ESSENTIAL ECONOMICS

Beveridge North West

PSP 1059

Retail and Needs Assessment

Prepared for

Metropolitan Planning Authority

by

Essential Economics Pty Ltd

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INTRODUCTION

Background

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

Beveridge North West PSP 1059 (Beveridge North West) is located in the north-west of the Northern Growth Corridor, in Mitchell Shire. The Northern Growth Corridor Plan (NGCP) identifies future land in Beveridge North West as primarily residential and land with landscape values.

The Metropolitan Planning Authority (MPA) indicate that potential may exist for up to approximately 10,000 residential lots in Beveridge North West, which will generate demand for retail and employment uses within and beyond the PSP area. A network of town centres has been identified by MPA which includes three Local Town Centres intended to serve a neighbourhood convenience role and one Local Convenience Centre.

Additionally, a proposal exists for a quarry in the northern part of the PSP, which is likely to impact the extent of residential development while the quarry is operational. Should the quarry be approved, it is likely to impact the size and viability of centres in the Beveridge North West during its operation.

Essential Economics Pty Ltd have been commissioned by MPA to provide guidance to the future retail and employment opportunities in Beveridge North West, including an assessment of supportable retail and commercial floorspace at the centre location identified by MPA. The advice relates to the opportunity for local and neighbourhood retail facilities, as no Major Town Centre has been identified for the Beveridge North West PSP.

The preparation of this report has had regard for the Precinct Structure Planning Guidelines, as well as a preliminary urban structure prepared by the MPA.

Information Inputs

The analysis in this report has been undertaken on the basis of information provided to the consultants by the MPA and from other sources, including the following:

- A preliminary urban structure for Beveridge North West PSP that identifies preferred town centre locations and a planned road network.
- Existing zones applicable to the land, including the Urban Growth Zone and the Rural Conservation Zone.
- Indicative future urban form as proposed in the Melbourne North Growth Corridor Plan.

- The existing and potential future town centre hierarchy and employment land locations in the surrounding region.

This Report

This report provides an assessment of the potential town centre requirements for the Beveridge North West PSP and will provide input into the drafting of the urban structure for the PSP area.

This technical report is organised as follows:

Chapter 1: **Regional Context**
Provides an overview of the urban development and infrastructure in the region surrounding Beveridge North West.

Chapter 2: **Beveridge North West PSP**
Describes the characteristics of the Beveridge North West PSP area as well as presenting the preliminary urban structure for the area.

Chapter 3: **Residential Development Outcomes**
Estimates the potential population capacity at full-development, based on two scenarios relating to land development efficiencies and dwelling yields.

Chapter 4: **Town Centre Assessment**
Provides guidance to the future activity centre requirements for Beveridge North West PSP, taking into account the hierarchy serving the wider region and analysis of supportable retail and non-retail floorspace. This will include an assessment of the implications of the proposed quarry on the future activity centre requirements.

Chapter 5: **Other Considerations**
Assesses a number of other implications of associated with the future development of the Beveridge North West PSP.

Chapter 6: **Summary of Main Findings**
Summarises the main findings of Beveridge North West arising from the analysis presented in Chapters 1 to 4.

1 REGIONAL CONTEXT

This Chapter presents an overview of the regional context within which Beveridge North West is situated. It includes a description of the regional location, as well as summary of the North Growth Corridor Plan and Plan Melbourne, and how they relate to the Beveridge North West PSP.

An overview of existing and proposed future transport infrastructure, as well as population and urban development trends in region, is also provided.

1.1 Regional Location of Beveridge North West

Beveridge North West PSP is located in the Mitchell Shire, within the north-western periphery of the Northern Growth Corridor of Melbourne (NGC). Situated approximately 40km north of the Melbourne CBD, Beveridge North West contains approximately 1,260ha of land which is bounded to the east by the Hume Freeway and to the west by Old Sydney Road. The township of Wallan is located approximately 3km north of Beveridge North West, while the Mandalay residential estate is located immediately to the south of the PSP.

The NCG 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 is currently underway. The *Melbourne North Growth Corridor Plan* (MNGCP) provides the broad strategic land use direction for the region and informs the preparation of more detail PSPs.

A number of PSPs have been approved in the area surrounding region, including the following:

- Merrifield West (PSP 1064)
- Merrifield Central Employment Area (E1)
- Folkstone Employment Area (E1)
- Lockerbie PSP (PSP 1066) and Lockerbie North PSP (PSP 1098), each of which is located east of the Hume Freeway .

In addition to the future PSP areas in the region, the existing township of Wallan is located nearby to the north, while the Mandalay residential estate (currently being developed) is located immediately south of the Beveridge North West.

1.2 North Growth Corridor Plan

The *Melbourne North Growth Corridor Plan* (MNGCP) broadly identifies the future urban form for the NGC, 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 Beveridge North West PSP include the following:

- A large portion of the area covered by the Beveridge North West PSP is identified as future residential. In addition, the area also contains land proposed as regional open space.
- Significant areas of land to the south of Beveridge North West PSP are identified as future residential. This includes the Mandalay estate to the south, which is currently being developed. Additionally, the township of Wallan and surrounding areas to the north are earmarked for future urban development.
- Beveridge North West residents will be served by several higher-order town centres which have been identified for nearby areas, including Donnybrook, Beveridge South West, Mickleham and Wallan. The town centre network within Beveridge North West will therefore serve a neighbourhood and local convenience role for future residents.
- A major long-term employment precinct is located approximately 4km to the east of Beveridge North West. A potential future Interstate Freight Terminal has been identified to form part of this precinct.

The MNGCP as it relates to the Beveridge North West PSP is provided in Figure 1.1 on page 6.

1.3 Planned Transport Infrastructure

Existing and planned transport infrastructure serving Beveridge North West PSP includes the following:

- **Hume Freeway,** which will provide primary access to major metropolitan locations to the south.
- **Outer Metropolitan Ring Road (OMR)**, which will provide connections from the Princes Freeway in Werribee, to the Metropolitan Ring Road in Bundoora. Access for Beveridge North West residents is planned approximately 3.5km south of the PSP, via the Hume Freeway.
- **Local road network**, which comprises two north-south and two east-west arterial roads which will connect Beveridge North West with urban areas beyond the PSP.
- **Access to a high capacity Public Transport Corridor** which links Beveridge North West to Donnybrook and Craigieburn Town Centres, as well as Broadmeadows and the future Interstate Freight Terminal Employment Area.

1.4 Plan Melbourne

Plan Melbourne was recently released by the Victorian Government and is intended to guide Melbourne's housing, commercial and industrial development through to 2050. The Plan seeks to integrate long-term land use, infrastructure and transport planning to meet the population, housing and employment needs of the future.

Beveridge North West PSP is situated within the outer area Northern Subregion, which is expected to grow into a *"vibrant, well serviced community".* Consistent with the MNGCP, Plan Melbourne identifies land to the north and south of Beveridge North West PSP a future urban areas.

1.5 Urban Development Trends in the Northern Growth Corridor

Urban development trends in the northern growth corridor, including population, and residential and employment land development, are summarised below.

Population Growth Trends and Forecast

Population growth in the outer northern region of Melbourne is expected to accelerate over the next 20 years or so, as more residential land is released for development.

For instance, the municipalities of Whittlesea, Hume and Mitchell (which contain the urban growth fronts in outer northern Melbourne) experienced combined growth of approximately +88,000 persons between 2001 and 2011. Recent forecasts prepared by DTPLI indicate that growth will increase to a total of approximately +160,000 new residents between 2011 and 2021, and to a total of +170,000 new residents between 2021 and 2031.

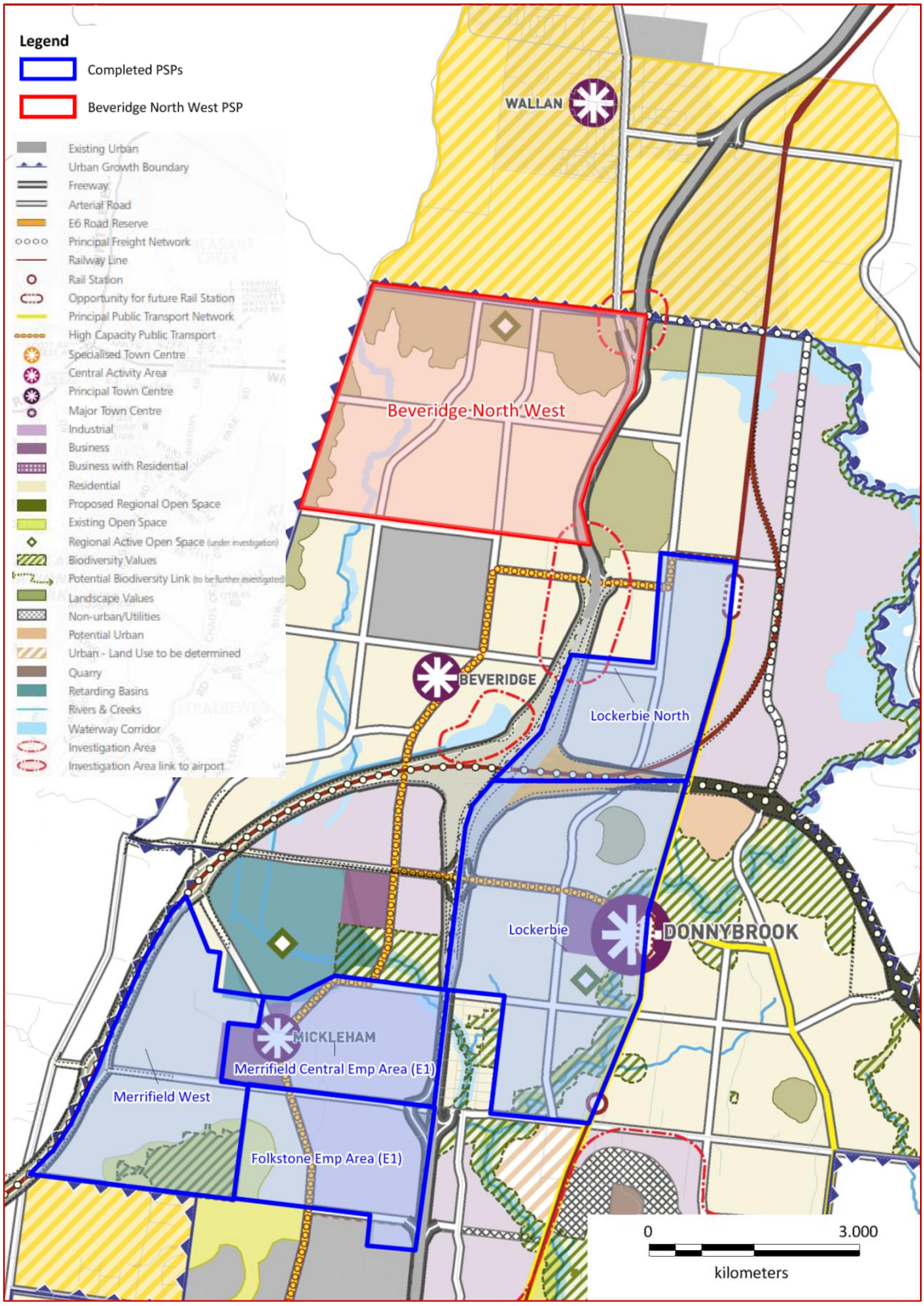
The share of Melbourne's population growth accommodated within these selected municipalities is forecast to increase from 14% between 2011 and 2011, to 19% between 2011 and 2021, and then to 20% between 2021 and 2031, as shown in Table 1.1.

Table 1.1: Population Growth Trends, Outer Northern Melbourne Municipalities, 2001 to 2031

Local Government Area	Recent and Forecast Population Growth (Persons)		
	2001-2011	**2011-2021**	**2021-2031**
Hume (C)	+38,300	+55,270	+61,720
Mitchell (S)	+6,700	+18,320	+35,510
Whittlesea (C)	+42,680	+85,700	74,140
Total	**+87,680**	**+159,290**	**+171,370**
Rounded	**+88,000**	**+160,000**	**+170,000**
Greater Melbourne	+647,430	842,240	+851,230
Share of Greater Melbourne	*14%*	*19%*	*20%*

Source: ABS, Regional Population Growth Trends, Cat No: 3218.0; DTPLI, Victoria in Future, 2014

Figure 1.1: Beveridge North West – Melbourne North Growth Corridor Plan



Source: DTPLI, MPA and Essential Economics

Broadhectare Residential Development Trends

Figure 1.2 illustrates the broadhectare residential development trends based on *Urban Development Program* as prepared by DTPLI.

A number of residential development fronts exist in the northern growth corridor, including land around Craigieburn, South Morang and Mernda. Of particular importance to Beveridge North West is the extent of development occurring in the Craigieburn area. As land in and around Craigieburn is becoming exhausted, approved PSP areas to the north, such as Merrifield West, are now experiencing residential development activity.

Additionally, residential development activity is occurring in and around Wallan, approximately 3km north of Beveridge North West. As these areas continue to develop, Beveridge North West will become next logical urban development extension within this corridor.

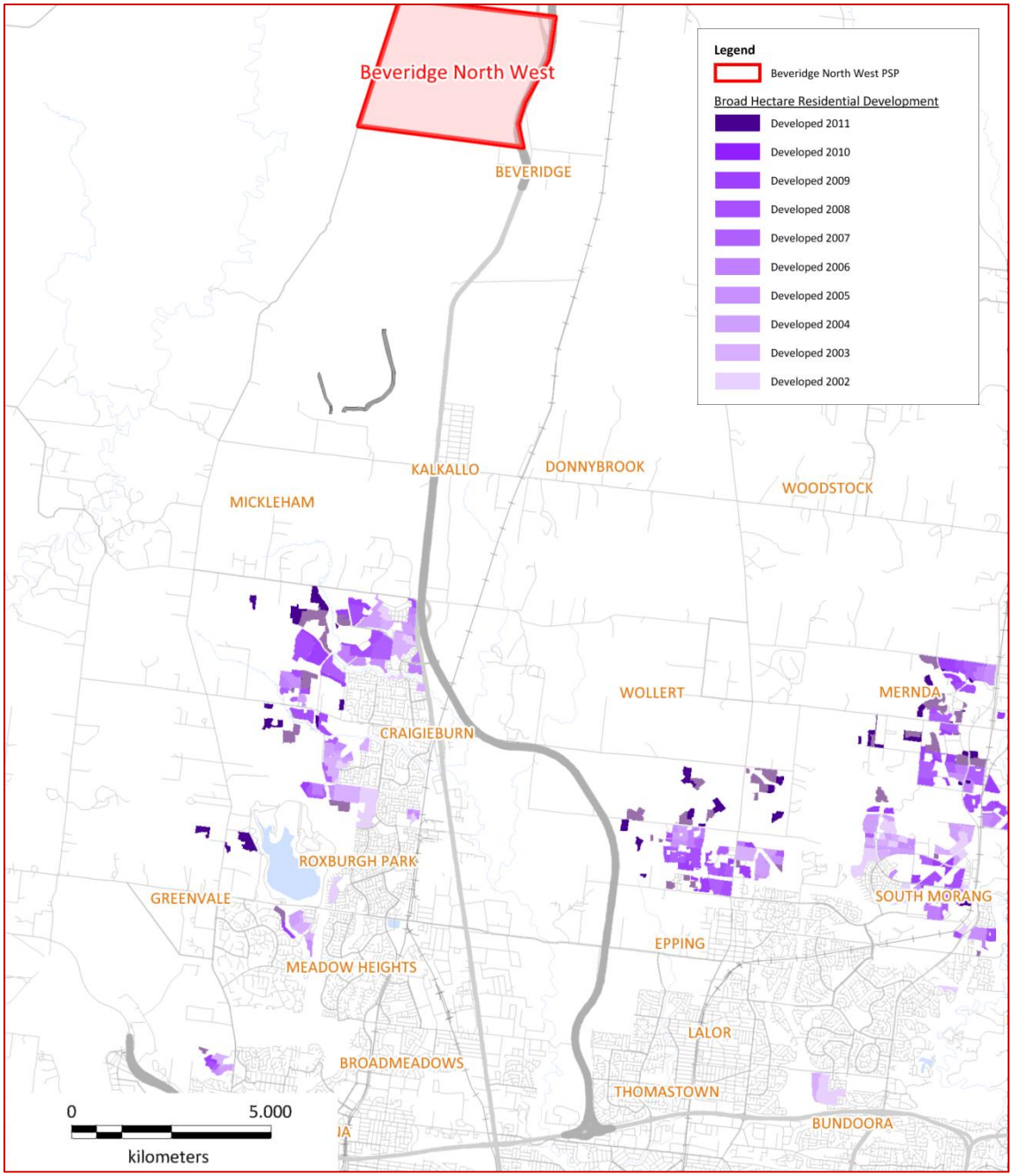
1.6 Summary

Beveridge North West is part of Melbourne's northern growth corridor which has been experiencing rapid population growth and urban development in recent years. Strong rates of population growth for this region are forecast for the foreseeable future.

The MNGCP is the strategic plan which provides guidance for land use planning in the region, and identifies significant areas for residential development, as well as a number of nearby higher-order town centre which will serve Beveridge North West residents in the future.

As the next logical extension of urban development within the Hume corridor, Beveridge North West will experience increasing development pressure, as nearby areas become exhausted.

Figure 1.2: Broadhectare Residential Development Trends, 2002-2013



Source: DTPLI, Urban Development Program, annual

2 BEVERIDGE NORTH WEST PSP

An overview of the key features of the Beveridge North West PSP and preliminary centre locations as identified by MPA are described in this Chapter.

2.1 Characteristics of the Beveridge North West PSP Area

The Beveridge North West PSP covers an area of approximately 1,260ha, and is bounded by the Hume Freeway to the east, Camerons Lane to the south, and Old Sydney Road (which defines the Urban Growth Boundary) to the west. A strip of land designated for regional open space in the northern parts of the PSP will separate Beveridge North West from future urban areas to the north.

A preliminary urban structure for the Beveridge North West PSP and has been prepared by MPA, and is shown in Figure 2.1 on page 11.

The main features of the preliminary urban structure for Beveridge North West PSP are as follows:

- **Primarily future residential area**: the majority of land in Beveridge North West will be future residential.
- **Significant Open Space**: A significant proportion of land (up to 350ha or 30% of total PSP area) is proposed open space. This includes a 300ha strip of land which incorporates the northern parts of the PSP and which may include a proportion of land as regional active open space.

  In addition, a 50ha strip of land located on the western edge of the PSP, along Old Sydney Road, is also identified as having landscape values. The future designation of this area is currently under investigation. The implications for town centres in the PSP arising from the potential for this land to become available for urban development is assessed later in this report.
- **Adjoins future residential areas:** Beveridge Central PSP, Beveridge South West PSP, and the Mandalay Estate (currently being developed) are located immediately south of Beveridge North West PSP. These areas are identified for significant residential development. Additionally, land to the north of the PSP is earmarked for future residential development.
- **Physical barriers and other constraints:** The strip of open space land (300ha) in the northern parts of the PSP will form a physical barrier between Beveridge North West and future urban areas to the north, including the Wallan township and the Wallan PSP.

  Urban development to the west of the PSP is restricted by the Urban Growth Boundary (UGB), which serves as the western borders of the Beveridge North West PSP.

- **Access to major arterials including Hume Freeway**: The proximity of the subject land to the Hume Freeway, as well as several major arterial roads, will provide access for residents to other parts of Melbourne. Primary access to the Hume Freeway will be via Camerons Lane (future major arterial) with a planned diamond interchange to the Freeway.
- **Proposed Quarry:** A proposal exists for a basalt quarry to be located in the north-east of the PSP area. As a result, a 500m residential buffer has been included in the preliminary urban structure, which, if approved, will temporally offset approximately 83ha of underlying residential land, for the life of the quarry.
- **Local connections**: The planned road network will provide a number of access points to Beveridge North West from surrounding residential areas. Main north-south access points will be provided by two north-south arterials, as well as from Old Sydney Road, and these roads will provide access to western parts of the PSP.

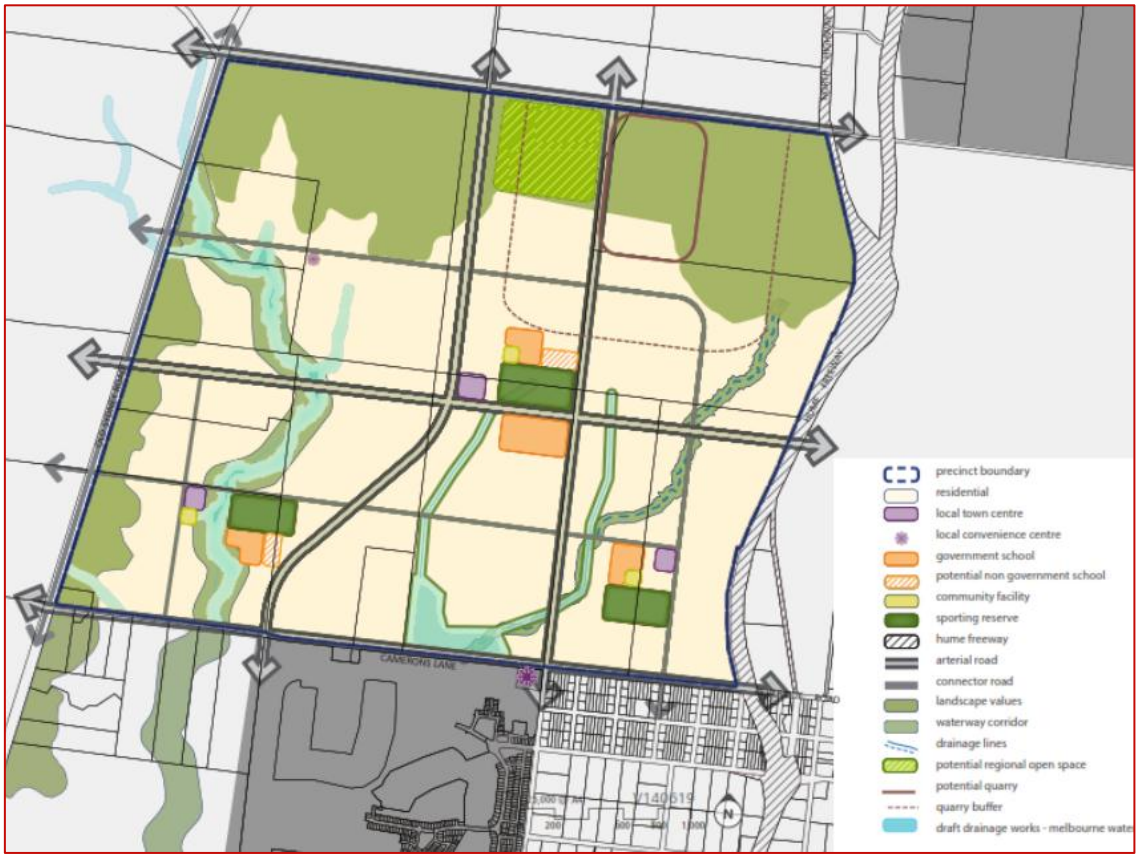
  East-west access points will be via by two arterial roads, linking the Hume Freeway, as well as the Northern Highway. A connector road will provide connections across the Hume Freeway.

2.2 Preliminary Centre Locations

MPA's preferred location of town centres is outlined in the preliminary urban structure. Preliminary analysis undertaken by the MPA has identified a preferred a centre network of three local town centres serving a neighbourhood role, as well a local convenience centre.

These centre locations are shown in Figure 2.1. The viability and extent of retail and non-retail floorspace supportable at these centres is assessed in Chapter 4.

Figure 2.1: Beveridge North West – Preliminary Centre Locations and Road Network



Source: Metropolitan Planning Authority

2.3 Summary

Beveridge North West PSP accounts for approximately 1,260ha of land which is identified for significant urban development and, as such, will accommodate a significant level of population.

A preliminary urban structure for the Beveridge North West PSP and has been prepared by MPA which details how these future residents will be serviced by a network of town centres, public transport, road networks, including an arterial road network which will provide linkages to the Hume Freeway and the planned OMR.

The expected residential development outcomes in the PSP are assessed in the following Chapter.

3 RESIDENTIAL DEVELOPMENT OUTCOMES

This Chapter presents an analysis of the likely residential development outcomes in Beveridge North West PSP.

3.1 Land Area

A total of 780ha of land has been identified in Beveridge North West PSP as having potential for residential development, based on information provided by the MPA. This figure takes into account land constrained for development purposes by drainage, waterways, and areas with landscape values identified for regional open space.

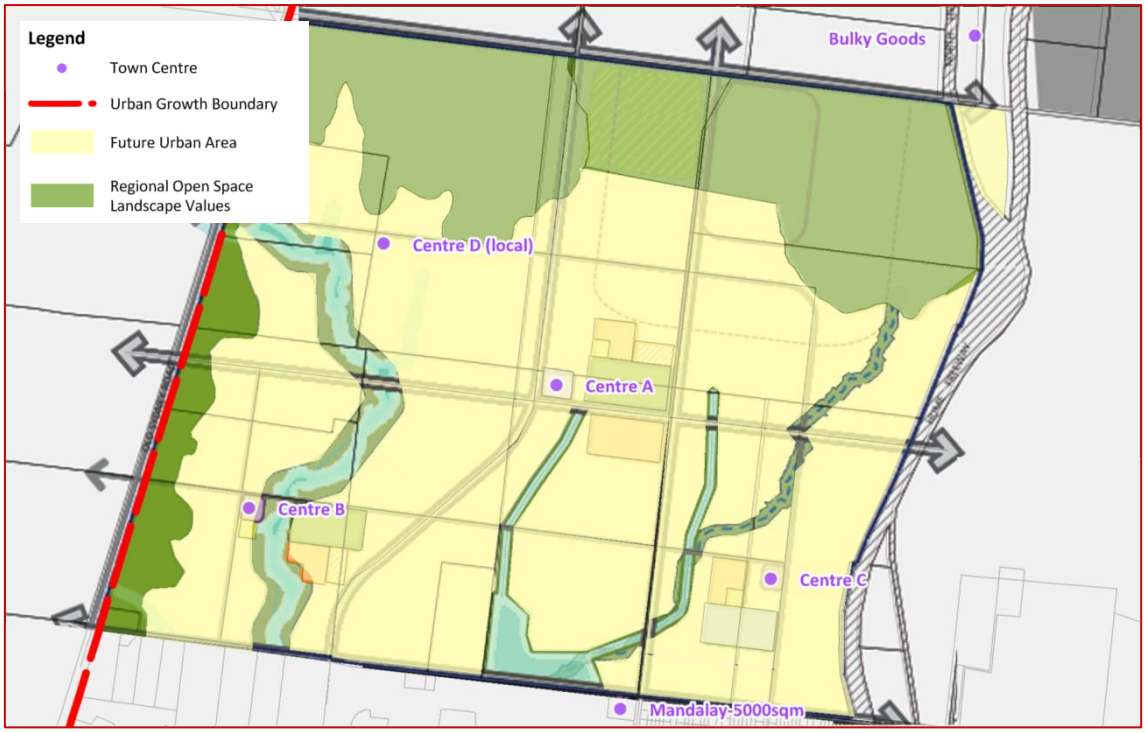
Assuming a development efficiency of 75%, the net developable area (NDA) in Beveridge North West is estimated at 587ha, as shown in Table 3.1 and Figure 3.1. The balance of the land is set aside for community facilities, schools, town centres and so on.

Table 3.1: Beveridge North West PSP, Potential Residential Dwelling Yields

Area	Gross Land Area	Net Developable Area
Beveridge North West PSP	782ha	587ha

Source: MPA and Essential Economics

Figure 3.1: Beveridge North West, Net Developable Area



Source: MPA and Essential Economics

3.2 Dwelling Yield and Population Capacity

Average dwelling yields throughout the northern growth area of Melbourne are currently in the order of 15 dwellings/ha of NDA; however, new residential estates are being planned with smaller lots and a higher proportion of medium-density (mainly townhouse) formats than in the past.

Potential exists for residential development in Beveridge North West to achieve average dwelling yields of 18 dwellings/ha. On this basis, and for the purposes of subsequent analysis, the following development scenarios have been prepared:

- Low development scenario: 15 dwellings per ha of NDA
- High development scenario: 18 dwellings per ha of NDA.

Based on the above dwelling yields, potential exists for approximately 8,800 (low development scenario) to 10,560 (high development scenario) dwellings in the Beveridge North West PSP.

Analysis of residential population outcomes for the purpose of this analysis are based on an average household size of 2.8 persons per household at full development. This is intended as a broad estimate at full development, and reflects the population projections prepared by DTPLI (*Victoria in Future, 2014*).

The average size of households will change over time as the region is developed for housing. For example, it is likely that in the early stages of development the region will attract a greater number of family households, with the average household size likely to be above 3.0 persons per dwelling or more in some localities. In the longer-term (ie after full-development), the trend is likely to be a decline in the average household size as family members leave the principal residence. Having regard for forecast household types in Beveridge (refer Section 3.3), an average household size of 2.8 persons is considered conservative.

Forecast dwelling and population outcomes at full development are shown in Table 3.2, and indicate that the total population at full capacity is broadly estimated between 25,000 residents (low development scenario) and 30,000 persons (high development scenario).

Table 3.2: Beveridge North West PSP, Potential Population Outcomes

Category	Total Beveridge North PSP
Dwelling Yield	
Low - assuming 15 lots/ha	8,800 lots
High - assuming 18 lots/ha	10,560 lots
Population Capacity	
Low	24,640 persons
High	29,570 persons

Source: MPA and Essential Economics

It is emphasised that these figures are provided as broad projections of the likely development outcomes in Beveridge North West PSP, with the actual outcomes dependent on factors such as the available land for residential development, the efficiency of use of this land, housing density, and household size.

3.3 Socio-Economic Characteristics

An indication of the likely socio-economic profile of future residents of Beveridge North West PSP is provided in Table 3.3, on the following page. This information provides a useful context to the subsequent assessment of likely retail spending patterns of future residents. The summary is based on a selection of three representative housing estates in Craigieburn, Epping and Wallan, and is based on data from the ABS 2011 Census of Population and Housing. The data in Table 3.3 reveals the following:

- Income – median income levels in Beveridge North West PSP are likely to be higher than the Greater Melbourne median.
- Age Structure – the age structure is expected to be relatively young, compared to that for Greater Melbourne.
- Family Composition – Beveridge North West PSP is expected to have a significantly higher proportion of families with children relative to the Greater Melbourne average.
- Tenure – The share of homes owned with a mortgage is likely to be significantly higher in Beveridge North West PSP, compared to Greater Melbourne.
- Car Ownership – car ownership rates will be relatively high, indicating that residents will have a high reliance on private motor vehicles to access retail and other services.
- Occupation –A higher share of technicians, trade workers, machinery operators and labourers are likely to be attracted to housing in Beveridge North West PSP.

3.4 Forecast Household Types

As indicated above, growth areas throughout Melbourne typically attract a demographic comprising young families with children, who are attracted by comparatively affordable home and land packages and the benefits of living in masterplanned communities (i.e. access to shops, schools, parks, etc). Forecasts prepared by id Consulting for Mitchell Shire Council indicate that this will be the case for Beveridge (which includes Beveridge North West), as shown in the following:

- Couple families with children are forecast to account for 62% of new households between 2001 and 2031
- Significant population growth is forecasts in the 25 to 45 years age cohort (36% of population growth between 2011 and 2031) and the 0 to 19 year age cohort (37%)
- Average household size in 2031 is forecast to be 3.6 persons per household.

Table 3.3: Socio-Economic Characteristics of Nearby Estates, 2011

Category	Craigieburn Estates	Epping Estates	Wallan Estates	Greater Melbourne
Income				
Median individual income (annual)	$34,320	$35,570	$37,890	$30,810
Variation from Greater Melbourne median	*+11.4%*	*+15.4%*	*+23.0%*	-
Median household income (annual)	$78,670	$81,350	$77,730	$69,510
Variation from Greater Melbourne median	*+13.2%*	*+17.0%*	*+11.8%*	-
Age Structure				
0-4 years	11.4%	11.5%	7.9%	6.5%
5-19 years	22.1%	19.5%	18.3%	18.3%
20-34 years	31.9%	32.9%	22.1%	22.9%
35-64 years	31.5%	33.2%	42.3%	39.1%
65-84 years	2.9%	2.7%	8.7%	11.3%
85 years and over	0.1%	0.2%	0.7%	1.8%
Median Age (years)	28	29	36	36
Family Composition				
Couple family with no children	27.6%	29.1%	41.0%	34.8%
Couple family with children < 15 years	46.1%	46.2%	29.5%	31.7%
Couple family with no children < 15 years	10.5%	11.8%	15.2%	16.2%
One parent family with children < 15 years	9.2%	7.3%	7.8%	7.0%
One parent family with no children < 15 years	5.1%	4.0%	5.1%	8.3%
Dwelling Structure (Occupied Private Dwellings)				
Separate house	92.7%	84.7%	100.0%	72.7%
Semi-detached, row or terrace house, townhouse etc.	6.7%	15.3%	0.0%	11.6%
Flat, unit or apartment	0.5%	0.0%	0.0%	15.3%
Other dwelling	0.1%	0.0%	0.0%	0.4%
Occupancy rate	*90.1%*	*96.8%*	*79.3%*	*91.0%*
Average household size	3.2	3.1	2.7	2.6
Tenure Type (Occupied Private Dwellings)				
Owned outright	9.1%	11.0%	27.6%	33.5%
Owned with a mortgage	72.5%	71.8%	62.6%	37.7%
Rented	17.5%	16.9%	9.8%	28.0%
Other tenure type	0.9%	0.4%	0.0%	0.8%
Share of occupied dwellings connected to the internet	86.2%	87.2%	79.0%	82.0%
Car Ownership per Dwelling				
None	2.6%	2.4%	1.6%	9.4%
One	30.2%	29.0%	27.7%	36.1%
Two	49.6%	52.5%	43.4%	38.0%
Three of more	17.5%	16.1%	27.3%	16.5%
Occupation				
Managers & professionals	26.7%	28.4%	26.6%	37.4%
Clerical & sales workers	35.8%	37.1%	39.4%	34.7%
Technicians & trades workers	16.7%	15.0%	16.6%	13.7%
Machinery operators & drivers	10.1%	9.9%	9.8%	6.0%
Labourers & related workers	10.7%	9.7%	7.6%	8.1%

Source: ABS Census of Population and Housing 2011

3.5 Summary

Beveridge North West has the potential to accommodate approximately 8,800 to 10,500 residential dwellings (rounded) and a population in the order of 25,000 to 30,000 residents (rounded) at full-development.

These estimates are based on information provided by the MPA, and a set of assumptions relating to the efficiency of development, dwelling density and average household sizes.

4 TOWN CENTRE ASSESSMENT

This Chapter presents analysis of the potential town centre outcomes in the Beveridge North West PSP, and provides the following information:

- The hierarchy of existing and planned centres that will serve future residents in Beveridge North West
- A description of the centre network for Beveridge North West as proposed by MPA
- An assessment of the extent of retail and non-retail commercial floorspace supportable at the proposed centre locations.

4.1 Planned Town Centre Hierarchy

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

Plan Melbourne no longer distinguishes between Principal Activity Centres (PACs) and Major Activity Centres (MACs), thereby allowing greater flexibility in determining activity centre hierarchies and implementing specialised policies around each centre.

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

- **Principal Town Centres** (PTC) are expected to play an important role as a focus for retail and commercial activity, administrative functions, entertainment, and residential development. The Donnybrook PTC will service future Beveridge North West residents and is located approximately 6km to the south-east of the Beveridge North West PSP.
- **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. No MTC has been identified for Beveridge North West as the area is likely to contain a population at full development between 25,000 to 30,000 residents, and is in proximity (less than 3km) to both the planned Beveridge and Wallan MTCs.
- **Local Town Centres** (LTC) are important in providing easily accessible local services including grocery and convenience shopping, and local services. LTCs serve a neighbourhood shopping and services role, and are anchored by supermarkets of varying sizes, with full-line stores being the main distinguishing feature of the larger and more successful LTC centres. LTCs are broadly equivalent to Neighbourhood Centres as identified in *Plan Melbourne.*

  MPA have identified potential for three LTCs in the Beveridge North West PSP. In addition, a LTC of 5,000m² of retail floorspace is planned for a location on Camerons Lane and will be part of the Mandalay Estate located to the immediate south of

Beveridge North West. This centre will service the day-to-day shopping needs of a proportion of future Beveridge North West PSP residents.

- **Local Convenience Centres** (LCC) provide more limited day-to-day retail and community services. MPA have identified one LCC for the Beveridge North West PSP.

4.2 MPA Identified Centres and Catchments for Beveridge North West

MPA's preliminary centre locations, as shown in Figure 4.1, are described below and are based on the principles guiding the location of town centres in PSP areas (provided in Volume 2 of the PSP Guidelines). These locations have been provided by MPA and reflect preferable locations from a planning perspective and include three LTCs (Centres A to C, refer Figure 4.1) and one LCC (Centre D).

Figure 4.1 shows the preliminary MPA centre locations and the potential catchments for each of the LTCs, namely Centres A to C.

These identified catchments reflect the indicative geographic areas where the majority of a centre's trade would be derived. The following factors have been considered when identifying centre catchments:

- Location of competing centres, both within and beyond the PSP
- Surrounding road networks
- Location of planned residential areas
- Potential constraints to customer movement, including significant areas of open space, rivers, major transport routes, etc.

Typically, retail catchments will overlap and this has been taken into account in the subsequent analysis. A summary of the planned centres in the Beveridge North West as identified by MPA is provided below.

Centre A – Local Town Centre (planned retail floorspace of 7,000m²)

Centre A is centrally located to the PSP area and is located at the intersection of two arterial roads. Initial analysis undertaken by the MPA suggests that Centre A could provide up to 7,000m² of retail floorspace, which would include a full-line supermarket and possibly a second smaller supermarket.

MPA have also planned for a variety of community facilities in close proximity to Centre A, including up to three schools and a sporting reserve.

Centre B – Local Town Centre (planned retail floorspace of 4,500m²)

Centre B is located in the south-west of the PSP with a relatively small, but contained catchment. Located at the intersection of two connector roads, the catchment extends

beyond the PSP to residential areas south of Camerons Lane (refer Figure 4.1). Centre B will adjoin a corridor of open space to the east.

Planning for LTCs to the south of Camerons Lane is yet to occur. The analysis presented in this report assumes Centre B will be the main LTC serving residents in the identified catchment located to the south of Camerons Lane.

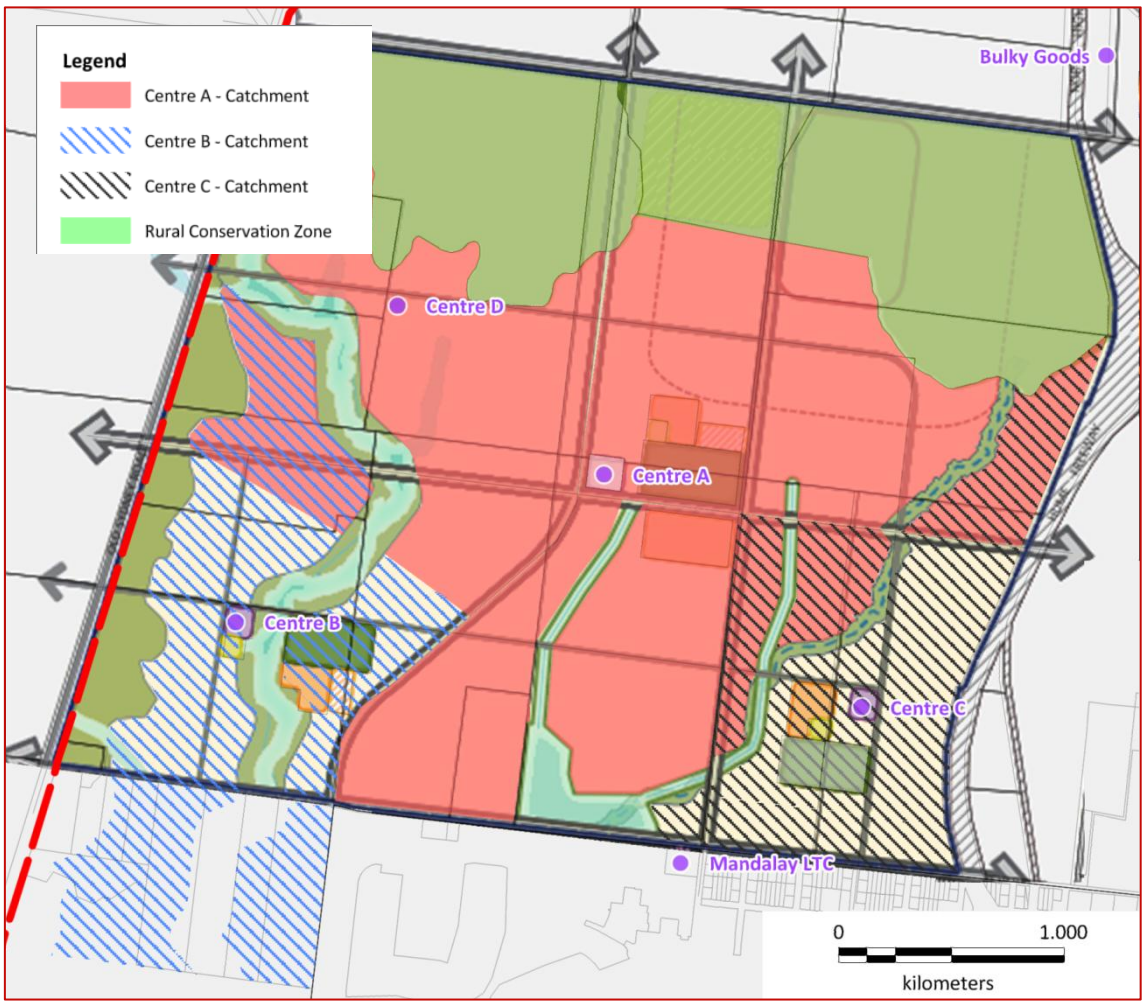
Centre C – Local Town Centre (planned retail floorspace of 4,500m²)

Centre C is located in the south-east of the PSP, approximately 600m north of Camerons Lane. Planned community facilities, including a school, sporting reserve and a community centre, are planned for land surrounding Centre C.

Situated in a relatively competitive context, Centre C will need to compete with the planned centre at Mandalay, as well as the larger Centre A.

The catchments for the above LTCs (Centres A to C) are shown in Figure 4.1.

Figure 4.1 Beveridge North West, Town Centre Catchments



Source: MPA and Essential Economics

Centre D - Local Convenience Centre (planned retail Floorspace of 1,000m²)

In addition to the three LTCs, MPA have identified potential for a Local Convenience Centre (LCC) centre located in the north-west of the PSP. The LCC will serve the day-to-day shopping and service needs for residents in the surrounding area.

4.3 Catchment Populations

Population estimates for each catchment have been prepared with regard for the residential development outcomes described earlier in Chapter 3, and these estimates are shown in Table 4.1.

Note that centre catchments overlap and where this is the case, residents will tend to be located further from a centre and will have a choice as to which is the most convenient centre.

Table 4.1: Beveridge North West PSP, Population by Centre Catchments

	Centre A	Centre B	Centre C
Low Scenario	17,750 persons	6,690 persons	5,490 persons
High Scenario	21,300 persons	8,220 persons	6,590 persons

Source: Essential Economics

The catchment populations identified above illustrate a clear hierarchy of LTCs in the Beveridge North West PSP, with Centre A being the largest centre serving a catchment and which contains more than twice the population of catchments for Centres B and C.

Previous work undertaken by Essential Economics (*Growth Corridor Plans – Activity Centre and Employment Planning,* November, 2011) identifies the need for catchments of at least 8,000 residents, and preferably up to 10,000 residents, in order to support the planning for supermarket-based LTCs.

One of the conclusions in that report is that "*supermarket catchments of approximately 8,000 residents may struggle to sustain a full-line supermarket, while a catchment of 10,000 persons would be able to support a store achieving typical trading benchmarks*."(p33)

Where population outcomes are less than 8,000 residents, opportunities for smaller supermarket-based centres (eg supported by mid-sized supermarkets) should be pursued where these are viable and where they are necessary to ensure good access to neighbourhood shopping services.

Having regard for the above commentary and the catchment populations shown in Table 4.1, Centre A is likely to contain at least one and potentially two full-line supermarkets, while it would be considered difficult for both Centres B and C to support full-line supermarkets. An assessment of the supermarket development potential for each centre is provided in Section 4.5.

4.4 Estimate of Future Retail Expenditure

Estimates of retail expenditure for the identified catchments have been derived from MarketInfo, which is a micro-simulation model that combines data from the ABS Household Expenditure Survey, ABS 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.

The following provides retail spending estimates for the identified catchments and the PSP area for the following retail categories:

- Food, liquor, groceries (FLG)
- Food catering (cafés and restaurant and take away food)
- Non-food merchandise and services.

For the purpose of this analysis, it is assumed that the Beveridge North West PSP will be fully developed by 2034.

Estimates of the retail spending capacity by residents in the identified catchments have been prepared by examining the average retail spending levels of new residents in the developing residential areas in the northern growth corridor, including new residents to estates in Craigieburn, Epping and South Morang. It is assumed that the retail spending patterns of existing residents in these developing areas will broadly reflect those of new residents to the Beveridge North West PSP area.

Average Per Capita Retail Spending

Estimated average per capita retail spending (in constant 2014 dollars) of future residents in the Beveridge North West PSP is shown in Table 4.2.

These estimates take into consideration forecast real growth in average per capita spending of +1.5% pa over the next 20 years, which reflects historical trends and assumes relatively stable growth in the Australian economy over the forecast period.

Retail expenditure in the Beveridge North West PSP is forecast to be 7.5% below the average for metropolitan Melbourne in 2034.

Table 4.2: Forecast Average Per Capita Retail Spending, Beveridge North West PSP, 2034 (in 2014 dollars)

Spending Category	Beveridge North West PSP	Metropolitan Melbourne	Variation from Metro Melbourne
Food, Liquor and Groceries	$5,790	$6,020	-3.8%
Food Catering	$2,000	$2,330	-14.2%
Non-Food	$9,760	$10,630	-8.2%
Total Retail	**$17,550**	**$18,980**	**-7.5%**

Source: MarketInfo

Forecast Total Retail Expenditure

Total retail spending by Beveridge North West residents has been calculated with reference to population outcomes shown in Table 4.1 and the forecast average retail spending levels shown in Table 4.2. Estimates of retail expenditure by retail category for the identified catchments and PSP as a whole are shown in Table 4.3.

Residents in the Beveridge North West PSP in 2034 are forecast to spend approximately $433m on retail merchandise and services under the Low Development Scenario and $519m under the High Development Scenario (in constant 2014 dollars).

Total retail spending by centre catchments are summarised below in constant 2014 dollars:

- Centre A – Total catchment spending of $312m to $374m
- Centre B – Total catchment spending of $117m to $144m
- Centre C – Total catchment spending of $96m to $116m.

Table 4.3: Forecast Retail Spending by Catchment and PSP Residents, 2034 (2014 dollars)

Retail Category	Centre A Catchment	Centre B Catchment	Centre C Catchment	Total PSP Area*
Low Development Scenario				
Food, Liquor and Groceries	$103m	$38.8m	$31.8m	$142.7m
Food Catering	$36m	$13.4m	$11.0m	$49.3m
Non-Food	$173m	$65.3m	$53.6m	$240.5m
Total Retail	**$312m**	**$117.5m**	**$96.3m**	**$432.5m**
High Development Scenario				
Food, Liquor and Groceries	$123m	$47.6m	$38.1m	$171.2m
Food Catering	$43m	$16.4m	$13.2m	$59.1m
Non-Food	$207.9m	$80.2m	$64.3m	$288.6m
Total Retail	**$373.9m**	**$144.2m**	**$115.6m**	**$519.0m**

Source: MarketInfo; Essential Economics
Note: * Total spending for PSPs does not equate to the total of catchment spending due to catchments overlapping

4.5 Supportable Supermarket Floorspace

In planning for future town centres, an understanding of the opportunity for supermarket development in each of the identified centres is important. Supermarkets act as anchor tenants that support adjoining businesses, both retail and non-retail, via the significant levels of custom they attract to a centre.

It is estimated the Beveridge North West PSP could support approximately 9,000m^2 of supermarket floorspace under the low development scenario and 11,000m^2 under the high development scenario. The level of supermarket provision equates to approximately 370m^2 of supermarket floorspace per 1,000 residents which is in-line with existing benchmarks for supermarket provision throughout metropolitan Melbourne.

Based on the analysis which is shown in Table 4.4, Centre A will be the main location for supermarket shopping in the PSP, with sufficient spending within its catchment to support approximately 5,500m^2 (low scenario) to 6,500m^2 (high scenario) of supermarket floorspace.

This level of floorspace is sufficient to support more than one supermarket. For instance, potential may exist for at least one full-line and one medium-sized supermarket under the low development scenario, while the high development scenario is almost sufficient to accommodate up two full-line supermarkets.

It is unlikely that full-line supermarkets will be supported at Centres B and C; however, each centre has the potential to provide surrounding residents with access to a medium-sized supermarket.

Based on the analysis presented in Table 4.4, Centre B could accommodate a supermarket in the order of 2,000m^2 to 2,500m^2 of floorspace, while Centre C could support a supermarket of approximately 1,500m^2 to 2,000m^2.

An analysis of the extent of supermarket floorspace that could be supported in each centre in shown in Table 4.4 and 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, based on analysis of ABS data. In growth areas, where limited choice and opportunities for specialty food retailing exist, supermarkets typically capture a higher proportion of FLG spending.

- Each centre is expected to capture between 55% and 60% 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 within the PSP. The balance of spending will be directed to other centres, including those within and beyond the PSP.

  Accounting for the flows of spending between catchments and at different centres, it is estimated supermarkets in the Beveridge North West PSP will capture approximately 70% of FLG spending directed to supermarkets. The balance of approximately 30% of spending will be directed to supermarkets located in other centres beyond the

Beveridge North West PSP, including the nearby Mandalay LTC and larger centres at Beveridge, Donnybrook and Wallan.

- Supermarkets will also capture turnover from beyond their catchments, and this is estimated to be in the order of 10% to 15% for each centre. These shares reflect the potential for centres to capture turnover from beyond their catchment and is influenced by access to the arterial road network and the presence of community infrastructure (e.g. schools, sporting reserves, community centres, etc) that may attract residents from further afield.
- An estimated 8% of supermarket turnover would be in non-FLG merchandise.
- Average supportable supermarket turnover per square metre in 2034 would be approximately $10,500/m^2, which is broadly based on an existing trading benchmark of approximately $8,000/m^2 and average growth of approximately +0.5% pa.

Table 4.4: Supermarket Assessment by Centre, 2034 (2014 dollars)

Category	Centre A		Centre B		Centre C		Total PSP*	
	Low	High	Low	High	Low	High	Low	High
Available FLG spending directed to supermarkets (@75% of FLG)*	$77.0m	$92.4m	$29.0m	$35.7m	$23.8m	$28.6m	$106.9m	$128.3m
Estimated market share of supermarket*	59%	59%	59%	59%	56%	56%	69%	69%
FLG supermarket turnover retained*	$45.7m	$54.7m	$17.2m	$21.1m	$13.4m	$16.1m	$73.7m	$88.5m
Estimated share of TO from beyond the Catchment*	13%	13%	12%	11%	12%	12%	15%	16%
Estimated FLG turnover from beyond the catchment*	$6.6m	$7.9m	$2.2m	$2.7m	$1.9m	$2.2m	$13.3m	$16.4m
Total FLG turnover	$52.2m	$62.6m	$19.5m	$23.8m	$15.3m	$18.4m	$87.0m	$104.8m
Total estimated supermarket turnover (assuming 8% of turnover in non-FLG merchandise)	$56.8m	$68.1m	$21.2m	$25.9m	$16.6m	$20.0m	$94.6m	$114.0m
Indicative supportable supermarket floorspace (assumes average trading level of $10,500/m^2)	**5,400m^2**	**6,500m^2**	**2,000m^2**	**2,500m^2**	**1,600m^2**	**1,900m^2**	**9,000m^2**	**10,900m^2**
Rounded	**5,500m^2**	**6,500m^2**	**2,000m^2**	**2,500m^2**	**1,500m^2**	**2,000m^2**	**9,000m^2**	**10,900m^2**

Source: MarketInfo; Essential Economics
Note: Figures are rounded; *Totals for the Total PSP may not add due to centre catchments overlapping

4.6 Supportable Retail and Non-retail Floorspace at Local Town Centres

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 two-thirds of the supermarket's total floorspace.

On this basis, potential exists for a total of 15,000m^2 of retail floorspace under the Low Development Scenario, comprising 9,000m^2 of supermarket floorspace and 6,000m^2 of speciality retailing.

Under the High Development Scenario, potential exists for a total of 18,300m^2 of retail floorspace, comprising 11,000m^2 of supermarket floorspace and 7,300m^2 of speciality retailing.

The distribution of supportable retail floorspace by centre is shown in Table 4.5.

Table 4.5: Total Supportable Retail Floorspace, 2034

Land Use Category	Centre A		Centre B		Centre C		Total PSP (LTCs only)	
	Low	High	Low	High	Low	High	Low	High
Supermarket	5,500m²	6,500m²	2,000m²	2,500m²	1,500m²	2,000m²	9,000m²	11,000m²
Speciality Retail	3,700m²	4,300m²	1,300m²	1,700m²	1,000m²	1,300m²	6,000m²	7,300m²
Total Retail	**9,200m²**	**10,800m²**	**3,300m²**	**4,200m²**	**2,500m²**	**3,300m²**	**15,000m²**	**18,300m²**

Source: Essential Economics

The above figures provide an indication of the extent of retail floorspace that could be supported at each centre. However, for planning purposes it would be prudent to allow for some flexibility in the amount of floorspace that could be developed within each centre, as retail formats and shopping patterns are likely to change over the next 20 or so years. Overall, it will be important that the extent of retail floorspace planned for each centre allows for a strong network of viable centres.

Having regard for the above factors and the extent of floorspace planned by MPA for each centre (refer Section 4.2), the following Table 4.6 provides comment of the provision of retail floorspace that should be planned for each LTC in Beveridge North West.

Table 4.6: Recommended Retail Floorspace for Planning Purposes, LTCs

Centre	MPA Planned Retail Floorspace	Essential Economics Supportable Retail Floorspace	Comment/Recommendation
A	7,000m^2	9,200m^2 – 10,800m^2	Recommend increasing planned retail floorspace provision to 11,000m^2
B	4,500m^2	3,300m^2 – 4,200m^2	Existing provision of 4,500m^2 is appropriate
C	4,500m^2	2,500m^2 – 3,300m^2	Existing provision of 4,500m^2 is appropriate.

Source: Essential Economics

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 at involves non-retail uses, and this proportion can often be 50% or more of total floorspace provision. Typically, this pattern prevails in strip centres characterised by a multitude of small business owners. As another example, information from the Adelaide Retail Database (2007) shows that approximately 80% of floorspace at neighbourhood centres in that city involves retail uses, with the remaining 20% of floorspace occupied by small offices, community uses, and so on.

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 4.7 summarises the potential retail and non-retail floorspace that could be supported in each LTC in the Beveridge North West PSP.

Table 4.7: Total Supportable Retail and Non-retail Commercial Floorspace at LTCs, Beveridge North West PSP

Land Use	Centre A	Centre B	Centre C	Total PSP (LTCs only)
Total retail floorspace (planned)	11,000m^2	4,500m^2	4,500m^2	20,000m^2
Commercial / office floorspace	4,700m^2	1,900m^2	1,900m^2	8,500m^2
Total retail and commercial floorspace	**15,700m^2**	**6,400m^2**	**6,400m^2**	**28,500m^2**

Source: Essential Economics

4.7 Assessment of Local Convenience Centre

MPA have identified the potential for a Local Convenience Centre (LCC), referred to as Centre D, in the north-western portion of the PSP area as shown earlier in Figure 4.1.

The need to plan for a town centre network that provides residents with easy access to day-to-day convenience shopping requirements within walkable catchments has to be balanced with the need for commercial viability of LCCs. Nationally, the viability of traditional, small convenience-based local strips in established suburban areas, in many instances, have been undermined by a combination of changing retail formats, consumer spending patterns and lifestyle trends.

Consumer preference for convenient multi-purpose trips and greater reliance on the motor vehicle has increased the popularity of modern convenience stores attached to petrol stations, where product range continues to expand. Furthermore, the level of convenience experienced at supermarkets has also increased, with the advent of express lanes, self-service check-out, convenient parking and extended shopping hours.

These trends have been to the detriment of many local convenience centres, with centres struggling to remain viable and to attract the required amount of investment to support the presentation and amenity shoppers now seek. Yet, examples exist where local convenience centres have successfully retained their convenience retail function and are vibrant focal points for local community activity. These successful centres assist in achieving planning objectives relating to the provision of local services provided within walkable catchments.

Some of the key features associated with successful local centres include the following:

- Local catchment within 1km of at least 1,000 residents.
- Good level of vehicle, bicycle and pedestrian access.
- High levels of exposure and accessibility.
- Co-location with other activity generators (such as schools), provided that a viable residential catchment is maintained in the surrounding areas.
- High standard of presentation and amenity.
- A selection of well-run businesses, with a focus on quality customer service.

Having regard for the above features, the proposed location of at LCC at Centre D is appropriate. Centre D is located on a connector road, is central to a catchment that in a large part is not within close proximity to a planned LTC, and is likely to have a population within 1km that exceeds 3,500 residents.

Allowing potential for Centre D to contain approximately 1,000m^2 of retail floorspace, a total of 1,300m^2 of total retail and commercial floorspace is considered sufficient to enable the centre to perform a local centre role.

4.8 Land Requirements for Centres in Beveridge North West

Assuming an average site coverage of 30%-40% is applied to the supportable retail and commercial floorspace for Centres A to D, a total land budget of approximately 7.5ha to 10ha of land within the Beveridge North West PSP would be required, and includes the following:

- Centre A: Approximately 3.9ha to 5.2ha
- Centre B: Approximately 1.6ha to 2.1ha
- Centre C: Approximately 1.6ha to 2.1ha
- Centre D: Approximately 0.3ha to 0.5ha.

4.9 Summary of Town Centre Outcomes

Based on the assessment presented in this Chapter, the location of centres identified by MPA for the Beveridge North West PSP are appropriate. A summary of extent of supportable floorspace, and recommendations on the extent of floorspace and land required for planning purposes, is provided in Table 4.8.

Table 4.8: Summary of Development Outcomes and Planning Recommendations for Centres in Beveridge North West PSP

Land Use	Centre A	Centre B	Centre C	Centre D	Total PSP
Supportable Floorspace					
Supermarket	5,000m^2 to 6,500m^2	2,000m^2 to 2,500m^2	1,500m^2 to 2,000m^2	-	9,000m^2 to 11,000m^2
Speciality Retail	3,700m^2 to 4,300m^2	1,300m^2 to 1,700m^2	1,000m^2 to 1,300m^2	1,000m^2	7,000m^2 to 8,300m^2
Total Retail	**9,200m^2 to 10,800m^2**	**3,300m^2 to 4,200m^2**	**2,500m^2 to 3,300m^2**	**1,000m^2**	**16,000m^2 to 19,300m^2**
Planning Recommendations					
Recommended retail floorspace for planning purposes	11,000m^2	4,500m^2	4,500m^2	1,000m^2	21,000m^2
Commercial/office	4,700m^2	1,900m^2	1,900m^2	300m^2	8,800m^2
Total retail and commercial floorspace	15,700m^2	6,400m^2	6,400m^2	1,300m^2	29,800m^2
Land requirements	**3.9ha - 5.2ha**	**1.6ha - 2.1ha**	**1.6ha - 2.1ha**	**0.3ha-0.5ha**	**7.5ha - 10ha**

Source: Essential Economics

5 OTHER CONSIDERATIONS

In preparing the urban structure for the Beveridge North West PSP, the following factors also need consideration:

- The implications of the proposed quarry
- The implications of potential urban development on land in the western part of the PSP and currently identified as open space on Centre
- The level of accessibility PSP residents will have to supermarket facilities
- Potential employment outcomes at town centres.

5.1 Implications of the Proposed Quarry

A proposal exists for a basalt quarry to be located in the north-east of the PSP area in the area designated for future open space, refer Figure 2.1 on page 11. As a result, a 500m residential buffer has been included in the preliminary urban structure which, if approved, will temporally offset approximately 83ha of underlying residential land for the life of the quarry.

The life of the proposed quarry is unknown at this stage; however, it is understood that the 83ha of land within the residential buffer would eventually be made available for urban development. Consequently, the proposal for the basalt quarry will not impact the viability or size of town centres in Beveridge North West over the long-term.

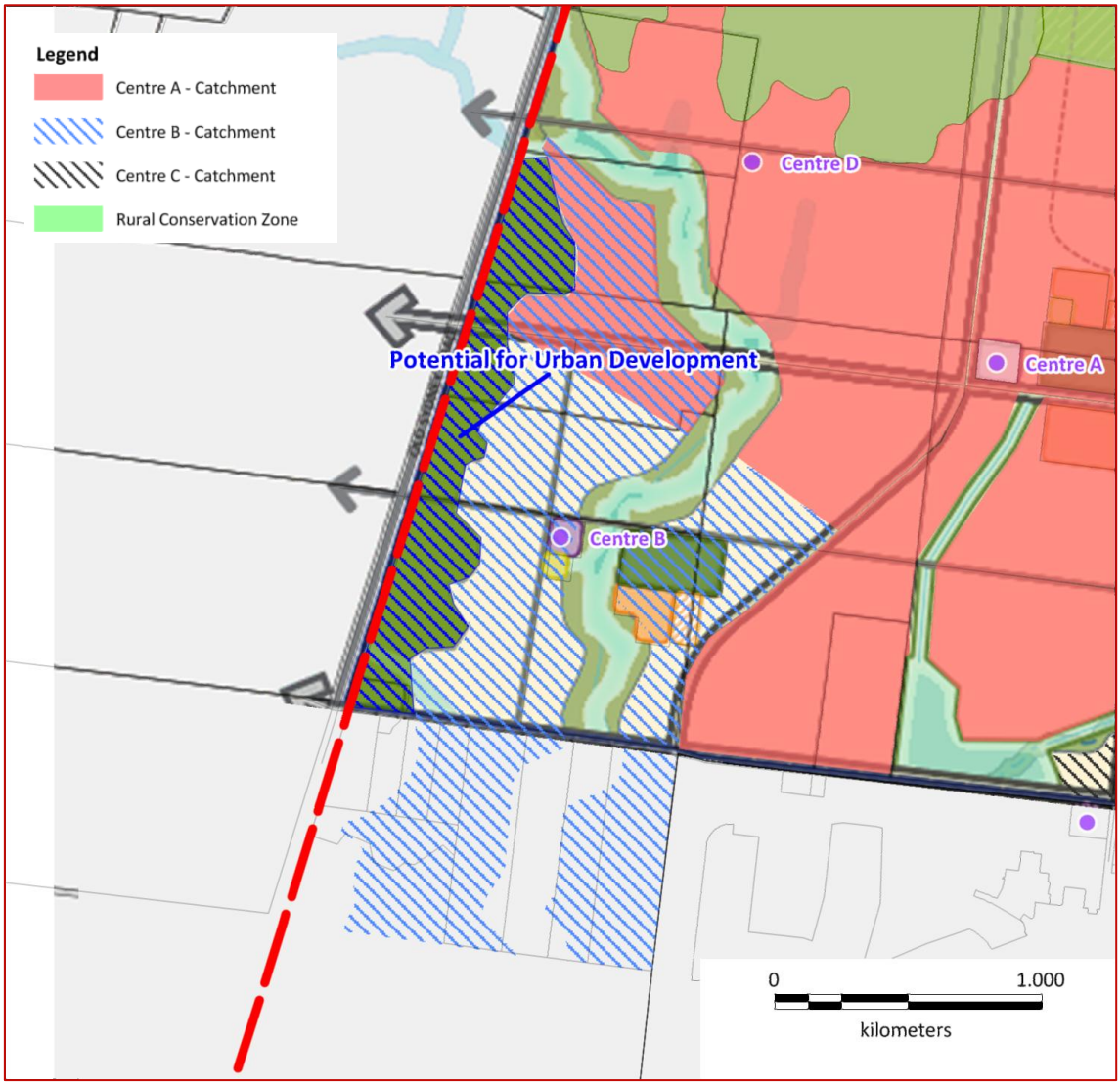
However, if approved, potential does exist for the proposed quarry to impact on the extent of development that may occur while the proposed quarry is operational. For instance, the 83ha of land (that would not be available for residential purposes due to the required buffer areas) could otherwise accommodate approximately 2,620 to 3,140 residents.

The proposed residential buffer would effectively reduce the catchment population for Centre A to approximately 15,130 residents under the low development scenario, and to 18,160 residents under the high development scenario. This level of catchment population is still sufficient to support at least one full-line supermarket, plus another small to mid-sized supermarket. Centre A would continue to be the dominant retail location within the PSP area, although it may be of a slightly more limited scale.

5.2 Implications of Urban Development on Land Identified for Open Space on Centre B

MPA has identified potential for land zoned as Rural Conservation Zone (RCZ) and planned for areas of open space in the western portion of the Beveridge North West PSP to be made available for urban development. This land, shown in Figure 5.1, amounts to approximately 45ha and could accommodate a population of approximately 1,430 to 1,720 residents.

Figure 5.1: Implications of Urban Development on Land Identified as Open Space



Source: MPA and Essential Economics

These additional residents would form part of the catchment for Centre B and would contribute to the viability of the centre.

For example, the catchment population for Centre B would increase under the low development scenario from approximately 6,690 residents to approximately 8,130 residents, and under the high development scenario from 8,220 residents to approximately 9,940 residents. This increase in catchment population would provide additional support for a larger supermarket at the centre.

As identified in Chapter 4, Centre B could accommodate a supermarket of up to 2,000m^2 under the low development scenario and 2,500m^2 under the high development scenario. Permitting urban development on land currently zoned RCZ would provide a sufficient population to support a larger supermarket of approximately 2,500m^2 under the low development scenario

and 3,100m^2 under the high development scenario. The increased catchment population would also support additional speciality retailing and other local services.

Table 5.1 summarises the impact of permitting urban development on this land on the extent of retail floorspace that could be supported at Centre B.

Table 5.1: Impact of Permitting Urban Development on Land Identified for Open Space on Centre B

Category	Existing Catchment		Expanded Catchment	
	Low	High	Low	High
Supermarket	2,000m^2	2,500m^2	2,500m^2	3,100m^2
Specialty retail	1,300m^2	1,700m^2	1,700m^2	2,100m^2
Total retail	**3,300m^2**	**4,200m^2**	**4,200m^2**	**5,200m^2**

Source: Essential Economics

Having regard for the above, it would be prudent to plan for an increased amount of retail floorspace and land at Centre B should the land currently designated as open space be utilised for urban development. Currently, planning for Centre B is for 4,500m^2 of retail floorspace and a total land area of up to 2.1ha (refer Table 4.8). Should the identified land be used for urban development, it would be prudent to plan for the following at Centre B:

- Retail floorspace: 5,500m^2
- Non-retail commercial floorspace: 2,400m^2
- Total land area: 2.0ha to 2.6ha.

5.3 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 household planned in the Beveridge North West PSP Region.

The analysis is summarised in Table 5.2 and shows that approximately 80% of households in the PSP will be located within 1km of a supermarket. This includes supermarkets at Centre A, Centre B, Centre C and at the Mandalay centre located on Camerons Lane which will also serve a proportion of future households.

Table 5.2: Assessment of Supermarket Accessibility

Category	Low	High
Total households in PSP	8,800	10,600
Households within 1km of a supermarket	7,000	8,400
Households within 1km of a supermarket	80%	79%

Source: Essential Economics

5.4 Employment Outcomes

When fully developed, the four centres in the Beveridge North West PSP would directly employ an estimated 1,160 people 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 5.3 summarises the potential direct employment outcomes associated with each centre and are based on the planned extent of floorspace within each centre and the following industry benchmarks:

- Retail: one job per 30m^2 of retail floorspace
- Non-retail: one job per 20m^2 of non-retail commercial floorspace.

Table 5.3: Potential Employment Outcomes at Beveridge North West Town Centres

Category	Centre A	Centre B	Centre C	Centre D	Total PSP
Retail job	370 jobs	150 jobs	150 jobs	30 jobs	700 jobs
Non-retail commercial jobs	240 jobs	100 jobs	100 jobs	20 jobs	460 jobs
Total retail and commercial jobs	**610 jobs**	**250 jobs**	**250 jobs**	**50 jobs**	**1,160 jobs**

Source: Essential Economics

5.5 Summary

A summary of the key findings in relation to other considerations relevant to the Beveridge North West PSP is provided below:

- Approval of the proposed quarry would not impact the long-term viability of Centre A; however, it would reduce Centre A's catchment population by approximately 2,620 to 3,140 residents during its operation. Even with a reduced catchment population, Centre A would continue to be the dominant retail location within the PSP area and contain at least one full-line supermarket, plus another small to mid-sized supermarket.
- Potential for urban development on land currently identified as open space in the western portion of the PSP area has been identified. This would contribute to an increase in the viability of Centre B. Should the identified land be used for urban development, it would be prudent to plan for the following at Centre B:
  - Retail floorspace: 5,500m^2
  - Non-retail commercial floorspace: 2,400m^2
  - Total land area: 2.0ha to 2.6ha.
- Based on the locations of planned supermarkets in the PSP and surrounds, approximately 80% of households in the PSP will be located within 1km of a supermarket.

- When fully developed, the four centres in the Beveridge North West PSP would directly employ an estimated 1,160 people on an ongoing basis, including full-time, part-time and casual positions.

6 SUMMARY OF MAIN FINDINGS

A summary of the main findings of the analysis presented in this report is provided below.

Potential Dwelling and Population Outcomes

Beveridge North West PSP has the potential to accommodate approximately 8,800 to 10,500 residential dwellings (rounded) and a population in the order of 25,000 to 30,000 residents (rounded) at full-development.

Planned Centre Network in Beveridge North West PSP

A network of three Local Town Centres (LTCs) and one Local Convenience Centre (LCC) has been identified by the Metropolitan Planning Authority (MPA). Based on an assessment of potential catchment and supportable retail floorspace, the location of centres identified by MPA for the Beveridge North West PSP are appropriate.

In summary, Centre A is likely to be the largest LTC and could accommodate up to 11,000m^2 of retail floorspace, including multiple supermarkets. Centres B and C are likely to smaller LTCs accommodating up to 4,500m^2 of retail floorspace and anchored by mid-sized supermarkets. Centre D will be a LCC serving the day-to-day retail needs of the surrounding population.

Recommendations on the extent of floorspace and land required for planning purposes for each centre in the Beveridge North West PSP is provided in Table 6.1 below.

Table 6.1: Summary of Planning Recommendations for Centres in Beveridge North West PSP

Land Use	Centre A (LTC)	Centre B (LTC)	Centre C (LTC)	Centre D (LCC)	Total PSP
Recommended retail floorspace for planning purposes	11,000m^2	4,500m^2	4,500m^2	1,000m^2	21,000m^2
Commercial/office	4,700m^2	1,900m^2	1,900m^2	300m^2	8,800m^2
Total retail and commercial floorspace	15,700m^2	6,400m^2	6,400m^2	1,300m^2	29,800m^2
Land requirements	**3.9ha - 5.2ha**	**1.6ha - 2.1ha**	**1.6ha - 2.1ha**	**0.3ha-0.5ha**	**7.5ha - 10ha**

Source: Essential Economics

Implication of Proposed Quarry

A proposal exists for a basalt quarry to be located in the north-east of the PSP area. As a result, a 500m residential buffer has been included in the preliminary urban structure which, if approved, will temporally offset approximately 83ha of underlying residential land for the life of the quarry.

The life of the proposed quarry is unknown at this stage; however, it is understood 83ha of land within the residential buffer would eventually be made available for urban development. Consequently, the proposal for the basalt quarry will not impact the viability or size of town centres in Beveridge North West over the long-term.

However, if approved it would reduce Centre A's catchment population by approximately 2,620 to 3,140 residents during its operation. Even with a reduced catchment population, Centre A would continue to be the dominant retail location within the PSP area and contain at least one full-line supermarket, plus another small to mid-sized supermarket.

Implication of Urban Development on Land Identified for Open Space on Centre B

Potential for urban development on land currently identified as open space in the western portion of the PSP area has been identified. This would contribute to the viability of Centre B. Should the identified land be used for urban development, it would be prudent to plan for the following at Centre B:

- Retail floorspace: 5,500m^2
- Non-retail commercial floorspace: 2,400m^2
- Total land area: 2.0ha to 2.6ha.