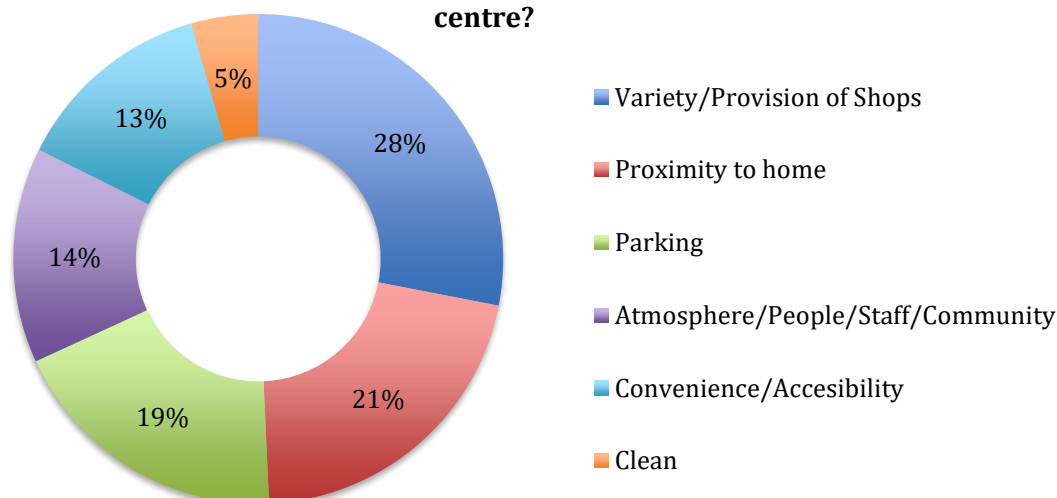
Notes: The use of post office was often explained as being for paying bills. Shopping (General) was used as a category when the responses did not specify the type of shopping. Notable other activities and specific types of shops not reflected in the graph include: gambling, socialising, entertainment, butcher and hairdressing/beauty.

Question 3: What three things do you like most about your nominated shopping centre?

Variety of shops, services and other offerings of the centres was a significant factor in why people liked their centre which reinforces the mix of uses required within activity centres rather than just relying on supermarkets.

Proximity to home and convenience / accessibility accounted for almost 35% of responses demonstrating a need to locate within each residential catchment. within close proximity of residential areas.

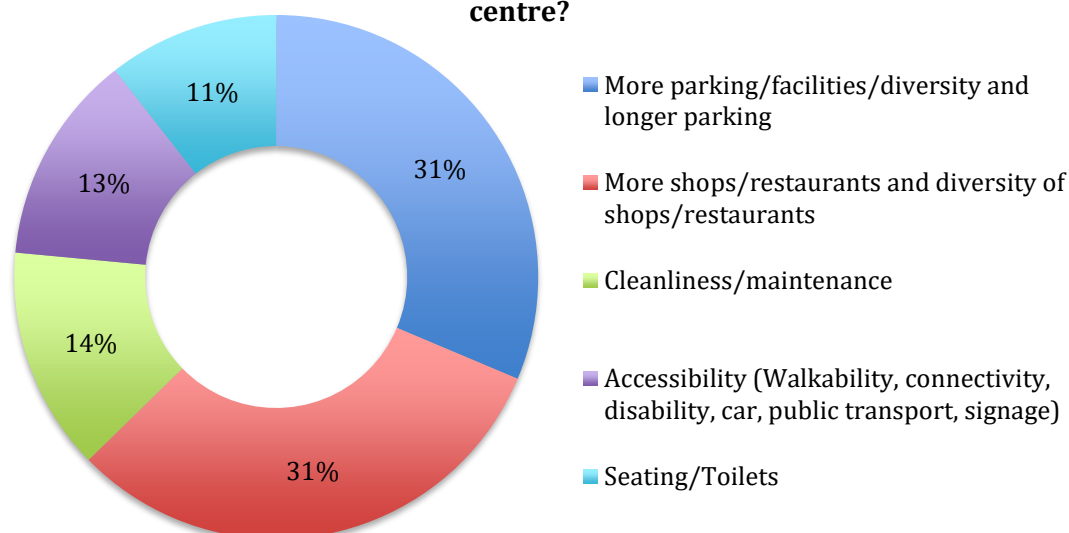
What three things do you like most about your nominated shopping centre?



Notes: "Variety/ provision of shops and Services" was the category that included the very common response of "Everything I Need" and similar variants. "Atmosphere/People/Staff/Community" may be heritage related as atmosphere was often prefixed with "Village". Parking as a category is likely to be skewed by Fountain Gate as parking was the main problem for residents at most activity centres.

Question 4: What three things would you like to change about your shopping centre?

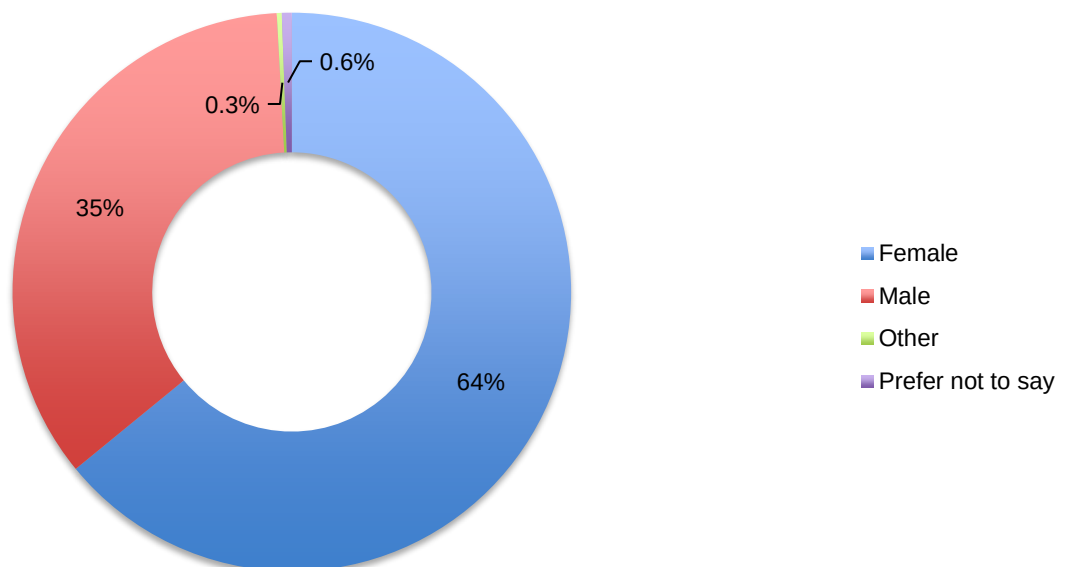
What three things would you like to change about your shopping centre?



Parking included; size, number of, type of, access to and maintenance of parking. Toilets and seats were combined because they were both equally represented and are considered public amenities. A lot of responses when answering "What Three things would you change about your activity centre?" "were nothing" or a similar variant perhaps reflecting a high level of satisfaction with activity centres in some sections of the community. Not every response was summarised as some were considered irrelevant.

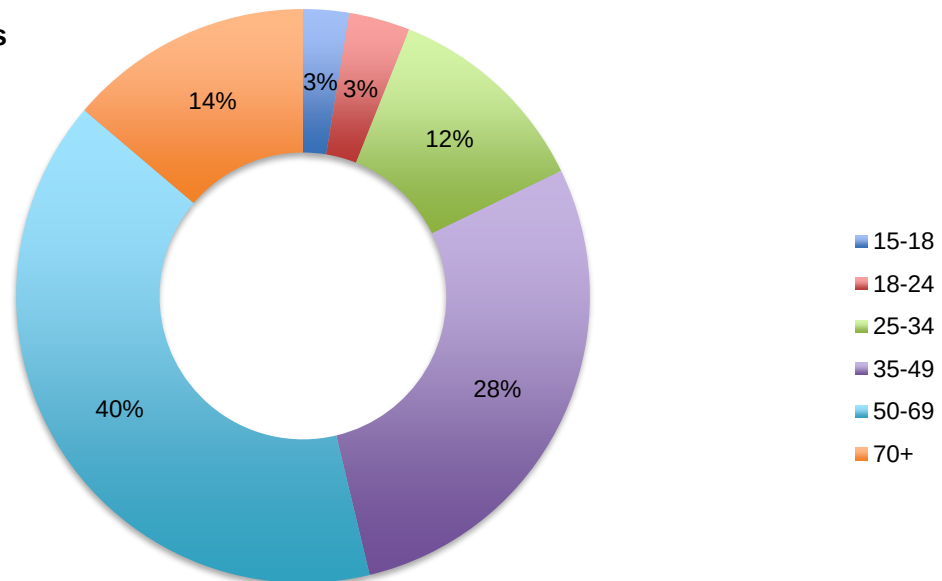


The majority of respondents were female for the short surveys. This may have been reflective of the time of day or nature in the way in which the surveys were conducted however it provides a quick snapshot demonstrating that females made up almost two thirds of the customers.



The age of respondents demonstrated a broad spectrum of society however a larger percentage of the respondents were over 50. This again may have been reflective of the time the surveys were conducted and the lower participation in the work force from this age bracket.

Age of Respondents



Long Surveys

Summary

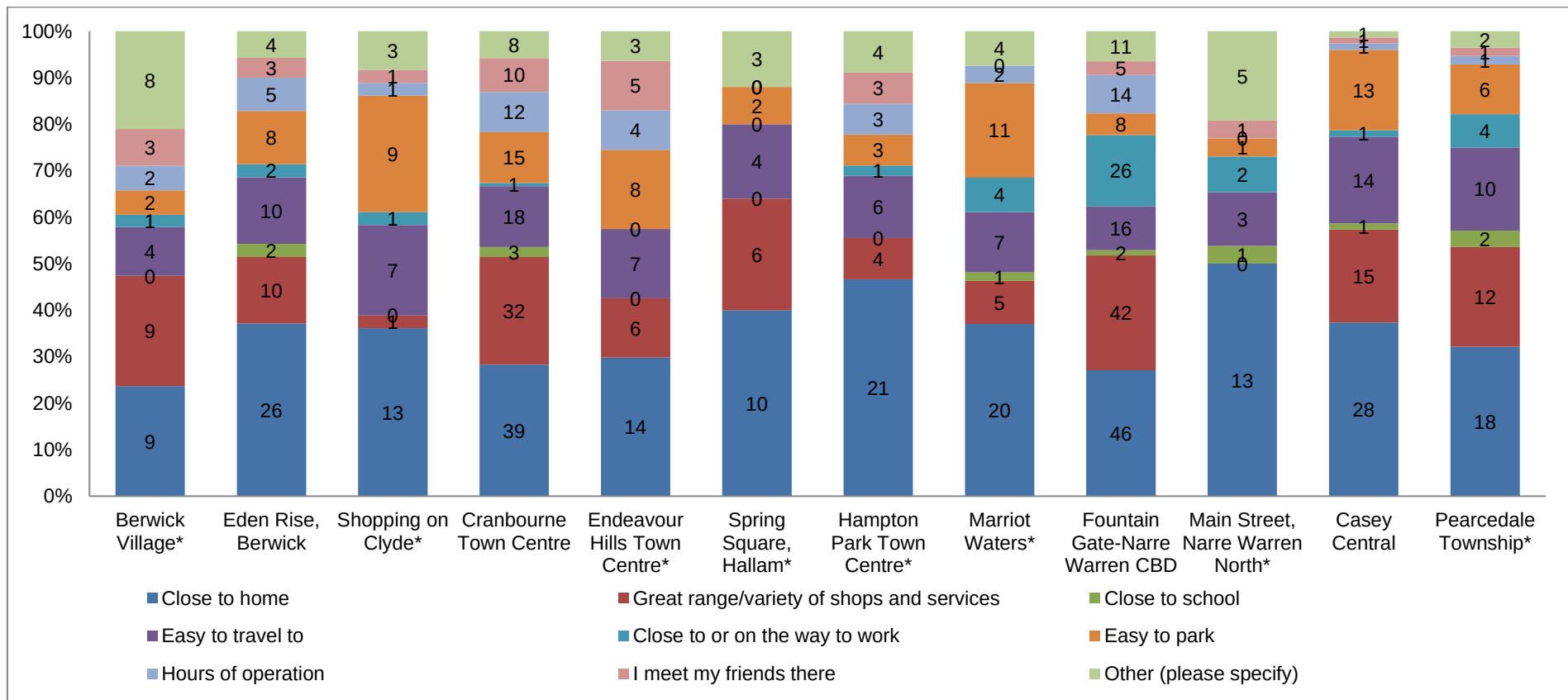
The 12 activity centres with the highest response rate to the long surveys have been further broken down. From this we are able to see the use and problems unique to the activity Centre. Top 12 activity centres were:

- Berwick Village, Berwick (Major activity centre) *
- Eden Rise, Berwick (Neighbourhood activity Centre)
- Shopping on Clyde, Cranbourne East*
- Cranbourne Town Centre, Cranbourne (Principal activity centre)
- Endeavour Hills Town Centre, Endeavour Hills (Major activity centre)*
- Spring Square, Hallam (Neighbourhood activity Centre)*
- Hampton Park Town Centre, Hampton Park (Major activity centre)*
- Marriot Waters, Lyndhurst (Neighbourhood activity Centre)*
- Fountain Gate-Narre Warren CBD, Narre Warren (Principal activity centre)
- Main Street, Narre Warren North (Convenience activity centre)*
- Casey Central, Narre Warren South (Major activity centre)
- Pearcedale Township, Pearcedale (Neighbourhood activity Centre)*

Activity centres with fewer than 30 responses have been marked by an asterisk (*). 12 of the original 16 questions have been summarised.

Question 1: Why do you use this Activity Centre most?

- Overall, people mostly used their nominated activity centre because it was 'Close to home' or had a 'Great range/variety of shops and services'.
- In most activity centres where the 'Easy to travel to' response was high so too was the 'Easy to park' response.
- The most common reason as to why people went to Main Street, Narre Warren North was that it was 'Close to home' which is reflected in the lower than average driving and higher forms of active transport
- Fountain Gate-Narre Warren CBD, Narre Warren had the highest response of 'close to or on the way to work'. This is likely explained by the high number of 'employees' (response to 'what is your relationship with the centre?') who participated in the survey, or that the surveys was held at lunch time when nearby workers went to Fountain Gate-Narre Warren CBD.

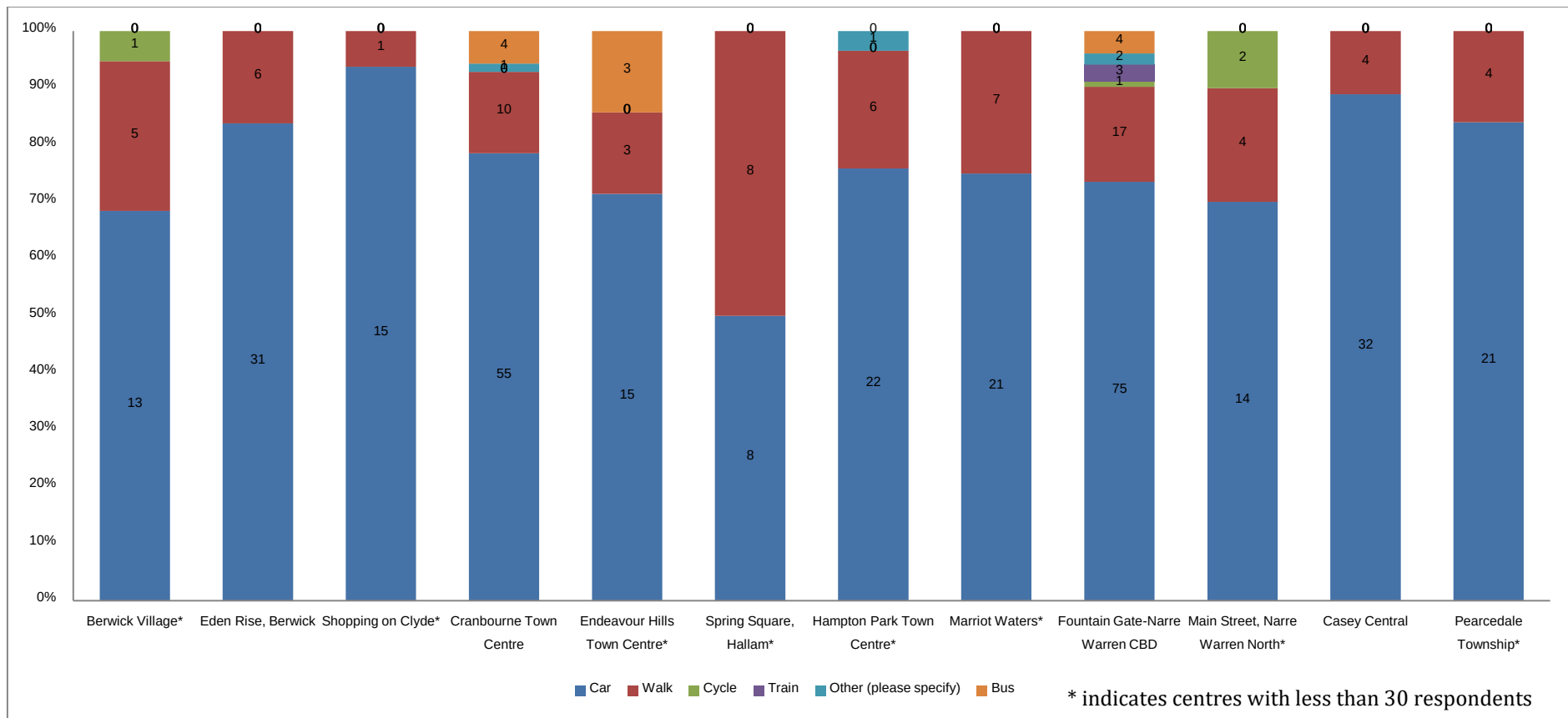


* indicates centres with less than 30 respondents

Activity Centre Strategy - Resident Consultation Summary

Question 2: How do you mostly travel to your Centre?

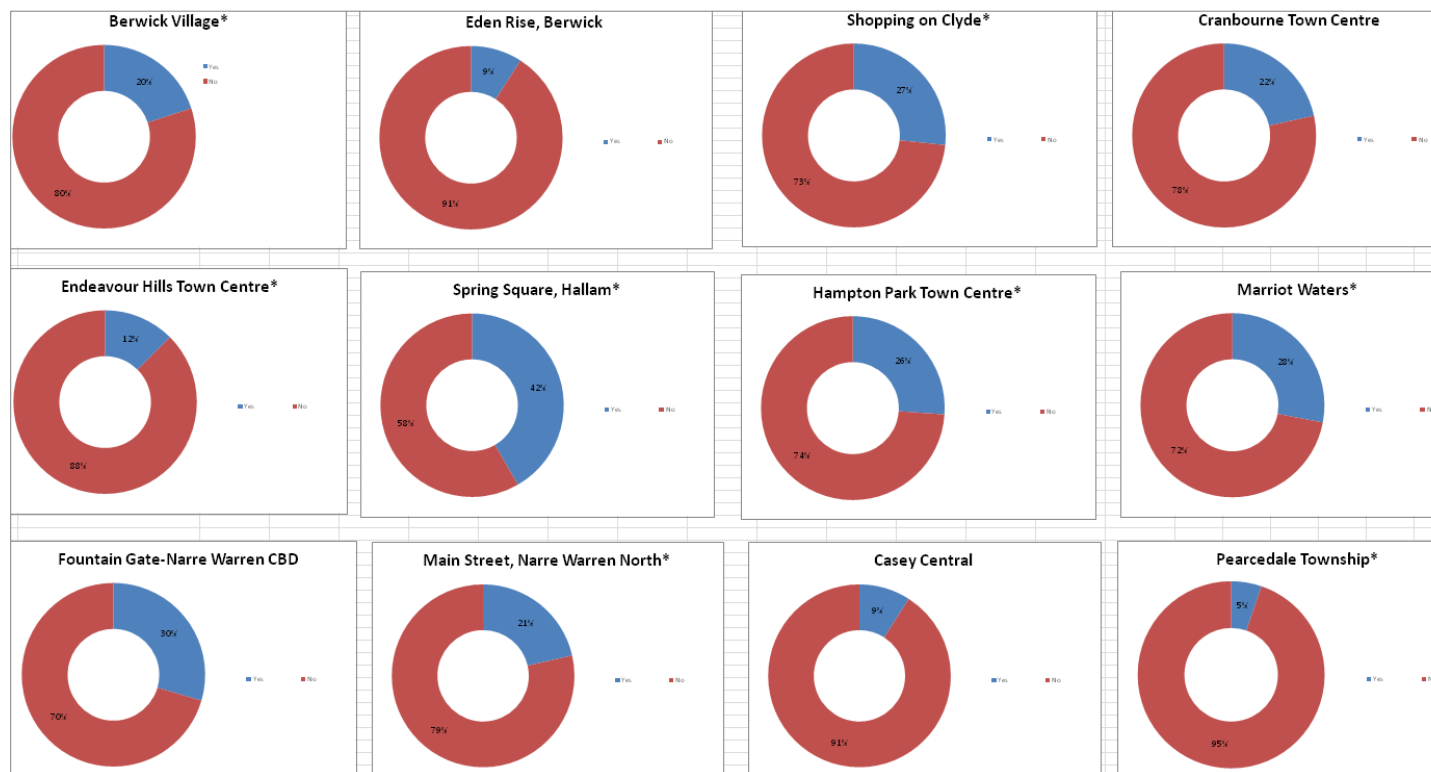
- Modes of transport other than driving are nearly never used to get to nominated activity centres except for at Spring Square Hallam where half of respondents walk and Marriot Waters where a quarter walk.
- Of Centres with higher response rates only Fountain Gate-Narre Warren and Cranbourne Town Centre had participants who used the bust to get to their centre but this was still a relatively small number.
- Endeavour Hills Town Centre had the highest proportion of respondents who caught the bus at 14%, possibly due to the 7 bus routes that stop there
- Main Street Narre Warren, Narre Warren North had the highest number of respondents who most often cycled to get to the centre.



Activity Centre Strategy - Resident Consultation Summary

Question 3: Would you prefer to travel to your Centre differently? – If yes, what mode would that be?

- The majority of people surveyed did not want to travel to their activity centre differently implying that people are content with driving to the centre. This is possibly connected to the fact that most common activity at the activity centres was shopping which can require shopping bags and people want to carry bags and it is easy to do in a car.
- Spring Square Hallam and Fountain Gate-Narre Warren CBD had the highest percentage of people wanting to travel to their centre differently
- Respondents in Spring Square wanted to, in order of most common response, walk or drive and get the bus (29% each). Some responses in the surveys said they did not drive because they could not access a car.
- Fountain Gate-Narre Warren CBD, people wanted to bus (29%) walk (26%) or train (18%). Second and third areas seen as needing most improvement were public transport infrastructure/transport and walkability (pedestrian footpaths and crossings).

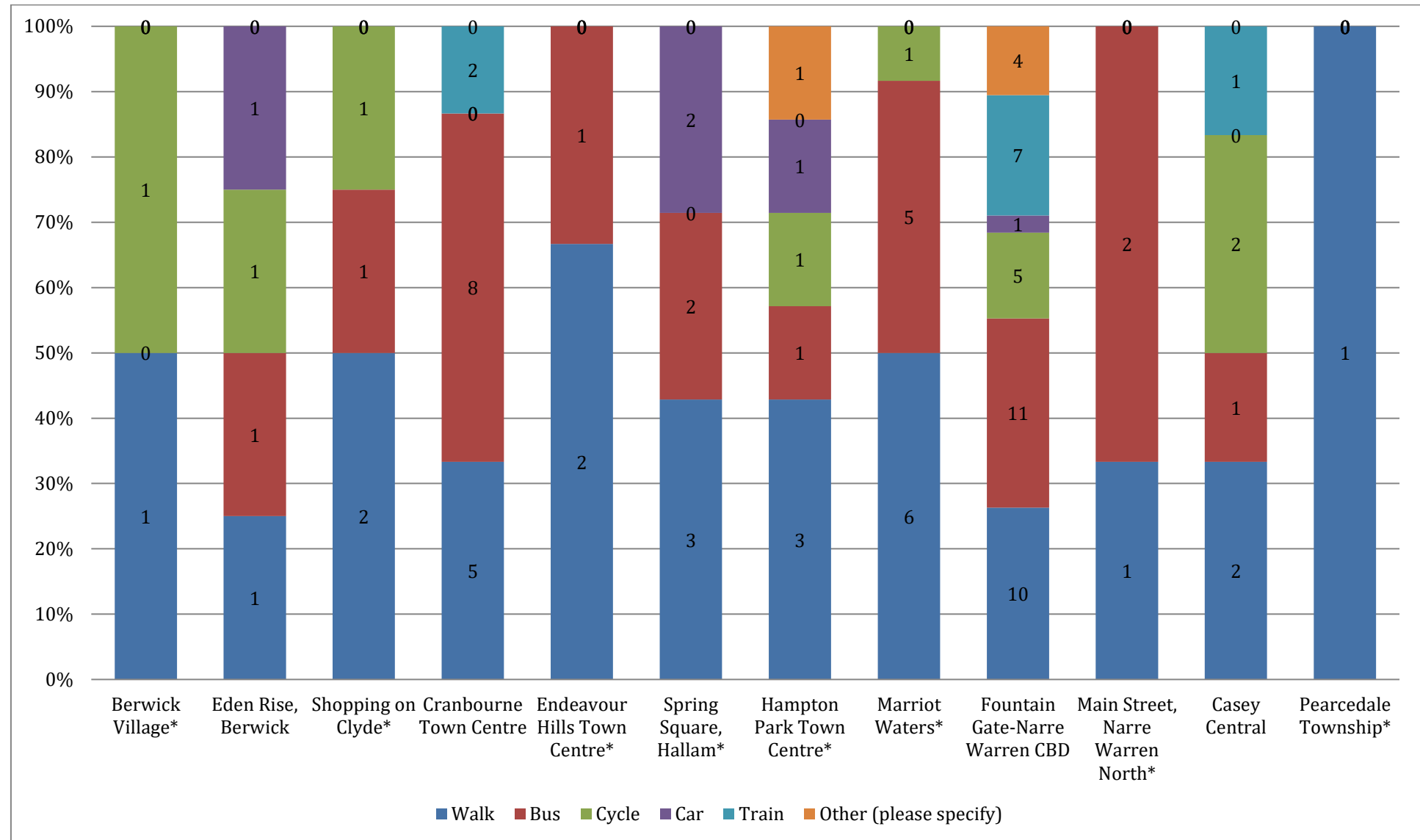


* indicates centres with less than 30 respondents

Activity Centre Strategy - Resident Consultation Summary

If yes, what mode would that be?

Note the responses in this section were limited to only a handful of people from each centre and as such should only be used as a guide.



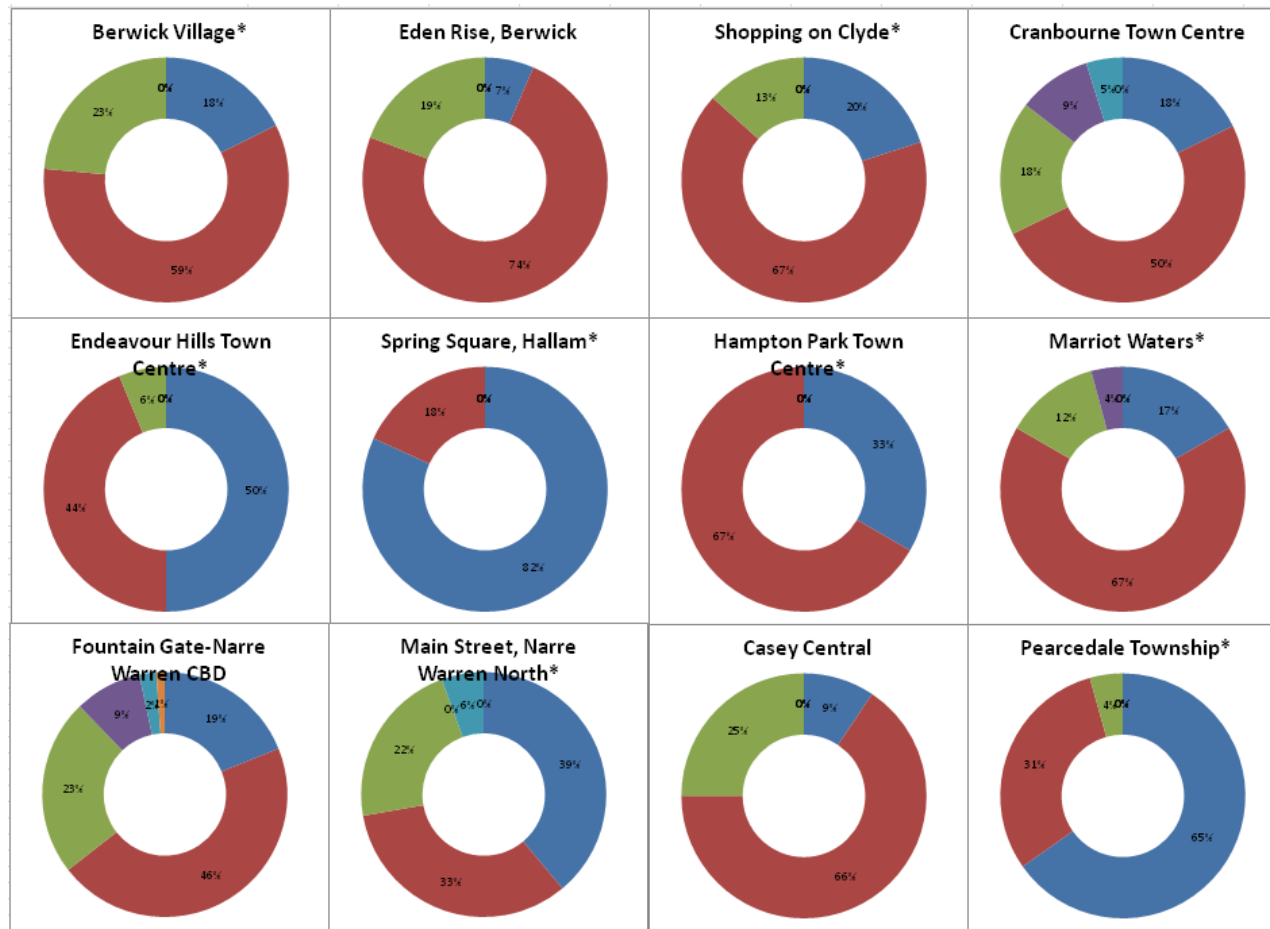
* indicates centres with less than 30 respondents

Activity Centre Strategy - Resident Consultation Summary

Question 4: What is your relationship to your Centre?

- Cranbourne Town Centre and Fountain Gate-Narre Warren CBD have the highest number of respondents who described their relationship to their nominated centre as 'Visitor from elsewhere outside City of Casey'. They were also the two centres with the highest number of respondents who frequented the centre weekly or monthly.
- Spring Square Hallam and Pearcedale Township had the highest proportion of respondents who frequented the centres daily. Spring Square had the highest group of respondents who walked to the centre possibly explaining the high number of daily visitors.

■ Daily ■ 2-3 times / week ■ Once / week ■ 2-3 times / month ■ Once / month ■ Less than once / month



* indicates centres with less than 30 respondents

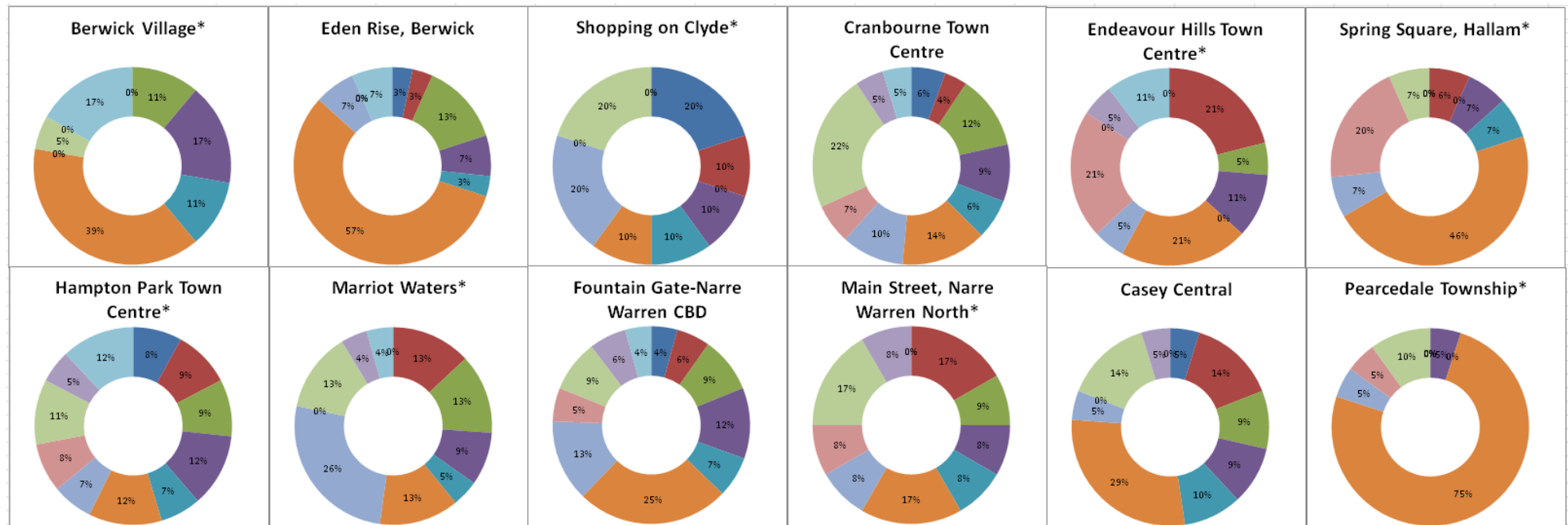
Question 5: Is there anything that you would improve to your Centre?

- Parking was seen as the biggest area needing improvement in every activity centre except Shopping on Clyde. A low ranking of 'parking' as an area needing in need of improvement is perhaps because of it being a relatively recent development and its location in the growth areas.

When referring to 'parking' as an area in needing improvement, this report refers to the numerous issues felt by the public with parking including:

- | | |
|--|-------------------------------------|
| 1. Parking times being too short | 7. Poor lighting at car-parks |
| 2. Not being enough car-parks | 8. Trolley collection and car-parks |
| 3. Car-parks too far from the destination | 9. Access to car-parks |
| 4. Not enough disabled parking | 10. Pedestrians and car-parks |
| 5. People without permission parking in disabled parks | 11. Parking for trucks |
| 6. Car-park being poorly maintained | 12. Safety in car parks |
-
- Public Transport was seen as the area needing most and second most improvement at Marriot Waters and Fountain Gate-Narre Warren CBD.
 - Marriot Waters is near a growth area possibly explaining the high demand for improved public transport.
 - Fountain Gate-Narre Warren CBD is one of the better activity centre's serviced by public transport but unreliable buses and poor walkability may explain the community's desire for better public transport. An improvement in the link between Narre Warren Station, including better way-finding signage, may address the community's views.
 - Public Amenities was the area in most need of improvement at Cranbourne Town Centre which was also the centre that had the highest use of government services.
 - Hampton Park Town Centre and Fountain Gate-Narre Warren CBD both had a relatively high response rate and a fairly diverse spread of responses to 'Is there anything you would improve in your centre?'

Is there anything that you would improve to your Centre?



- Increased development (e.g. commercial or residential development)
- Landscaping and trees
- Bicycle paths and pedestrian crossings
- Public transport infrastructure and services
- Public amenities (eg: toilet facilities, baby/family rooms, seating areas)
- General cleanliness

- Increased mix/ diversity of uses? (more office, services, shops)
- Footpaths and pedestrian crossings
- Parking
- Lighting
- Way-finding signage

* indicates centres with less than 30 respondents

Activity Centre Strategy - Resident Consultation Summary

Question 6: Are there services that you would like in your Centre that are currently not provided?

- There is a high demand for more entertainment at Cranbourne Town Centre, with respondents often specifically requesting a Cinema.
- Respondents from Eden Rise, Shopping on Clyde and Marriot Waters want a post office/postal services. Responses requesting a 'post office' were often explained by needing 'somewhere to pay bills'. This could possibly reflect the inability of a section of the community to easily access internet/internet services. Internet courses at libraries in near these activities centres could correct this issue.

Answer Options	Berwick Village*	Eden Rise, Berwick	Shopping on Clyde*	Cranbourne Town Centre	Endeavour Hills Town Centre*	Spring Square, Hallam*	Hampton Park Town Centre*	Marriot Waters*	Fountain Gate-Narre Warren CBD	Main Street, Narre Warren North*	Casey Central	Pearcedale Township*
Food services (supermarket, green grocer, butcher etc)	1	1	0	5	1	1	3	2	2	0	1	0
Clothing stores	0	3	3	5	4	1	5	2	4	1	3	0
Consulting services (Engineering, planning, building, accounting, legal)	0	0	0	0	1	0	0	0	2	0	0	0
Cafes, Bars and Restaurants	1	1	1	1	1	1	2	2	7	0	2	2
Medical and Health Services (Dental, Optometry, Physio, pharmacy)	0	0	1	3	0	1	0	0	2	7	1	0
Beauty Salons, Spa,	0	0	0	0	0	0	0	0	0	2	0	1
Banking and Insurance	0	4	3	4	2	4	1	6	1	2	2	3
Gyms, Personal Training	0	0	1	1	0	1	2	0	1	0	1	0
Entertainment (Cinemas, Nightclubs and Theatre)	0	2	1	23	2	0	2	5	2	0	5	0
Educational	0	1	0	0	0	0	1	0	2	0	0	0
Vet	0	2	0	0	0	0	0	2	1	0	1	0
Government Services	0	1	0	2	1	1	3	0	5	1	3	0
Post office	0	25	11	3	0	0	0	16	0	1	1	0
Cleaning services (dry cleaning, laundromat)	0	6	1	0	0	0	1	1	0	2	1	0
Homewares, Gift shop, Manchester	0	2	1	3	0	0	2	1	0	0	0	1
Bookshops/newsagent	1	3	1	1	0	1	5	1	0	0	4	0

The above table demonstrates the respondents for each category with the bar in the background noting the percentage of respondents (for that given centre) requesting that service.

Activity Centre Strategy - Resident Consultation Summary

Question 7: What activities/functions do you carry out at your Centre?

- Overall, respondents mostly went to their elected activity centres to shop for groceries and eat out/go to cafes.
- The higher order activity centres received the most retail activity.
- Entertainment was one of the biggest activities/functions at Fountain Gate-Narre Warren CBD, explained by the cinema, games areas and other entertainment facilities.

Answer Options	Berwick Village*	Eden Rise, Berwick	Shopping on Clyde*	Cranbourne Town Centre	Endeavour Hills Town Centre*	Spring Square, Hallam*	Hampton Park Town Centre*	Marriot Waters*	Fountain Gate-Narre Warren CBD	Main Street, Narre Warren North*	Casey Central	Pearcedale Township*
Food services (supermarket, green grocer, butcher etc)	13	30	15	51	15	11	21	24	70	17	32	22
Clothing stores	7	3	0	47	8	0	2	0	72	0	18	0
Consulting services (Engineering, planning, building, accounting, legal)	3	0	0	3	1	0	0	0	2	0	0	1
Cafes, Bars and Restaurants	10	16	11	33	12	10	14	10	79	15	26	12
Medical and Health Services (Dental, Optometry, Physio, pharmacy)	9	19	6	16	6	3	10	9	6	0	6	14
Beauty Salons, Spa	8	7	5	9	4	4	3	2	14	0	8	6
Banking and Insurance	10	8	3	35	8	1	10	3	27	0	10	10
Gyms, Personal Training	1	0	0	4	2	0	0	3	5	0	0	0
Entertainment (Cinemas, Nightclubs and Theatre)	0	0	0	5	0	0	0	0	44	0	0	0
Educational	0	0	0	3	0	0	0	0	0	0	0	1
Vet	2	0	0	1	0	0	1	0	1	0	0	0
Government Services	0	0	0	13	0	0	0	0	1	0	0	0
Post office	5	0	0	39	9	7	16	0	36	12	23	20
Cleaning services (dry cleaning, laundry)	2	0	0	8	0	0	2	0	8	0	4	2
Homewares, Gift shop, Manchester	5	3	3	33	7	1	1	2	29	0	13	7
Bookshops/newsagent	6	4	4	12	7	4	3	2	24	5	9	16
Other (please specify)	6	3	1	8	1	2	3	0	12	0	0	4

The above table demonstrates the respondents for each category with the bar in the background noting the percentage of respondents (for that given centre) requesting that service.

Centre Summary

Endeavour Hills

- Endeavour Hills Town Centre is the most social centre with the highest 'I met friends there responses' to 'what do use your centre for?' Most popular reasons as to why respondents used the centre were however because of 'the parking' and that it is 'easy to get there'.
- Most respondents drove to the centre but Endeavour Hills had the highest percentage of respondents who catch the bus, possibly due to good bus links, and likely influencing the response 'it's easy to travel to'.
- Respondents were generally content in how they travel to the centre but those who want to get there differently want to walk or get the bus.
- Respondents go there daily which is surprising for its allocation as a Major Activity Centre.
- Respondents want better diversity in shops and improved lighting and parking. Most people surveyed were locals and usually went to Endeavour Hills Town Centre to shop and eat.

Berwick Village

- Most respondents walk or drive there but there is a relatively high number of cyclists. This is surprising as it is located close to train station, but likely means that most people interviewed live locally and is confirmed in the question "what is your relationship with this council?"
- Those surveyed happily drive and walk to Berwick village but those who don't want to cycle or walk.
- Respondents mostly went to the centre daily, possibly to use the train, but also many went there 2-3 times a week or weekly.
- A high number of participants used 'the vet' or 'consulting services'. There are three Veterinary clinics within walking distance of the Centre.
- Respondents were there for the common activities of shopping and eating.
- Participants want better parking and Berwick Village has the highest proportion of respondents who want better cycling routes. Cleanliness was also seen as a major problem.

Fountain Gate Narre Warren CBD, Narre Warren.

- Surprisingly, most respondents went to fountain gate because it is 'close to home', so close that many people walked there but they were still not as many as those who drove. It was also the only centre with respondents who used the train to get there.
- Those surveyed also go to Fountain Gate for the 'variety of shops and services' and because it was 'close or on the way to work'.
- Most people were content with driving there but those who weren't wanted to walk or get public transport. This is surprising as there is a nearby train station. Perhaps better advertisement of the station and of the path connecting Fountain Gate and the station would encourage respondents to catch the train.
- It is likely that those surveyed drive and not take their preferred mode of transport because most people shop at Fountain Gate and need to carry their shopping.
- Respondents, being largely local residents but not employees, go to Fountain Gate daily which is surprising as it's designated a Principal Activity Centre.
- Respondents wanted the centre to be improved in many different ways but the standout issues were 'parking', 'public transport' and 'walkability'.

- There were a high number of participants who went to Fountain Gate for entertainment (largely the cinema), the post office and to buy 'home wares'.

Eden Rise, Berwick

- Respondents went to Eden Rise, Berwick to shop for groceries, use the medical, beauty and banking services because it is "easy to get to" and 'close to home'.
- Medical services as an activity at a shopping centre was the highest at Eden Rise of all centres surveyed.
- People drove and walked to the centre two to three times a week.
- Respondents were content in travelling there the way they did.
- Most people were locals and wanted an improvement in the 'parking' and 'landscaping'. Of all activity centres there is the most demand at Eden Rise for postal services.

Spring Square Hallam

- People go to Spring Square, Hallam because it's close to home and has a variety of shops and services.
- People surveyed equally walked or drove to get to the centre.
- Respondents visited Spring square daily, and regarded lighting as the biggest needed improvement
- Those surveyed either shopped for groceries or ate at the centre.

Main Street, Narre Warren North*

- Of people surveyed, most go to Main Street Narre Warren North because it was close to home and for other reasons not identified.
- Respondents drove there but had a higher proportion of cyclists when compared to most of the other centres.
- Most of those surveyed do not want to change the way they get to the centre.
- There is a mixed frequency in how often people go to the centre, from daily, 2-3 times a week and weekly.
- Parking is not seen as the single most significant issue of Main Street which is uncommon in these surveys. Respondents mostly wanted more 'shops and services' and 'more, better public amenities'.

Shopping on Clyde, Cranbourne East

- Research has found that people shop at Shopping on Clyde for 'groceries' because it's 'close to home', 'has good parking' and is 'easy to get to'.
- Most participants drive to Shopping on Clyde but want to travel there differently, mostly by foot but also a mix of other modes.
- People use the centre 2-3 times a week.
- Nothing stands out at how the respondents think the centre could be improved other than an 'increase in development' and the addition of 'postal services'.
- Most respondents were locals from Cranbourne East.

Hampton Park Town Centre

- Respondents went to Hampton Park Town Centre to shop, eat and go to the Newsagent primarily because it was close to home.
- People drive and want to keep driving to the centre, but those few who don't want to walk.
- Respondents went to Hampton Park Town Centre daily or two to three times a week.
- Participants felt that the 'parking', 'cleanliness' and 'public amenities' of the centre needed improving the most, followed by the 'landscaping', 'lighting' and 'diversity of shops and services' in the activity centre
- Respondents were mostly locals.

Casey Central

- Respondents went to Casey Central to 'shop', 'eat' and go to the 'post office' because it was 'easy to get a park', 'close to home' and had a 'variety of shops and services'.
- Participants drive to the shopping centre and were happy to continue doing so; Casey Central had some of the highest responses of people not wanting to change transport mode and number of people who drive to get their elected activity centre.
- Respondents mostly went to Casey Central 2-3 times a week, but a high proportion of people only went there weekly.
- Most respondents were locals who saw parking as the biggest issue for the centre with public amenities and shop/service diversity second.
- People wanted better/more entertainment.

Cranbourne Town Centre

- Respondents drove to Cranbourne Town Centre because it was 'close to home' with a 'variety of shops and services'. A notable amount of those surveyed catch the bus to the centre.
- Respondents 'ate', 'shopped', 'banked' and went to 'the post office' when they were at the Cranbourne Town Centre. A uniquely high amount of people were using 'government services' and going to Cranbourne Town Centre for 'medical services'.
- People usually went there 2-3 times a week but some went daily and weekly.
- Respondents wanted mostly improved 'public amenities'. After amenities, respondents thought the 'parking', 'landscaping' and 'public transport' needed to be improved.
- Respondents wanting improved 'public transport' was strange as most respondents were happy driving to the centre.
- Most respondents were from Cranbourne and they largely wanted better entertainment, particularly a cinema.

Marriot Waters

- Respondents 'shopped' and 'ate' at Marriot Waters because it was 'close to home' with 'easy parking'.
- Most respondents drove to the centre and were content with doing so, but a few walked and wanted to get to Marriot Waters a different way.
- People mostly wanted to 'walk', 'take the bus', or 'cycle'.
- Respondents went to the centre 'two to three times a week' and wanted a 'post office'.
- Those surveyed thought the centre could be improved by better 'public transport'.
- Respondents were locals.

Pearcedale Township

- Persons surveyed who nominated Pearcedale Township as their most frequented Town Centre went to the centre mostly because it was 'close to home' and had a 'good variety of shops and services.'
- According to the surveys people drove to the centre and did not want to change transport mode, Pearcedale having the lowest response of "yes" to "Would you prefer to travel to your Centre differently?"
- Respondents went to the centre daily or two to three times a week.
- Participants were mostly locals who wanted improved 'parking'.
- At the activity centre respondents used the 'postal facilities', 'shopped for groceries' or went to the 'newsagent/book shop'.

Appendix B. Industry Consultation Summary

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Industry Consultation Summary Report

Activity Centres Strategy Review

Definitions

NAC – Neighbourhood Activity Centre (Large, Medium, Small)

MAC – Major Activity Centre

M/PAC – Metropolitan / Principal Activity Centre

Scentre Group, Vicinity, Pask Group, Marriott Waters, Mondous, Westfarmers, Woolworths, Waterman, Fairhaven Homes, Navire Economics

Approach to Strategy

Are you aware of the Activity Centre Strategy?	Most businesses and developers who have undertaken development in the past are aware of the Strategy.
How do you think the Activity Centres Policy impacts your business?	There was a mixed response regarding the impact of the existing Strategy with some respondents believing it has allowed for too much supermarket growth in a short period of time around the newer growth areas which is waiting for the residential population to catch up. Some areas in the strategy have allowed for ad-hoc development in some cases with problems around development in residential areas. There was feedback that the policy is too slow to react to trends and changing needs of the community.

Barriers

What impact do the current planning provisions and zoning have on your business?	Comments received around the implications of floor space requirements and a push for these to get removed in centres.
What are the key planning issues that impact or promote your interest or investment?	Multiple concerns that the existing policy is too slow to react in some cases. There was concern on the lack of a consistent approach around centre growth and the impact on businesses within existing centres. Speed of change was raised and the Activity Centre Strategy needs to be able to react to trends and changes more quickly.
What key market based drivers affect/limit or promotes your interest/investments?	Most respondents noted car parking as a key aspect to their business with businesses around Fountain Gate needing

(eg. Transport, Catchment, Land value)	significantly more parking than the minimum provisions. This was particularly evident for office based businesses. Catchment areas are an important factor particularly for the supermarket chains. It was raised that there are now 8 supermarkets within a 20-minute drive from Cranbourne. Demographics of various centres were also raised as a significant driver with the changing market in many areas. Land value was not raised as an issue by any respondents.
Do you think a flexible zoning (i.e. Activity Centre Zone/Comprehensive Development Zone) provide greater opportunities for your business/network/franchise?	There was general support for flexible zoning however it was recognised that this will typically require more input from the developer/landholder to ensure that the zoning is consistent with future development aspirations.
Are Development Plans and Precinct Structure Plans an incentive or burden for your business?	There was concern that existing zones and DPO's limit growth in some cases or particularly extend timeframes for development applications where DPO's require amending etc. PSP's were also raised by some respondents as causing issues in growth areas where they are not updated frequently and are becoming outdated and not reacting to trends.

Policy to Stimulate Growth

How could the policy/planning framework promote broader industry drivers that may stimulate investment?	Outlining a demand analysis for Discount Department Stores (DDS) and a framework around delivery was raised by a number of respondents. However, discussions with Westfarmers and Woolworths who deliver the majority of DDS within Casey noted they undertake their own market based analysis and delivery mechanisms.
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Design Guidelines

How do you use the existing Activity Centre Design Guidelines?	Overall there was strong support for consistent design guidelines. It was noted that these must be practical to ensure they don't constrain different development styles or trends. Comments were raised that tenants were not particularly active in ensuring the upkeep or amenity of centres and this has typically fallen to landholders. The issues with this is the loss of sense of ownership in centres by tenants which in some cases result in poorer community outcomes.
What are your views in relation to Main Street design parameters?	The two main supermarket providers had very different views on main street designs with Coles focusing on efficiency and access via car to the front door of the stores. Woolworths were beginning to transition towards a more civic plaza space focusing on linger time and improving the output of the whole centre. This may be due to Woolworths getting into development and renting out space more than Coles.

	The major centre owners emphasised the need to diversify into more entertainment and food offerings which traditionally exist in more main street environments. The offerings that are likely to be provided in these centres are more likely to be chain stores with a higher profile.
Building height and floor height preferences for your business?	Little was raised about the building or floor heights with each development having individual design constraints.
How important is the availability of car parking? What distance would your customers be willing to walk from parking to your business?	Access to priority parking at the front of businesses is still prevalent amongst smaller players and Coles. Woolworths and the larger centre operators are recognising the implications of front door parking and showed an intention to pushing back on providing parking at the main entrances, with more focus on getting people into the centre for longer periods of time. It is still to be seen if this is put into practice however Woolworths provided examples at the Point Cook Shopping Centre and Mernda Town Centre.
Do you think developers have a part to play in provide alternative transport options?	Access to transport was raised by all respondents and improvements were supported across the board. It was evident however that there was a significant expectation that it was only the role of Council and the State Government to undertake the lobbying and advocacy for public transport infrastructure. In the private market there was little emphasis on the centre owners to push for better public transport links where this group would have significant weight in assisting with an advocacy role. In the Narre Warren Business Park and other office / service industries there was a recognised need for better public transport however again this was the expectation for Council or the State to push for the delivery of these services rather than the owners or users.
What business hours does your business operate? (24 hour economy – day time, after hours, weekend activities)	The larger centre owners noted a transition towards a more entertainment and dining offering exceeding the traditional trading hours. This may help the issues that were raised around centres closing and losing trade after 6pm.
Do you consider safety, security and passive surveillance issues to be important in your decision to locate in a given centre?	Safety was raised by the smaller operators more with concerns around theft and vandalism. It appears the larger centre have more visual surveillance given the higher visitation and longer trading hours.
What is the importance of design criteria in developing local centres?	Flexibility was the consistent theme raised around design criteria to allow a range of development.
How important does your business view energy use, water use, stormwater and waste impacts and other ESD initiatives?	The consistent response was that ESD is now expected in the industry. The larger parties had no issue with providing a high level of ESD initiatives in development recognising's the cost and benefits. The main concern was the lack of consistency policy and therefore many of the smaller players are still only including

	very basic ESD initiatives. This would give the poorer quality developments an initial cost advantage in some cases. Across the board there was support for stronger regulations on ESD to level the playing field, to get better outcomes and to provide a consistent approach to other areas of Melbourne.
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Retail Formats

To what extent is an anchor retail premises important to your business?	It was evident that anchor stores still play an important role in activity centres. The traditional role of Coles and Woolworths are being challenged by Aldi and other intermediate offerings which now provide an anchor for smaller centres. Coles and Woolworths did not appear too concerned at this stage as there is significant overlap between shoppers at Aldi and the full line supermarkets. It was noted that Aldi now has around 13% market share across Australia compared with Coles at 33% and Woolworths at 36%.
How does ease of access, connectivity, interface and walkability impact your business and customers?	Walkability was not realised as a significant issue however all respondents recognised that this is overlooked in an Australian context compared to international examples.
Is higher density housing around and within Activity Centres important to your business and what are your views on providing for this?	Most respondents supported higher density housing within or nearby centres to provide an alternative development option and to increase the patrons and visitors to the centres. Flexibility again was raised as one of the key aspects to allow appropriate development cycles.
Is street dining/seating and street-side activation an important factor in your business? Why?	For a number of respondents in their next stages of development they are looking at including additional outdoor seating and dining areas. There were some concerned raised however that the Australian climate does not support outdoor dining and as such were sceptical of its success in a Casey context.
What potential is there for niche/pop-up retail? What type? Which tenancies?	Most respondents were supportive of popup style stores however did not believe they were financially viable given shorter rental leases and build costs that may be required.
Do you believe that Activity Centres should be only retail focused? How can we transition to a more community service centre providing more than just retail?	There was significant support for centres to be more than just retail focused with interest in office and residential uses to be integrated as part of future developments. The push for larger centres to transition to more dining and entertainment is also a demonstration of support for this. Health, gym and childcare services are an area that is becoming more prominent in smaller centres and are now at the scale where they can support some speciality stores in their own right. Respondents were supportive of these uses and see them as an opportunity to diversify centres further.

Other Points Raised

In regard to office space there was a sense of interest in co-location of facilities and co-working spaces particularly from Waterman Group who are in this area noting that the model has been successful for them.

Amenity for workers is becoming more of a drawcard for office and service based business.

It was raised that better parks and green spaces for lunch breaks and active recreation would provide a significant drawcard for office tenants.

Post collection was raised for office areas and a convenient postal service is still important to business owners. The lack of a post office or post box in the Narre Warren Business Park was raised on multiple occasions.

One of the key findings was the need to cater for efficiency verses amenity as separate issues.

All centres see a large portion of their businesses from drop-in passing traffic, typically as part of other trips with a strong focus on getting in and out of the centre as quickly as possible.

On the other hand there is a significant need for centres to provide spaces for people to linger and enjoy and centre owners realise that speciality shops benefit much more from linger traffic than passing traffic.



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Customer Service Centres

Cranbourne
Cranbourne Park Shopping Centre

Narre Warren
Magid Drive

Narre Warren South
Amberly Park Shopping Centre

Appendix C. Precinct Structure Plan Activity Centre Floorspace Targets Review

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Analysis of Activity Centre Floorspace Targets in Casey's Precinct Structure Plans (PSPs)

				PSP Floorspace Targets (sqm)			Percentage of Total Activity Centre Floorspace Targeted for Office (i.e. Non-retail)	
Centre name	status	type	PSP	Retail Floorspace Target	Commercial Office Floorspace Target	Activity Centre Total Floorspace	Majors Activity Centres	Medium & Local NACs
Hardys Road	Proposed	Major	Thompson Road	60,000	60,000	120,000	50%	
Clyde	Proposed	Major	Clyde Creek	50,000	50,000	100,000	50%	
Hall and Evans Road	Proposed	Medium	Cranbourne West	No applicable floorspace targets in PSP				
Selandra Rise	Existing	Medium	Cranbourne East	8,000	2,000	10,000		20%
Avenue Village	Existing	Medium	Cranbourne North	3,500	750	4,250		14%
Shopping on Clyde	Existing	Medium	Cranbourne East	5,000	2,000	7,000		29%
Adrian Street	Proposed	Medium	Cranbourne East	5,000	2,000	7,000		29%
Merinda Park	Proposed	Medium	Cranbourne West	No applicable floorspace targets in PSP				
Soldiers Road	Proposed	Medium	Clyde North	8,000	4,000	12,000		33%
Central Parkway	Proposed	Medium	Cranbourne West	No applicable floorspace targets in PSP				
Centre Road	Proposed	Medium	Berwick Waterways	5,000	1,000	6,000		17%
Craig Road	Proposed	Medium	Botanic Ridge Stage 2	8,700	1,400	10,100		14%
St Germain	Proposed	Medium	Thompsons Rd	8,000	5,000	13,000		38%
Brompton Lodge	Proposed	Medium	Brompton Lodge PSP	6,280	1,700	7,980		21%
Alexander Blvd	Proposed	Medium	Cardinia Creek	8,000	3,000	11,000		27%
Patterson Road	Proposed	Medium	Cardinia Creek	8,000	3,000	11,000		27%
Clarinda Park	Proposed	Local	Cranbourne West	No applicable floorspace targets in PSP				
Cranbourne West North	Proposed	Local	Cranbourne West	No applicable floorspace targets in PSP				
Cranbourne East South	Proposed	Local	Cranbourne East	No applicable floorspace targets in PSP				
Wheelers Park Drive	Proposed	Local	Cranbourne North	No applicable floorspace targets in PSP				
Clyde North South-East	Proposed	Local	Clyde North	No applicable floorspace targets in PSP				
Clyde North North-East	Proposed	Local	Clyde North	No applicable floorspace targets in PSP				
Grices Road	Proposed	Local	Clyde North	No applicable floorspace targets in PSP				
Springbrook Drive	Proposed	Local	Clyde North	No applicable floorspace targets in PSP				
Ballarto Road	Proposed	Local	Cardinia Creek	1,500	300	1,800		17%
Tuckers Road	Proposed	Local	Clyde Creek	5,000	1,000	6,000		17%
Hardys Road Local	Proposed	Local	Clyde Creek	5,000	1,000	6,000		17%
Smiths Lane	Proposed	Local	Botanic Ridge Stage 2	3,000	600	3,600		17%
Berwick-Cranbourne Road	Proposed	Local	Thompsons Rd	1,500	0	1,500		0%
							50%	21%

Average Non-Retail Activity Centre Floorspace Targets in Casey's PSPs