

BROMPTON LODGE: ECONOMIC ASSESSMENT

FINAL REPORT

AS AMENDED
3RD JULY 2014
PROJECT REFERENCE: 13-109



PREPARED FOR:



PREPARED BY:



EDITORIAL NOTE:

The final report (3rd July 2014) was prepared on the basis of the September 2013 report, together with amendments and clarifications requested by Council and the Metropolitan Planning Authority (MPA) (refer communication from Council June 2014).

A new section (5.3A) was provided to provide clarification on the catchment areas of the Cranbourne West large NAA and the Brompton Lodge medium NAA.

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EXECUTIVE SUMMARY

In February 2013 Renaissance Planning was commissioned by Wolfdene Pty Ltd to undertake an economic impact assessment for a proposed neighbourhood activities area (NAA). The size and function of the NAA would be dependent on the catchment population at full development. The work is part of a Precinct Structure Plan (PSP) that Wolfdene have prepared for the Brompton Lodge area.

The analysis found that:-

- The proposed Brompton Lodge NAA will have a main trade area (MTA) catchment with an estimated resident population (ERP) at full development of approximately 10,530 persons (refer Table 1, page 12 and Figure 1, Page 11) comprised of:-
 - a primary catchment area with approximately 4,050 persons at full development;
 - a secondary catchment area with approximately 6,480 persons;
- The 'Activities Areas and Non-Residential Uses Strategy' (as amended December 2012) sets out catchment population requirements for neighbourhood activities areas. These are:-
 - Large: 15,000 - 25,000 persons
 - Medium: 8,000 - 12,000 persons
 - Local: up to 4,000 persons
- On the basis of the catchment assessments the NAA to service Brompton Lodge and adjacent areas meets the requirements for a medium sized NAA and would be approaching the threshold for a large NAA;
- The assessments indicate that the Brompton Lodge area and adjacent catchment areas will support a full line supermarket of approximately 3,200m² gross leasable area (GLA) together with a complement of retail stores and services (supportable by 2026);
- A second discount supermarket will be supportable at full development (strictly the analysis supports approximately 970m² GLA by 2031. The floorspace planning (refer Table 8) allows for 1,100m² GLA);
- A range of tenancies and activities including non-retail and community activities can be supported at the proposed NAA.

A trade impact assessment was undertaken of the proposed NAA at Brompton Lodge on the future NAA at Cranbourne West (Hall Road). Gravity modelling indicated that based on the assessment of future supermarket trade at both the Cranbourne West (Hall Road) NAA and Brompton Lodge NAA that if one takes account of both the additional activity centre development at Brompton Lodge together with the new residential areas not known at the time of the Cranbourne West PSP assessments then the overall effect is one of a net trade benefit to the Cranbourne West (Hall Road) NAA. In the case of 3,700 - 4,300m² GLA supermarket floorspace at Brompton Lodge the net trade benefit is approximately \$11.4 million (of supermarket and other fresh food) at 2011/12 constant prices.

Following a review of the draft final (September, 2013) report by Casey City Council and the Metropolitan Planning Authority (MPA) further clarification was required in relation to the Cranbourne West large NAA and Brompton Lodge medium NAA catchment areas. An extensive discussion and mapping analysis clearly explains that the Brompton Lodge medium

NAA catchment area and the original catchment areas determined for the Cranbourne West large NAA are largely mutually exclusive and complementary areas (refer Section 5.3A and Figure 8).

Analysis undertaken for this report found that there will be additional shared catchment that will be available to the Cranbourne West large NAA. This is comprised of some existing and several future residential areas which were not considered or not known at the time of the original economic analysis for the Cranbourne West NAA.

The additional shared catchment that will be available to the Cranbourne West large NAA substantially explains why an economic effects assessment of the trade impacts of the Brompton Lodge medium NAA on the Cranbourne West large NAA actually results in a **net trade benefit** to the Cranbourne West large NAA that takes account of both the new centre (Brompton Lodge) and the new catchment areas to be served (refer Section 5.3 in this report). That is, the benefits of the new catchment areas to the Cranbourne West large NAA will marginally outweigh the competitive effects of trade drawn to the Brompton Lodge medium NAA.

A net community benefit assessment was undertaken in relation to the proposed development based on the criteria set out by Council (refer Activities Areas and Non-Residential Uses Strategy, op. cit.). It was found that the proposal:-

- will “contribute to the economic, sociocultural and environmental sustainability” of the area by virtue of its street-based design, links to the open space network and pedestrian links to the surrounding residential areas;
- will “establish key connections with the adjacent community in terms of both land uses and activities” on the basis that the uses have been determined by likely market requirements and reflect the likely demographic characteristics of the area;
- will “have the flexibility to reflect changing market conditions” by virtue of the flexible layout of the concept plan with opportunities to vary component areas;
- will “contribute to high quality urban design and landscape treatment” by virtue of the integrated design approach taken for the activity centre and the broader residential area. This is focused on pedestrian safety and landscape design expressed thematically through the area;
- provides a planned NAA to serve the future residential area and adjacent areas consistent with the requirements set by Council. The proposal is fully consistent with the objectives set by Council to effectively serve the community and function as a “vibrant community focus”.

The proposal meets the comprehensive requirements of net community benefit as set out by Council in terms of:-

- opportunity for choice
- accessibility and convenience
- design and amenity
- viability and efficiency.

The proposal will provide significant employment during the construction and operational stages:-

- in the construction phases of the project, approximately 190 jobs will be generated over a

15 month period (includes on-site and off-site jobs);

- in the operational phase of the project approximately 460 jobs will be generated (including both on-site employment and other employment generated through local and district multipliers).

In summary the assessment indicates that the proposed Brompton Lodge NAA is fully consistent with Council policy and meets its net community benefit requirements. It contributes to a high amenity, community focused activity centre and will be fully integrated with its neighbourhood and linked through open space and pedestrian networks. The function and scale of the proposed centre is consistent with Council's catchment standards and requirements.

INTRODUCTION

1

In February 2013 Renaissance Planning Pty Ltd was commissioned by Wolfdene Pty Ltd to prepare an economic impact assessment in relation to the proposed Brompton Lodge Neighbourhood Activities Area (NAA). The report includes an economic impact assessment for a medium neighbourhood activities area with a full line supermarket and a smaller discount supermarket (at a later stage) at the subject site and a net community benefit assessment as required by the City of Casey 'Activities Areas and Non-Residential Uses Strategy' (December 2012).

Brompton Lodge is a proposed residential development of approximately 104 hectares in extent, and is currently zoned Urban Growth Zone (UGZ) in the Casey Planning Scheme. It is generally bounded as follows (refer Figure 1):

- to the north by Ballarto Road (proposed);
- to the south-east by the Frankston-Cranbourne Road;
- to the west by the Western Port Highway.

Wolfdene Pty Ltd has prepared a Precinct Structure Plan (PSP) to guide the development of the land. It is envisaged the subject land will be planned as a new residential community with a neighbourhood activities area (NAA) as its social focus, to be located on Frankston-Cranbourne Road, generally north of Chevron Avenue.

Renaissance Planning has undertaken the following work for Wolfdene Pty Ltd:

- Preparation of an Economic Report to assess the sustainable retail and activity centre floorspace requirements to support an NAA to serve the Brompton Lodge PSP area and likely catchment area;
- Advice on the preparation of an indicative principles plan for the NAA in conjunction and consultation with the planning and design team at Wolfdene Pty Ltd to assist planning and contribute to optimal development and centre function outcomes as part of the PSP process.

Figure 1: Brompton Lodge: Future Urban Structure Plan

Source: Draft Brompton Lodge Precinct Structure Plan (Wolfdene Pty Ltd, September 2013)

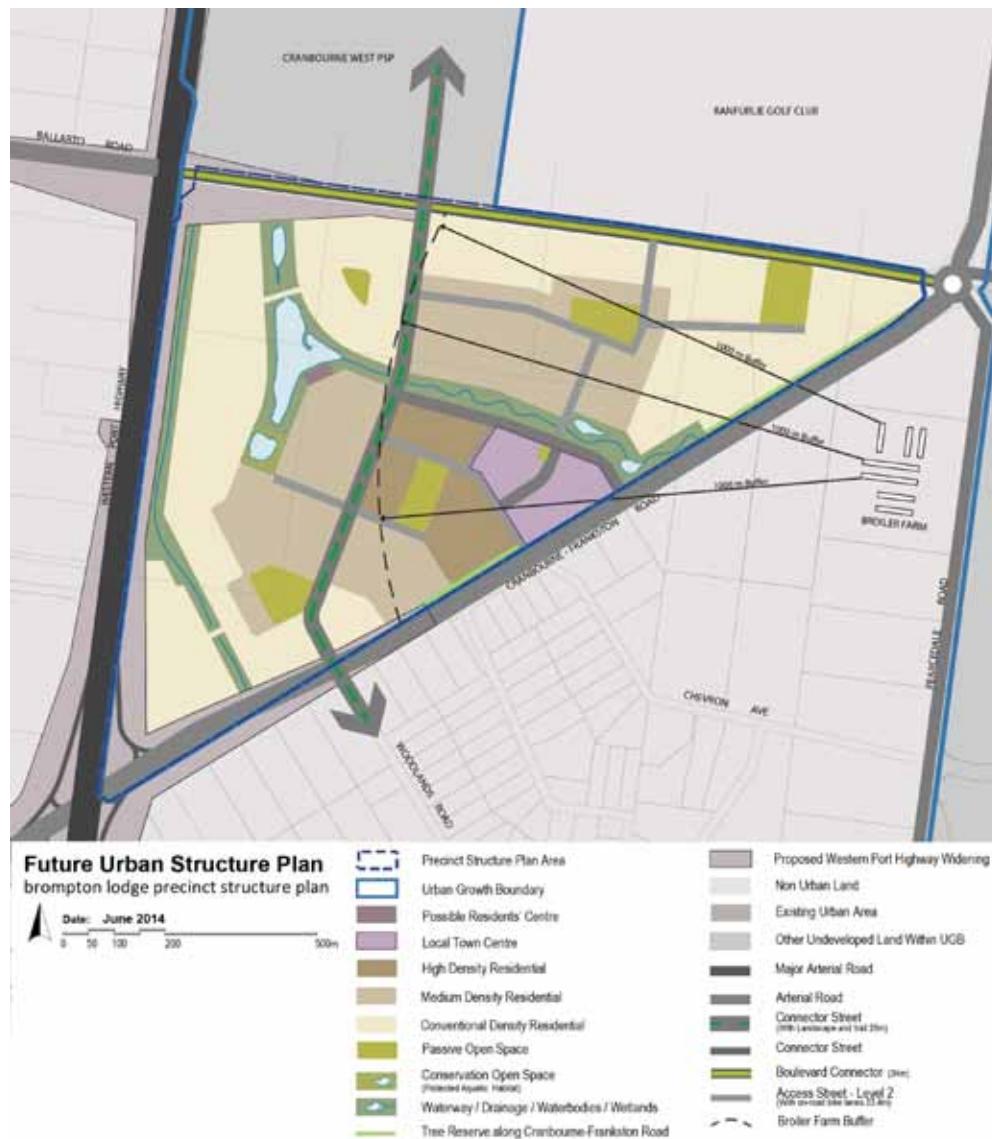
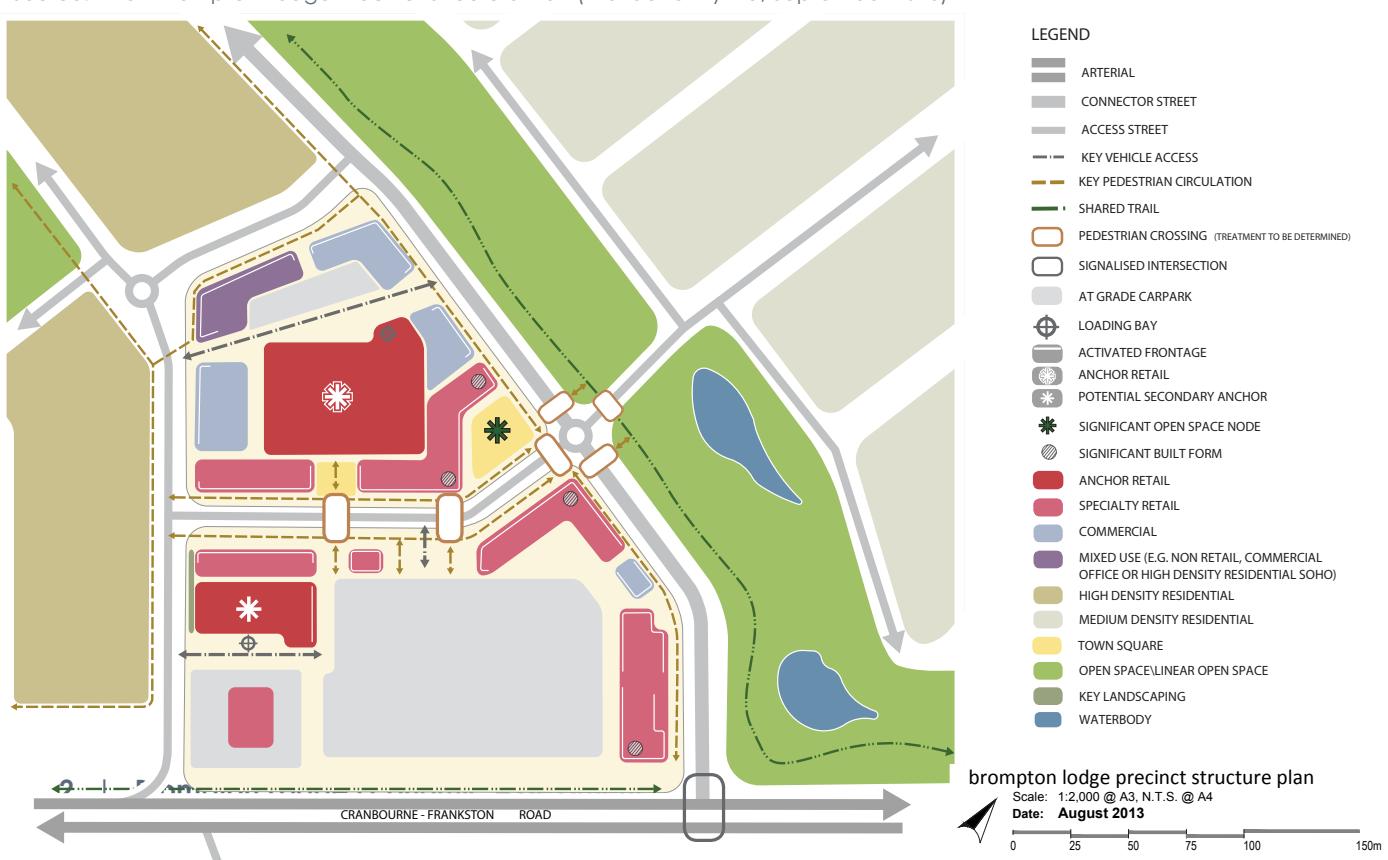


Figure 2: Brompton Lodge: Local Town Centre

Source: Draft Brompton Lodge Precinct Structure Plan (Wolfdene Pty Ltd, September 2013)



STUDY OBJECTIVES

2

ECONOMIC REPORT

The principal objective of the study is to prepare a report for and on behalf of Wolfdene Pty Ltd that identifies the economically sustainable retail and activity centre floorspace that will be required to optimise the neighbourhood role and function of a neighbourhood activities area (NAA) to be located at the Brompton Lodge PSP area.

The supporting objectives are to undertake necessary analyses to assess the following:

- Ultimate residential development capacity of the subject land of the Brompton Lodge PSP area;
- Ultimate residential development capacities of other approved areas within the immediate vicinity of the subject land, and likely to be encompassed within the primary and secondary catchment areas of an NAA appropriate for the area (refer Figure 4);
- Ultimate residential development capacity of the land currently occupied by the Ranfurlie Golf Club, and likely to be rezoned for residential purposes within the foreseeable future;
- Future retail expenditures at ultimate residential development capacity for the PSP area and for related areas within the vicinity that are likely to lie within the primary and secondary catchments of a future NAA to serve the local area;
- Future retail expenditures at ultimate residential capacity for the land now currently occupied by the Ranfurlie Golf Club, assuming the land is redeveloped for residential purposes at some time in the future
- Retail and activity centre floorspace requirements for the NAA at full development taking account of existing and approved activity centres within the vicinity of a future centre at Brompton Lodge. The assessment is required at two levels:
 - Assuming that the Brompton Lodge land and other approved residential land in the vicinity likely to be served by an NAA at the subject land is developed to capacity;
 - In addition to the above, assuming the Ranfurlie Golf Club land is rezoned in the foreseeable future and developed as a residential site.
- The Economic Report is required to take full account of Council's activity centre policy (refer Activities Areas and Non-Residential Uses Strategy, as amended December 2012), and other relevant local and state policies.

NEIGHBOURHOOD ACTIVITIES AREAS PRINCIPLES PLAN

The principal objective is to prepare an indicative principles plan to guide the planning and development of an NAA to serve the Brompton Lodge future residential community and related local areas. The indicative principles plan is to be prepared in conjunction and consultation with the planning and design team at Wolfdene and as a contribution to the PSP process.

POLICY CONTEXT

3

3.1 STATE POLICY

Metropolitan planning policy is incorporated in the Victoria Planning Provisions (VPPs) (refer Clause 11.4, Metropolitan Melbourne and Clause 17, Economic Development). The VPPs provide strategic directions for activity centre planning and development throughout Victoria. These encompass:

- the facilitation of “sustainable development that takes full advantage of existing settlement patterns, and investment in transport and communication, water and sewerage and social facilities.” (Victoria Planning Provisions: Section 11);
- “Define the role and function of activity centres, preferred uses, scale of development and links to the public transport system based on five classifications of activity centres comprising Central Activities District, Principal Activity Centres, Major Activity Centre, Specialised Activity Centres and Neighbourhood Activity Centres” (Victoria Planning Provisions Section 11.04-2)
- with respect to commercial development the policy objective is to “encourage developments which meet communities’ needs for retail entertainment, office and other commercial services and provide net community benefit in relation to accessibility, efficient infrastructure use and the aggregation and sustainability of commercial facilities.” (Victoria Planning Provisions Section 17.01-1)

In relation to activity centres, government policy is that activity centres should be planned to:

- “Undertake strategic planning for the use and development of land in and around the activity centres;
- Give clear direction in relation to the preferred location for investment;
- Encourage a diversity of housing types at higher densities in and around activity centres;
- Reduce the number of private motorised trips by concentrating activities that generate high numbers of (non-freight) trips in highly accessible activity centres;
- Improve access by walking, cycling and public transport to services and facilities for local and regional populations;
- Broaden the mix of uses in activity centres to include a range of services over longer hours appropriate to the type of centre and needs of the population served;
- Provide a focus for business, shopping, working, leisure and community facilities;
- Encourage economic activity and business synergies;
- Locate new small scale education, health and community facilities that meet local needs in or next to Neighbourhood Activity Centres;
- Ensure Neighbourhood Activity Centres are located within convenient walking distance in the design of new subdivisions;
- Improve the social, economic and environmental performance and amenity of the centre” (Victoria Planning Provisions Section 11.01-2)

3.2 LOCAL RETAIL POLICY

The City of Casey's current Local Planning Policy Framework (LPPF) includes a section on Retail Policy (Clause 22.07). "This policy complements the Municipal Strategic Statement (MSS) by providing a comprehensive framework for retail activity and related land use and development proposals in the City of Casey" (pg.1, 2007). The relevant policy objectives include:-

- To consolidate Casey's retail and commercial development patterns into recognised and planned activity centres.
- To develop a clear activity centre hierarchy.
- To direct and facilitate a diversity of activity (retail, commercial, community, institutional, education, recreation and housing) in activity centres.
- To ensure land use and development proposals for retail and commercial activities produce a net community benefit when measured against clear assessment criteria.
- To manage floorspace allocations according to a management framework.
- To develop robust neighbourhood centres that are presently the weakest link in the retail hierarchy.
- To provide car parking to satisfy the needs of users without detriment to local amenity

Relevant policies include:-

- New retail and commercial development is to occur in designated activity centres, unless otherwise provided for in this policy.
- A structure planning process is to be used as the mechanism to ensure that floorspace allocations achieve the best net community benefit outcomes.
- Structure plans are to be developed for all principal, major and neighbourhood centres and peripheral sales precincts and will be required to be prepared in conjunction with any associated rezoning greenfields planning and major redevelopment request.
- Sufficient floorspace is to be available over the long term to ensure each of the designated principal, major, neighbourhood activity centres and peripheral sales precincts can grow to fulfil their intended role, taking into account the general opportunities and constraints of each centre across the municipality.
- Floorspace 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 balanced activity centre system for the City.
- The broad allocation of floorspace to activity centres is to be based on the intended role of the centres rather than the precise floorspace to be provided.
- The subdivision of activity centres is to be carefully managed to retain flexibility for redevelopment and evolution over time, resisting short-term pressures to subdivide centres into small units that can then be individually sold.
- The regulation of commercial competition between individual businesses and activity centres should only occur where there is a prospect of an overall adverse impact upon the extent and adequacy of facilities available to the local community.

- 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 need for additional neighbourhood and convenience centres arising from the development of new suburban areas is to be identified through the preparation of development plans for these areas.

3.3 ACTIVITIES AREAS AND NON-RESIDENTIAL USES STRATEGY

The City of Casey 'Activities Areas and Non-Residential Uses Strategy' was released in December 2011, providing an update and review of the previous City of Casey Activity Centres Strategy (2006). The City of Casey activities area hierarchy can be seen in Figure 3.

A number of key objectives of the Strategy (*op. cit.*, page 5) impact on the proposed Brompton Lodge Neighbourhood Activities Area, including:

- To achieve best practice in Activities Areas planning and development;
- To consolidate Casey's commercial and residential settlement patterns;
- To respond to changes in the market place with regard to Activities Areas planning and land uses;
- To recognise the differences in planning for and reviewing Activity Areas at greenfield sites and in the existing urban area;
- To substantially strengthen the tier of Major Activities Areas;
- To develop a robust Neighbourhood Activities Areas hierarchy and network;
- To ensure all development provides for a Net Community Benefit.

A four tiered activity centre hierarchy, outlined in the State Planning Policy Framework (SPPF) provides the basis for Casey's activity centre hierarchy. The hierarchy encompasses:

- Central Activities Areas (CAA);
- Principal Activities Areas (PAA);
- Major Activities Areas (MAA); and
- Neighbourhood Activities Areas (NAA).

The Strategy notes that there are no CAAs located in the municipality which reduces the structure of the Casey activity centre hierarchy to three levels. The lowest tier of the hierarchy, NAAs, is able to be broken down into a sub-hierarchy, comprising:

- Large NAAs;
- Medium NAA;
- Local NAA.

The Strategy sets out the various components which define the different levels of the Neighbourhood Activities Areas sub-hierarchy.

NEIGHBOURHOOD ACTIVITIES AREAS CATCHMENT POPULATION

- Large: 15,000 – 25,000 persons;
- Medium: 8,000 – 12,000 persons;
- Local: up to 4,000 persons.

OPPORTUNITY FOR CHOICE

- **Large NAAs:** can have up to two full line supermarkets with 15 – 25 retail premises and other tenancies, medical services and a wide range of other possible retail/commercial uses to co-locate.
- **Medium NAAs:** can accommodate a single supermarket with 10 – 15 retail premises and other tenancies, medical services and other possible retail/commercial uses to co-locate.
- **Local NAAs:** may contain a convenience grocery outlet with up to five retail premises and other tenancies and a range of other possible retail/commercial uses to co-locate.

Note that the number of supporting tenancies refers to the number of **retail** tenancies. Other tenancies such as medical services or offices are not included in this number.

Further to the retail mix, Large and Medium NAAs should also accommodate:

- leisure and entertainment facilities, including open space reserves, and sporting and recreation facilities;
- opportunity for a range of commercial and professional services uses;
- community facilities, including community support services, child care, community meeting places and special needs housing;
- education and institutional facilities such as kindergartens, primary and secondary schools and religious facilities; and
- medium density housing (including an option for affordable housing in Large NAAs).

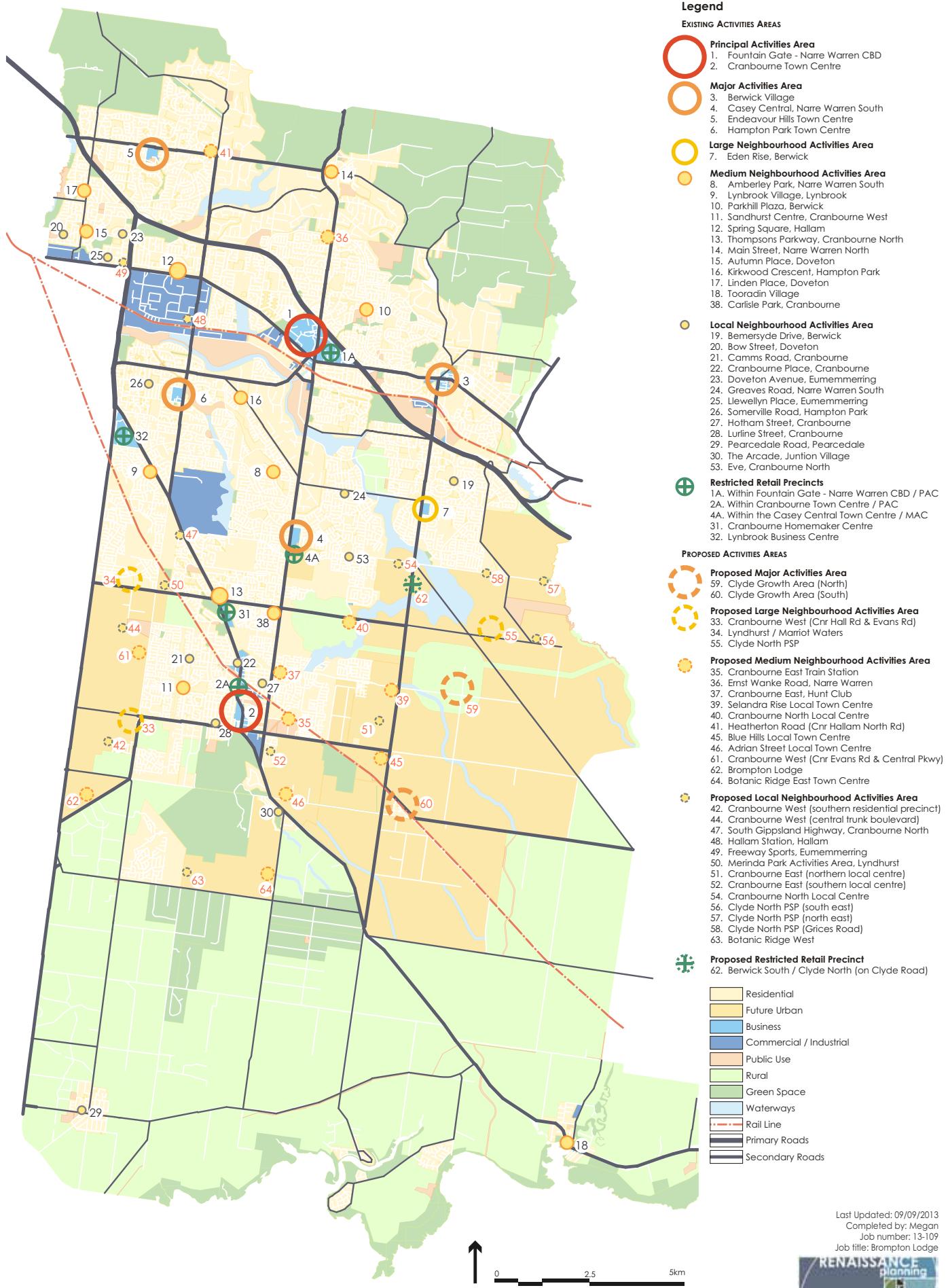
The Activities Areas and Non-Residential Uses Strategy (AANRUS) clearly sets out an existing and proposed activities area hierarchy for the municipality and includes a framework for NAAs detailing the purpose, objectives, catchment population, functions provided, opportunity for choice, accessibility and policy directions for each level of the NAA in the sub-hierarchy (refer Section 6 of the Strategy).

In summary, key requirements of policy in relation to a proposed NAA at Brompton Lodge encompass the following:-

- concentrate retail development within the activity centre hierarchy;
- accommodate a variety of stores and services to provide opportunity for choice;
- ensure equitable access to public transport, road, pedestrian and cycleway networks;
- incorporate environmentally sustainable urban design outcomes into activity centre design;
- provide for local employment opportunities.

Figure 3: City of Casey Existing and Future Retail Hierarchy (2013)

Source: Activities Areas and Non-Residential Uses Strategy (City of Casey, December 2012)



STUDY PROCESS & METHODOLOGY

4

The principal area for assessment is the Brompton Lodge Catchment Area (refer Figure 4). The existing and proposed activity centre network in the City of Casey Activities Areas and Non-Residential Uses Strategy are shown in Figure 3.

An overview of the study process applied to the economic impact assessment and the net community benefit assessment is shown below. They comprised four phases. These are:-

- Phase 1: Study Context
- Phase 2: Preliminary Analysis
- Phase 3: Demand Analysis
- Phase 4: Net Community Benefit Assessment.

PHASE 1: STUDY CONTEXT

The context of the Study was established through an assessment of Brompton Lodge and the surrounding urban area and the planning framework in which that area is positioned. The assessment took account of:-

- the likely resident population of the Brompton Lodge Neighbourhood Activities Area trade catchment at 2026 and 2031;
- the intended retail role of the Precinct as a medium neighbourhood activities area consistent with its future catchment population;
- recognition of the future and existing activities area hierarchy within the surrounds of the Precinct and the wider City of Casey.

PHASE 2: PRELIMINARY ANALYSIS

In this phase, the preparatory analysis for the economic assessment was completed. These comprised:-

- population forecasts. These forecasts were extended to 2026 and 2031 to allow for the expected date that the Brompton Lodge Precinct would be fully functional.

These are based on development capacity assessments and future development commencement dates as assessed by Renaissance Planning;

- an assessment of the likely household income characteristics of the Brompton Lodge Precinct trade catchment. The household income characteristics of the Precinct will affect the expenditure and activity demand forecasts. These outcomes can be found in Section 5.

The income assessments are based on small area household income and expenditure modelling of existing residential areas in the local district prepared by Marketinfo (2007) and updated to constant 2011/12 prices by Renaissance Planning;

- the development of current and forecast retail expenditure profiles for the Brompton Lodge catchment. These were prepared based on the Cranbourne North profiles for 2006/07 taking account of household income characteristics and related social and economic factors. These profiles were updated to 2011/12 constant prices by Renaissance Planning

by applying retail sales per capita ratios. Future retail expenditure profiles were prepared at 2011/12 constant prices applying conservative long term real growth assumptions for food retail.

- the supermarket floorspace supply was assessed for 2026 and 2031 for the area surrounding the Brompton Lodge Precinct within an approximate two kilometre radius.
- measures of retail productivity were prepared for the purpose of the economic assessment. These encompassed:-
 - a measure of required turnover per square metre of supermarket floorspace (retail turnover density). The information source for this work is comprised on industry data collected and held by Renaissance Planning;
 - employment densities for both retail and non-retail activities. The information source for this work is comprised on industry data collected and held by Renaissance Planning;

PHASE 3: DEMAND ASSESSMENTS

The demand assessments were completed in a series of inter-related steps. These comprised the following:-

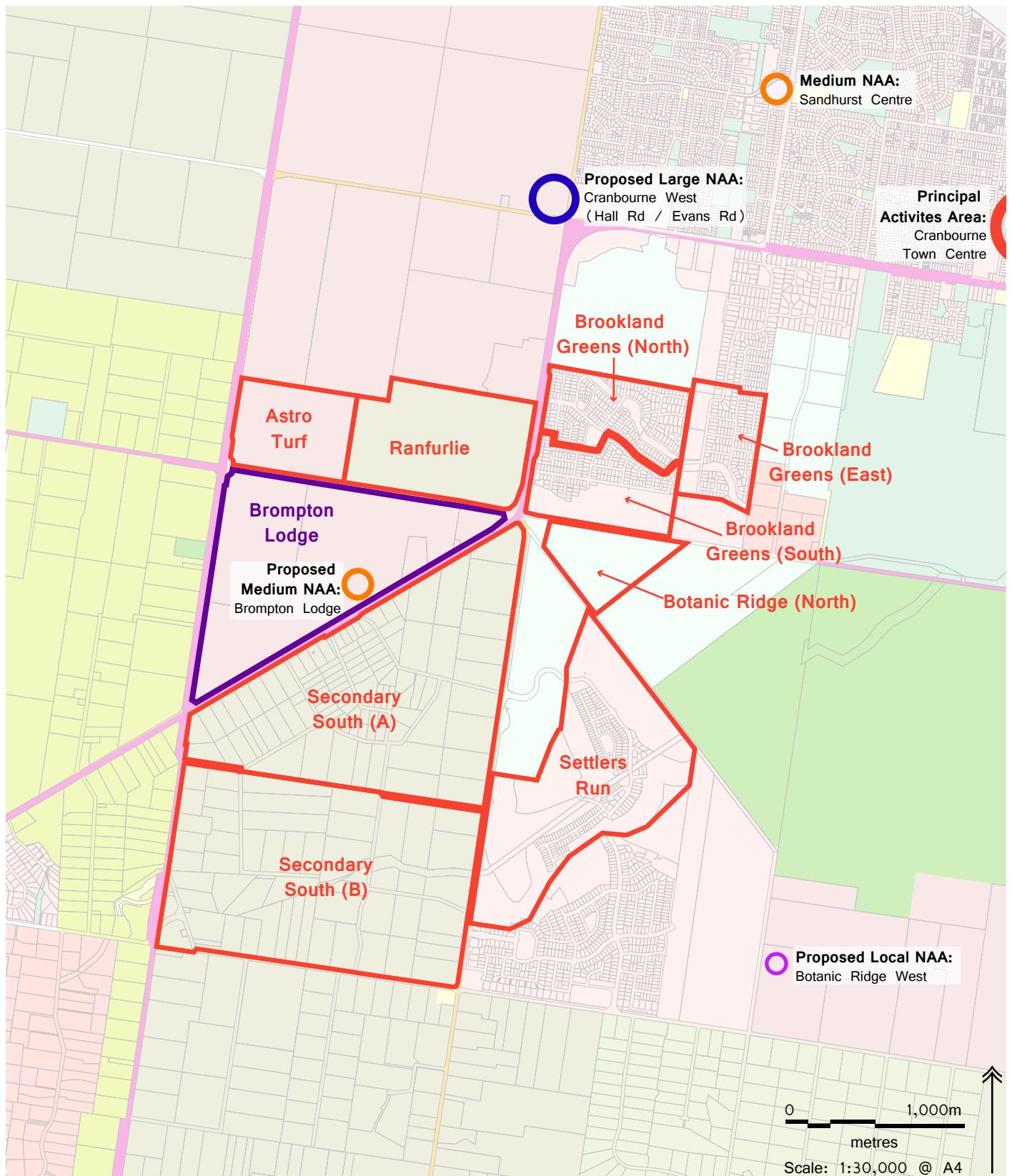
- retail demand forecasts were prepared for the Brompton Lodge trade catchment area based on the projected population at 2026 and the retail expenditure profiles. Forecasts of retail expenditures were prepared at 2011/12 constant prices for 2016, 2021, 2026 and 2031.
- a gravity model was applied for the wider trade catchment area where:
 - the trade catchment area was divided into a number of residential precinct (refer Figure 4);
 - a matrix of centroidal network distances was compiled for each of the precincts with measured distances to existing and proposed centres with supermarket anchors within an approximate four kilometre radius;
 - the gravity model was run to identify future supermarket market shares in each precinct based on estimates of future supermarket floorspace at each centre;
 - the gravity model was run under the assumption that the Brompton Lodge Precinct would accommodate a large format supermarket of 3,200m² GLA and potentially a smaller discount supermarket at 1,100m² GLA;
 - no attraction or disattraction factors were applied to the model;
- market share analysis was undertaken on the basis of the gravity modelling;
- supermarket sales forecasts were prepared for the Brompton Lodge Precinct by applying the market shares and the supermarket and fresh food demand forecasts. It was estimated that approximately 10 per cent of supermarket and other fresh food sales would be drawn from beyond the Main Trade Area (MTA). Estimates of future sales for other centres was made on the basis of future estimated floorspace and retail turnover density future estimates for each centre.

PHASE 4: NET COMMUNITY BENEFIT ASSESSMENTS

The outcomes of the analyses were brought together and reviewed in terms of economic and employment effects and an assessment of net community benefits. The major steps in the analysis comprised the following:-

- the assessment of the economic effects of a large format supermarket of 3,200 m² GLA and a discount supermarket at 1,100m² GLA being developed at Brompton Lodge in addition to the existing and proposed activity centre hierarchy in the City of Casey;
- Net Community Benefit Assessments were undertaken within a framework based on the City of Casey's 'Activities and Non-Residential Uses Strategy' (December, 2012). This sets out the comprehensive benefits to the local and wider community likely to be achieved through the development of a medium neighbourhood activities area anchored by a large format supermarket at the Brompton Lodge site.

Figure 4: Brompton Lodge Catchment Area



Legend

- Primary Catchment
- Secondary Catchment

KEY FINDINGS

5

The key findings from the demographic and economic analysis are set out in this section. These have been addressed in terms of the following:-

- population forecasts
- retail demand forecasts
- retail floorspace requirements
- current and future floorspace supply
- economic impact assessment

5.1 POPULATION FORECASTS

The Brompton Lodge Neighbourhood Activities Area's catchment extends approximately two kilometres from the subject site (refer Figure 4). Population forecasts were prepared for the each precinct within the catchment with an estimated population at capacity and assumed year of development completion (refer Table 1).

Table 1: Forecast Resident Population for Brompton Lodge Catchment

Component Area	Estimated Allotments at Capacity	Estimated Resident Population at Capacity ¹	Assumed Development (Year Completion)
Primary Catchment Area:			
Brompton Lodge	1,500	4,050	2026
Secondary Catchment Area:			
Secondary South (A)	110	300	2021
Secondary South (B)	60	160	2021
Settlers Run	450	1,220	2016
Botanic Ridge (North) ²	220	590	2031
Brookland Greens (North)	210	570	2016
Brookland Greens (South)	230	620	2016
Brookland Greens (East)	160	430	2011
Astro Turf ²	340	920	2031
Ranfurlie ²	620	1,670	2031
Total: Secondary Catchment Area	2,400	6,480	-
Total: Main Trade Area	3,900	10,530	-

¹ Assumes a long term yield rate of 2.7 persons per occupied dwelling. Rounded to the nearest 10 units

² Assumes 72% of land is developed as residential at a standard density of 15 lots per hectare

Assuming new residential areas have a net developable area of 72 per cent and are developed at a standard density of 15 lots / hectare and that each dwelling accommodates approximately 2.7 persons the analysis found that:-

- The primary catchment had an estimated resident population (ERP) of 4,050 persons;
- The secondary catchment will have an ERP of 3,300 persons at 2026 and 6,480 persons at 2031.

5.2 RETAIL DEMAND FORECASTS

RETAIL EXPENDITURE PROFILES

Retail expenditure profiles for supermarket and other fresh foods were prepared for the Brompton Lodge catchment by 5 year period from 2016 - 2031. These forecasts take account of an increase in supermarket goods sales per capita (based on Victoria as a whole) between 2006/07 and 2011/12 and forecast real per capita growth over the period 2016 - 2031 (refer Table 2) of:-

- 1.35 per cent per annum for food retail; and
- 1.5 per cent per annum for food catering purchases.

Table 2: Forecast per capita expenditures: supermarket goods, liquor and food

Source: MarketInfo (2006/07), updated to 2012 constant prices by Renaissance Planning

Commodity Group	Brompton Lodge Main Trade Area ¹ : Per Capita Expenditures ^{2,3} (\$ at 2011/12 constant prices)						Commodity Groups	Real Annual Change Assumptions (% per annum)		
	Historic	Current	Forecast							
	2006/07	2012	2016	2021	2026	2031				
Supermarkets and other fresh food	3,630	4,170	4,340	4,640	4,960	5,310	Food Retail	1.35		
Liquor	380	590	610	660	700	750		1.50		
Food catering	1,810	2,250	2,350	2,530	2,730	2,940				
Total (selected groups)	5,820	7,010	7,300	7,830	8,390	9,000				

¹ Indicative expenditure profile for the Brompton Lodge catchment based on Cranbourne North

² Includes Forecast Cumulative Growth

³ Includes online retail expenditures

It was estimated (based on previous analysis) that the supermarket component of total food retail expenditure would be approximately 76 per cent of total food retail expenditures. The resultant per capita expenditures for supermarkets are as follows:-

- \$3,630 per capita at 2012;
- \$4,640 per capita at 2021;
- \$5,310 per capita at 2031.

RETAIL DEMAND FORECASTS

Supermarket expenditure forecasts (Table 3) were prepared for the Brompton Lodge catchment area based on the projected future population at 2026 and 2031 along with the supermarkets expenditure profiles in Table 2. It can be seen that supermarket and fresh food, liquor and food catering expenditures (at 2011/12 constant prices) are:-

- expected to grow from approximately \$34.0 million at 2026 to \$36.5 million at 2031 for the Brompton Lodge precinct (primary catchment) (refer Figure 4);
- expected to grow from approximately \$27.7 million at 2026 to \$58.3 million at 2031 for the secondary catchment areas.

GRAVITY MODELLING

Market shares were calculated using a distance matrix and a gravity modelling methodology (refer Tables 4 - 5 & Figure 5). Market share forecasts were prepared for the Brompton Lodge catchment on a precinct basis.

Table 3: Estimated Resident Based Expenditure by Catchment Area

Source: MarketInfo (2006/07), updated to 2012 constant prices by Renaissance Planning

Commodity Group	Estimated Resident based Retail Expenditure 2026 (\$ million at 2011/12 constant prices)								Total: Main Trade Area	
	Primary	Secondary South (A)	Secondary South (B)	Settlers Run	Botanic Ridge (North)	Brookland Greens (South)	Brookland Greens (East)	Astro Turf	Ranfurie	
Supermarkets and other fresh food	20.1	1.5	0.8	6.1	n.a.	2.8	3.1	2.1	n.a.	n.a.
Liquor	2.8	0.2	0.1	0.9	n.a.	0.4	0.3	n.a.	n.a.	16.4
Food catering	11.1	0.8	0.4	3.3	n.a.	1.6	1.7	1.2	n.a.	2.3
Total	34.0	2.5	1.3	10.2	n.a.	4.8	5.2	3.6	n.a.	9.0

Commodity Group	Estimated Resident based Retail Expenditure 2031 (\$ million at 2011/12 constant prices)								Total: Main Trade Area	
	Primary	Secondary South (A)	Secondary South (B)	Settlers Run	Botanic Ridge (North)	Brookland Greens (South)	Brookland Greens (East)	Astro Turf	Ranfurie	
Supermarkets and other fresh food	21.5	1.6	0.8	6.5	3.1	3.0	3.3	4.9	8.9	34.4
Liquor	3.0	0.2	0.1	0.9	0.4	0.4	0.5	0.7	1.3	4.9
Food catering	11.9	0.9	0.5	3.6	1.7	1.7	1.8	1.3	2.7	4.9
Total	36.5	2.7	1.4	11.0	5.3	5.1	5.6	3.9	8.3	58.3

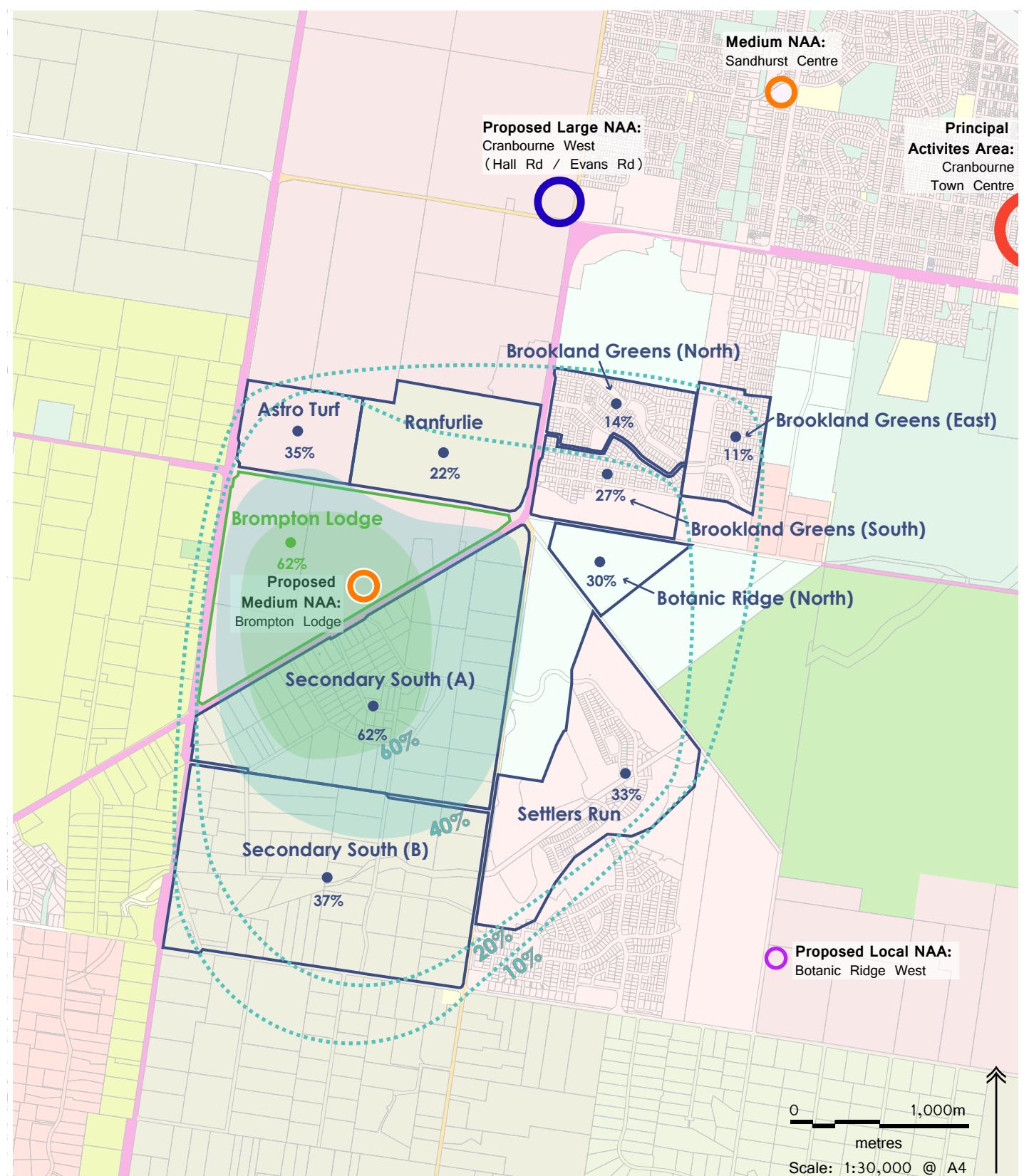
Table 4: Brompton Lodge Gravity Model: Matrix of Centroidal Network Distances between Catchment Areas and Existing and Future Supermarket based activity centres

Catchment Area	Centroid Network Distance to Existing and Future Supermarket based Activity Centres (kms)								Total: Main Trade Area	
	Brompton Lodge	Secondary South (A)	Secondary South (B)	Settlers Run	Botanic Ridge (North)	Brookland Greens (North)	Brookland Greens (South)	Astro Turf	Ranfurie	
Brompton Lodge NAA	0.7	0.7	2.0	2.0	1.4	2.1	1.4	2.9	1.2	1.8
Cranbourne West (Hall Rd)	3.3	3.3	4.6	4.6	2.1	1.8	1.9	2.5	2.2	2.0
Sandhurst Centre (Coles)	5.1	5.1	6.4	6.4	3.9	2.4	3.7	2.1	4.0	3.8
Botanic Ridge West NAA	4.5	3.9	3.4	1.9	4.9	5.4	4.9	6.3	5.4	4.9
Cranbourne PAA	5.9	5.9	7.2	7.2	4.9	3.2	4.5	3.0	4.8	4.6

Table 5: Brompton Lodge Gravity Model - Market Shares by Precinct

Supermarket based Activity Centre (m ²)	% Market Share by Catchment Area								Total: Main Trade Area	
	Brompton Lodge	Secondary South (A)	Secondary South (B)	Settlers Run	Botanic Ridge (North)	Brookland Greens (South)	Brookland Greens (East)	Astro Turf	Ranfurie	
Brompton Lodge NAA	3,700	62.3	62.1	36.5	25.5	23.0	39.4	43.5	41.7	33.9
Cranbourne West (Hall Rd)	9,000	14.8	14.8	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	34.7
Sandhurst Centre (Coles)	2,140	1.8	1.8	3.7	3.3	3.7	6.7	3.7	10.5	3.4
Botanic Ridge West NAA	1,500	1.6	1.9	6.7	14.5	1.8	1.4	1.7	1.4	1.5
Cranbourne PAA	10,840	7.5	7.4	15.7	14.2	13.3	22.1	13.8	31.1	13.0
Total: Main Centres	27,180	88.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0	88.0
Total: Online / Other Centres	12.0	12.0	12.0	12.0	12.0	12.0	12.0	12.0	12.0	12.0
Total: Main / Online / Other Centres	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**Figure 5: Assessed Market Share of Brompton Lodge for Supermarket Goods:
Analysis by Local Area at Full Development**



Legend



Primary Catchment



Secondary Catchment

Source: Brompton Lodge Economic Assessment, Tables 5

MARKET SHARE AND CATCHMENT FORECASTS

Primary and Secondary catchments were drawn for the Brompton Lodge catchment to form the main trade area (MTA) (refer Table 5 & Figure 4). The primary catchment will be the focus of walk, cycle and daily trips generated to the supermarket and medium NAA. The primary catchment at 2031 accounts for:

- approximately 38 per cent of the total catchment population;
- an average market share of 62 per cent for supermarket goods. That is, the Brompton Lodge NAA would be likely to capture around 62 per cent of all resident based supermarket expenditures for households within the primary catchment.

The secondary catchment for Brompton Lodge catchment extends approximately two kilometres from the proposed NAA. The secondary catchment of the proposed supermarket will provide a convenient and accessible neighbourhood centre for food, grocery and convenience shopping trips. The analysis found that the secondary catchment accounted for:

- approximately 62 per cent of the total catchment population;
- an average market share of 30 per cent for supermarket goods. That is, the Brompton Lodge NAA would likely capture around 30 per cent of all resident based supermarket expenditures for households within the secondary catchment.

5.3 TRADE EFFECTS

FORECAST RETAIL SALES

The assessed retail expenditure for the precincts in the main trade area (refer Table 3) have been multiplied by the market shares to determine supermarket sales bound to Brompton Lodge (refer Table 6 & Figure 6).

It can be seen that the supermarket and fresh food sales bound to Brompton Lodge are estimated to grow from approximately \$25.3 million in 2026 to \$33.9 million in 2031 when the catchment areas are estimated to be fully developed. It can also be seen that at 2031:-

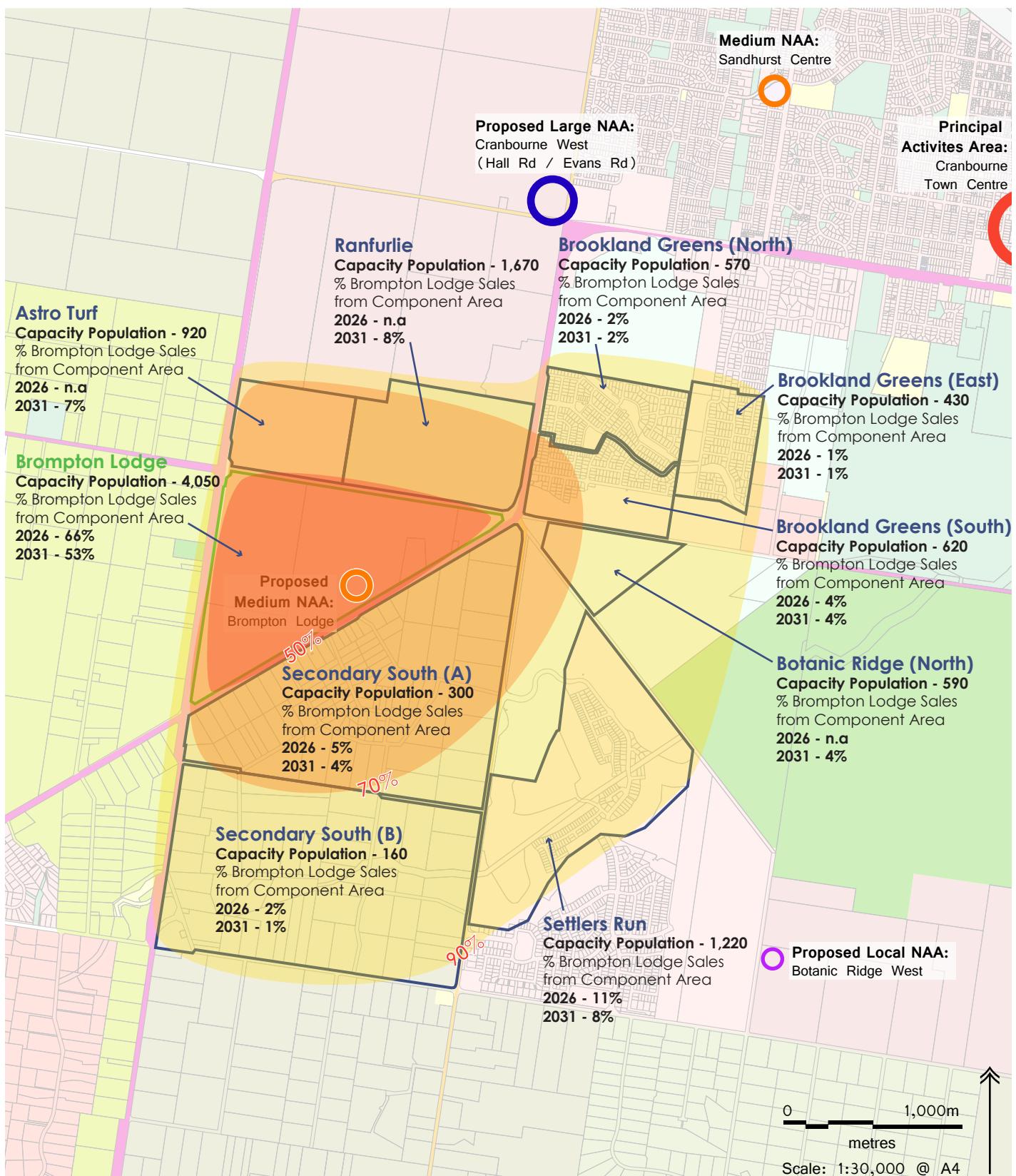
- the primary catchment accounts for approximately 52 per cent of the supermarket and other fresh food expenditure bound to Brompton Lodge;
- the secondary catchment accounts for approximately 38 per cent of the supermarket and other fresh food expenditure bound to Brompton Lodge; and
- The remaining 10 per cent of supermarket sales come from beyond the main trade area.

Table 6: Forecast Sales bound to Brompton Lodge Neighbourhood Activities Area

		Brompton Lodge Neighbourhood Activities Area: Forecast Sales 2026 (\$ million at 2011/12 constant prices)									Sales from beyond MTA		Total Sales bound to Brompton Lodge		
		Primary			Secondary Catchment			Secondary Catchment			Total: Secondary				
Commodity Group	Brompton Lodge	Secondary South (A)	Secondary South (B)	Settlers Run	Botanic Ridge (North)	Brookland Greens (North)	Brookland Greens (South)	Brookland Greens (East)	Astro Turf	Ranfurie	Total: Secondary				
Supermarkets and other fresh food	12.5	0.9	0.3	2.0	n.a	0.4	0.8	0.2	n.a	n.a	4.7	1.9	19.1		
Liquor	1.8	0.1	0.0	0.3	n.a	0.1	0.1	0.0	n.a	n.a	0.7	0.3	2.7		
Food catering ¹	2.3	0.2	0.1	0.4	n.a	0.1	0.2	0.0	n.a	n.a	0.9	0.4	3.5		
Total	16.6	1.2	0.4	2.6	n.a	0.5	1.1	0.3	n.a	n.a	6.2	2.5	25.3		

		Brompton Lodge Neighbourhood Activities Area: Forecast Sales 2031 (\$ million at 2011/12 constant prices)									Sales from beyond MTA		Total Sales bound to Brompton Lodge		
		Primary			Secondary Catchment			Secondary Catchment			Total: Secondary				
Commodity Group	Brompton Lodge	Secondary South (A)	Secondary South (B)	Settlers Run	Botanic Ridge (North)	Brookland Greens (North)	Brookland Greens (South)	Brookland Greens (East)	Astro Turf	Ranfurie	Total: Secondary				
Supermarkets and other fresh food	13.4	1.0	0.3	2.1	0.9	0.4	0.9	0.3	1.7	1.9	9.6	2.6	25.6		
Liquor	1.9	0.1	0.0	0.3	0.1	0.1	0.1	0.1	0.0	0.2	0.3	1.4	0.4	3.6	
Food catering ¹	2.5	0.2	0.1	0.4	0.2	0.1	0.2	0.0	0.0	0.3	0.4	1.8	0.5	4.7	
Total	17.8	1.3	0.4	2.8	1.2	0.6	1.2	0.3	2.3	2.5	12.7	3.4	33.9		

Figure 6: Modelled Trade Catchment (2031): Forecast Distribution of Food Sales by Origin Area



Source: Brompton Lodge Economic Assessment, Tables 1 & 6

POTENTIAL IMPACTS ON THE CRANBOURNE WEST (HALL ROAD) LARGE NAA

An economic impact assessment was undertaken on the effects of the proposed development at Brompton Lodge on the future Cranbourne West (Hall Road) Large NAA. The analysis considered:-

- the potential loss of trade from catchment areas that **form part of the original Cranbourne West PSP area** that would likely have been known or taken into account (refer Figure 7);
- Additional trade at the Cranbourne West (Hall Road) NAA would likely receive from **new residential areas** that did **not form part of the Cranbourne West PSP and were not known of the time of the PSP assessments**.

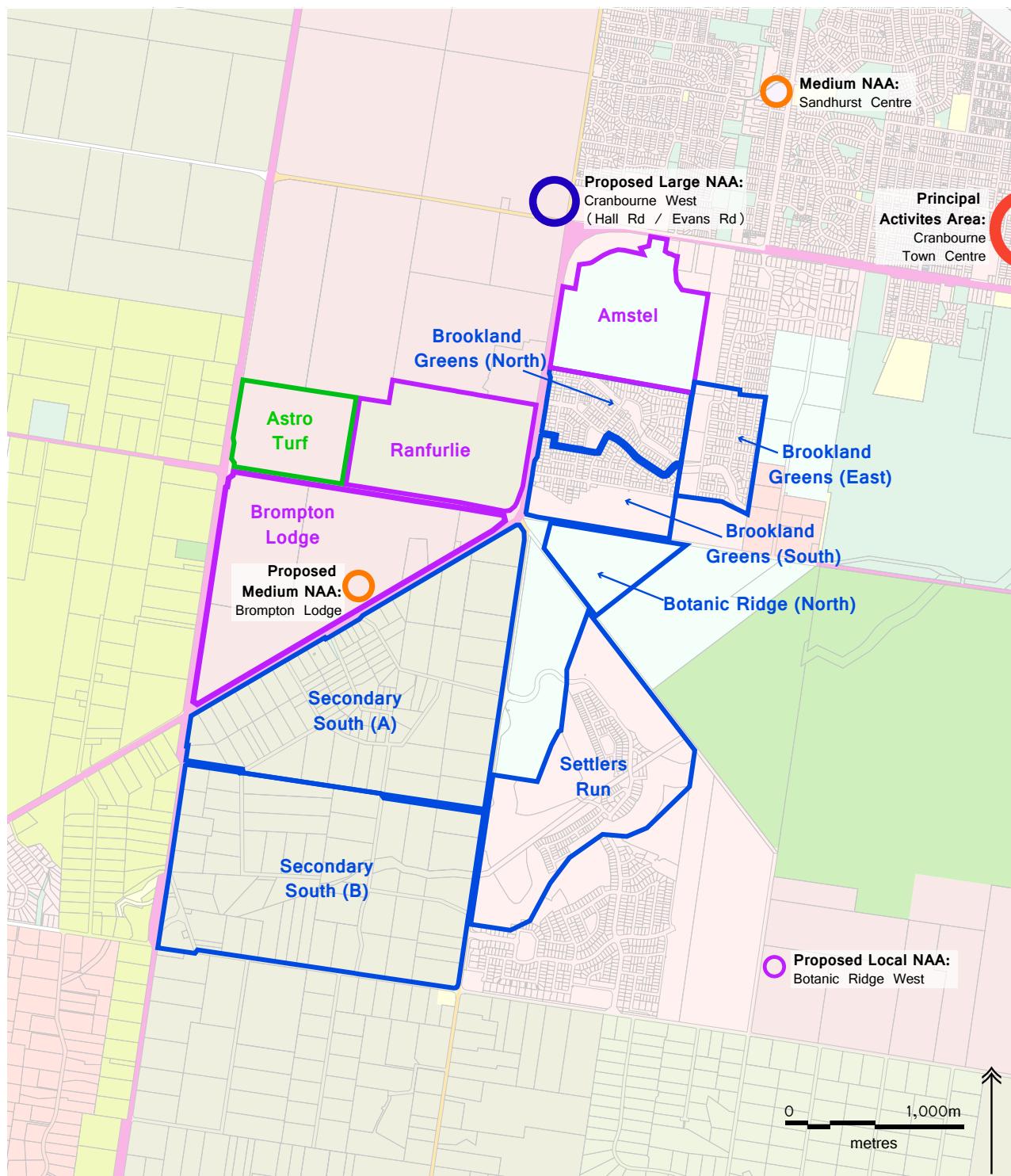
Following a request from the Metropolitan Planning Authority (MPA) a clarification of catchment areas for the Brompton Lodge medium NAA and the Cranbourne West large NAA is set out in a new section (refer Section 5.3A and Figure 8).

If approximately 3,700 - 4,300m² GLA supermarket floorspace is assumed at the Brompton Lodge NAA by 2031 then the impacts on the future Cranbourne West (Hall Road) NAA area are as follows:-

- the potential loss of trade from the original PSP areas (including Secondary South (A), Secondary South (B), Settlers Run, Brookland Greens (North), Brookland Greens (South) and Brookland Greens (East)) assuming that 50% of trade bound to Brompton Lodge will go to Cranbourne West (Hall Road) is approximately \$2.5 million at 2011/12 constant prices for supermarket and other fresh food at 2031;
- further, the addition of the new residential areas (including Brompton Lodge, Botanic Ridge North, Ranfurlie and Amstel) not known at the time of the PSP assessments would generate approximately \$13.9 million at 2011/12 constant prices to the Cranbourne West (Hall Road) NAA for supermarket and other fresh food at 2031. It will be noted that this will occur even taking into account a 3,700 - 4,300m² GLA supermarket floorspace at the Brompton Lodge NAA;
- therefore the overall net trade effect of both the new residential areas and the additional supermarket floorspace at Brompton Lodge result in a **net trade benefit** of (\$13.9m - \$2.5m =) **\$11.4 million** at 2011/12 constant prices.

In summary, gravity modelling indicates that based on the assessment of future supermarket trade at both the Cranbourne West (Hall Road) NAA and Brompton Lodge NAA that if one takes account of both the additional activity centre development at Brompton Lodge together with the new residential areas not known at the time of the Cranbourne West PSP assessments then the overall effect is one of a net trade benefit to the Cranbourne West (Hall Road) NAA. In the case of a 3,700 - 4,300m² GLA supermarket floorspace at Brompton Lodge the net trade benefit is approximately \$11.4 million (of supermarket and other fresh food) at 2011/12 constant prices.

Figure 7: Potential Cranbourne West (Hall Road) Catchment Area



Legend

- Part of original Cranbourne West PSP area.
- Known catchment areas not part of Cranbourne West PSP.
- Areas not part of Cranbourne West PSP and not part of trade catchment area.

5.3A CLARIFICATION OF CATCHMENT AREAS

This sub-section was prepared in June 2014 following the review of the September 2013 draft final report by Council and the Metropolitan Planning Authority (MPA). In particular, it is directed to address commentary from Council that “*the MPA has expressed some confusion with respect to differentiating between all the various catchment areas, i.e. those that were considered in a catchment analysis for the Cranbourne West PSP and those that were not*” (communication from City of Casey to Watsons, 4 June 2014).

CRANBOURNE WEST (HALL ROAD) LARGE NAA: ORIGINAL CATCHMENT AREA

Figure 8 shows the catchment areas that were used to determine the floorspace requirements for the Cranbourne West NAA in original analysis which underpinned the activity centre requirements for the Cranbourne West Precinct Structure Plan (PSP). The analysis was undertaken by Applied Development Research in June 2008.

It can be seen that the **original catchment for the Cranbourne West (Hall Road) large NAA** was deemed to comprise the following **component areas**:

- future residential areas in the Cranbourne West PSP that were likely to form part of the catchment for the Cranbourne West large NAA are shown in orange (areas A, D and E in Figure 8). ADR estimated that the residential population capacity of these areas was approximately 8,700 persons. The projected population for the Cranbourne West PSP area is approximately 12,570 persons (refer Cranbourne West Precinct Structure Plan, May 2012). It will be noted that the other future residential areas in the northern part of the PSP area (likely to accommodate approximately 3,870 persons) fall into the catchment that will be served by the Marriott Waters large NAA;
- the catchment of the Cranbourne West large NAA would also draw into existing urban areas immediately east of the Cranbourne PSP. These are areas B and C located between Monahans Road and Evans Road and are shown in orange in Figure 8. ADR estimated the population capacity of these areas at approximately 8,980 persons. These areas would be effectively shared with the Sandhurst medium NAA located at Duff Street, west of Monahans Road (for original source material refer City of Casey Neighbourhood Activity Centre Trade Area Analysis, ADR Pty. Ltd., June 2008, Map 8 “Cranbourne West Proposed Activity Centre Catchment Sub-Areas”);
- a small part of the Cranbourne West PSP area: designated as the Astro Turf precinct (shown in grey stripe on an orange background) is the only area which is common to both the main trade area of Brompton Lodge and:
 - the original catchment area for the Cranbourne West (Hall Road) large NAA, as assessed by ADR (June 2008);
 - any part of the Cranbourne West PSP area.

CRANBOURNE WEST (HALL ROAD) LARGE NAA: ADDITIONAL CATCHMENT AREAS

Figure 8 also shows additional catchment areas that the Cranbourne West (Hall Road) large NAA will likely draw from and which were not considered as part of the original catchment areas as assessed by ADR at June 2008. These include:

- the Amstel precinct which is currently occupied by the Amstel Golf Club and is an operating golf course. An application is currently before Council (July 2014) for the rezoning of the land to residential purposes. Any future development of the precinct, which would add to the residential population of the area would form part of the Cranbourne West (Hall Road) large NAA catchment area. The land is shown in striped orange in Figure 8. It will be noted that the Amstel area would not form part of the Brompton Lodge catchment area;
- the Ranfurlie and Brookland Greens precincts are shown in green in Figure 8. These precincts encompass existing or future residential areas which will form part which will form part of the Cranbourne West (Hall Road) large NAA catchment area. They will also form part of the Brompton Lodge medium NAA catchment area and thus should be considered to be a shared catchment area for both NAAs.

In summary the original catchment area determined by ADR Pty. Ltd. for Casey City Council in 2008 is shown in orange (parts of the Cranbourne West PSP area and existing urban areas between Monahans Road and Evans Road). The **total projected population capacity** for the support catchment area for the Cranbourne West large NAA was approximately **17,680 persons**.

Only a very small component of this catchment area forms part of the main trade area for Brompton Lodge. This is the area referred to as the Astro Turf precinct in this report. The capacity population of this precinct was estimated at approximately 920 persons in this report and approximately 1,100 persons in the Cranbourne West PSP report. On the basis of the ADR report the Astro Turf precinct only comprises approximately 6 per cent of the original projected catchment area for the Cranbourne West large NAA.

The likely trade catchment area of the Cranbourne West (Hall Road) large NAA also encompasses several precincts that were not considered by ADR in its original analysis (2008). This includes the Amstel, Ranfurlie and Brookland Greens precincts.

BROMPTON LODGE MEDIUM NAA CATCHMENT AREA

Figure 8 also shows the likely **catchment areas** of the **Brompton Lodge medium NAA**. It will be noted that:

- the primary catchment area (show in dark blue) is the Brompton Lodge Structure Plan area. This is the triangular area south of the proposed Ballarto Road alignment and bounded by Cranbourne-Frankston Road and Western Port Highway;
- the secondary catchment areas are shown in striped grey;
- a small part of the Cranbourne West PSP area: designated as the Astro Turf precinct (shown in grey stripe on an orange background) is the only area which is common to both the main trade area of Brompton Lodge and the Cranbourne West PSP area;
- there are several precincts which are additional catchment areas for the Cranbourne West (Hall Road) large NAA and form part of the secondary catchment area for Brompton Lodge. These are the areas shown in green in Figure 8 and encompass the Ranfurlie and Brookland Greens precincts;
- the total catchment population capacity of the main trade area is approximately 10,530 persons (refer Section 5, Table 1 in this report).

In summary it can be seen that the Brompton Lodge medium NAA and Cranbourne West large NAA catchments are largely mutually exclusive. The Cranbourne West large NAA catchment generally lies to the north of the Brompton Lodge medium NAA catchment. Only a very small area (referred to as the Astro Turf precinct in this report) is common to both the PSP area and the likely catchment area of the Brompton Lodge medium NAA.

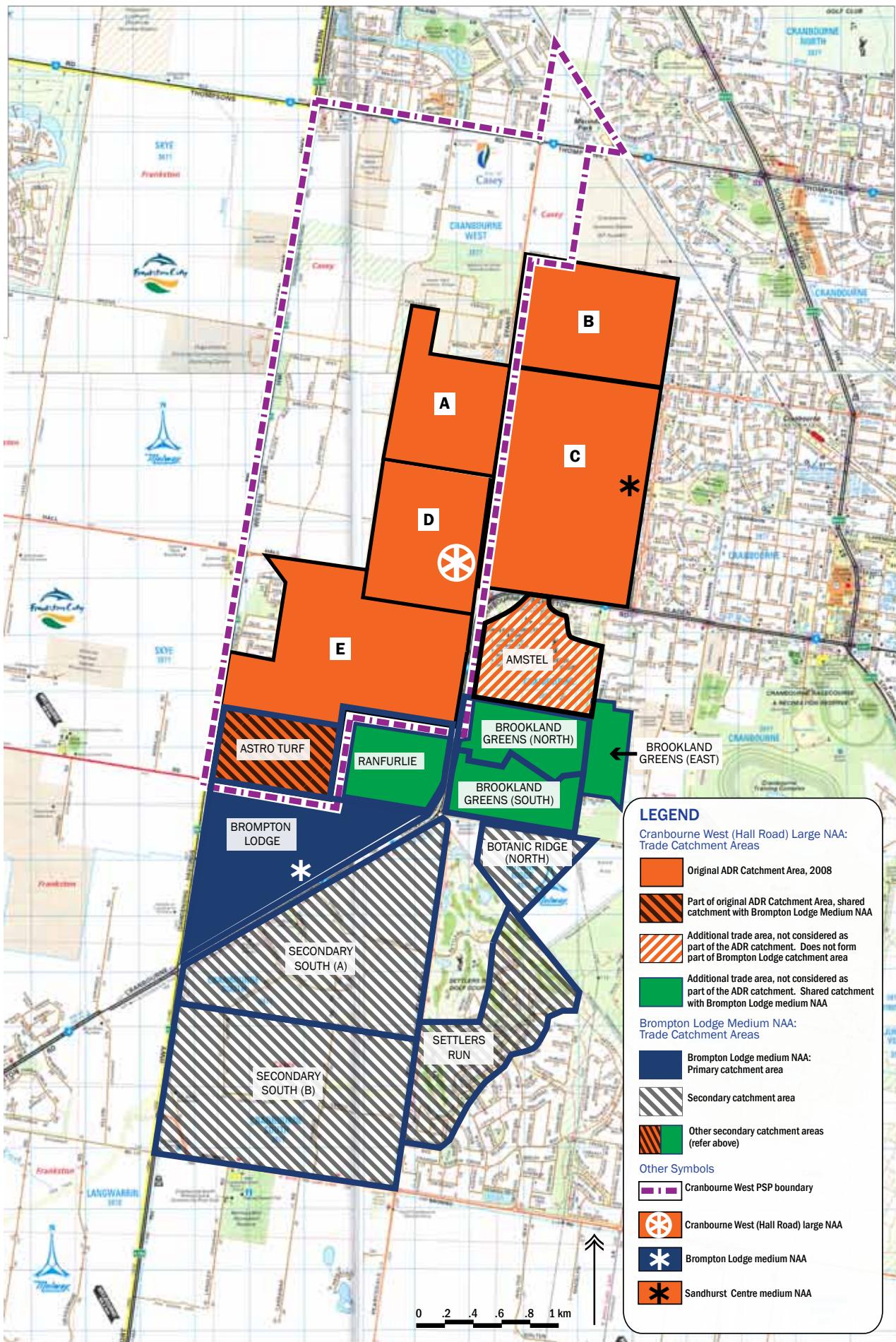
There are several additional precincts that will likely form shared catchments for both the Hall Road large NAA and the Brompton Lodge medium NAA. These are shown in green in Figure 8 and they encompass the Ranfurly and Brookland Greens precincts. Significantly, these areas were not considered as part of the original catchment for the Cranbourne West (Hall Road) large NAA and therefore add to original demand projections.

These existing and future residential areas effectively provide additional supporting population for the Cranbourne West large NAA and form part of the secondary catchment area for the Brompton Lodge medium NAA; and as indicated these areas were not considered or known at the time of the original 2008 study.

The additional shared catchment that will be available to the Cranbourne West large NAA substantially explains why an economic effects assessment of the trade impacts of the Brompton Lodge medium NAA on the Cranbourne West large NAA actually results in a **net trade benefit** to the Cranbourne West large NAA that takes account of both the new centre (Brompton Lodge) and the new catchment areas to be served (refer Section 5.3 in this report). That is, the benefits of the new catchment areas to the Cranbourne West large NAA will marginally outweigh the competitive effects of trade drawn to the Brompton Lodge medium NAA.

Figure 8: Brompton Lodge and Cranbourne West (Hall Road) Catchment Areas

(Source: Hall Road Catchment Areas, refer City of Casey Neighbourhood Activity Centre, Trade Area Analysis, Applied Development Research Pty Ltd, June 2008)



5.4 FLOORSPACE REQUIREMENTS

On the basis of a retail turnover density (RTD) of \$7,000/m² GLA for supermarket, fresh food and liquor and \$5,500/m² GLA for cafes, restaurants and takeaway food (refer Table 7) Brompton Lodge will support a full line supermarket (3,200m² GLA) and a second smaller discount supermarket (1,100m² GLA) by 2036. The Brompton Lodge NAA can also support 860m² of cafes, restaurant and takeaway food by 2031. Table 8 shows an indicative tenancy structure for the proposed medium neighbourhood activities area.

Table 7: Summary of Floorspace Requirements

Store Type	Retail Turnover Density	Floorspace Allocation (m ² GLA)	
		2026	2031
Supermarket, fresh food & liquor	7,000	3,120	4,170
Cafes, Restaurants & Takeaway Food	5,500	640	860
Other Retail ¹	–	600	800
Retail Services ²	–	220	320
Non-Retail ³	–	500	1,000
Other	–	700	700
Total Floorspace	–	5,780	7,850

¹Other retail can include newsagents, pharmacy etc.

²Personal retail services can include hairdressers, beauty services, dry cleaning etc.

³Non-Retail can include gym, medical services and offices.

Table 8: Indicative Tenancy Structure

Store Type	Indicative Tenancy Structure			
	2026		2031	
	# Tenancies	Floorspace (m ² GLA)	# Tenancies	Floorspace (m ² GLA)
Major Supermarket ¹	1	3,200	1	3,200
Discount supermarket ¹	-	-	1	1,100
Cafes, restaurants and takeaway food				
Family type restaurant / takeaway	1	350	1	350
Other cafes / takeaway	3	290	5	510
Other retail stores				
Newsagency / tattslotto / post office	1	250	1	250
Pharmacy	1	250	1	250
Other stores (gift shop, household goods)	1	100	3	300
Retail services				
Hairdresser / beautician	1	100	2	200
Dry cleaner	1	120	1	120
Non retail				
Retail estate agents	1	100	2	200
Medical suites	2	200	4	400
Office suites	2	200	4	400
Other				
Gym	1	350	1	350
Tavern	1	350	1	350
Total: All Tenancies	20	5,860	32	7,980

¹Assumes that by 2031 all fresh food will be provided by the supermarkets. In the future there is potential for an additional fresh food / health food store at the centre.

Note that the capacity number of tenancies (at 2031) is comprised of 15 retail tenancies and 17 non retail tenancies (refer page 7 for definition of medium NAA)

Table 9: On-Site and Multiplier Employment Effects during the Construction Phase (2026/2031)

Floorspace Type	Floorspace m ² GLA	Approximate Cost / Unit (cost/m ² GLA at 2011/12 prices)	Estimated Development Costs ¹ (\$million at 2011/12 price)	On-Site Construction Employment			Off-Site Construction Employment ³			Total Construction Employment / Year (assumes 15 month project)
				On-Site Job Years / \$ million Development Cost ²	Number of Job Years (rounded)	Number of Jobs / Year (assuming 15 month project)	Number of Jobs Years (rounded)	Number of Jobs (assuming 15 month project)	Number of Jobs (assuming 15 month project)	
2026										
Retail Stores and Services	4,580	2,750	12.6	4.25	50	40	80	64	104	
Non-Retail Services	1,200	2,750	3.3	4.25	10	8	20	16	24	
Total: 2026	5,780	2,750	15.9	4.25	60	48	100	80	128	
2031										
Retail Stores and Services	1,700	2,750	4.7	4.25	20	16	30	24	40	
Non-Retail Services	500	2,750	1.4	4.25	10	8	20	16	24	
Total: 2031	2,200	2,750	6.1	4.25	30	24	50	40	64	
Total	7,980	2,750	21.9	4.25	90	72	150	120	192	

¹ Costs exclude site acquisition and costs of finance but include provision for site development and on-site infrastructure and access.² Estimate by Renaissance Planning based on ABS Publication 8772.0³ Includes building, construction, transport, design and services employment. Off-site multiplier of 1.6 based on ABS National Accounts data

5.5 EMPLOYMENT EFFECTS

An assessment was undertaken of the likely employment effects that would be generated as a consequence of the proposed development of the 3,200m² GLA full line supermarket and the 1,100m² GLA discount supermarket at Brompton Lodge NAA. The results are shown in Table 9 and 10. It was found that:-

- during the construction phase of the development a total of 128 jobs to 2026 and an additional 64 jobs to 2031 would be created assuming the development was constructed over two 15 month periods;
- in the post construction phase a total of approximately 330 jobs would be generated to 2026 and an additional 130 jobs to 2031.

In summary the development of a medium neighbourhood activities area at the Brompton Lodge site will generate significant additional employment benefits to the region.

Table 10: On-Site and Multiplier Employment Effects during the Operational Phase (2026/2031)

Major Commodity Group	Brompton Lodge Neighbourhood Activities Area: On-Site and Multiplier Effects during Operation				
	On-Site Jobs Generated per 100m ² GLA of Floorspace	Proposed Additional Activities Areas Floorspace (m ² GLA)	On-Site Jobs Generated**	Off-Site Jobs Generated***	Total Jobs Generated Post Construction
2026					
Supermarket	4.0	3,200	130	80	210
Cafes, restaurants and takeaway food	3.5	640	20	10	30
Other Retail Stores and Services	3.0	820	20	10	30
Gymnasium	2.5	350	10	10	20
Other Non-Retail Services	2.5	500	10	10	20
Tavern	3.5	350	10	10	20
Total: 2026	n.a	5,860	200	130	330
2031 (additional jobs)					
Supermarket	4.0	1,100	40	20	60
Cafes, restaurants and takeaway food	3.5	220	10	10	20
Other Retail Stores and Services	3.0	300	10	10	20
Other Non-Retail Services	3.5	500	20	10	30
Total: 2031 (additional jobs)	n.a	2,120	80	50	130
Total	n.a	7,980	280	180	460

* The employment density ratios utilised in this analysis are in line with analysis undertaken by Essential Economics in Growth Corridor Plans: Activity Centre and Employment Planning, November 2011, including approximately 4 jobs per 100m² GLA for supermarket floorspace, 2.3 for other retail floorspace, 3.1 for total retail floorspace and 3.3 for non-retail floorspace.

** Full-time / part-time and casual employment generated directly on-site in the post-construction phase.

*** Using an off-site indirect employment multiplier of 0.6 for every on-site job generated

NET COMMUNITY BENEFIT ASSESSMENT

6

The proposed Brompton Lodge Neighbourhood Activities Area (BLNAA) is located in the suburb of Cranbourne South in the City of Casey. This report had provided an economic assessment of the sustainable demand requirements for an additional large format supermarket and a smaller discount supermarket at the BLNAA. The report found that the precinct will be able to support approximately 860m² GLA of cafe, restaurant and takeaway food stores within the precinct and a suite of complementary activities (refer Tables 7 & 8).

This section of the report is an assessment of net community benefit and applies the 'Net Community Benefit Checklist' from the City of Casey 'Activities Areas and Non-Residential Uses Strategy' (pages 45 - 46). The key components of the checklist are:-

- opportunity for choice;
- accessibility and convenience;
- design and amenity;
- viability and efficiency;
- key questions.

Table 11 provides an assessment of the proposal in terms of these criteria and the specific tests set out in the checklist.

Table 11: Net Community Benefit Assessment

NET COMMUNITY BENEFIT GUIDELINES	BROMPTON LODGE COMMENT
<p>Opportunity for Choice</p> <p>"Proposals should seek to enhance opportunities for choice in shopping, business and social activities. Choice is enhanced by the provision of viable alternative facilities and areas at each level in the hierarchy. A key direction of this Strategy is to encourage a broad range of uses to locate in Activities Areas"</p> <ul style="list-style-type: none"> • Promotion of single destination multi-purpose trips • Satisfying community lifestyle needs • Maximising choice / level of service in one location • Providing goods / services specifically needed within the area • Providing a social / community focus and establishment of community facilities 	<p>The proposed Brompton Lodge Neighbourhood Activities Area (BLNAA) will provide opportunity for choice by providing the following stores, services and facilities at the centre:</p> <ul style="list-style-type: none"> • a full format supermarket (3,200m² GLA); • a discount supermarket (1,100m² GLA); • cafes, restaurants and takeaway stores (860m² GLA); • pharmacy, newsagents and other retail stores (800m² GLA); • retail services (320m² GLA); • real estate agent (200m² GLA); • medical and office suites (800m² GLA); • tavern (350m² GLA); • gymnasium (350m² GLA); • child care centre; and • green space. <p>The layout of the medium neighbourhood activities area (MNA) (refer Figures 1 & 2) will maximise opportunities for multi-purpose trips through the provision of:-</p> <ul style="list-style-type: none"> • a diverse range of stores, services and community facilities; • a range of professional and commercial services; • surrounding higher density residential uses. <p>The Brompton Lodge Precinct Structure Plan "will be a model for sustainable, compact and mixed-use neighbourhoods. It will deliver a wide range of housing types and uses and in turn it will encourage a diverse local community" (Brompton Lodge PSP, page 7).</p>
<p>Accessibility and Convenience</p> <p>"All persons should have an acceptable and equitable level of access to Activities Areas, and no areas of the City should be significantly disadvantaged in terms of public and private transport access to areas and services at various levels in the hierarchy"</p> <ul style="list-style-type: none"> • Accessibility for all users • Public transport access • Pedestrian / bicycle connections • Vehicular access & parking design • Infrastructure contributions 	<p>The Brompton Lodge medium neighbourhood activities area (MNA) aims to meet the accessibility and convenience criteria by:</p> <ul style="list-style-type: none"> • being centrally located for its catchment; • being accessible from both secondary and local roads, and pedestrian and cycle paths; • providing vehicular links to future residential areas to the north of the subject site; • providing pedestrian and cycle links to surrounding residential areas; • currently being serviced by the public transport network with the 789 (Mon - Fri), 790 (Mon - Sat) and 791 (Sat - Sun) buses driving past the site. • providing ample standard and disabled car parking fronting onto Cranbourne - Frankston Road.

NET COMMUNITY BENEFIT GUIDELINES

BROMPTON LODGE COMMENT

Design and Amenity

"New development (including extensions to existing development) must achieve high quality and sustainable urban design outcomes. In particular, innovative and environmentally sustainable design will be given greater weight"

- High quality design outcome
- Safety and convenience for all users
- Street-based design with active street frontages
- Integration of land uses and public spaces
- Permeability of centre
- High quality public realm, contributing to social opportunities and "sense of place"
- Site responsive design, reflecting local community values
- Appropriate landscape treatment
- Building design - scale proportion and building mass to reflect human scale
- Building design - innovative design, use of colour, texture & shading, facade articulation
- Environmentally sustainable design features incorporated into all stages of development, including energy efficient building design, waste minimisation, water sensitive urban design and construction practices
- Consideration of future sign locations
- Control of noise emissions near sensitive uses

The Brompton Lodge Precinct Structure Plan will "provide an urban form that will lay the foundation for a healthy, prosperous and sustainable local community. A permeable network of pedestrian friendly streets will connect the residents to areas of attractive open spaces and the Local Town Centre. This street pattern will create a walkable neighbourhood with a strong sense of urban character."

Three distinct character and density zones encourage more compact housing types and a mixing of uses to occur adjacent to areas of high amenity and around the Local Town Centre. Passive parks will link the central wetlands and provide a central green 'spine' to the neighbourhood, showcasing and protecting the biodiversity of the area"

(Brompton Lodge PSP, page 7)

Viability and Efficiency

"Proposals should contribute to the robustness and economic viability of the Activities Areas including:-

- contributing to the range of customer choices / land use activities within the area;
- providing local employment opportunities; and
- providing land uses and spaces which are adaptable over time and can withstand future market shifts."

- Range of choices / land use activities
- Local employment opportunities
- Adaptability of spaces over time
- Additional floorspace will contribute to long term sustainability of Activities Areas
- Impact on overall Activities Area network
- Economic justification to support location and floorspace proposed (where required)
- Impact on land availability for intended future uses
- Impact of any subdivision on future provision of intended services and long term site flexibility

The Brompton Lodge Neighbourhood Activities Area meets the criteria for viability and efficiency as:-

- the economic analysis demonstrates that accommodating a major supermarket and a smaller discount supermarket based centre at the subject site is sustainable;
- the indicative facilities brief (Table 8) shows a diverse range of stores and services proposed for the site;
- the diversity of stores and services will maximise the economic and employment role of Brompton Lodge;
- it will generate retail sales within the acceptable industry ranges in terms of RTD;
- it will not impose significant or notable impacts on other centres in the existing and proposed activities area hierarchy.

NET COMMUNITY BENEFIT GUIDELINES**BROMPTON LODGE COMMENT****Key Questions**

Does the proposal:-

- contribute to economic, sociocultural and environmental sustainability?
- establish key connections with the adjacent community in terms of both land uses and activities?
- have the flexibility to reflect changing market conditions?
- contribute to high quality urban design and landscape treatment?
- Does the proposal reflect and enhance the Activity Areas role, function and values within the community? Will it contribute to the centre becoming a vibrant community focus?

The proposed activities area at Brompton Lodge will:-

- directly contribute to the economic, socio-cultural and environmental sustainability by:
 - providing a higher degree of self sufficiency
 - for the area in terms of convenience goods and services and a broader provision of commercial, professional and community services;
 - minimising unnecessary trips out of the area
 - for convenience goods and services and for a range of regularly consumed services.
- improve the economic sustainability of the centre through the provision of a broad employment base with a diversity of local employment opportunities;
- provide pedestrian linkages to the existing and proposed residential and commercial areas;
- create a high quality urban design outcome in line with the City of Casey's Design Guidelines;
- enhance the activity centre role by providing two supermarkets and various stores and services.

An activities area at Brompton Lodge would serve the future residential area and adjacent areas consistent with the requirements set by Council. The centre would serve the community and function as a "vibrant community focus" through its provision of:-

- a variety of stores and services;
- professional services;
- community services;
- a gymnasium;
- open space linkages; and a
- pedestrian and cycle network.