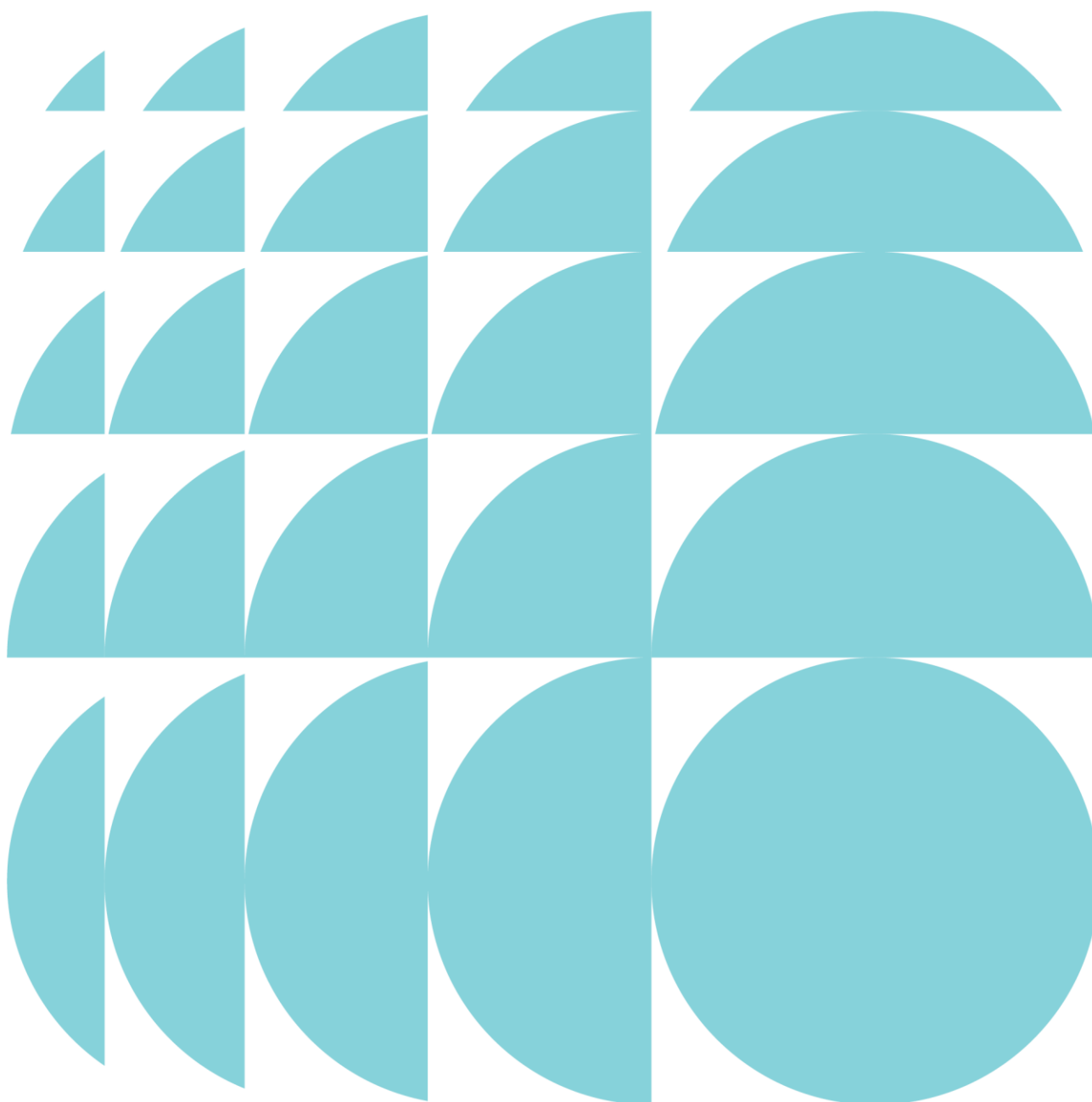


**Shenstone Park
Precinct Structure Plan
Retail and Employment
Needs**

Economic Assessment

September 2019

Prepared for Victorian Planning Authority and
City of Whittlesea



Authorship

Report stage	Author	Date	Review	Date
Draft report V1	Nick Brisbane	12 December 2017	John Henshall	14 December 2017
Draft report V2	Nick Brisbane	7 June 2019	VPA	4 September 2019
Final report	Nick Brisbane	6 September 2019		
Final report (revised for update FUS)	Nick Brisbane	19 September 2019		

Disclaimer

Every effort has been made to ensure the accuracy of the material and the integrity of the analysis presented in this report. However, Ethos Urban Pty Ltd accepts no liability for any actions taken on the basis of report contents.

Contact details

For further details please contact Ethos Urban Pty Ltd at one of our offices:

Ethos Urban Pty Ltd		ABN 13 615 087 931
Level 8, 30 Collins Street Melbourne VIC 3000 (03) 9419 7226	173 Sussex Street Sydney NSW 2000 (02) 9956 6962	Level 1, 356 St Pauls Terrace Fortitude Valley QLD 4006 (07) 3852 1822
economics@ethosurban.com		
www.ethosurban.com		

Our Reference: 3190204 and 3190406

Contents

Executive Summary	i
Introduction	1
1 Regional Context	3
1.2 Regional Location	3
1.3 Melbourne Northern Growth Corridor Plan	5
1.4 Plan Melbourne	6
1.5 Overview of Relevant Precinct Structure Plans	8
1.6 Urban Development Trends in the Region	14
1.7 Implications	20
2 Shenstone Park Precinct Structure Plan	21
2.1 Characteristics of the Shenstone Park PSP	21
2.2 Planned Centre Location	22
2.3 Estimate of Residential Dwelling Yield and Population	23
2.4 Characteristics of Future Shenstone Park Residents	24
2.5 Implications	25
3 Town Centre Assessment	27
3.1 Planned Town Centre Hierarchy Serving the Region	27
3.2 Local Town Centre Catchment	28
3.3 Estimate of Future Retail Expenditure	30
3.4 Supportable Supermarket Floorspace	31
3.5 Supportable Retail and Non-retail Floorspace	32
3.6 Land Area Requirements	33
3.7 Accessibility to Supermarkets	33
3.8 Potential for a Local Convenience Centre	34
3.9 Summary of Town Centre Outcomes	34
4 Regional Employment Land Assessment	36
4.1 Planned Shenstone Park Employment Land	36
4.2 Employment Land Planning in the Surrounding Region	37
4.3 Potential Employment Uses	40
4.4 Implications	42
5 Potential Employment Outcomes	43

Executive Summary

Project Background

The City of Whittlesea in partnership with the Victorian Planning Authority (VPA) have commissioned this project to provide guidance for future retail and employment opportunities in the Shenstone Park PSP.

Shenstone Park PSP is situated in Melbourne's northern growth corridor and is located directly south of the Donnybrook-Woodstock PSP, which was approved by the Minister for Planning in November 2017. To the west of Shenstone Park PSP is the English Street PSP, which was gazetted into the Whittlesea Planning Scheme in 2016.

The preparation of this report has regard for the Precinct Structure Planning Guidelines, as well as a Future Urban Structure (FUS) prepared by the VPA which includes locations identified for town centres, employment land and residential uses.

Potential Dwelling and Population Outcomes

Shenstone PSP has the potential to accommodate approximately 3,630 dwellings assuming a dwelling density of 25 dwelling per hectare of net developable land within the walkable catchment of the Local Town Centre and 17 dwellings per hectare of net developable land beyond the walkable catchment. This level of development could support a population of 10,160 persons assuming an average household size of 2.8 persons at full development, or a population of 11,250 persons assuming an average household size of 3.1 persons.

Planned Centre Network in Shenstone Park PSP

A Local Town Centre (LTC) comprising 6,000m² of retail floorspace and 2,500m² of commercial/office floorspace can be supported in a location that is central to the PSP area. This LTC has the potential to be anchored by a full-line supermarket.

In addition, potential may exist for two Local Convenience Centres (LCC) situated in the east and west, comprising 1,200m² and 700m² of retail and commercial floorspace, respectively.

Employment Land

The FUS identifies approximately 97ha of land for employment uses accounting for a significant share of land in the western part of the PSP area. This includes approximately 23ha of land identified for 'business' with Donnybrook Road frontage and is intended to accommodate the types of uses found in the Commercial 2 Zone (C2Z). The balance of employment land is identified for 'industry' and 'light industry'. In addition, approximately 34ha of land has been identified for 'industry' in the longer-term, once quarrying operations have been completed.

The Melbourne North Growth Corridor Plan (2012) and constraints to potential land uses associated with buffer areas from the Woody Hill Quarry are two major influences for the designation of land in the FUS as employment.

Planning for the employment area should have regard for the following:

- Potential for land with direct frontage to Donnybrook Road to accommodate bulky goods, restricted retailing and showroom development; regional/corporate offices; a range of uses reliant on high levels of passing traffic including service station, fast food, medical centre, fitness centre, indoor recreation, etc; and a small format supermarket (up to 1,800m²).
- Potential for land in the north-western portion of the site to form part of an expansion of the English Street PSP commercial precinct.
- Traditional industry, light industry and mixed businesses areas in the balance of the area identified for employment uses, noting the need to respect areas with interfaces to more sensitive uses.

Potential Employment Outcomes

When fully developed, the LTC, two LCCs and the planned employment area have the potential to provide up to 4,330 jobs on an ongoing basis, including full-time, part-time and casual positions. Additional employment within the PSP will be generated via other planned uses, including schools and community centres.

Introduction

Background

Planning for the future development of Melbourne's Northern Growth Corridor has been underway for a number of years. This includes the preparation of the Melbourne Northern Growth Corridor Plan (2012) and a number of completed and approved Precinct Structure Plans (PSPs). In addition, a number of PSPs are currently in various stages of development, including the Shenstone Park PSP.

The City of Whittlesea in partnership with the Victorian Planning Authority (VPA) have commissioned this project to provide guidance for future retail and employment opportunities in the Shenstone Park PSP.

Shenstone Park PSP is located directly south of the Donnybrook-Woodstock PSP which was approved by the Minister for Planning in November 2017. To the west of Shenstone Park PSP is the English Street PSP, which was gazetted into the Whittlesea Planning Scheme in 2016.

The preparation of this report has regard for the Precinct Structure Planning Guidelines, as well as a Future Urban Structure (FUS) prepared by the VPA which includes locations identified for town centres, employment land and residential uses.

Information Inputs

The analysis in this report has been undertaken on the basis of a FUS for Shenstone Park PSP as provided by the Victorian Planning Authority, and which identifies a preferred location for a planned local town centre, local convenience centres, road network, residential areas, employment areas, education and community uses, open space, and buffer areas from nearby sensitive uses. The FUS takes into account numerous constraints on the land associated with buffers for the Woody Hill Quarry located in the PSP, the Phillips Quarry located to the south of the PSP and the APA high pressure gas pipeline which runs north-south through the eastern part of the PSP area.

The report has also been informed by a number of other reports and plans available at the time of writing, including the Melbourne North Growth Corridor Plan (MNGCP), and completed PSPs including the nearby Donnybrook-Woodstock PSP and English Street PSP.

This Report

This report provides an assessment of the potential town centre and employment land requirements for the Shenstone Park PSP and is organised as follows:

- Chapter 1: **Regional Context**: Summarises the regional location and implications arising from the completion of nearby PSPs. An overview of relevant development and economic trends in the broader region is also provided.
- Chapter 2: **Shenstone Park Precinct Structure Plan**: Describes the key features of the Shenstone Park PSP, including the FUS identified by the VPA and an estimate of the potential dwelling and residential yield.

- Chapter 3: **Town Centre Assessment**: Provides guidance to the future town centre requirements for the Shenstone Park PSP, taking into account the hierarchy of centres serving the wider region and analysis of supportable retail and non-retail floorspace.
- Chapter 4: **Employment Land Assessment**: Provides guidance on the future employment land requirements in the Shenstone Park PSP.
- Chapter 5: **Potential Employment Outcomes**: Assesses the potential employment outcomes in the Shenstone Park PSP and the level of accessibility to employment opportunities in the broader region.

1 Regional Context

This Chapter presents an overview of the regional context which the Shenstone Park PSP is situated. It includes a description of the regional location, a summary of the North Growth Corridor Plan and Plan Melbourne, and an overview of the relevant urban development and economic trends and PSPs in the wider region.

1.2 Regional Location

Shenstone Park PSP is located in the City of Whittlesea, within the north-eastern periphery of the northern growth corridor of Melbourne. Situated approximately 30km north of the Melbourne CBD, Shenstone Park contains approximately 619ha of land and the boundaries are as follows:

- North: Donnybrook Road
- East: Urban Growth Boundary (UGB)
- West: Sydney-Melbourne Rail Line
- South: land encumbered by existing and future quarries, and land zoned for rural conservation.

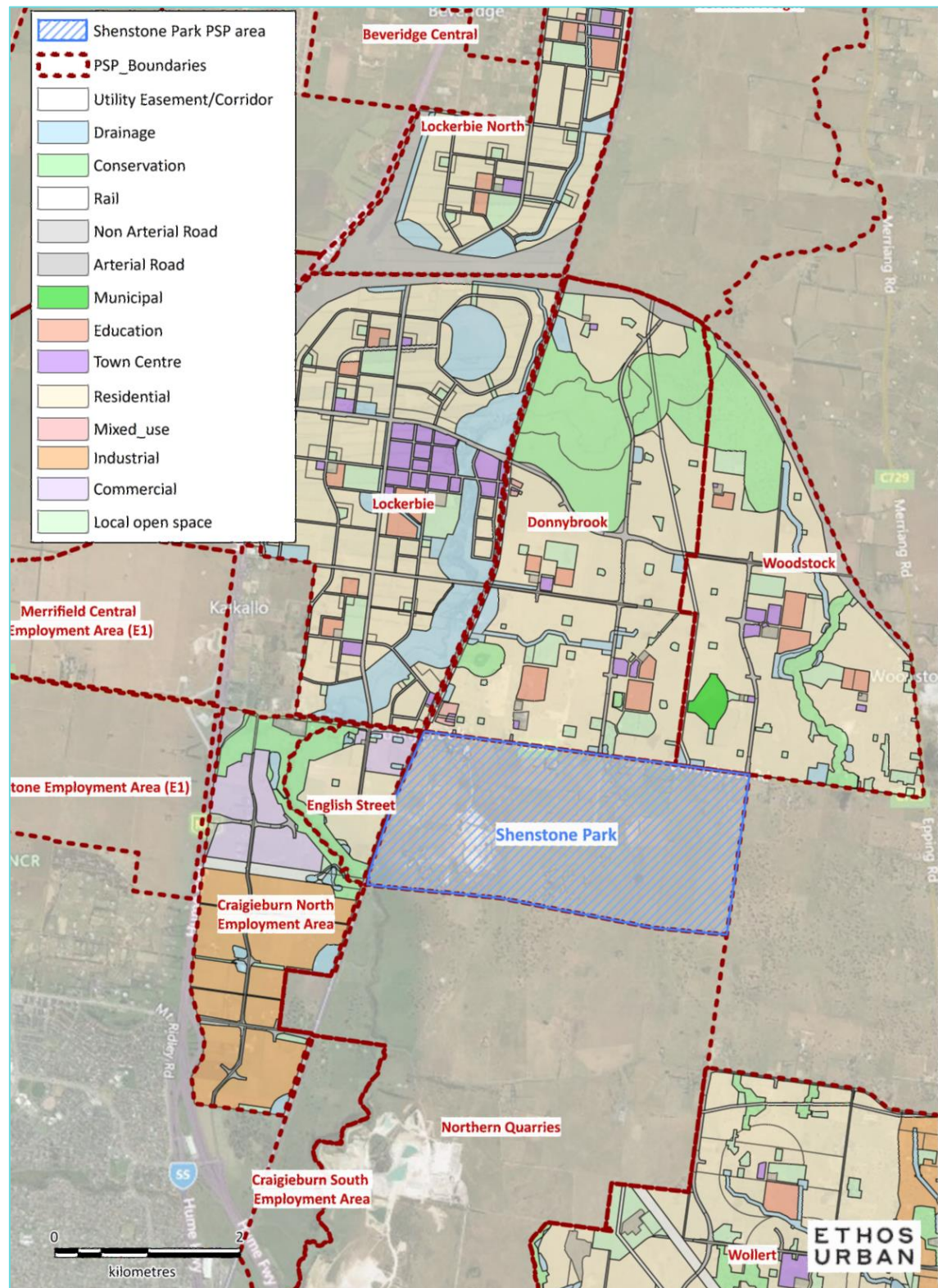
From a regional accessibility perspective, Donnybrook Road provides the main east-west link connecting Shenstone Park PSP to the Hume Highway to the west and Epping Road to the east. Donnybrook Station, which is planned to accommodate more intensive development in its surrounds in the future, is located to the immediate north-west of the PSP area and will provide future residents with commuter trains in-bound towards the Melbourne CBD.

Land to the south of the Shenstone Park PSP is encumbered by numerous quarries at differing stages of completion and areas preserved for rural conservation. As such, no urban development will occur to the immediate south of the Shenstone Park PSP area.

The northern growth corridor of Melbourne is a rapidly developing part of metropolitan Melbourne, where the planning and development for new suburbs containing employment areas, town centres, transport infrastructure, community facilities, etc has been underway for many years. The *Melbourne North Growth Corridor Plan* (2012) provides the broad strategic land use direction for the region and informs the preparation of PSPs. An overview of the Melbourne North Growth Corridor Plan (MNGCP) is provided in Section 1.2, while an overview of the economic growth experienced in the northern growth corridor is provided in Section 1.6.

The surrounding PSPs of Donnybrook-Woodstock, Wollert, Lockerbie, English Street and the Craigieburn North Employment Area have been completed and provide guidance on the future urban structure of the area, most importantly the activity centre and employment context. Figure 1.1 illustrates the regional location of the Shenstone Park PSP and the location of other PSPs, planned town centres and employment areas.

Figure 1.1: Shenstone Park Regional Location



Prepared by Ethos Urban using MapInfo, StreetPro, BingMaps and information from DataVic and City of Whittlesea

1.3 Melbourne Northern Growth Corridor Plan

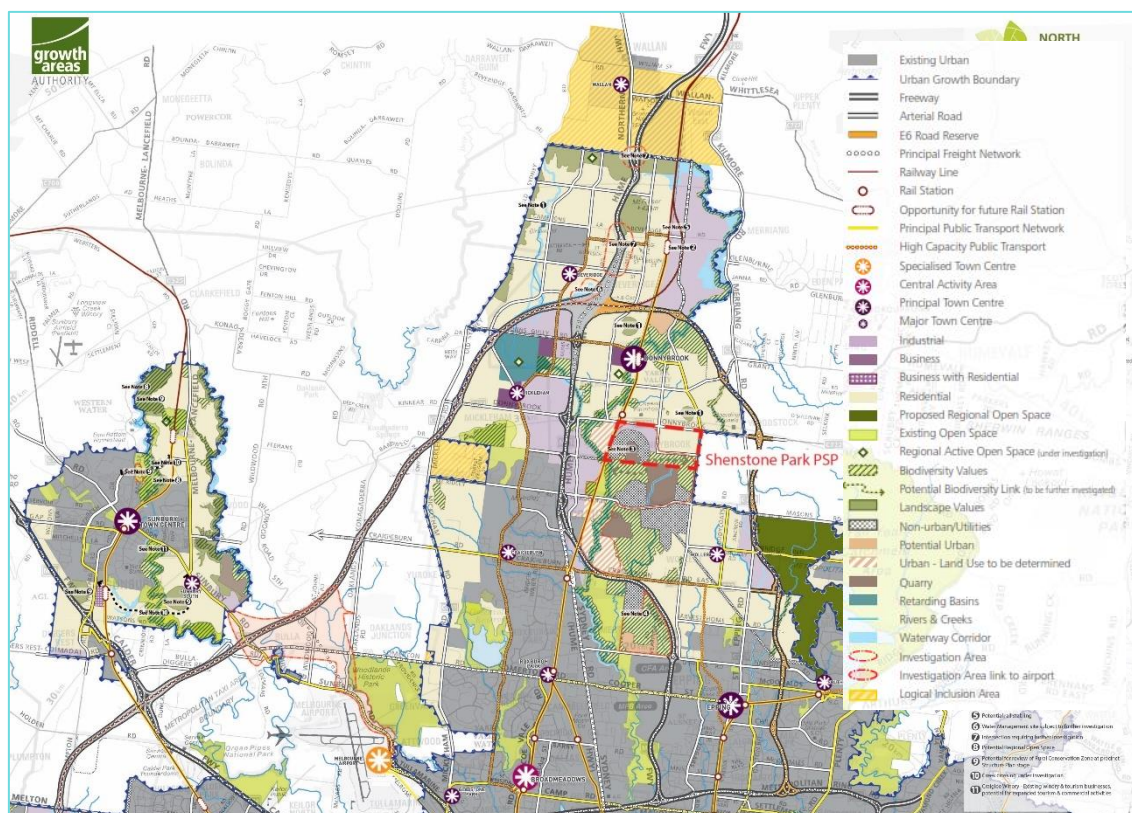
The *Melbourne North Growth Corridor Plan* (MNGCP) broadly identifies the future urban form for the northern growth corridor, as well as providing strategic direction in relation to land designated for urban development, the delivery of transport infrastructure, higher-order town centre requirements, and areas for dedicated employment uses.

Features of the MNGCP of relevance to the Shenstone Park PSP include the following:

- The land within the Shenstone Park PSP area is identified in the MNGCP for future residential use. The PSP area also contains land with biodiversity values.
- In addition, the MNGCP identifies approximately 100ha of land for employment/industrial uses.
- Significant areas of land to the north of Shenstone Park in the Donnybrook-Woodstock PSP area also identified as future residential areas. The Donnybrook-Woodstock PSP has recently been gazetted (refer Section 1.5).
- Shenstone Park residents will be served by several higher-order town centres which have been identified for nearby areas, including Lockerbie, Mickleham and Wollert.
- An intensive industrial and utilities area has been identified for the area immediately south of Shenstone Park. Buffers from the existing quarries impact the developable area of Shenstone Park.

The MNGCP as it relates to the Shenstone Park PSP is shown in Figure 1.2.

Figure 1.2: Melbourne North Growth Corridor Plan



Source: Growth Area Authority (now Victorian Planning Authority)

1.4 Plan Melbourne

Plan Melbourne 2017-2050 (the 'Plan') was prepared by the Victorian Government and is intended to guide Melbourne's housing, commercial and industrial development through to 2050. The Plan aims to integrate long-term land use, infrastructure and transport planning to meet future population, housing and employment needs of the future, and identifies nine key principles which will guide Melbourne's development.

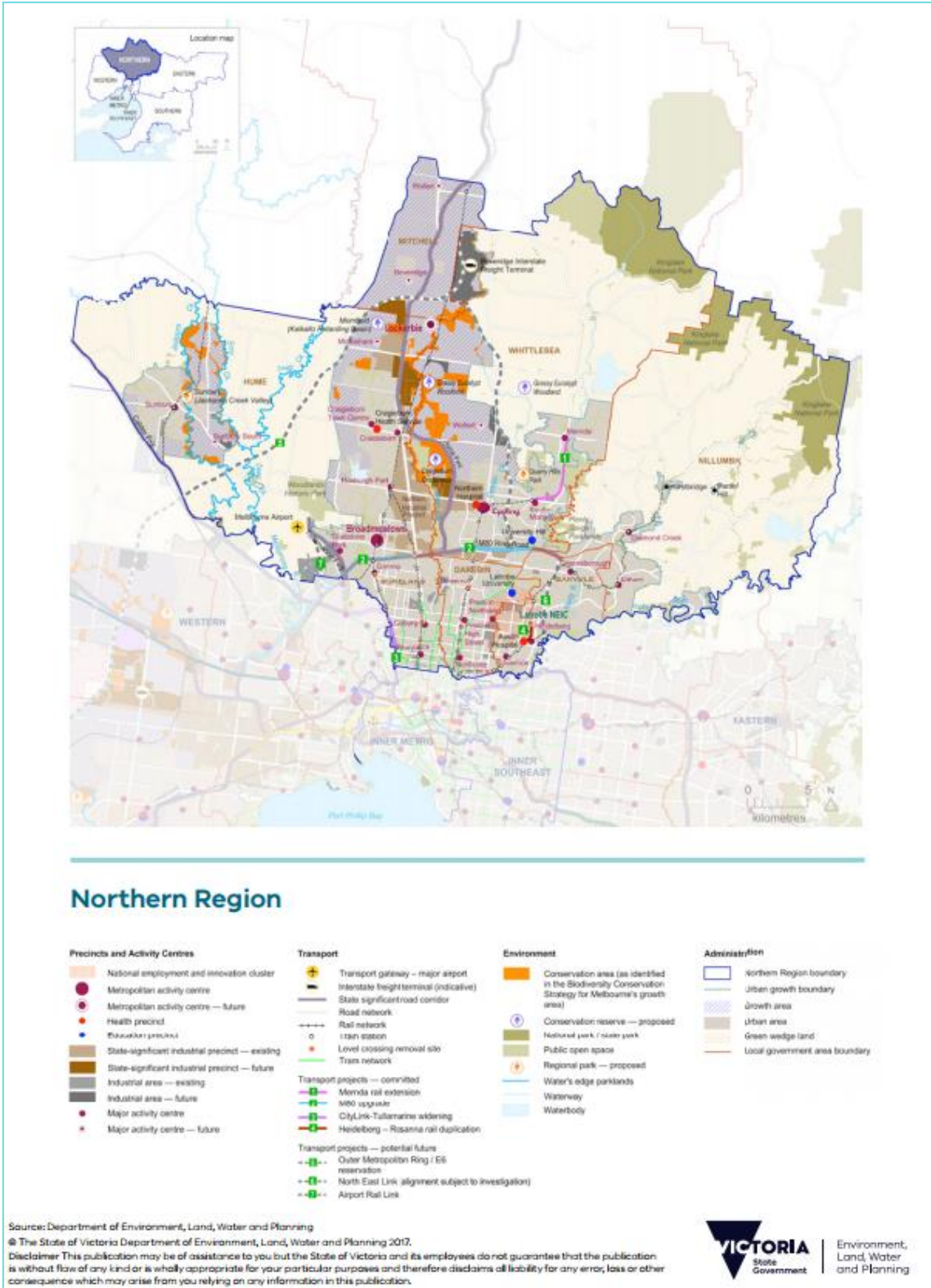
One of these principles, "*living locally – 20-minute neighbourhoods*", is particularly relevant to the future planning for town centres in growth areas, including Shenstone Park. The implication is that future residents will be able to access all their town centre needs within 20-minutes.

In this context, *Plan Melbourne* identifies the future Lockerbie Metropolitan Activity Centre only 3km to the north of the northern boundary of the Shenstone Park PSP. Major Activity Centres are also planned for the surrounding region, including at Mickleham to the west, Wollert to the south-east, and Craigieburn and Craigieburn Town Centre to the south-west. No major activity centre is planned for the Shenstone Park PSP.

Plan Melbourne also identifies the Northern Industrial Precinct as a state-significant industrial precinct located less than 2km to the west of Shenstone Park.

The Plan Melbourne Implementation Plan for the Northern Region Plan Melbourne is shown in Figure 1.3.

Figure 1.3: Plan Melbourne - Melbourne 2050 Plan



1.5 Overview of Relevant Precinct Structure Plans

An overview of key features of relevant PSPs is provided below.

Donnybrook-Woodstock PSP

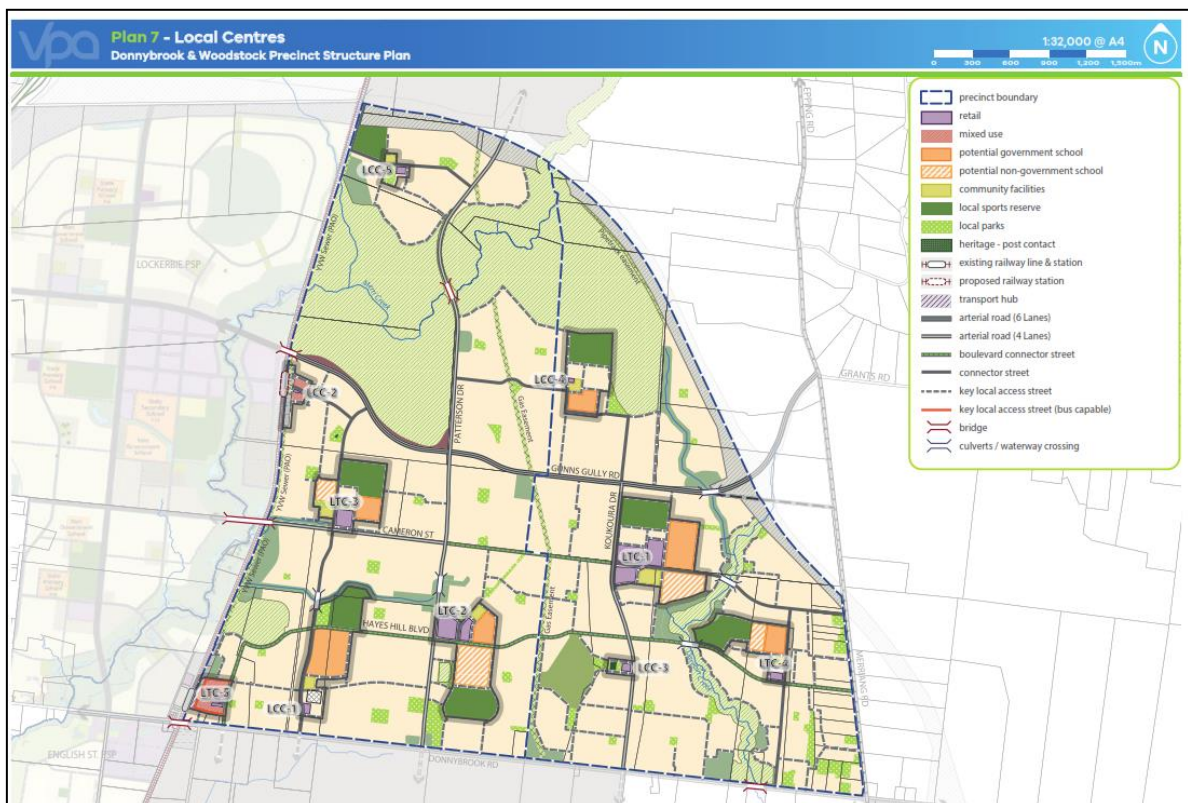
The Donnybrook-Woodstock PSP was approved by the Minister of Planning and gazetted into the planning scheme in November 2017. Located to the immediate north of Shenstone Park, the future development of Donnybrook-Woodstock PSP will have a significant influence on future urban structure of Shenstone Park. Containing a total land area of 1,765ha, the Donnybrook-Woodstock PSP is estimated to accommodate approximately 17,000 dwellings and a population of more than 47,000 persons.

Five Local Town Centres (LTCs) and five Local Convenience Centres (LCCs) are planned for development, with total retail floorspace of 47,000m². Figure 1.4 shows the location of planned centres in the Donnybrook-Woodstock PSP.

LTC1 (Koukoura Drive) and LTC2 (Patterson Drive) are the two main centres which will influence the catchment for a LTC in Shenstone Park, given their intended size and role, and their relative accessibility to future residents in Shenstone Park.

An overview of each planned centre as outlined in the Donnybrook-Woodstock PSP and their relevance to the future planning for Shenstone Park PSP is provided in Section 3.1.

Figure 1.4: Donnybrook-Woodstock PSP Future Urban Structure – Plan 7 Local Centres



Source: VPA, Donnybrook-Woodstock PSP, October 2017

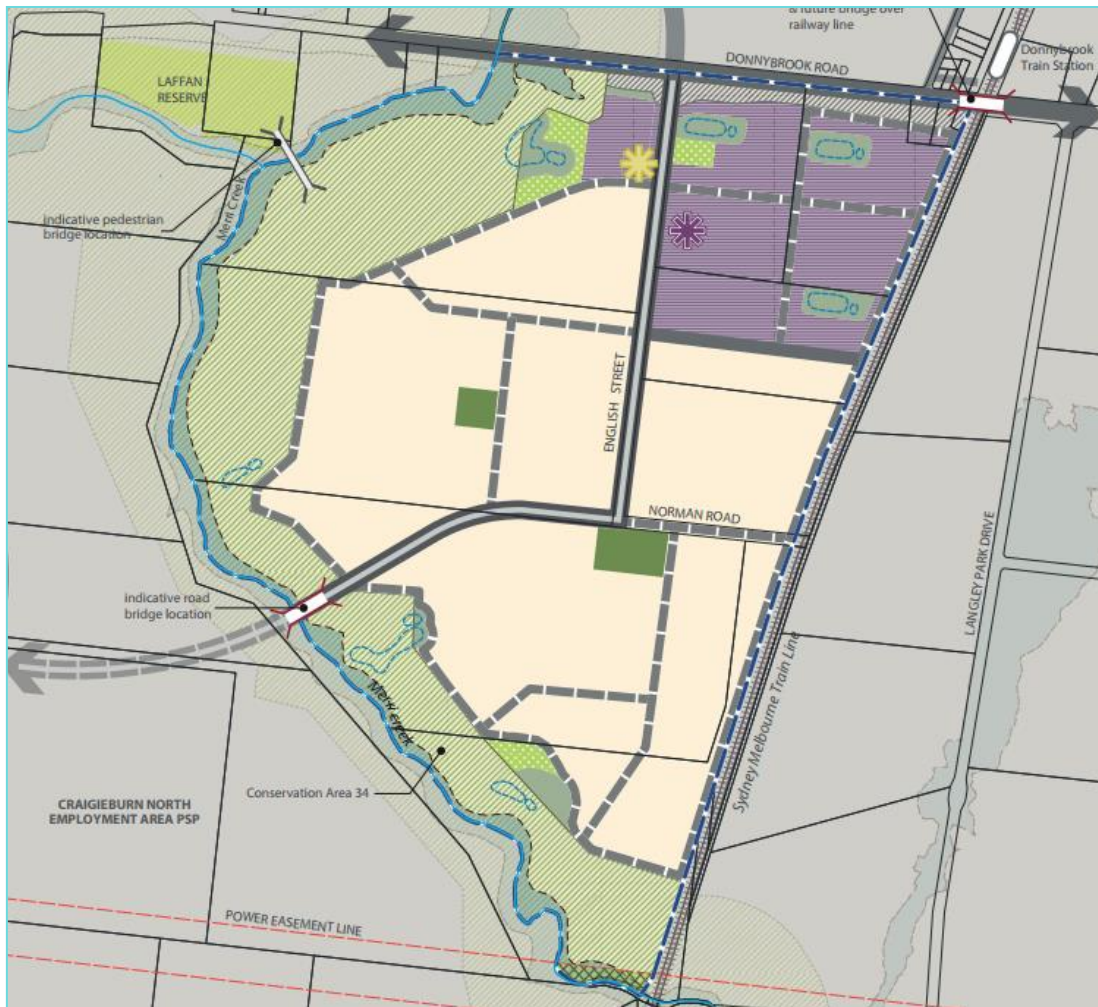
English Street PSP

The English Street PSP is located to the immediate west of the Sydney-Melbourne railway line, and to the south-west of Donnybrook Station. Completed in February 2016, the PSP was gazetted into the Whittlesea Planning Scheme through Amendment C183.

Comprising approximately 143ha of land, English Street PSP will, at capacity, contain approximately 1,200 residential dwellings and a commercial precinct of approximately 19ha. The potential for a LCC has also been identified. In total, the PSP will support more than 700 jobs.

The English Street PSP is shown in Figure 1.5, while Figure 1.6 shows the Concept Plan for the commercial precinct.

Figure 1.5: English Street Future Urban Structure Plan



Source: VPA, English Street PSP, November 2015

[illegible]

Source: VPA, English Street PSP, November 2015

Lockerbie PSP is located to the north-west of the Shenstone Park PSP area and was approved in 2012. The PSP is planned to accommodate approximately 10,220 dwellings, a population of 29,000 persons, and will accommodate the future Lockerbie Town Centre (or Metropolitan Centre as referred to in Plan Melbourne). Development has commenced at the Lockerbie PSP.

The Lockerbie Town Centre is planned to be the highest-order of the proposed town centres in Melbourne's northern growth corridor; it will be the regional destination for a number of activities including retail, employment, education, entertainment, health, civic, dining and socialising (*Lockerbie PSP, p18*).

A summary of the potential land uses and activities at the Lockerbie Town Centre is summarised on page 23 of the Lockerbie PSP and includes the following:

Retail Uses

- Department stores
- Discount Department Stores
- Supermarkets
- Mini Majors
- Restricted retail premises (such as small format premises and showrooms)
- Specialty shops and stores

Entertainment

- Cafes, restaurants, bars and clubs
- Hotels
- Cinemas
- Arts and entertainment facilities

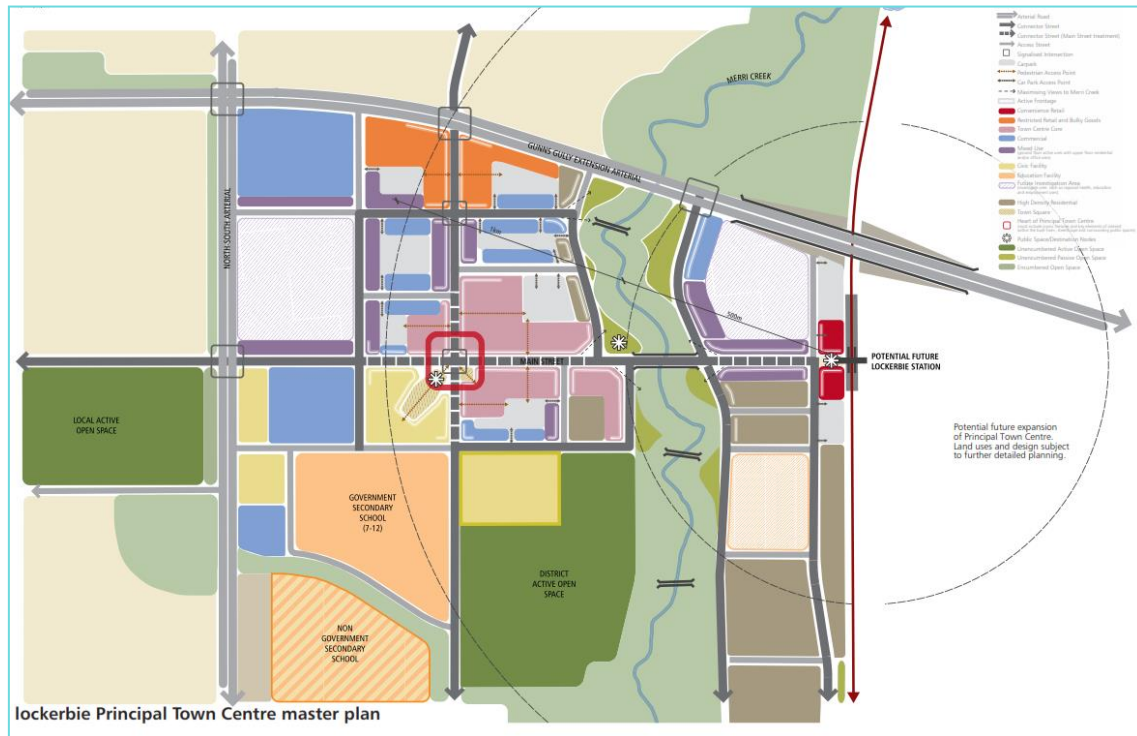
Commercial / Civic / Recreation

- | | |
|--|--|
| <ul style="list-style-type: none"> • Offices • Office/warehouse • Child care services • Service industries • Medical and specialist services • Health services (including aged care) • Tertiary and life-long learning services • Community services • Law courts • Galleries and museums • Convention and exhibition centres | <ul style="list-style-type: none"> • Short stay accommodation (such as hotels and serviced accommodation) • Potential Federal, State and/or Local government offices • Non-Government Organisation facilities • Conference Centres • Places of assembly • Council and State Government facilities (such as libraries, performing arts centres, indoor sports centres, leisure centres, community centres, etc) • Gymnasiums |
|--|--|

The Lockerbie PSP notes that the Lockerbie Town Centre can contain up to 80,000m² of shop floorspace without a permit and, as such, will have a significant influence on the shopping patterns of future residents in the broader region, including Shenstone Park. This will particularly be the case for non-food shopping, where it is envisaged that the Lockerbie Town Centre will include Department Stores, Discount Department Stores and an extensive range of non-food speciality retailing. A precinct for significant restricted retailing and bulky goods is also envisaged for the Lockerbie Town Centre.

The masterplan for the Lockerbie Town Centre is shown in Figure 1.7.

Figure 1.7: Lockerbie Principal Town Centre Masterplan



Source: VPA, Lockerbie PSP, 2012

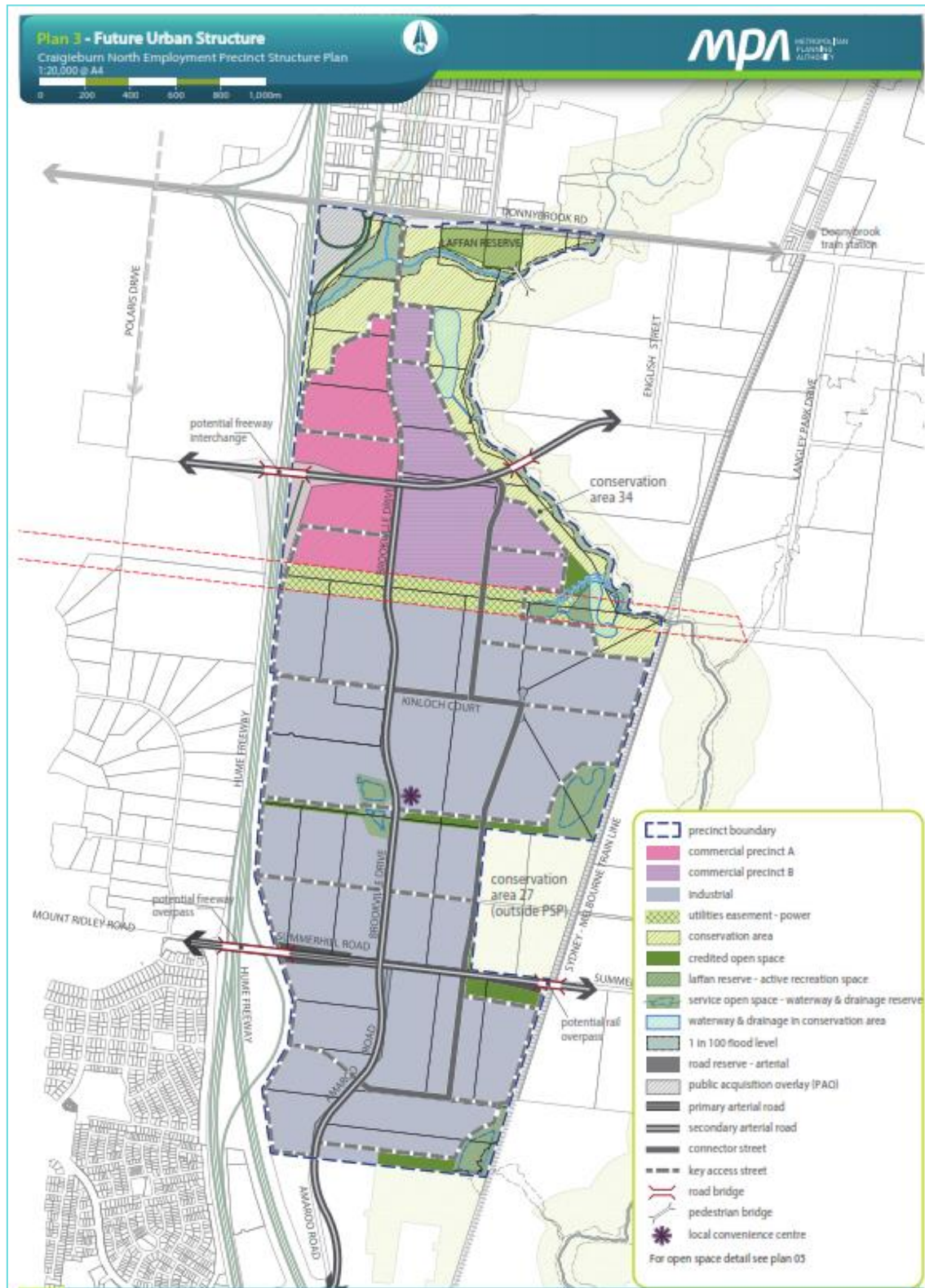
Craigieburn North Employment Area PSP

The Craigieburn North Employment Area PSP is located less than 2km to the west of the Shenstone Park PSP and forms part of the state significant Northern Industrial Precinct as identified in *Plan Melbourne*.

The precinct is bounded by Donnybrook Road to the north, Merri Creek and the Sydney-Melbourne railway line to the east, and the proposed Amaroo Business Park to the south. The VPA estimate the area will ultimately accommodate approximately 7,900 jobs, in a combination of commercial and industrial areas amounting to approximately 344ha of net developable employment land.

Figure 1.8 shows the Craigieburn North Employment Area PSP.

Figure 1.8: Craigieburn North Employment PSP



Source: VPA, Craigieburn North Employment Area PSP, June 2016

1.6 Urban Development Trends in the Region

Relevant urban development and economic trends in the broader region surrounding the Shenstone Park PSP are summarised below, including population, residential and employment land development, and labour force growth by industry.

For the purpose of this assessment, the broader region comprises the City of Whittlesea (which includes Shenstone Park) and City of Hume.

Population Growth Trends and Forecast

The outer northern region is a major urban growth front for metropolitan Melbourne and has experienced significant population growth over the past decade or so.

Population in the City of Whittlesea and City of Hume increased by approximately +166,000 residents between 2006 and 2018, representing approximately 14% of population growth throughout metropolitan Melbourne.

Combined, Whittlesea (C) and Hume (C) experienced population growth of +3.9% per annum (or +13,900 residents per annum) between 2006 and 2018, and this compares to an average of +2.3% per annum throughout metropolitan Melbourne.

The rate of population growth has increased in recent years. Between 2006 and 2011 population growth in Whittlesea (C) and Hume (C) averaged +10,760 persons a year and has subsequently increased to +15,800 persons a year between 2011 and 2016, and more recently +16,810 persons a year between 2016 and 2018.

These figures are shown in Table 1.1.

Table 1.1: Population Growth Trends, 2006-2018 (Persons)

Category	2006	2011	2016	2018
<u>Estimated Resident Population</u>				
Whittlesea (C)	128,490	160,800	207,060	223,320
Hume (C)	152,800	174,290	207,040	224,390
Study Region	281,290	335,090	414,100	447,720
<i>Greater Melbourne</i>	<i>3,760,760</i>	<i>4,169,370</i>	<i>4,714,390</i>	<i>4,963,350</i>
<u>Average Annual Growth (no.)</u>				
Whittlesea (C)	-	6,460	9,250	8,130
Hume (C)	-	4,300	6,550	8,680
Study Region	-	10,760	15,800	16,810
<i>Greater Melbourne</i>	-	<i>81,720</i>	<i>109,000</i>	<i>124,480</i>
<u>Average Annual Growth (%)</u>				
Whittlesea (C)	-	4.6%	5.2%	3.9%
Hume (C)	-	2.7%	3.5%	4.1%
Study Region	-	3.6%	4.3%	4.0%
<i>Greater Melbourne</i>	-	<i>2.1%</i>	<i>2.5%</i>	<i>2.6%</i>

Source: ABS, Regional Population Growth Trends, Cat No: 3218.0

Population growth in the outer northern region of Melbourne is expected to continue over the next 15-20 years according to population projections prepared by the Department of Environment, Land, Water and Planning (DELWP) in *Victoria in Future* (2019), as more residential land is released for development.

For instance, the population in Whittlesea (C) and Hume (C) is forecast to increase by a approximately +261,000 persons between 2018 and 2036 at an average of +13,900 persons a year.

Table 1.2: Recent and Forecast Population Growth Trends, 2006-2036

Location	Total Growth		Annual Growth	
	2006-2018	2018-2036	2006-2018	2018-2036
Whittlesea (C)	94,830	141,130	7,900	7,840
Hume (C)	71,590	119,590	5,970	6,640
Study Region	166,420	260,730	13,870	14,480
<i>Greater Melbourne</i>	<i>1,202,590</i>	<i>1,920,780</i>	<i>100,220</i>	<i>106,710</i>

Source: ABS, Regional Population Growth Trends, Cat No: 3218.0; DELWP, Victoria in Future, 2019

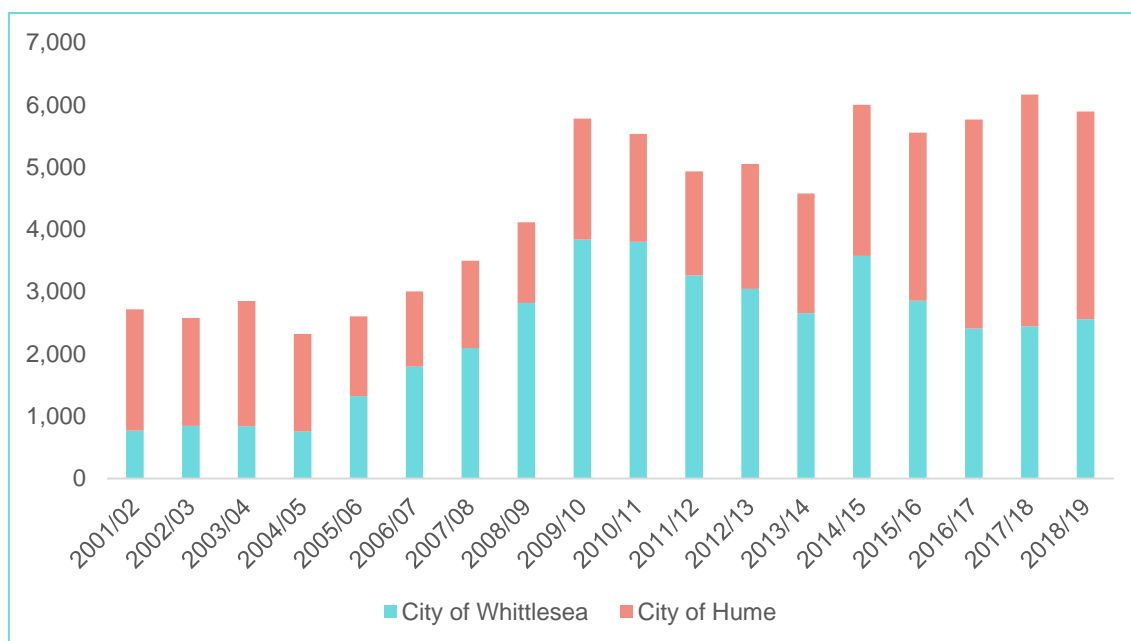
Residential Development Approvals

The continued release of residential land has supported an average of 5,390 new dwelling building approvals a year since 2008/09 in the combined municipalities of Whittlesea (C) and Hume (C), including an average of 3,020 new dwelling approvals in the Whittlesea (C) and 2,370 new dwelling approvals in the Hume (C).

Figure 1.9 summarises the recent trends in new dwelling building approvals in Whittlesea (C) and Hume (C).

A number of residential development fronts exist in the northern growth corridor, including the South Morang, Mernda and Doreen corridor; Epping North; and around Craigieburn. More recently, with the completion of the Lockerbie PSP and English Street PSP, residential development has commenced in the areas to the direct north-west and west of the Shenstone Park PSP. The development of residential areas in the Donnybrook-Woodstock PSP area directly north of Shenstone Park PSP has also commenced.

Figure 1.9: Number of New Dwelling Building Approvals, 2001/02 – 2018/19



Source: ABS, Building Approvals, Cat No. 8731.0

Note: *Figure represent estimate for 2018/19 based on data to March 2019

Employment Land Development Trends and Investment

Significant areas of existing and planned employment land are located in the northern growth corridor which will provide opportunities for employment for Shenstone Park residents, but also provide an element of competition for any employment land planned for the PSP area – noting the MNGCP identifies approximately 100ha of employment land for Shenstone Park.

These existing and planned employment areas combine to form one of Melbourne's major industrial nodes. The region has excellent access to major infrastructure in the metropolitan

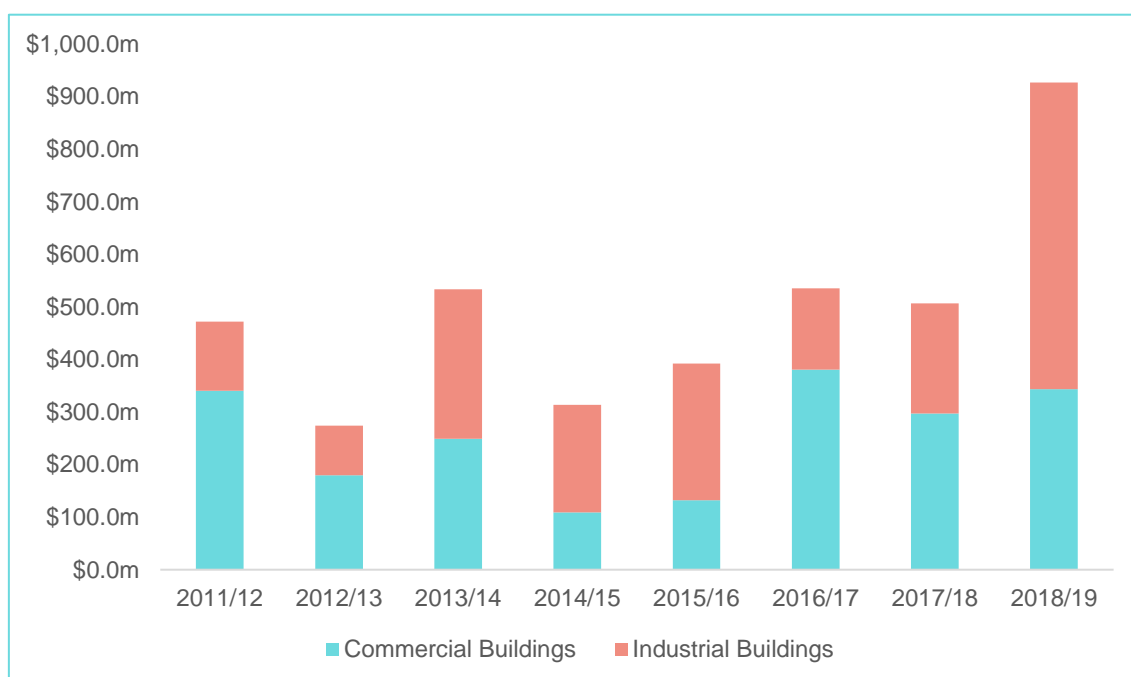
region, including Melbourne Airport at Tullamarine and the Port of Melbourne, intermodal facilities at Somerton, and a planned intermodal facility at Beveridge. Metropolitan linkages are also excellent via CityLink and the Metropolitan Ring Road, and in the future via the Outer Metropolitan Ring Road (OMR).

At present, the major occupied industrial precincts are located at Somerton/Campbellfield (east and west of the Hume Highway), Thomastown (south of the Metropolitan Ring Road), and in Epping along Cooper Street.

More recently, the MAB Merrifield Business Park has been released and includes Dulux as its major tenant. MAB Merrifield Business Park contains approximately 330ha of employment land.

Recent trends in the value of commercial and industrial building permits in the area broadly defined as Whittlesea (C) and Hume (C) are shown in Figure 1.10 and illustrate that investment in commercial and industrial building approvals (particularly industrial) has increased significantly in recent years.

Figure 1.10: Value of Commercial and Industrial Building Approvals in Whittlesea (C) and Hume (S), 2011/12 – 2018/19



Source: ABS

Employment Trends

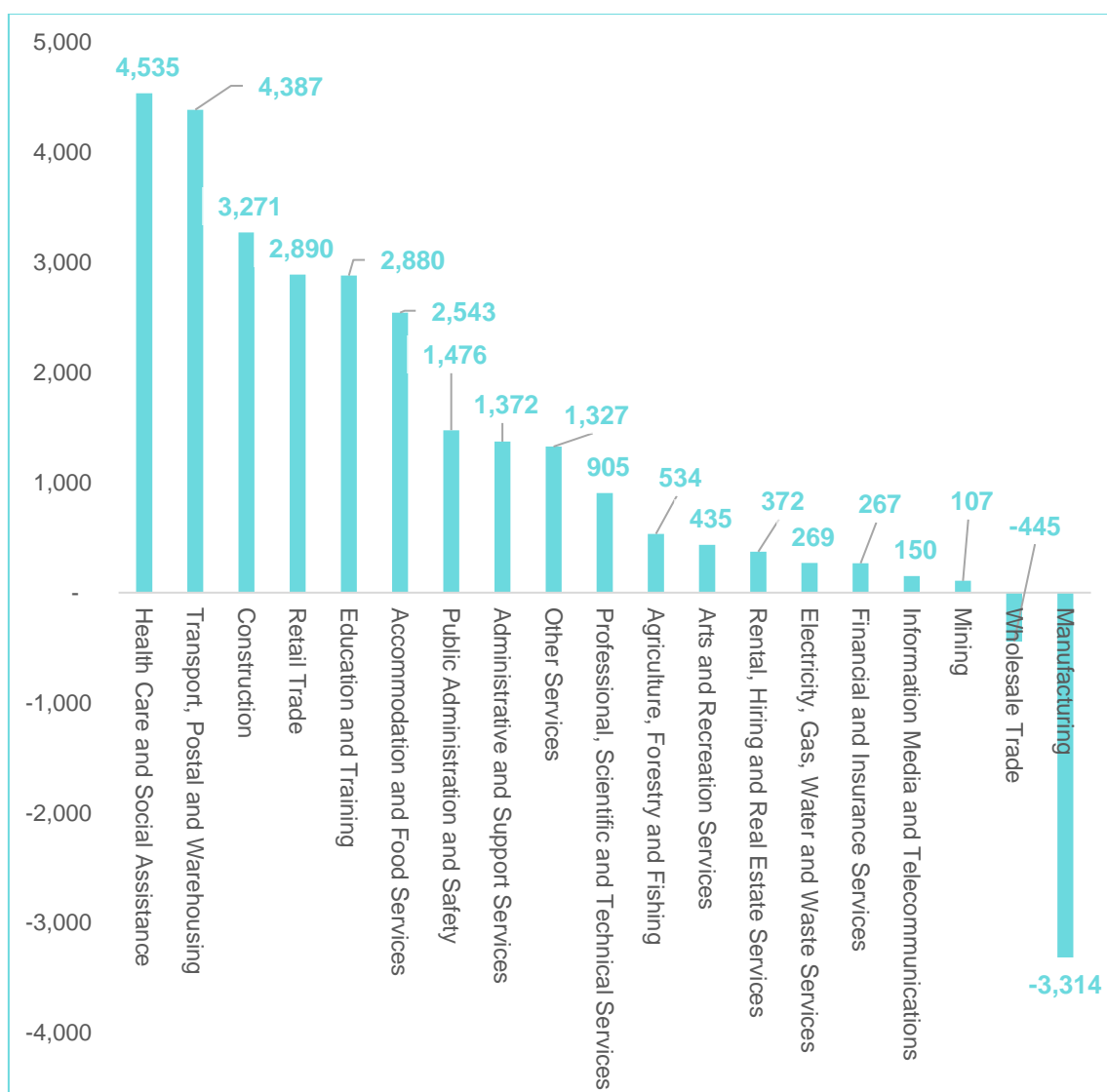
Manufacturing and Transport, Postal & Warehousing are the two largest employment industries in Whittlesea (C) and Hume (C) based on analysis of ABS Census of Population and Housing (Place of Work data) in 2016. Combined, these two industries account for 29% of jobs and reflect the designation of major employment areas in the region being of state significance.

Figure 1.11 shows that change in employment by industry between 2011 and 2016. While Manufacturing has experienced a significant decline in employment numbers, Transport, Postal & Warehousing has experienced strong growth. Logistics has become a major driver of

employment, development and investment in the northern region. It is expected logistics will continue to drive investment in the region in the future, with significant areas of land available for large-scale logistic operations, strong transport connections, and growth in the demand for logistics services driven by factors such as continued growth in internet retailing.

The continued development of major residential areas and the population growth this has attracted has also driven strong growth in population-serving industries such as Health Care and Social Assistance, Construction, Retail Trade, Education and Training and Accommodation and Food Services.

Figure 1.11: Change in Employment (Place of Work), Whittlesea (C) and Hume (S), 2011 - 2016



Source: ABS, Census of Population and Housing, Place of Work, 2011 and 2016

Labour Force Trends

According to the latest ABS Census of Population and Housing data (2016), the employed labour force in Whittlesea (C) and Hume (C) increased by more than +27,000 persons between 2011 and 2016 (or approximately +5,430 persons a year).

The major growth industries in regard to those employed residents in Whittlesea (C) and Hume (C) between 2011 and 2016 include:

- Health Care and Social Assistance: +5,740 employed persons
- Education and Training: +3,370 employed persons
- Transport, Postal and Warehousing: +2,630 employed persons
- Accommodation and Food Services: +2,460 employed persons
- Construction: +2,380 employed persons
- Retail Trade: +2,220 employed persons.

Although a decline in residents employed in the Manufacturing industry has occurred, this sector still employs 10% of the local labour force and is the fourth largest employing industry of local residents in Whittlesea (C) and Hume (C).

Table 1.3 shows the recent labour force trends by industry in Whittlesea (C) and Hume (C).

Table 1.3: Employed Labour Force Trends in Whittlesea (C) and Hume (C), 2011-2016 (No. Persons)

Industry	2011	2016	Change, 2011-16
Health Care and Social Assistance	14,572	20,311	+5,739
Education and Training	8,445	11,813	+3,368
Transport, Postal and Warehousing	12,073	14,702	+2,629
Accommodation and Food Services	7,889	10,347	+2,458
Construction	14,558	16,933	+2,375
Retail Trade	16,597	18,820	+2,223
Professional, Scientific and Technical Services	6,380	7,929	+1,549
Public Administration and Safety	7,551	9,092	+1,541
Administrative and Support Services	5,023	6,282	+1,259
Other Services	5,500	6,720	+1,220
Rental, Hiring and Real Estate Services	1,808	2,294	+486
Financial and Insurance Services	5,283	5,758	+475
Electricity, Gas, Water and Waste Services	1,528	1,939	+411
Arts and Recreation Services	1,704	2,062	+358
Agriculture, Forestry and Fishing	536	857	+321
Information Media and Telecommunications	2,116	2,429	+313
Mining	205	259	+54
Wholesale Trade	6,492	5,364	- 1,128
Manufacturing	20,010	16,157	- 3,853
Inadequately described/Not stated	4,147	9,525	+5,378
Total	142,418	169,575	+27,157

Source: ABS, Census of Population and Housing, 2016

1.7 Implications

The northern growth corridor has experienced strong rates of population, employment and labour force growth, with strong growth rates expected to continue to occur in the future.

Shenstone Park PSP is surrounded by a number of PSPs that have recently been approved and gazetted. Development has already commenced in the Lockerbie, English Street and Donnybrook/Woodstock PSPs.

These PSPs will influence the future development outcomes of Shenstone Park PSP to some extent, having regard for the town centre and employment areas planned for these locations.

2 Shenstone Park Precinct Structure Plan

An overview of the key features of Shenstone Park PSP including the Future Urban Structure (FUS) provided by the VPA are described in this Chapter.

2.1 Characteristics of the Shenstone Park PSP

The Shenstone Park PSP covers an area of approximately 630ha and is bordered by Donnybrook Road to the north and the Sydney-Melbourne railway line to the west.

The Donnybrook-Woodstock PSP forms the northern border of the PSP, the Northern Quarries PSP borders the south, and the English Street PSP borders the west of the Shenstone Park PSP area.

A FUS for the Shenstone Park PSP has been prepared by the VPA and forms the basis of this assessment. Figure 2.1 shows the preliminary future urban structure which includes the following main features:

- **Employment area:** Approximately 97ha of land has been identified for employment uses and is situated in the north-west portion of the PSP area. The employment precinct will have direct access to Donnybrook Road, with the north-western parts of the precinct close to Donnybrook Station.

The north-western employment areas have been identified for 'business' and is intended to accommodate the types of uses found in the Commercial 2 Zone (C2Z). This land accounts for approximately 23ha of land. The balance of employment land, representing approximately 74ha of land, has been identified as 'industrial' including approximately 40ha of 'light industrial' land.

An additional 34ha has been identified as 'long-term' industrial and is located within the 200m blast buffer of the Woodhill Quarry. The future development of this land will occur after the completion of quarrying activities at Woody Hill quarry.

- **Future residential area:** Approximately 192ha of land has been identified for residential land uses.
- **Local Town Centre (LTC):** One LTC has been identified in a central location within the Shenstone Park PSP area. Approximately 1.6ha of land has been allocated to the LTC. The LTC is intended to provide the local convenience retailing and town centre services to the surrounding community. It is envisaged the LTC will be anchored by a supermarket.
- **Local Convenience Centre (LCC):** Two LCCs has been identified on land in the eastern and western parts of the PSP and are intended to provide daily, convenience retailing and services to the immediate surrounding residential (Eastern LCC) and employment areas (Western LCC).
- **Education, community facilities and sports reserve:** A potential government school, community facility and sports reserve are planned for areas surrounding the LTC.
- **Quarry and Utilities Buffers:** Constraints to development of differing uses include the existing Woody Hill Quarry and a sewerage treatment facility owned by Yarra Valley Water within the PSP area, the future Phillips Quarry to the south of the PSP, and a gas

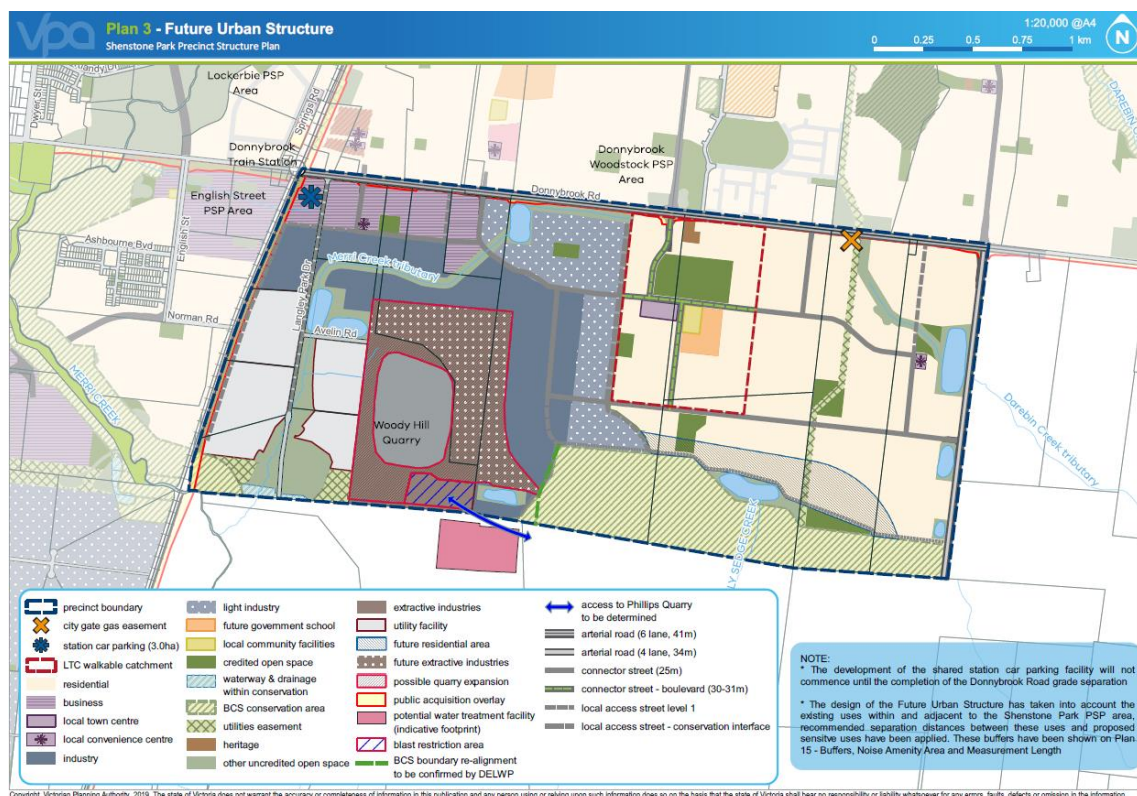
easement which runs through the PSP area. The FUS shown in Figure 2.1 takes these constraints into account.

- **Open Space:** Areas of open space are planned for the PSP under a range of classifications. These areas lie predominantly to the south of the PSP area where a large section of land is classified as Conservation Reserve.
- **Local connections:** An indicative road network is shown in Figure 2.1 of the FUS which shows Connector roads operating throughout the precinct. The continuation of the planned arterial roads to the north, namely Koukoura Drive and Patterson Drive, into the Shenstone Park PSP will provide connectivity between the Donnybrook-Woodstock and Shenstone Park PSP areas.

As indicated above, major buffers are in place throughout the Shenstone Park PSP. These buffers are created by the Phillips Quarry to the south, Woody Hill Quarry, the planned Yarra Valley Water treatment plant, and APA high pressure gas pipeline.

The balance of this report is based on the FUS identified in Figure 2.1.

Figure 2.1: Shenstone Park PSP - Preliminary Future Urban Structure



2.2 Planned Centre Location

Preliminary analysis undertaken by the VPA and City of Whittlesea identified the need for one LTC. The planned LTC is centrally located within the PSP area and will be accessible via a north-south connector street that connects the centre with Donnybrook Road and Patterson Drive to the north, and an east-west connector street.

The location of the LTC is also influenced by the buffer distances required from the gas easement that runs through the eastern part of the PSP area.

The Shenstone Park LTC will serve a neighbourhood shopping role for future residents and provide a community focal point, having regard for its co-location with planned community facilities, school and sports facilities.

Two LCC has been identified for the Shenstone Park PSP.

The market demand for the planned LTC and extent of retail and non-retail floorspace supportable is assessed in Chapter 3.

2.3 Estimate of Residential Dwelling Yield and Population

Based on the FUS (refer Figure 2.1) and information provided by the VPA, a total of approximately 192ha of Net Developable Residential Area (NDRA) has been identified within the Shenstone Park PSP. Land identified for employment, arterial roads, recreation and open space, education, community facilities, the LTC and LCCs has been excluded from the land areas described above.

For the purpose of this assessment, it is assumed the average dwelling yield for the Shenstone Park PSP will be 17 dwellings per hectare of NDRA beyond the identified 'walkable' catchment of the LTC and 25 dwellings per hectare of NDRA for land within the identified 'walkable' catchment. These assumptions are broadly consistent with current planning expectations for the City of Whittlesea and Melbourne's growth areas.

Based on the above assumptions, the Shenstone Park PSP is estimated to accommodate approximately 3,630 dwellings. Assuming an average household size of 2.8 persons, this dwelling yield could accommodate a population of approximately 10,160 persons.

The assumed average household size of 2.8 persons is considered to be conservative, with the average household size among Melbourne's growth areas estimated to be above 3 persons per household in 2016. Assuming an average household size of 3.1 persons, the population within the Shenstone Park PSP is estimated at approximately 11,250 persons.

A summary of the above assumptions and analysis is shown in Table 2.1.

Table 2.1: Estimated Dwelling Yield and Population

Category	Low Scenario	High Scenario
Net Developable Area - Residential (beyond walkable catchment)	145	145
Net Developable Area - Residential (within walkable catchment)	47	47
Net Developable Area - Residential (total)	192	192
Dwelling Density - beyond walkable catchment	17.0	17.0
Dwelling Density - within walkable catchment	25.0	25.0
Dwelling Density - total (derived)	18.9	18.9
Dwellings	3,630	3,630
Assumed Average Household Size	2.8	3.1
Estimated Population	10,160	11,250

Source: VPA; Ethos Urban

In general terms, catchments in the order of 10,000 residents are typically sufficient to support a LTC anchored by a full-line supermarket of 3,000m² or more. However, the ability to support a full-line supermarket or LTC is also influenced by the location of competing centres and the size of catchment populations.

The viability an opportunity for an LTC, including a full-line supermarket, is assessed in Chapter 3 and has regard for the dwelling and population yields described above.

2.4 Characteristics of Future Shenstone Park Residents

It is difficult to establish the socio-economic characteristics of future Shenstone Park PSP residents, as the area will develop over a significant period of time. However, analysis of the 2016 ABS Census of Population and Housing data for areas in the northern growth corridor which have been the focus for new residential communities provides an indication of the potential characteristics of future Shenstone Park residents.

Table 2.2 summarises the key socio-economic features of residents in the developing areas of Craigieburn, Greenvale, Epping, South Morang, Mernda and Doreen. The key distinguishing features include:

- Above-average household incomes, with the median household income approximately 9.2% above the median for Greater Melbourne.
- High share of couple family households with children, which account for 55% of households compared to 35% in Greater Melbourne. This contributes to an average household size of 3.3 persons compared to an average of 2.7 persons for Greater Melbourne.
- High proportion of households with a mortgage, which accounts for 62% of households compared to 37% for Greater Melbourne.
- A lower share of employed persons working as managers or professionals, with these occupations accounting for 27% of employed persons compared to 38% throughout Greater Melbourne.

2.5 Implications

The location of the LTC identified in the FUS is appropriate having regard for its central location to the Shenstone Park PSP, its connectivity based on the indicative planned road network, and constraints associated with the buffer requirements for the gas easement which limit the opportunity for the centre to be located further to the east. Analysis of the supportable retail and commercial floorspace within the planned LTC is provided in Chapter 3.

Approximately 97ha of employment land is also located within the PSP, which is broadly in-line with the 100ha identified in the MNGCP. In the longer-term, an additional 34ha of employment is likely to become available once quarrying activities in the area have been completed. The designation of employment land is influenced by the location of the Woody Hill Quarry, the potential for the quarry to expand and the associated buffers. Guidance on the planned employment areas and potential uses is provided in Chapter 4.

In total, it is estimated the Shenstone Park PSP could accommodate approximately 3,600 dwellings, and a population in the order of 10,200 to 11,300 persons assuming an average household size in the order of 2.8 to 3.1 persons.

Table 2.2: Socio-economic Characteristics of Residents in Northern Growth Corridor – New Communities, 2016

Category	Indictive Northern Growth Areas (new communities)	Greater Melbourne
<u>Income</u>		
Median household income (annual)	\$88,410	\$80,990
Variation from Greater Melbourne median	+9.2%	na
<u>Age Structure</u>		
0-4 years	11.2%	6.4%
5-19 years	22.7%	17.9%
20-34 years	25.8%	23.7%
35-64 years	35.5%	38.0%
65-84 years	4.6%	12.0%
85 years and over	0.2%	2.0%
<u>Household Composition</u>		
Couple family with no children	19.1%	24.3%
Couple family with children	54.8%	35.5%
One parent family	12.3%	10.7%
Other families	0.9%	1.3%
Lone person household	11.4%	23.3%
Group Household	1.6%	4.9%
Average household size	3.3	2.7
<u>Tenure Type (Occupied Private Dwellings)</u>		
Owned outright	13.1%	31.4%
Owned with a mortgage	62.0%	37.1%
Rented	24.7%	30.9%
Other tenure type	0.3%	0.6%
<u>Occupation</u>		
Managers/Professionals	27.2%	38.2%
Technicians and trades workers	15.0%	12.6%
Community and personal service workers	11.9%	10.2%
Clerical and administrative workers	15.0%	13.9%
Sales workers	10.4%	9.7%
Machinery operators and drivers	9.3%	5.6%
Labourers	9.5%	8.1%
Inadequately described or not stated	1.8%	1.7%

Source: ABS, Census of Population and Housing, 2016

3 Town Centre Assessment

This Chapter presents analysis of the potential town centre outcomes in the Shenstone Park PSP and provides the following information:

- The hierarchy of existing and planned centres that will serve future residents of Shenstone Park PSP
- An assessment of the extent of retail and non-retail commercial floorspace supportable at the proposed centre location.

3.1 Planned Town Centre Hierarchy Serving the Region

The VPA have developed a town centre hierarchy for Melbourne's growth areas which broadly reflects that identified in *Plan Melbourne*, although the VPA adopts a different terminology, referring to centres as 'town centres' as opposed to 'activity centres'.

A brief summary of the town centre hierarchy adopted by the VPA in the preparation of the Growth Corridor Plans and PSPs is provided below:

- **Principal Town Centres (PTC)** play an important role as a focus for retail and commercial activity, administrative functions, entertainment, and residential development. The Lockerbie PTC (identified as a Metropolitan Centre in Plan Melbourne) will service future Shenstone Park residents and is located approximately 4km to the north-west of the planned Shenstone Park LTC.
- **Major Town Centres (MTC)** are similar to PTCs in terms of the diversity of land uses that are expected to develop; however, they serve smaller catchments and can therefore be differentiated mostly in terms of scale. The planned Merrifield, planned Wollert and Craigieburn MTCs are located approximately 5-7km from Shenstone Park.

Having regard for Shenstone Park's close proximity to the Lockerbie PTC, it is envisaged these MTCs will be of less relevance in terms of serving the higher-order shopping requirements of future Shenstone Park residents compared to the Lockerbie PTC.

- **Local Town Centres (LTC)** provide easily accessible local services including grocery and convenience shopping, and local services. LTCs serve a neighbourhood shopping and service role, and are anchored by supermarkets of varying sizes, with full-line stores being the main distinguishing feature of the larger and more successful LTCs. LTCs are broadly equivalent to Neighbourhood Centres as is often described in retail economic assessments.

The key competing LTCs will be located in the Donnybrook-Woodstock PSP and include the following:

- **Patterson Drive LTC:** Located on Patterson Drive and approximately 1.5km to the north of the planned Shenstone Park LTC. The Patterson Drive LTC is planned to accommodate 10,000m² of retail floorspace without the requirement for a permit and is intended to include one full-line and one smaller supermarket.
- **Koukoura Drive LTC:** Koukoura Drive LTC is intended to serve the role of a large LTC and is planned to accommodate up to 21,500m² of retail floorspace without the requirement for a permit, including two full-line supermarkets and potentially a large

non-food retail anchor tenant (such as a Discount Department Store) in the longer-term. Koukoura Drive LTC is approximately 2.5km (direct-distance) from the planned Shenstone Park LTC and will be accessible via the planned arterial road located to the east of the Shenstone Park PSP area and which extends to Koukoura Drive.

- Lockerbie East LTC: Located approximately 2.3km (direct-distance) from the Shenstone Park LTC and planned to accommodate up to 5,000m² of retail floorspace without the requirement for a permit.
- Donnybrook Station LTC: Located approximately 1.7km (direct-distance) from the Shenstone Park LTC at the planned Donnybrook Station. The Donnybrook Station LTC is planned to accommodate up to 2,500m² of retail floorspace without the requirement for a permit and will serve future residents who use the train station.
- **Local Convenience Centres (LCC)** provide more limited day-to-day retail and community services. Two LCCs in the Donnybrook-Woodstock PSP may have limited competitive relevance for the planned LTC in Shenstone, namely Donnybrook Farmhouse LCC and the Hayes Hill LCC.

Figure 3.1 shows the surrounding town centre hierarchy serving Shenstone Park.

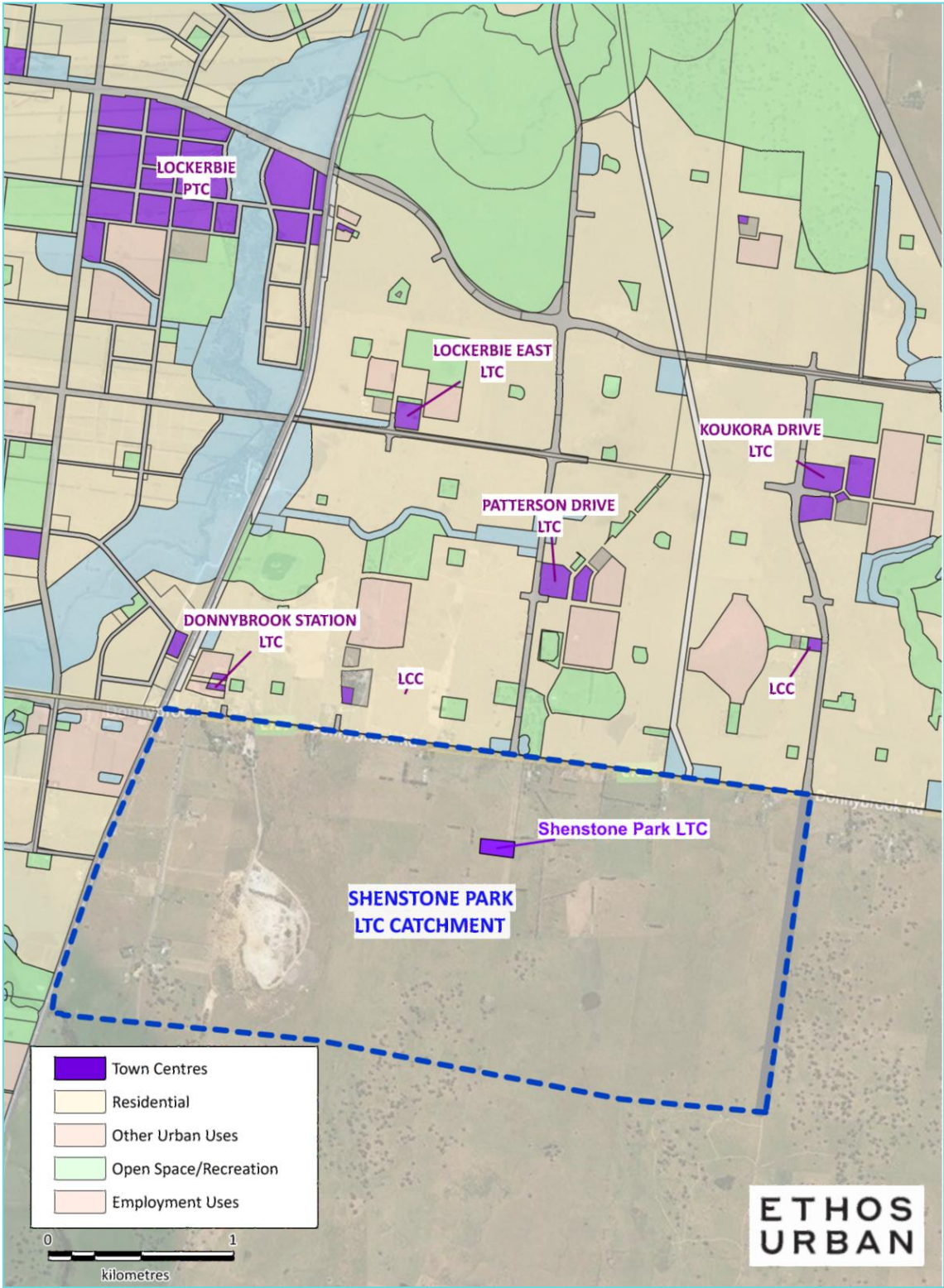
3.2 Local Town Centre Catchment

Figure 3.1 shows the preliminary location for the Shenstone Park LTC, the potential catchment the centre is likely to serve, and the location of key competing (planned) centres. The identified catchment reflects the indicative geographic area from which the majority of the centre's trade is expected to be derived. The following factors have been considered when identifying centre catchments:

- Location of competing centres beyond the Shenstone Park PSP
- Surrounding road networks
- Location of planned residential areas
- Potential constraints to customer movement, including significant areas of open space to the south, the Melbourne-Sydney railway line and Donnybrook Road, all of which are considered to be potential barriers to customer movement.

Having regard for the above, the area defined as the Shenstone Park PSP reflects a sensible catchment upon which to assess the future town centre needs.

Figure 3.1: Town Centre Hierarchy and Shenstone Park LTC Catchment



Prepared by Ethos Urban using MapInfo, StreetPro, BingMaps and information from DataVic and City of Whittlesea

3.3 Estimate of Future Retail Expenditure

Estimates of retail expenditure for the Shenstone Park PSP area have been derived from MarketInfo, which is a micro-simulation model that combines data from the ABS Household Expenditure Survey, ABS Population and Housing Census, National Accounts and other sources, to generate estimates of retail expenditure for small areas. MarketInfo is widely used in the retail economic, property and planning sectors.

Retail spending estimates for the Shenstone Park PSP are provided for the following retail categories:

- Food, liquor, groceries (FLG) which is the most relevant in terms of assessing future supermarket opportunities
- Food catering, including cafés, restaurant and take away food
- Non-food merchandise and services.

For the purpose of this analysis, it is assumed that the Shenstone Park PSP will be fully developed by 2034.

Estimates of the retail spending capacity by residents in the catchment (i.e. Shenstone Park PSP) have been prepared by examining the average retail spending levels of new residents in the developing residential areas in the northern growth corridor. It is assumed that the retail spending patterns of existing residents in these developing areas would broadly reflect those of new residents to the Shenstone Park PSP area.

Average Per Capita Retail Spending

Estimated average per capita retail spending (in constant 2019 dollars) for residents in the northern growth areas of Melbourne is shown in Table 3.1. These provide an indication of the retail spending profile of future Shenstone Park PSP residents and show that on average retail spending by residents in the northern growth areas is approximately 5% below that of the average for metropolitan Melbourne average.

Table 3.1: Average Per Capita Retail Spending, Recently Developed Area in the Northern Growth Corridor, 2019 (in 2019 dollars)

Retail Category	Shenstone Park	Metropolitan Melbourne	Variation from Metropolitan Melbourne
Food, Liquor & Groceries	\$5,190	\$5,900	-3%
Food catering	\$1,510	\$1,970	-11%
<u>Non-food</u>	<u>\$5,530</u>	<u>\$6,690</u>	<u>-5%</u>
Total Retail	\$12,230	\$14,560	-5%

Source: MarketInfo

Total Retail Spending

Total retail spending by Shenstone Park residents has been calculated for the purpose of testing the initial observations made in Section 2.3 relating to supermarket provision at the Shenstone Park LTC.

These estimates have been calculated with reference to population outcomes shown in Table 2.1 and the average retail spending per capita shown in Table 3.1. Furthermore, these estimates take into consideration forecast real growth in average total per capita spending of approximately +1% pa over the next 15 years, which broadly reflects historical trends and assumes relatively stable growth in the Australian economy over the forecast period.

Residents in the Shenstone Park PSP in 2034 are forecast to spend approximately \$143m (Low Scenario) to \$158m (High Scenario) on retail merchandise and services (in constant 2019 dollars, i.e. excluding the effects of inflation). Forecast retail spending by retail category is shown in Table 3.2.

Table 3.2: Forecast Retail Spending by Shenstone Park PSP Residents, 2034 (2019 dollars)

Retail Category	Shenstone Park PSP – Low Scenario	Shenstone Park PSP – High Scenario
Food, Liquor & Groceries	\$55.0m	\$60.9m
Food catering	\$16.6m	\$18.3m
Non-food	\$70.9m	\$78.5m
Total Retail	\$142.5m	\$157.8m

Source: MarketInfo

3.4 Supportable Supermarket Floorspace

When planning for future LTCs, an understanding of the opportunity for supermarket development is important. Supermarkets act as anchor tenants that support adjoining businesses, both retail and non-retail, via the significant levels of custom the supermarkets attract to a centre.

An analysis of the extent of supermarket floorspace that could be supported in the LTC is shown in Table 3.3 and indicates that a full-line supermarket in the order of 3,200m² could be supported within the centre. The analysis is based on the following assumptions and information:

- Supermarkets capture 75% of total FLG spending by catchment residents. Supermarkets are the dominant form of retailing in the FLG spending market, nationally, and capture an estimated 65% to 75% of national FLG spending. In growth areas, where limited choice and opportunities for specialty food retailing exist, supermarkets typically capture a higher proportion of FLG spending.
- A supermarket at the Shenstone Park LTC is estimated to capture in the order of 65% of catchment FLG spending directed to supermarkets. This level of market share is consistent with market shares experienced at other supermarkets and reflects the potential level of competition located beyond the PSP, namely in centres located to the north and identified in Section 3.1.

- In addition to capturing turnover from catchment residents, a supermarket would also capture turnover from residents beyond the catchment. This may include people visiting the adjoining school, community facility or sports grounds, or people working in the nearby employment precinct. An estimated 10% of supermarket FLG turnover is derived from shoppers living beyond the Shenstone Park PSP area.
- An estimated 6% of supermarket turnover would be in non-FLG merchandise.

Table 3.3 summarises the above analysis and shows that a full-line supermarket of 3,200m² could achieve turnover in the order of \$32m to \$35m a year upon full-development of the PSP (in constant 2019 dollars). This is considered to be an acceptable level of trading and would support the development of a LTC in this location.

Table 3.3: Supermarket Assessment, 2034 (2019 dollars)

Category	Shenstone Park PSP - Low	Shenstone Park PSP - High
Available FLG spending directed to supermarkets (@75% of FLG)	\$41.3m	\$45.7m
Estimated market share of supermarket from catchment	65%	65%
FLG supermarket turnover retained from catchment	\$26.8m	\$29.7m
Estimated share of turnover from beyond the catchment	10%	10%
Estimated FLG turnover from beyond the catchment	\$3.0m	\$3.3m
Total FLG turnover	\$29.8m	\$33.0m
Total estimated supermarket turnover (assuming 6% of turnover in non-FLG merchandise)	\$31.7m	\$35.1m
Assumed supermarket floorspace	3,200m ²	3,200m ²
Average trading level	\$9,910/m ²	\$10,970/m ²

Source: Ethos Urban; MarketInfo

3.5 Supportable Retail and Non-retail Floorspace

An assessment of the supportable retail floorspace (including speciality retailing) and total commercial floorspace (including non-retail businesses that typically locate in LTCs) is provided below.

Supportable Retail Floorspace

Supermarkets in Australia generally create customer traffic and exposure sufficient to support specialty shops equivalent to approximately one-half to two-thirds of the supermarket's total floorspace. Assuming the development of a 3,200m² supermarket and the upper-end of this benchmark eventuates, this would indicate potential for approximately 6,000m² of total retail floorspace at the Shenstone Park LTC and which may consist of the following:

- Supermarket: 3,000m² to 3,500m² (depending on operator, desired model, competition, etc)
- Speciality retail shops: 2,000m² to 2,500m².

The provision of 6,000m² of retail floorspace is broadly in-line with the planning for LTC elsewhere in metropolitan Melbourne's growth areas.

Non-retail Commercial Development Potential

In addition to retail activities, LTCs (or neighbourhood activity centres) also accommodate a range of non-retail shopfront businesses. Examples include real estate agents, travel agents, post offices, solicitors, accountants, tax agents, financial advisers, and so on. In some circumstances, home-based businesses may seek small office space in neighbourhood centres as they expand.

The proportion of non-retail floorspace in LTCs varies considerably. For example, single ownership neighbourhood shopping centres in growth areas typically have a relatively low proportion of non-retail floorspace; in these centres, non-retail uses can make up just 10% of centre floorspace.

In some inner-city suburbs of Melbourne, a much greater share of floorspace involves non-retail uses, and this proportion can be 50% or more of total floorspace provision. Typically, this pattern prevails in strip centres characterised by a multitude of small business owners.

For centre planning purposes, allowing for approximately 30% of total centre floorspace to be used as non-retail commercial uses is reasonable. Having regard for this benchmark, Table 3.4 summarises the potential retail and non-retail floorspace that could be supported in the Shenstone Park LTC.

Table 3.4: Total Supportable Retail and Non-Retail Commercial Floorspace at the Shenstone Park LTCs

Land Use	Floorspace
Total retail floorspace	6,000m ²
Commercial / office floorspace	2,500m ²
Total retail and commercial floorspace	8,500m²

Source: Ethos Urban

3.6 Land Area Requirements

Assuming an average site coverage of 30%-40% is applied to the supportable retail and commercial floorspace for the Shenstone Park LTC, a total land budget of approximately 2.1ha to 2.8ha of land would be required.

3.7 Accessibility to Supermarkets

An analysis of the number of households located within 1km of supermarket facilities has been undertaken, and this has been compared to the total number of households planned in the Shenstone Park PSP.

The analysis is summarised in Table 3.5 and shows that approximately 60% of households in the PSP will be located within 1km of a planned supermarket, including the planned supermarket at Shenstone Park LTC and other supermarkets in nearby centres.

The share of household within 1km of a supermarket is below the 80-90% range identified by VPA in the PSP Guidelines (Volume 2).

While the level of accessibility to supermarkets is below the benchmark set by VPA, the location of the buffers associated with the gas pipeline provides limited opportunities to shift the LTC to the east. Therefore, the level of accessibility to supermarkets may not be ideal, but the existing location of the LTC is considered to be the optimal location in these circumstances.

Table 3.5: Assessment of Supermarket Accessibility

Category	Households
Total households in PSP	3,630
Households within 1km of a supermarket	2,080
Households within 1km of a supermarket	57%

Prepared by Ethos Urban using MapInfo, StreetPro, BingMaps and information from DataVic and City of Whittlesea

3.8 Potential for a Local Convenience Centre

As described earlier, LCCs provide day-to-day convenience retailing and are often planned in locations where accessibility to LTCs is limited.

The FUS identifies a potential LCCs in the eastern part of the PSP area, which is considered appropriate as this area does not benefit from the same level of accessibility to LTCs as other parts of the PSP. A LCC containing in the order 1,200m² of retail/commercial floorspace may be supported in this location.

In addition, the employment area in the western portion of the PSP has the potential to accommodate significant employment when fully developed (refer Chapter 4). Potential may also exist for a small LCC (say, 700m² of retail/commercial floorspace) to serve these future workers. Based on existing planning in the area, future workers would need to cross Donnybrook Road and visit the Donnybrook Station LTC or the Donnybrook Farmhouse LCC, or visit the Shenstone Park LTC to access basic convenience retailing including food catering.

3.9 Summary of Town Centre Outcomes

Based on the assessment presented in this Chapter, the location of the Shenstone Park LTC identified by the VPA and City of Whittlesea is appropriate. In addition, potential may exist in the future for two LCCs, one located in the eastern portion of the PSP and one within the future employment precinct.

A summary of the extent of supportable floorspace, together with recommendations on the extent of land required for planning purposes, is provided in Table 3.6.

Table 3.6: Summary of Indicative Development Outcomes and Planning Recommendations for Shenstone Park LTC

Land Use	Shenstone Park TC	Eastern LCC	Western LCC	Total PSP
<u>Supportable Floorspace</u>				
Supermarket	3,500m ²	-	-	3,500m ²
Speciality Retail	<u>2,500m²</u>	<u>1,000m²</u>	<u>500m²</u>	<u>4,000m²</u>
Total Retail	6,000m ²	1,000m ²	500m ²	7,500m ²
Commercial/office	2,500m ²	200m ²	200m ²	2,900m ²
Total Retail and Commercial Floorspace	8,500m²	1,200m²	700m²	10,400m²
Land Requirements	2.1ha – 2.8ha	0.3ha – 0.4ha	0.2ha	2.6ha – 3.4ha

Source: Ethos Urban

4 Regional Employment Land Assessment

This Chapter presents an assessment of the opportunity for employment land in the Shenstone Park PSP, taking into consideration land identified in the FUS for employment uses and the regional context for employment land in the northern growth corridor.

4.1 Planned Shenstone Park Employment Land

The FUS (refer Figure 2.1) identifies approximately 97ha of land for employment uses accounting for a significant share of land in the western part of the PSP area. This includes approximately 23ha of land identified as 'business' with Donnybrook Road frontage and is intended to accommodate the types of uses found in the Commercial 2 Zone (C2Z). The balance of employment land is identified as 'industry' and 'light industry'. In addition, approximately 34ha of land has been identified as 'industry' in the longer-term, once quarrying operations have been completed.

The MNGCP and constraints to potential land uses associated with buffer areas from the Woody Hill Quarry are two major influences for the designation of land in the FUS as employment.

The MNGCP identifies approximately 100ha of land for employment/industrial uses in the Shenstone Park PSP and the FUS broadly responds to this designation. Furthermore, constraints on the development of sensitive land uses within the relevant buffer from the quarry exist, including residential. The FUS also allows for the expansion of the Woody Hill quarry in a northerly and eastern direction whereby the appropriate buffer distances extend to Donnybrook Road.

In terms of supporting employment uses, the following present as positive influences that may support the attraction of employment generating uses:

- Close proximity to Donnybrook Station is regarded as a positive feature for businesses and employees.
- Adjoins planned commercial area to the west of the Sydney-Melbourne railway line.

The English Street PSP identifies 19.1ha of land for 'commercial' uses and identifies potential for a small LCC and office/commercial uses. Background research prepared by Essential Economics as input to the PSP (*Regional Town Centre and Employment Land Assessment*, June 2014) identifies potential in the long-term for a 'high amenity' commercial area, such as a business park that could accommodate regional and local office development. The Whittlesea Planning Scheme applied the Commercial 1 Zone to the land identified as 'commercial' in the English Street PSP.

- Excellent exposure and access to Donnybrook Road, providing businesses with exposure to significant levels of passing traffic. This is significant in terms of supporting uses that would typically be accommodated in the C2Z such as bulky goods or restricted retailing.
- Proximity to a large number of future businesses in areas planned for industrial and commercial uses in the future.
- Direct access to a future population of more than 90,000 persons in the Shenstone Park, English Street, Donnybrook-Woodstock and Lockerby PSPs.

A review of potential employment land uses that would be suited to the land identified in the FUS are discussed in Section 4.3.

4.2 Employment Land Planning in the Surrounding Region

An overview of the key employment areas planned in the region surrounding Shenstone Park PSP is provided in Figure 4.1 and described below.

State-Significant Northern Industrial Precinct

The state-significant northern industrial precinct is located approximately 2km to the west and is identified as a location for future investment and growth in freight, logistics and manufacturing. The precinct includes areas of land already zoned for industrial/commercial purposes in the Epping, Somerton and Campbellfield areas, as well as areas planned for future employment identified in the MNGCP and recently approved PSPs (e.g. Craigieburn North Employment Precinct).

Based on analysis of information contained in the Urban Development Program 2018 (DELWP), approximately 993ha of vacant existing employment land and approximately 716ha of planned employment land is located in the state-significant industrial precinct.

Consumption of industrial land in the Northern state-significant industrial precinct has increased in recent years as shown below:

- 2015-16: 15.8ha
- 2016-17: 26.2ha
- 2017-18: 43.3ha.

MAB Merrifield Business Park

The MAB Merrifield Business Park is located approximately 3km to the west of the Shenstone Park PSP. Development at MAB Merrifield commenced in 2017, with the precinct's first major tenant, Dulux, being developed in 2017. MAB Merrifield Business Park is located within the state-significant northern industrial precinct.

English Street PSP – Commercial Precinct

As described earlier, the English Street PSP identifies 19.1ha of land for 'commercial' uses. Background research (Essential Economics, *Regional Town Centre and Employment Land Assessment*, June 2014) identifies potential in the long-term for 'high amenity' commercial area, such as a business park that could accommodate regional and local office development.

Wollert PSP – Industrial Precinct

Approximately 169ha of industrial land is located in the eastern portion of the Wollert PSP, approximately 5km to the south-east of the Shenstone Park PSP.

Potential Interstate Freight Terminal and Surrounding Land

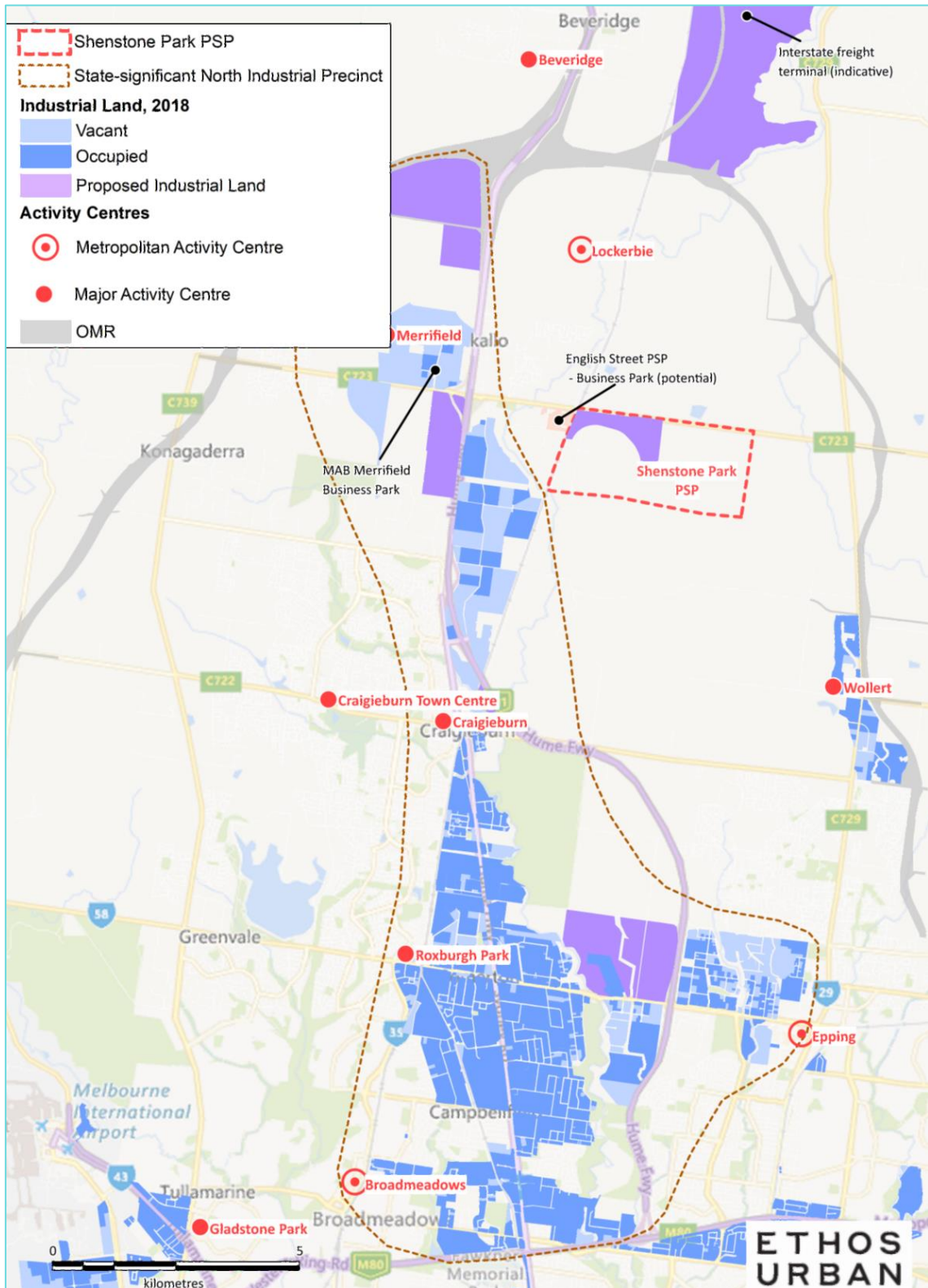
The potential for an interstate freight terminal in Beveridge has long been identified in State planning policy, and again more recently in Plan Melbourne. The MNGCP identifies potential for more than 1,000ha of industrial land in this location.

Bulky Goods and Restricted Retailing

Potential bulky goods/restricted retailing locations in the surrounding region include the following:

- The Lockerbie PTC Concept Plan (refer Figure 1.7) identifies potential for a bulky goods/restricted retail precinct in the northern portion of the town centre.
- Land identified as 'Commercial' in the Craigieburn North Employment Precinct is permitted to accommodate up to 25,000m² of restricted retail/trade supplies floorspace without a permit (Hume Planning Scheme).
- MAB Merrifield, where 'restricted retail' is identified as a Section 2 – Permit required use in the Hume Planning Scheme.

Figure 4.1: Regional Employment Land Context



Produced by Ethos Urban using MapInfo, StreetPro, BingMaps and information from VPA, City of Whittlesea and DELWP

4.3 Potential Employment Uses

Having regard for the features of the land identified for employment uses in the Shenstone Park PSP (refer Section 4.1) and the supply and type of land identified in the broader region for employment (Section 4.2), the following potential employment-generating uses may be suited to employment land in the FUS for the Shenstone Park PSP.

Land Identified as ‘Business’ (i.e. Commercial 2 Zone)

Bulky Goods / Restricted Retailing / Showrooms

Bulky goods, restricted retailing and showrooms (including trade supplies, car dealerships, etc) would benefit from the following:

- access to an immediate population in the surrounding area of more than 90,000 persons
- significant exposure to traffic passing along Donnybrook Road
- location within a residential growth area where demand for trade supplies is anticipated to be strong over the coming decades.

Shenstone Park PSP is centrally located to the 90,000 or so future residents in Shenstone Park PSP, Lockerbie PSP, Donnybrook-Woodstock PSP and English Street PSP. Based on industry benchmarks, approximately 0.6m² of bulky goods floorspace is provided in bulky goods/homemaker precincts per capita. Applying this to the 90,000 or so future residents in the surrounding region equates to demand for approximately 55,000m² of bulky goods floorspace.

This floorspace would be dispersed between future bulky goods areas in the Lockerbie PTC and other locations further afield. Nevertheless, having regard for the central location of Shenstone Park to this catchment, potential exists for between 20,000m² to 25,000m² of bulky goods floorspace to be accommodated in a location that has direct frontage to Donnybrook Road. Allowing for a development efficiency of approximately 35%, approximately 6-7ha of land would be required to accommodate such floorspace which would be provided in the land identified as business/retail'.

In addition, potential will also exist for non-retail and showrooms uses such as car dealerships, caravan sales, motorcycle sales, agricultural machinery, machinery hire, etc. Therefore, it would be prudent to plan for around 15ha of land with direct frontage to Donnybrook Road for a mix of bulky goods and showroom uses.

Regional/Corporate Office

Shenstone Park PSP is similar to the English Street PSP in that its proximity to Donnybrook Station presents it as a *potential* unique opportunity to attract regional or corporate-style office development. Potential may also exist for land in the north-west of the Shenstone Park PSP to represent an extension of the commercial precinct planned for English Street.

However, as noted above, numerous opportunities for large-scale regional office development are already provided for in the wider region, including MAB Merrifield Business Park and in the adjacent English Street PSP.

Service Station, Fast Food, Fitness Centre, Medical Centre and Other High-exposure Reliant Uses

The intended C2Z allows for a wide variety of uses including many uses that rely on high levels of exposure to passing traffic. Examples of these uses include the following:

- Service station with associated convenience retailing
- Fast food convenience restaurants
- Medical centre
- Fitness centre, gymnasium, karate dojo, indoor sport centre etc.

Small Format Supermarket

The C2Z allows for a supermarket up to 1,800m² plus up to 500m² of shop floorspace. A supermarket in this location would serve a much broader region than the Shenstone Park PSP and would be less accessible to Shenstone Park PSP residents than the planned LTC. The extent to which the development of a small format supermarket on this land would impact the viability of planned centres in the region would depend on its location and comparative accessibility to other centres.

Land Identified as 'Industrial'

Approximately 74ha of land has been identified as 'industrial' plus a further 34ha in the longer-term.

Shenstone Park PSP is well-located with respect to existing and future transport routes, with Donnybrook Road providing connections to Hume Freeway, Epping Road and the future Outer Metropolitan Ring Road.

On this basis, planning for industrial land that can accommodate transport & logistics, and manufacturing in the western portion of the land identified as 'industrial' in the PSP (refer Figure 2.1) that do not require treatment with residential interfaces appears appropriate. Light industrial and commercial uses may be appropriate for land with residential interfaces.

It is acknowledged that while industrial uses appear to be appropriate from a land use planning perspective, a significant supply of industrial land is planned for the wider region, and therefore the development of industrial uses may be a long-term proposition.

It should also be acknowledged that the nature of land uses is changing in areas traditionally identified as light industrial areas that are in close proximity to expanding populations and in areas with relatively high levels of amenity. While historically these areas typically accommodated a range of warehouses, factories and service-related industry (e.g. car servicing), they are now attracting a wider range of uses that include recreational, cultural and entertainment uses.

For example, 'non-industrial' uses that are now being attracted to such areas include recreational uses such as trampoline centres (e.g. Bounce), high-ropes and rock climbing centres (e.g. Clip'n'Climb), places of worship, dance studios, karate dojos, micro-breweries with bar and food catering, etc.

It would be prudent to have regard for this trend towards a greater range of employment generating uses when planning for the identified employment land in the Shenstone Park PSP.

4.4 Implications

Land identified in the FUS for the Shenstone Park PSP is appropriate for employment uses having regard for:

- Access and exposure to Donnybrook Road
- Proximity to the Donnybrook station
- Adjoining planned commercial precinct to the west
- Regional access to major transport routes
- Constraints on the land associated with the quarry and associated buffers which restrict the development of more sensitive uses (e.g. residential).

5 Potential Employment Outcomes

When fully developed, the LTC, two LCCs and the planned employment area has the potential to provide up to 4,330 jobs on an ongoing basis, including full-time, part-time and casual positions. Additional employment within the PSP will be generated via other planned uses, including schools and community centres.

Table 5.1 summarises the potential direct employment outcomes associated with identified uses, and are based on the planned extent of floorspace in each centre and the following industry benchmarks:

- Retail: one job per 30m² of retail floorspace
- Non-retail: one job per 20m² of non-retail commercial floorspace
- Employment land: assumes a broad industry-wide job density of 30 jobs per hectare of employment land (gross) – noting some uncertainty regarding the eventual land uses exists.

Table 5.1: Potential Employment Outcomes (indicative)

Locations	No. Jobs
Shenstone Park LTC	330
Eastern LCC	40
Western LCC	30
Employment land (short and long-term)	3,930
Total PSP	4,330

Source: Ethos Urban