

St Marys Economic Strategy



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1 Executive Summary

Economic Analysis Study

St Mary's centre operates as a town centre, providing retail and some commercial services for the local and surrounding district catchment. With the release of the *Greater Sydney Region Plan* in 2018, and Australian and NSW Government commitments to fund and investigate major infrastructure for Western Sydney, the strategic context of St Marys Town Centre, and its future role has potential to change.

Under the *Greater Sydney Region Plan* 2018, St Mary's has been identified as a Strategic Centre for the emerging third city of Sydney (the Western Parkland City) alongside Mount Druitt, Marsden Park, Blacktown and the Metropolitan Centre of Greater Penrith.

With this changing strategic context, Penrith City Council is investigating the future of St Mary's Town Centre to ensure it is well positioned to leverage transport and other infrastructure investments to achieve the continued social and economic development of the centre as an asset for the local community and surrounding region.

State and local planning strategies identify opportunities to capitalise on the changing urban structure of Sydney, supported by major infrastructure investments, to grow local job opportunities and best integrate land use and transport planning.

Economic and employment profiling has highlighted the current population-serving function of the Town Centre, where most employment is in sectors such as Retail Trade and Food and Accommodation.

The population serving role of St Mary's Town Centre was further identified through a floorspace audit of the Town Centre (SGS 2019). The audit indicated a prominence of Retail Trade and Accommodation and Food Servicing industries. Of the total amount of floorspace audited, approximately 70 percent was attributed to Main Street Retail along Queen Street.

Capacity of the Town Centre (under Council's current LEP and DCP) for further employment-related development may be impacted by the ability to develop shop-top housing and mixed-use development. The incorporation of residential development may act to decrease the amount of available commercial floorspace, when redevelopment occurs, but may also need to be managed to ensure capacity for long term town centre growth.

Several 'notional capacity' scenarios have been developed to show the impact of mixed-use, 'shop-top' development in the centre on future commercial and retail capacity (based on the amount of non-residential floorspace is retained).

Projecting the future demand for retail and commercial floorspace in St Mary's Town Centre was assessed under two scenarios: the first future scenario where St Marys continued to grow on its population serving trajectory, and an alternate future scenario that factored in major infrastructure developments and changes in population and employment in Western Sydney. When the growth projected in these scenarios were measured against notional floorspace capacity, it is expected retail and commercial floorspace under current planning frameworks may exceed capacity between 2031 and 2046, dependent on the scenario.

Therefore, results from the economic analysis highlights the population serving function of St Marys but also reinforces the opportunity for St Marys to develop and grow into a Strategic Centre in Western Sydney that leverages major local infrastructure investment. An economic strategy also needs to protect the retail and commercial core of St Marys Town Centre for future non-residential use and also identify how future land use plans can cater for long term increased need for such floorspace.

Economic Strategy

The Economic Strategy supports St Marys development into a Strategic Centre that can cater to increases in floorspace, provide a greater employment mix and leverage off the major infrastructure development (particularly the north-south rail line to the proposed airport) while retaining local character. At a high level this is supported through the following vision:

*St Marys is a **resilient hub of connectivity**, grounded in its **rich history, local industry** and growing diversity. A spirited centre with a sense of place and belonging, St Marys embodies the **opportunity for growth and change**, offering **smart connections** within the centre as well as to the Greater Sydney region and Western Sydney Airport and Aerotropolis (slide 50).*

At a more detailed level, this vision is supported by a series of priorities, actions and urban design elements over three time periods (short, medium and long term) that ensures St Marys will:

- Be one of the strategic centres for employment growth and services in the Western Corridor
- Leverage the investment in transport for transformation and future growth
- Continue to be a mixed-use centre for local residents and workers, and
- Operate as a higher-order retail and service centre, as well as being a location for knowledge, research and innovation businesses (slide 50).

The Economic Strategy identifies:

- Ten key priorities for St Marys: establish an employment target, establish a partnership between State and Local Government to deliver a new rail interchange, encourage well designed mixed-use residential renewal, retain the traditional 'main street' core, develop a civic precinct, utilise Council land assets, improve north-south connections over the rail line, encourage specialisation, establish a high amenity centre for living and working, and develop a multi-modal transport hub (slides 51 and 52).
- Ten future precincts and associated characteristics for the Town Centre, to be developed into the future, including a station precinct, civic precinct and Glossop Street precinct (slide 53).
- Short Term Actions to 2026 to consolidate the strong foundations of the Town Centre and associated Structure Plan elements (slides 54-56).
- Medium Term Actions for 2026 to 2036 to enhance accessibility as a catalyst for renewal and associated Structure Plan elements (slides 57-59).
- Long Term Actions for 2036 to 2056 to transform and grow the strategic centre and associated Structure Plan elements (slides 60 and 61).
- Some of these actions are described in detail in slides 62 to 68.
- Aspects to consider for implementation and monitoring of the Economic Strategy (slides 69-71).
- Slide 72 introduces six big summary ideas that could be progressed by Council.
- Slides 73 to 77 provide a summary of the linkage between the vision, priorities and actions.
- The St Marys Town Centre Structure Plan completed by Architectus is included at Attachment A.

2 IntroductionI

Foundation for the Economic Strategy

Penrith Council is embarking on a range of work for St Marys Town Centre and the area of land known as the Glossop Street Precinct.

Council would like to:

- Refine their understanding of the opportunities provided by the current Town Centre and future transport investments.
- Identify the future role and function of St Marys in the hierarchy of centres and how the precinct may transform overtime.
- Leverage opportunities from the Western Sydney Airport, Aerotropolis, and connectivity via transport infrastructure.
- Prepare St Marys Town Centre to take full advantage of opportunities from transport investments.

Under the *Greater Sydney Region Plan (2018)*, St Marys has been identified as a Strategic Centre for the emerging third city of Sydney, the Western Parkland City. The Greater Sydney Commission has also identified job targets for St Marys at approximately 10,000-11,500 jobs by 2036.

Alongside its nomination as a Strategic Centre, St Marys will also experience change with incoming infrastructure investments to the Western Sydney region, namely Western Sydney Airport, Badgerys Creek Aerotropolis, the North South Rail Link and the Outer Sydney Orbital. These infrastructure investments have potential to impact growth, development and the functionality of St Marys and change employment and dwelling structures in Western Sydney.

Penrith City Council would like to ensure that St Marys is well positioned to leverage surrounding infrastructure investments and build off its strengths to produce the best urban planning outcomes and economic development future for the local community and surrounding region. The strength of St Marys includes good pedestrian amenity of Queen Street, good quality parks, through site links, links to industrial and freight industries and the local character of the economic centre.

SGS Economics & Planning, in conjunction with Architectus, have been commissioned by Penrith City Council to analyse the economic and planning context of St Marys Town Centre and its relationship to surrounding areas to develop an Economic Analysis Study, Structure Plan and Economic Strategy for the short, medium and long-term future of St Marys Town Centre.

This document includes high level findings from the Economic Analysis Study; urban design elements from the Structure Plan; and the short, medium and long-term actions that make up the Economic Strategy.



Figure 1: St Marys Station Street

Study Area

St Marys Town Centre is located in Penrith Local Government Area (LGA).

The Project Study Area is shown in Figure 2. It incorporates a core study area of St Marys Town Centre that is a B4 Mixed Use zone. This area was the key focus of the study.

A secondary study area of relevant surrounding precincts was also included. This area generally includes residential R3 and R4 zones to the east, including the Glossop Street precinct; residential R2 and R4 zones to the west and south and some B6 Enterprise Corridor south of the Great Western Highway.

A section of IN1 Industrial zone, bounded by Glossop Street was also included in the secondary study area. This area was included as it would have a close relationship to the Town Centre and rail station given its close proximity. The land is also free of any rail constraints. Recreational RE1 is distributed in various zones around the core study area and particularly to the west heading to Werrington.

St Marys is positioned between centres that traditionally have had a more dominant role in the region for retail and commercial uses such as Penrith, Parramatta and Blacktown. These centres are nominated as a Metropolitan Cluster, Metropolitan Centre and Strategic Centre under the *Greater Sydney Region Plan*.



Figure 2: Study Area



3 Strategic Context

Strategy Policy Context

A number of State and local government policy documents and urban planning studies are guiding growth and development of St Marys.

The relationship between these documents and the current study is highlighted in Figure 3.

In summary, some of the key issues and opportunities from these studies and strategies, for St Marys, includes:

- Capitalising on local economic activity change and infrastructure investments that are planned for Western Sydney
- Growing local job opportunities and ensuring efficient access to these jobs
- Enabling a mix of land uses for St Marys and integrating these land uses with transport infrastructure
- Recognising St Marys has a strong association to the freight and logistics industry
- St Marys has a history of poor connectivity, particularly with side street activation to surrounding shopping centres and residential areas and severance to the north with the rail line
- Issues of vibrancy and safety and the need to develop the night-time economy
- Creating and strengthening the unique identity of St Marys
- Review of carparking around the centre
- Increases in density and expansion need to ensure high-quality built environment results, therefore improving amenity and increasing safety and vibrancy.

The planning outcomes from key strategic documents are highlighted on the following slides.

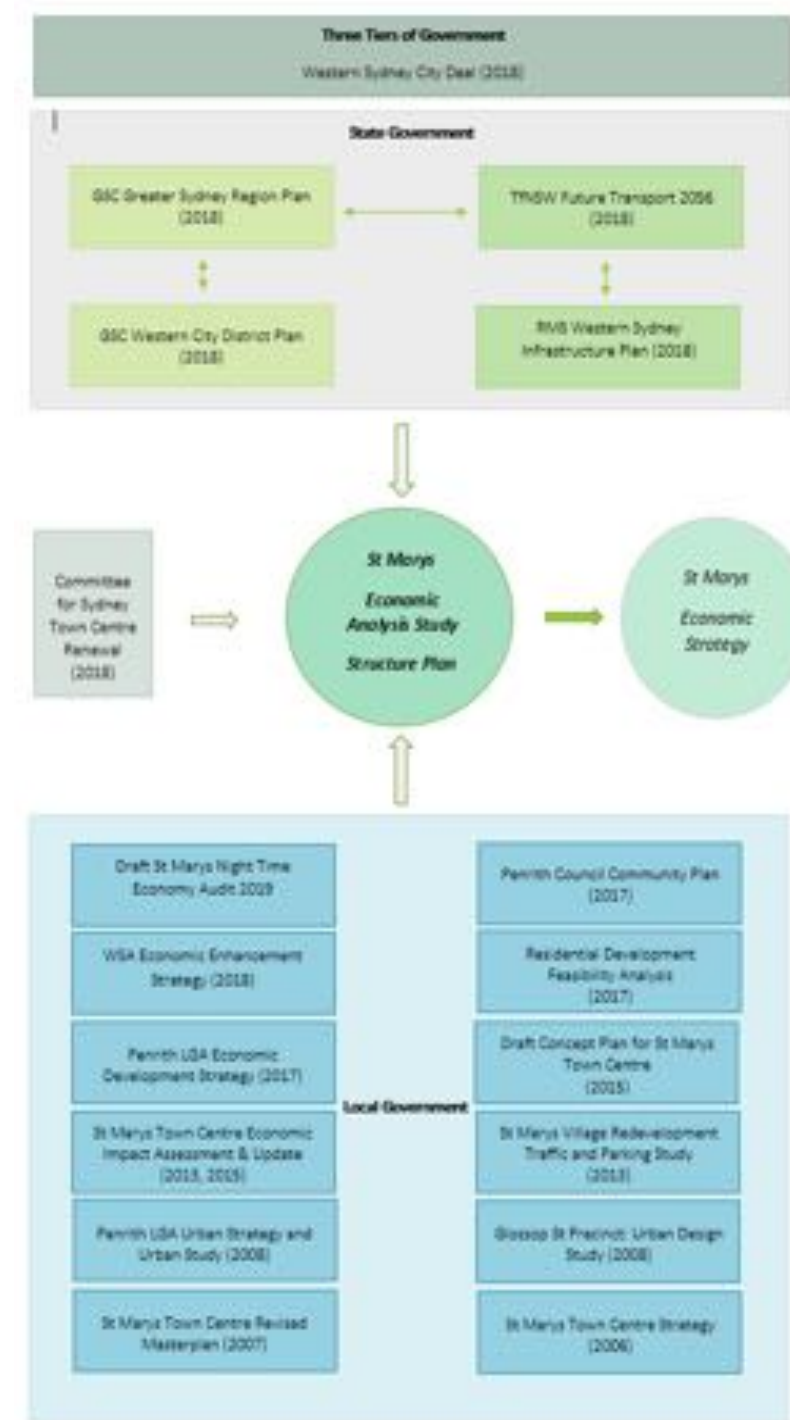


Figure 3: The strategic policy context and relationship to study

Western City Deal (2018)

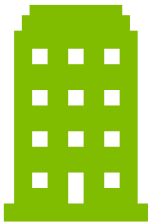
The Western Sydney City Deal sets out to deliver a grand vision for the Western City.

It is a partnership agreement between the three tiers of government to deliver an agreed set of commitments for Western Sydney.

The agreement supports the development of opportunities in business, skills and education, employment, liveability and environment, planning and housing.

Key commitments include delivering the first stage of the North South Rail Link and rapid bus services in the Western City, connecting people between metropolitan centres and jobs in the Western Sydney Airport and Aerotropolis.

Outcomes from the Deal could change economic activity in the Western Sydney landscape.



Greater Sydney Region Plan (2018)

The Greater Sydney Region Plan directions for productivity for Greater Sydney include:

- Developing a well-connected city that supports localised connections to jobs, schools and services through integrated land use, transport and infrastructure planning
- Strategic planning that enables jobs and skills growth and investment for the City.

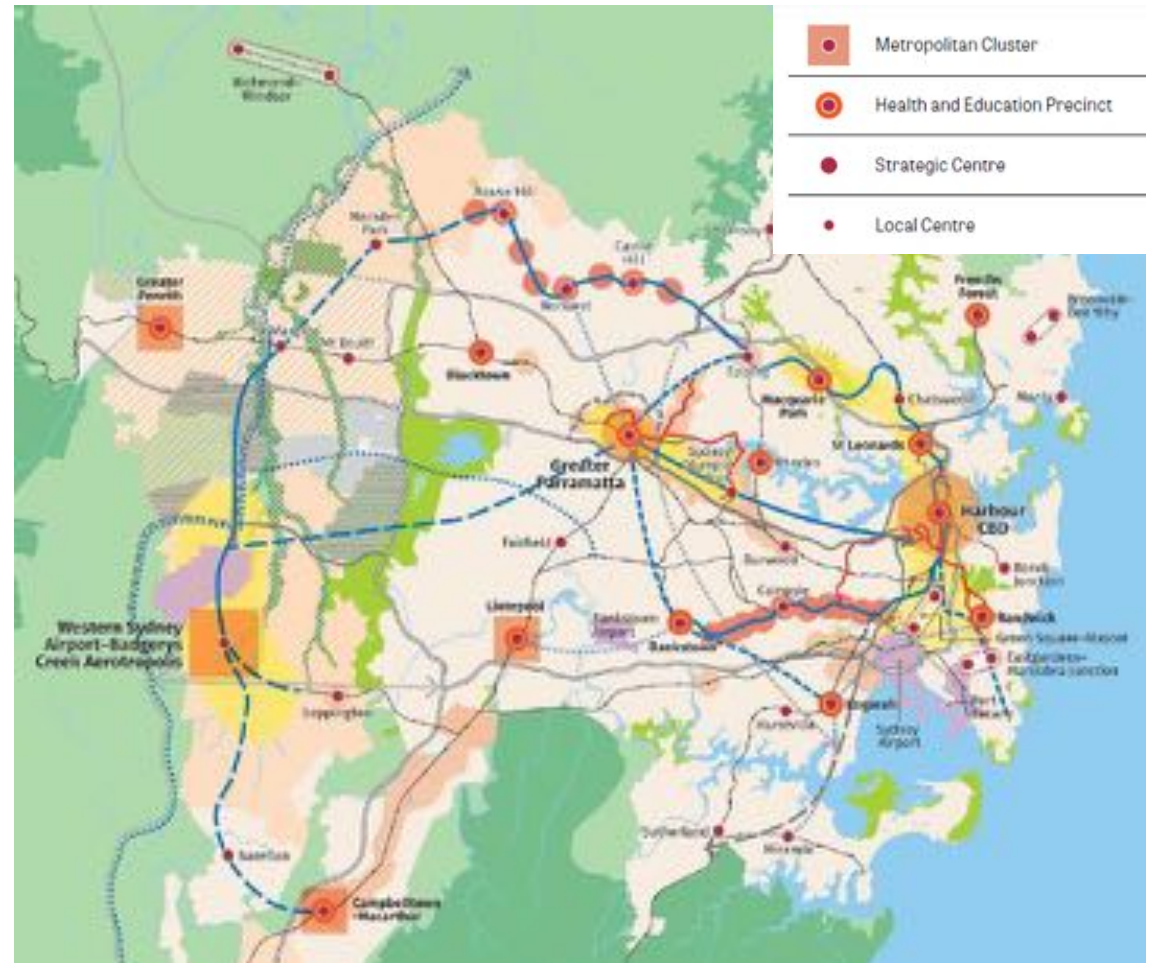
The Western Parkland City is identified as requiring more local jobs.

The GSC indicates that Strategic Centres can include:

- High levels of private sector investment
- Flexibility so that the private sector can choose where and when to invest
- Co-location of a wide mix of land uses, including residential
- High levels of amenity and improve the provision of active transport
- Areas identified for commercial uses, and where appropriate commercial cores.

St Marys is identified as a Strategic Centre.

Figure 4: Greater Sydney – metropolitan planning



St Marys has been designated a Strategic Centre for the Western Parkland City

Western City District Plan 2018

Planning priorities for the Western District include:

- Establishing the land use and transport structure to deliver a liveable, productive and sustainable Western Parkland City that leverages and coordinates with the first stage of the North South Rail Link, WSA and the Aerotropolis.
- Maximising freight and logistic opportunities and planning and managing industrial and urban services land where industrial and urban services land in the Western City District is to be retained and managed.
- Growing investment, business opportunities and jobs in strategic centres where St Marys is designated a strategic centre in the hierarchy of centres and the principal underlying economic goal for such centres is employment growth.

Productivity actions for St Marys Strategic Centre include:

- Review and maximise opportunities from St Marys location at the intersection of north-south and east-west transit corridors
- Support the role of St Mary as a centre by enabling a mix of land uses to encourage a diverse and active night-time economy
- Facilitate attraction of a range of uses that contribute to an active and vibrant place
- Improve transport connectivity and walkability within and to St Marys
- Support greater housing diversity and densities
- Activate primary and secondary streets and deliver contemporary urban public spaces
- Support and demonstrate innovation.

Figure 5: St Marys in the context of Greater Sydney metropolitan planning



It is estimated that St Marys contains 8,300 jobs. As a base for 2036, the Western City District Plan designates a target of 10,000 jobs and a higher target of 11,500 jobs for the Strategic Centre into the future.

Future Transport 2056 (2018)

Transport for NSW released the *Future Transport Strategy 2056* as an overarching strategy to achieve a 40-year vision for the NSW transport system.

The vision is built on six outcomes, including customer focus, successful places, a strong economy, safety and performance, accessible services and sustainability. Transport planning and infrastructure investment is focused around the three cities concept contained in the GSRP.

For the Western Parkland City, Transport for NSW has committed in the next 10 years to investigate a North South Rail Link. It will potentially run from the Main West Line near St Marys, through the WSA and Badgerys Creek Aerotropolis to the Main South Line near Macarthur. In the future, it has been identified that there may be more investigations to extend the rail corridor between St Marys and Schofields.

The NSW Government will also investigate the Outer Sydney Orbital corridor that would connect through Box Hill in the north and the Hume Motorway near Menangle in the south which is in the vicinity of St Marys.

Both of these pieces of infrastructure would assist in the development of the Western Economic Corridor and improve the accessibility to jobs and services at the Western Sydney Airport and Aerotropolis. This could potentially impact the population and employment mix of places like St Marys.



Figure 6: Queen St, St Marys

Local Strategic Planning

Penrith Economic Development Strategy 2017

Opportunity areas identified as:

- Leveraging sectorial strengths – education, health, professional services, construction, arts and recreation, transport and logistics, advanced manufacturing and agricultural sectors
- Leveraging population growth
- Capitalising on game-changing development projects
- Improving urban amenity
- Improving social capital with a focus on small and medium enterprises.
- Availability of land
- Foster amenity, lifestyle and opportunity.
- St Marys Town Centre was considered an opportunity area for increased infrastructure, jobs and investment.

Penrith Community Plan 2017

Outcomes include:

- Work Closer to Home - more jobs closer to home with strategy actions to increase the range of businesses operating and attract further investment
- Plan for Future Growth - ensuring services and infrastructure keep up
- Have Safe, Vibrant Places - developing major centres for the community that are safe and vibrant.
- Get Around Our City – safely and easily
- St Marys is identified as one of the town centres earmarked for renewal and aiming to align with the outcomes identified above.



Figure 7: Queen St, St Marys

Relationship to Neighbouring Centres

Today, St Marys fulfils the role of a local centre. St Marys in the future, has the potential to re-position it's role within the centres hierarchy. As a Strategic Centre in the Western Parkland City, it could grow and link with the employment lands along the Western Corridor, provide services for the WSA and other strategic centres.

Consideration of the role of neighbouring centres in Western Sydney is important to ensure St Marys develops a complementary rather than competitive development pathway.

In Table 1, the future pathway for other neighbouring centres in Western Sydney has been identified, as designated by the Greater Sydney Commission.

Discussions with Council highlighted the following:

- St Marys will potentially compete with other centres to attract commercial jobs
- St Marys would benefit from complementing neighbouring centres, and
- Council indicated that retaining a sense of local character was an important feature for St Marys Town Centre.

In developing major sites such as the University of Western Sydney lands at Werrington, it will be important that St Mary's retains it's district retail and servicing role, and the development at the university site has strong links to the St Marys town centre for students and business.

Development of a vision and actions in the Economic Strategic (from slide 45 onwards) will seek to support a new strategic role for St Marys that is complementary to neighbouring centres but also retains a sense of local character, as designated by state and local policy.

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Table 1: Future development pathway for neighbouring centres and St Marys position

Neighbouring Centre*	Key Consideration for St Marys
Penrith CBD is incorporated in the Greater Penrith Collaboration Area that will continue to fulfil a major commercial role, expansion of its health and education role with Nepean Hospital, Nepean TAFE, as well as Werrington's Western Sydney University Campus which is growing as discussed in section 2.1. Greater Penrith is also expected to facilitate an entertainment and tourism role with its proximity to the Blue Mountains.	The commercial role of St Marys should stand apart and relate to unique strengths such as industrial uses and manufacturing, freight and logistics. Opportunity to develop as a 'district' scale centre with additional recreation, entertainment activities as well as developing it as a destination for night time economy activities. There could be potential to function as services centre for students of the Werrington Campus, with this campus having limited higher order retailing.
Badgerys Creek Aerotropolis is expected to offer a significant number of jobs in Aerospace and Defence; Food and Agribusiness; Advanced Manufacturing; and Freight and Logistics.	Existing strengths in industrial uses, manufacturing and freight and logistics should link to the development of the Aerotropolis. Opportunity for technical and professional businesses that service the employment corridor and business/activities to the south to WSA. Operating as a mixed-use centre as an alternate location for office-based functions servicing the western economic corridor. It was identified by EY that locations immediately adjacent to the Airport are more suitable for food and agribusiness processing and packaging. They also stated that surrounding locations should focus on complementary logistics and distribution businesses that will support the airport.
Blacktown Centre is identified as an existing retail and commercial centre. Future actions are to protect the commercial core; build the health and education focus with an expansion of Blacktown Hospital and ancillary services; advanced manufacturing, research and innovation is also earmarked for advancement.	St Marys should note the advanced manufacturing pathway taken by Blacktown as a competitor centre for commercial jobs.
Marsden Park is noted as being the largest employment zone in the North West Growth Area with an industrial precinct zone and medium density residential zones. The future of the centre has not been clearly identified.	St Marys should note the industrial precinct pathway taken by Marsden Park, as a competitor centre.
Mount Druiitt Centre is recognised as a retail, industrial and local services centre that is expected to focus on its provision of social support services.	There is a substantial presence of social support services existing in St Marys Town Centre. By maintaining and strengthening these services, and developing appropriate employment opportunities, St Marys could service wider catchment as a more accessible location to north and south than Mount Druiitt.
Leppington Town Centre will function as an urban services centre and will provide retail and employment opportunities for the local residential population of the South West Growth Area.	St Marys currently fulfils this function and as an existing mixed-use centre. Diversifying the employment mix of St Marys will set the centre apart from Leppington.

*Source: Western City District Plan and Central City District Plan



4 Socio-Economic Profile

Local Employment

Socio-economic profiling data is based on ABS Census material. The St Marys Statistical Area 2 (SA2) includes St Marys Town Centre, the industrial area to the north of the rail line, the Glossop Street Precinct, as well as some surrounding suburban development.

Economic characteristics and trends of this SA2 will have implications for future planning and development of St Marys Town Centre.

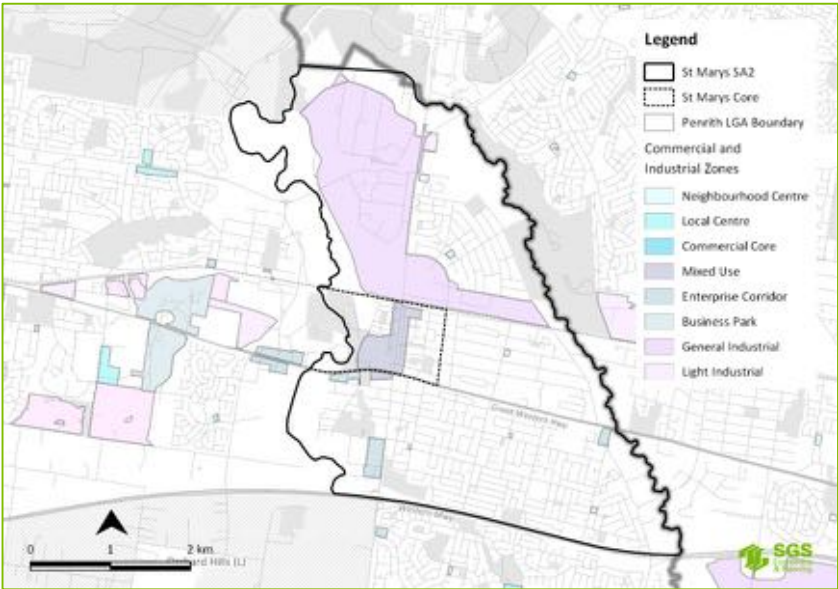


Figure 8 : SA2 area for Economic Profiling

- Retail Trade, Accommodation and Food Services, Public Administration and Safety, and Health Care and Social Assistance are the industries employing the highest numbers of people in this area.
- Manufacturing jobs include structural metal production, bakery productions, transport equipment manufacturing and polymer products. Construction jobs centred around building structure services.
- In both St Marys core area and the SA2 there are low proportions of people working in Professional, Scientific and Technical Services or Financial and Insurance Services.

- St Marys Town Centre core contains about 2,356 jobs, or 22 percent of total employment, for the SA2. The industrial portion of the SA2 comprises almost half of the employment.
- Employment in St Marys core area is relatively low compared to other major centres such as Penrith.
- Employment growth was slower in St Marys SA2 than Penrith LGA or Greater Sydney at 5, 13 and 10 percent respectively.
- St Marys core area has a predominately local population services based economic function.

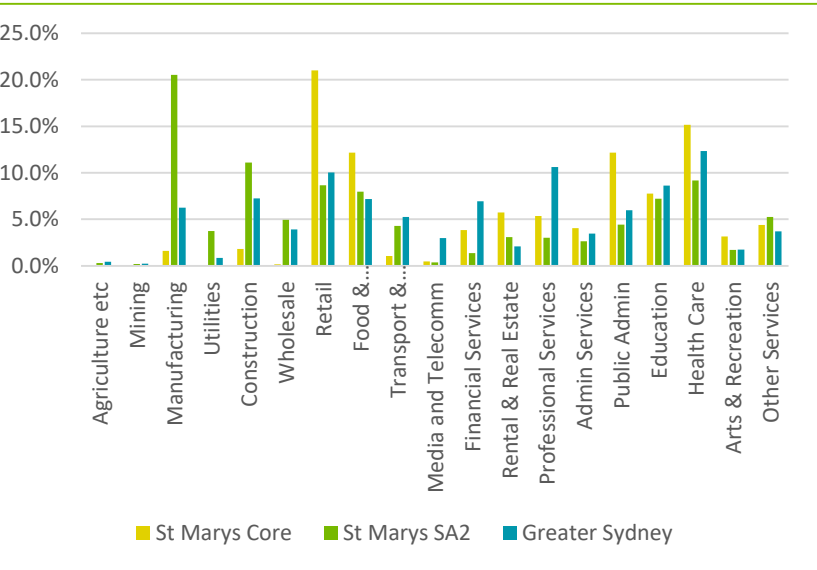


Figure 9: Industry of Employment for Workers (%) in St Marys core, SA2 and Greater Sydney

Industry Specialisation

Location Quotient indicates industry specialisation. A Location Quotient greater than one on the horizontal axis indicates a relatively specialised industry, while an industry with a Location Quotient less than one is relatively unspecialised.

The graph demonstrates employment in St Marys SA2 is specialised in Manufacturing and Utilities with smaller concentrations of employment in Construction, Rental & Real Estate, Other Services and Wholesale Trade when compared to Greater Sydney. This is consistent with the role of St Marys as a local centre and with the presence of the large industrial area to the north of the Town Centre.

While Manufacturing may be highly concentrated in St Marys SA2 and the largest industry in the area, employment in Manufacturing actually contracted by approximately 21 percent between 2011-2016.

Utilities are the most highly specialised industry in St Marys SA2, although only 3.7 percent of workers in the area are employed in this industry.

Employment in Construction; Rental & Real Estate; and Arts & Recreation increased substantially between 2011-2016, although it is worth noting these are relatively minor industries in St Marys SA2, with the exception of Construction.

Employment in Health Care and Education also increased slightly, while Retail Trade; and Public Administration and Safety contracted when compared to Greater Sydney.

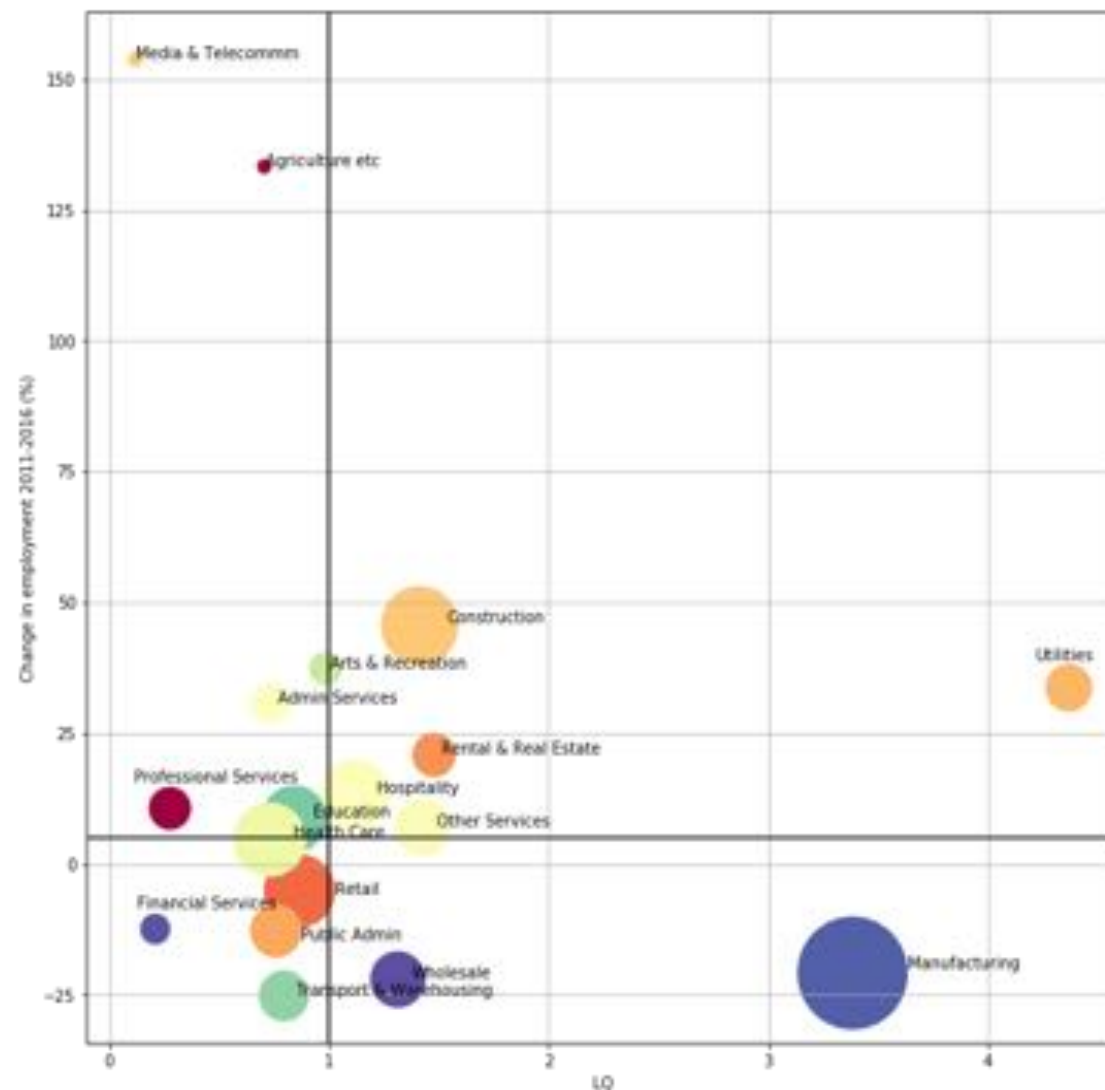


Figure 10: Location Quotient of St Marys SA2 compared with Greater Sydney

Workforce and Journey to Work

When compared to Greater Sydney, workers in the St Marys core area are:

- Slightly younger, with a higher proportion of workers aged 15-24 years and a lower proportion aged 24-55 years
- Are predominately female with many working part-time
- Have a low level of educational attainment
- Are relatively culturally homogenous with a high proportion born in Australia or residing in Australia for more than 10 years.

Data for the industrial workforce in the St Marys SA2 compared to Greater Sydney workers, showed local workers:

- Have a lower level of educational attainment than Greater Sydney or the St Marys Core.
- Are mostly male and work full time, in contrast to the St Marys core
- Have a similar age profile, with slightly more workers aged 55-64
- Are culturally homogenous and did not arrive in Australia recently, with similar rates for these variables to the St Marys core.

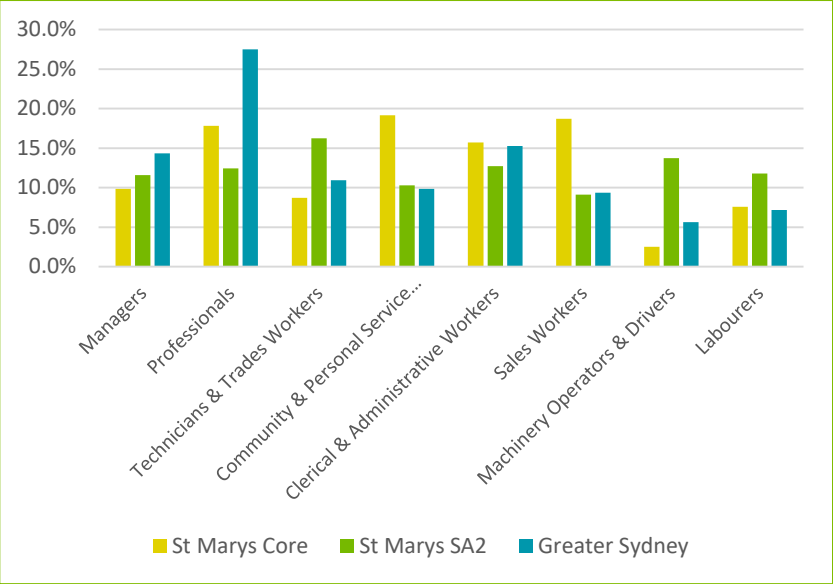


Figure 11: Occupations of Workers in St Marys and Greater Sydney

- Both St Marys and Greater Sydney became more culturally diverse with an increased proportion of workers having arrived in Australia in the last 10 years. This is driven by increased international immigration.
- The age profile of workers changed more in the St Marys core area and St Marys SA2 than Greater Sydney, however, the working population become older in all cases.
- A large increase in the proportion of university educated workers in the St Marys core area corresponds to the increase in Professionals and Managers.

- The origin of commutes to St Marys are concentrated locally. Almost half of people who worked in the St Marys SA2 in 2016 also lived in Penrith LGA at 47 percent.
- Private vehicle is used as the main transport mode for the journey to work at 84 percent for people travelling to St Marys and for 28 percent of people living in St Marys.
- The industries in which the most people travel to St Marys for work are Manufacturing and Construction, reflecting specialisation in these sectors in St Marys.
- Commute destinations for people who live in the St Marys SA2 were more diffuse than origins for people who work in St Marys, with only 29 percent of resident workers working in the Penrith LGA
- The most common industries for workers commuting to much of Western Sydney were Retail Trade and Manufacturing, reflecting the large size of these industries.

Percentage of St Marys SA2 workers		
LGA		
Penrith	47%	
Blacktown	22%	
Blue Mountains	4%	
Hawkesbury	4%	
LGA	% of St Marys SA2 resident workers	Top industry of resident workers travelling to LGA
Penrith (C)	29%	Retail Trade
Blacktown (C)	22%	Retail Trade
Parramatta (C)	10%	Health Care and Social Assistance
Sydney (C)	6%	Financial and Insurance Services
Cumberland (A)	6%	Manufacturing

Table 2: Occupations of Workers in St Marys and Greater Sydney

Socio-Economic Index

Socio-Economic Indexes for Areas (SEIFA) have been developed by the ABS. The Indexes rank areas in Australia in relation to relative socio-economic advantage and disadvantage. Data is based on the Census.

Common uses for SEIFA include determining areas that need funding and services; identifying new business opportunities; understanding the relationship between socio-economic disadvantage and health and educational outcomes

The map indicates many areas of Western Sydney are classed as having a medium level to high level of socio-economic disadvantage.

For Penrith LGA, the most disadvantaged areas are concentrated in the suburbs either side of the Great Western Highway and rail line.

In particular, the core study area of St Marys and the secondary study area shows a higher prevalence of socio-economic disadvantage than other areas in the LGA.

This indicates there is a need, and an opportunity, to develop employment, business opportunities and education options in the area that are better aligned to local needs

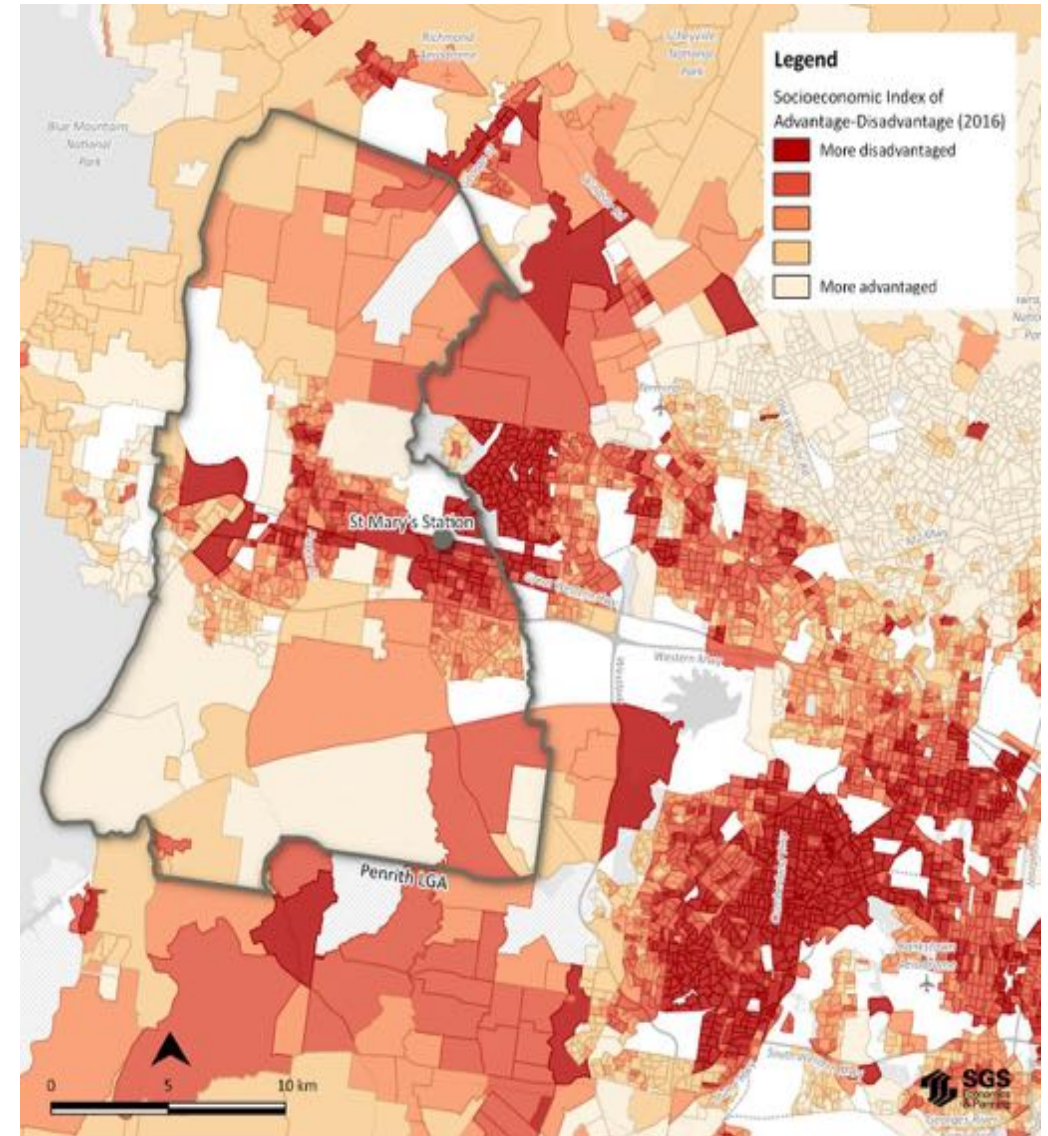


Figure 12: Socio-Economic Index, Western Sydney

Key Considerations for St Marys

In summary, the socio-economic profiling indicates:

- Key industries of employment, Retail Trade and Accommodation and Food Servicing, reinforce the population serving role of St Marys core study area.
- St Marys has a strong presence of Manufacturing and Construction jobs in the industrial zone north of the rail line, although in the last few years manufacturing jobs have declined.
- There is a low proportion of Professional Services jobs in the area which could be an opportunity area for employment growth for St Marys if linked to existing strengths.
- There is high usage of private vehicle use to/from St Marys for commutes which may be related, in part, to the key employment types for local workers. A shift to more Professional service jobs and more local job opportunities, may see a decline in private vehicle use as people may be inclined to use public transport or walk to work. This may affect the rate of carpark use in the future.
- St Marys is an area with relatively high socio-economic disadvantage. Therefore, employment opportunities and appropriate education and training that is relevant to the characteristics of the local population will assist employment growth.



Figure 13: Queen St, St Marys



5 Drivers of Change |

Drivers of Change - Infrastructure

Major infrastructure developments can influence population and employment distribution across a city.

The redistribution of population and employment towards Western Sydney, due to the development of major pieces of infrastructure, may impact St Marys.

Infrastructure drivers of change for Western Sydney include:

- North South Rail Link
- Outer Sydney Orbital
- Western Sydney Airport and the Aerotropolis

St Marys may have to support more people through the provision of housing, job opportunities and access to services as it may become a more attractive place to locate.

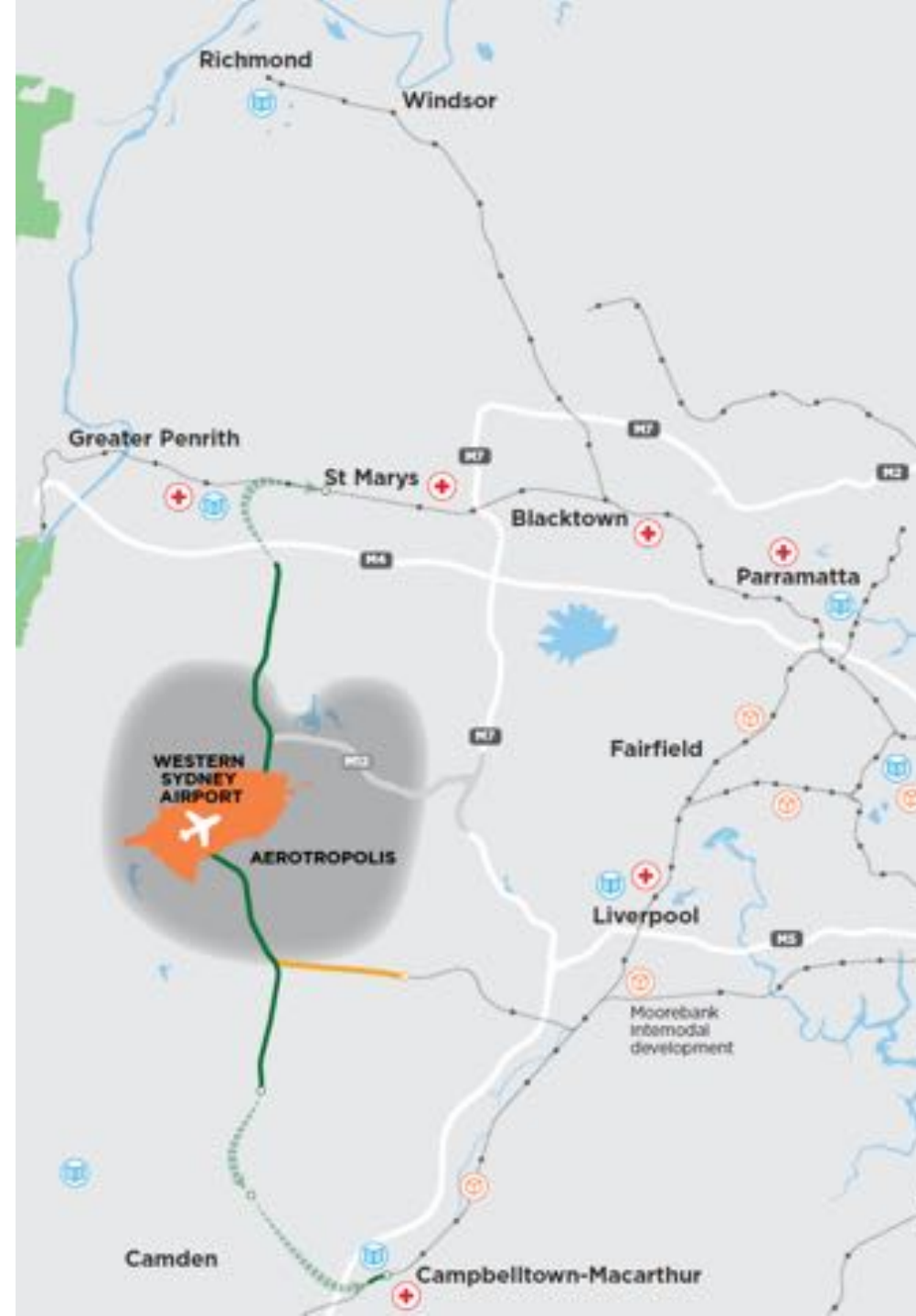


Figure 14: Major Infrastructure, Western Sydney

Source: Department of Infrastructure, Regional Development and Cities, https://www.westernsydneyairport.gov.au/files/Aerotropolis_Investor_Guide.pdf

Drivers of Change - Infrastructure

North South Rail Link

Indicative alignments for the North South Rail Link run from St Marys in the north to Macarthur in the south.

Transport for NSW expects the North South Rail Link will:

- Assist the development of the Western Sydney Economic Corridor
- Assist greater accessibility to employment opportunities and achieve the '30-minute city'
- Provide linkage between the North-West and South-West Growth Areas and Western Sydney Airport
- Support future town centres that are designed and planned around future transport infrastructure.

Transport for NSW consulted on recommended corridors of land in 2018.

In the future, TfNSW will conduct further investigations to extend the passenger rail corridor between St Marys and Schofields.

This transport connection has potential to increase the accessibility and attractiveness of St Marys as a location to live and locate businesses.

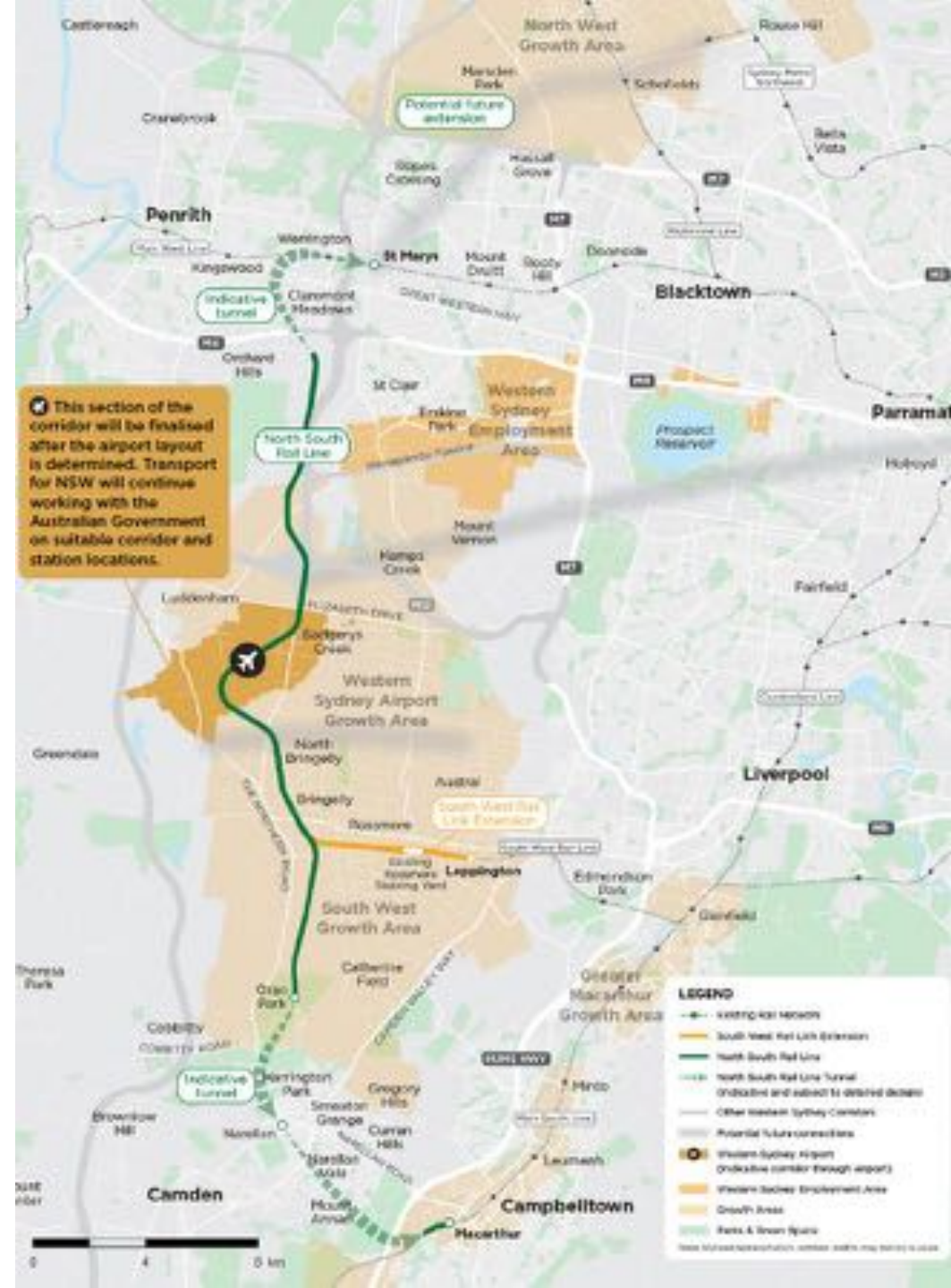


Figure 15: Indicative alignment, North South Rail Link
Source: TfNSW, <https://www.transport.nsw.gov.au/corridors/nsrl-swrl>

Drivers of Change – Infrastructure Outer Sydney Orbital

The Outer Sydney Orbital would be a motorway and rail freight connection between Box Hill in the north, and the Hume motorway, close to Menangle in the south.

Transport for NSW expects the key benefits of the Outer Sydney Orbital would be:

- The provision of a major transport link between the North West and South West Growth Centres and Western Sydney Airport.
- Allowing for efficient and safe movement of freight by rail
- Support for growing communities, business and the creation of new jobs in Western Sydney.

Transport for NSW is currently identifying land for the corridor.

This transport connection would help improve the movement of people and freight around the Western Sydney region, therefore increasing the attractiveness of Western Sydney as a area to live, work and transport goods.



Figure 16: Indicative alignment Outer Sydney Orbital

Source: TfNSW, <https://www.transport.nsw.gov.au/corridors/oso>

Drivers of Change - Infrastructure

Western Sydney Airport & Aerotropolis

WSA will be operational 24-hours a day with passenger forecasts of 5 million by 2026, 10 million by 2031 and 82 million by 2063.

It is expected 11,346 jobs will be created during the commissioning and construction phase of WSA and 27,946 on-site jobs once the Airport is operational to 2031.

The Aerotropolis is expected to create 200,000 jobs in:

- Aerospace and defence: industry, research and development cluster in electronic systems development, information analytics, communications technologies, cybersecurity, simulation and advanced component design and manufacturing.
- Food and agribusiness: production of fresh food on-site; niche brand development; advancing technological solutions in quarantine, cold storage and biosecurity; linking of agri-precincts with high-tech businesses and rapid delivery to market.
- Health, research and advanced manufacturing: connect medical expertise to health and education precincts in Nepean, Blacktown, Mount Druitt and Campbelltown and local university campuses.
- Freight and logistics: airport related investment, potential new intermodal terminal.

Development of the Airport and Aerotropolis will help generate new business opportunities and attract more people to the region. St Marys has the opportunity to leverage this increase and change in activity.

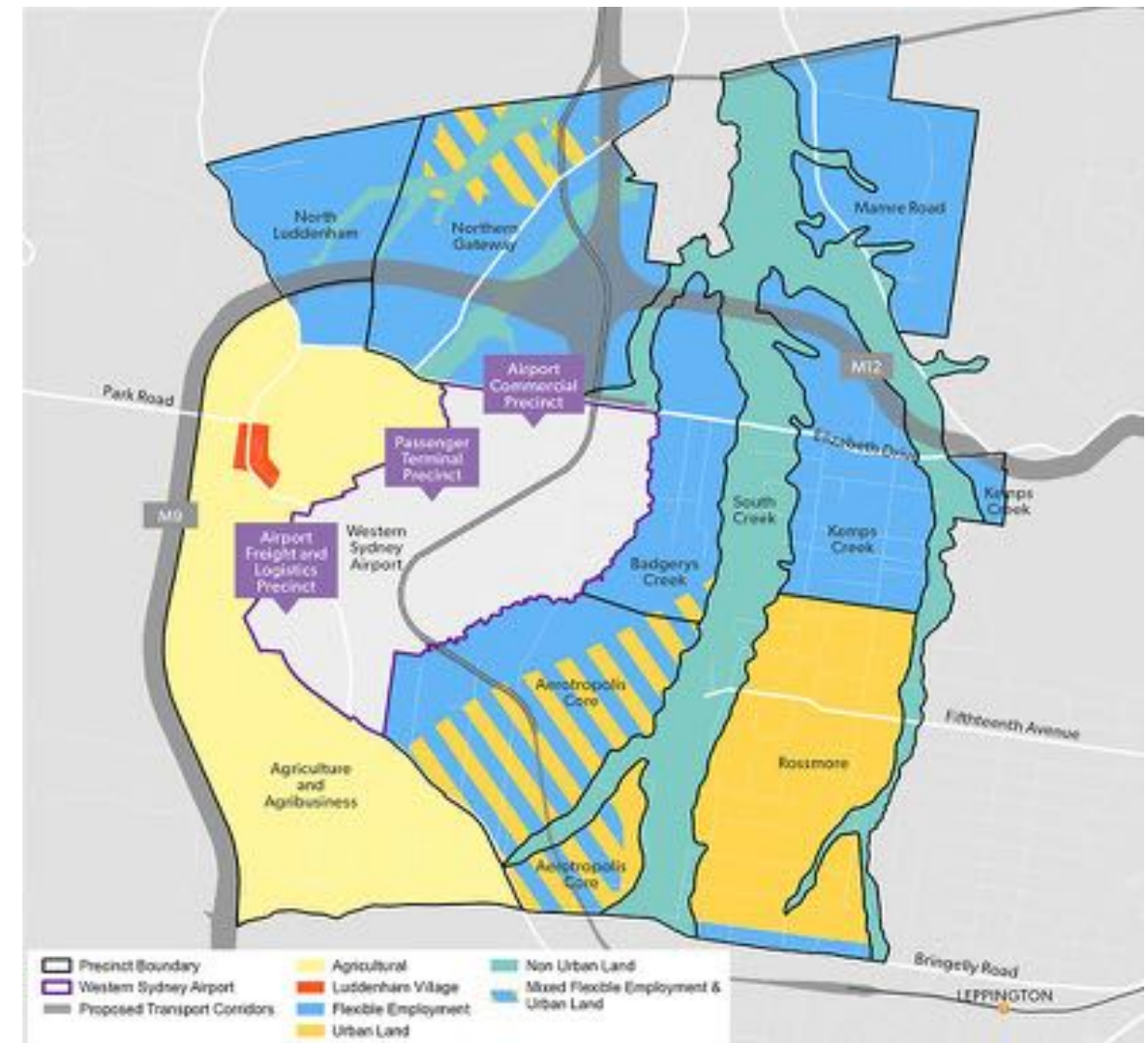


Figure 17: Indicative WSA and Aerotropolis

Source: DPIE, <https://www.planning.nsw.gov.au/Plans-for-your-area/Priority-Growth-Areas-and-Precincts/Western-Sydney-Aerotropolis/Map>

Driver of Change – general retail trends

A number of general retail trends and drivers may impact the future of retailing in St Marys:

- **Retail trading hours** have relaxed over the past twenty years where shops tend to open on both weekdays and weekends for longer hours. Tenancies that have longer opening hours can also support retail services that operate 'after hours', such as cinemas and restaurants. This creates a symbiotic relationship and can help to promote and sustain the evening economy in a precinct.
- **Regional suburban centres have emerged as the preferred destination for many consumers and preferred location for retailers.** This is due to the growth of an affluent and mobile population in suburban areas; the development of strong corporate chains with fewer ties to a locality and more willingness and need to move shops to areas of demand and opportunity; changes in the methods of selling which have seen a demand for larger stores and associated parking.
- The growing emergence of **café culture, eat streets and food centres.** The café market has grown significantly over the past decade as an appreciation for coffee and the lifestyle associated with it takes hold in Australian cities. The café industry is forecast to grow by 7.4 percent between 2011 and 2016. A number of high streets throughout inner Sydney and western Sydney centres are increasingly focusing on the pedestrian and diner experience along local retail strips. Standalone shopping centres have also refocused on their food offering, clustering cafés, restaurants and fresh food outlets to provide a contemporary, appealing food offering. St Marys Town Centre has positive physical attributes. Physical improvements that progress greater accessibility and integration and Town Centre greening may assist in developing the 'café culture' trend along Queen Street and adjacent areas.
- **Fine grain retail involves shop fronts at a human scale, often in the form of a main street or high street.** A fine grain high street shopping experience offers a more unique retail experience to shopping centres with small local businesses and boutiques. The trend of fine grain retailing may be well suited to St Marys high street and may be a factor that sets the Town Centre apart from bigger, neighbouring retail and commercial centres.



Figure 18: Queen St, St Marys



6 Current Land Use |

Current Planning Framework



- Land Use zoning Legend
- Core study area boundary
 - Secondary study area boundary
 - B1 Neighbourhood Centre
 - B4 Mixed Use
 - B6 Enterprise Corridor
 - E2 Environmental Conservation
 - IN1 General Industrial
 - R2 Low Density Residential
 - R3 Medium Density Residential
 - R4 High Density Residential
 - RE1 Public Recreation

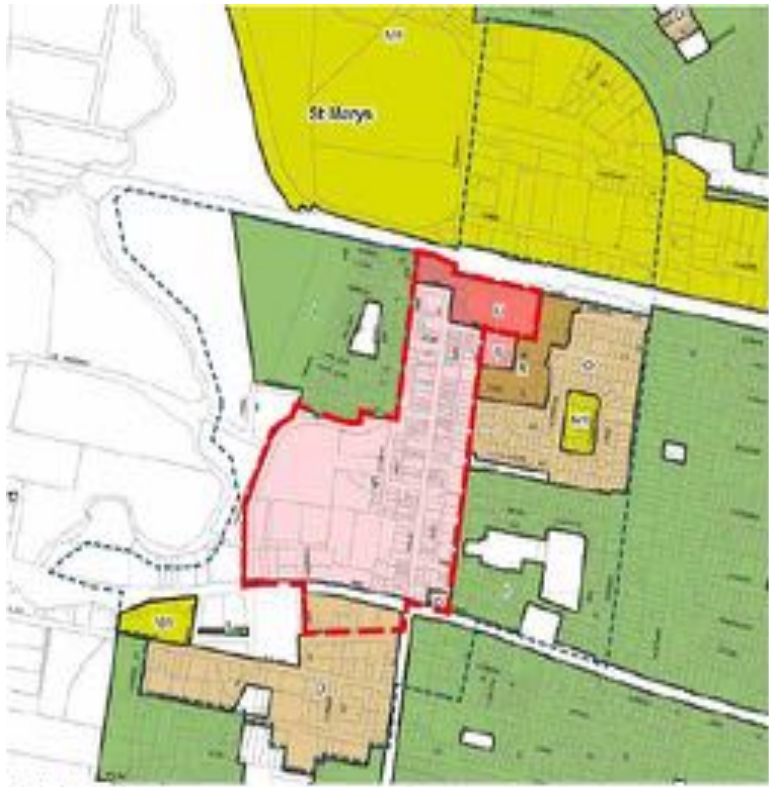
The core study area is contained within the B4 Mixed Use zone. To the north, there is IN1 General Industrial. R4 High Density Residential and R3 Medium Density Residential occupy the east, while R2 Low Density Residential and several parcels of RE1 Public Recreation occupy the west. South of the Great Western Highway there is combination of B6 Enterprise Corridor, R4 High Density Residential, R2 Low Density Residential and B4 Mixed Use.



Floor Space Ratio

- Floor Space Ratio Legend
- Core study area boundary
 - Secondary study area boundary
 - 2.5:1
 - 3.5:1

Floorspace ratio for the core study area is a maximum of 2.5:1 for the area around Queen Street and the parcels of land south of the Great Western Highway. The parcels of land in immediate proximity to the rail station and bus interchange have a maximum floorspace ratio of 3.5:1.



Height of Building

- Height of Building Legend
- Core study area boundary
 - Secondary study area boundary
 - 18.5m
 - M1 10m
 - 0 15m
 - 8.25m
 - 5.24m
 - 7.27m
 - U 32m

Building Heights for the majority of the Town Centre are allocated a maximum of 24 metres. Land in close proximity to the rail and bus interchange has a maximum building height of 32 metres. A few lots directly opposite the bus interchange area are allocated 27 metres. The Glossop Street Precinct has a maximum building height of 12-21 metres. The area south of the Great Western Highway has a maximum building height of 15 metres.

Floorspace Audit

In January 2019, an audit of the current built form and land uses within St Marys core study area was conducted, focussing on the retail and commercial components. As such, the current floorspace audit represents a snap shot of the core study area at this point in time and is subject to change. The audit provides an insight into the provision of retail and commercial space in this area.

Utilising a cadastral layer supplied by Penrith Council, the footprints of relevant buildings were digitised from aerial imagery. The cadastral layer data was imported into the Fulcrum audit application.

Using the application on tablets, SGS was able to visit the study area and collect information on:

- SGS Broad Land-use Classification (see definition of BLC on slide 34)
- Current use of land by industry (1-digit ANZSIC Codes, with 2-digit ANZSIC Codes collected for Retail Trade classifications, Accommodation & Food Services classifications and Other Services classifications, to distinguish between different types of activity in these sectors, see definition of ANZSIC codes on slide 34)
- Floorspace per activity
- Number of storeys per building
- Zoning and maximum FSR and building heights.

Beyond this core dataset, supplementary information included:

- Areas within Station Plaza and St Marys Village Shopping Centre were audited using information collected from respective websites which was imported into a GIS application to determine area.

Spatial joins were then performed using GIS programs in order to assign land uses to floors of buildings and to lots within the core study area. The planning controls applicable to sites within the study area were obtained from the Department of Planning and Environment's (DPE) Open Data Portal.

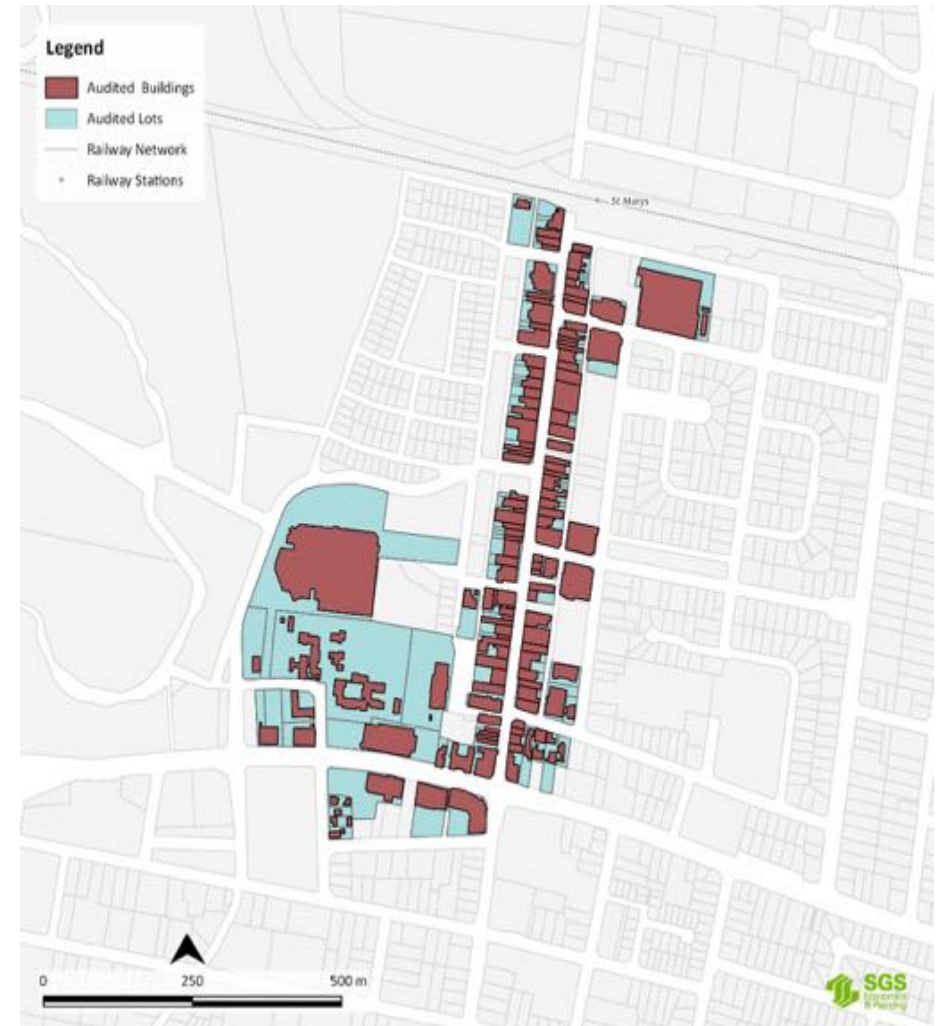


Figure 19: Audit area

Audit Results - Current Industry Use

- Of the total amount of floorspace audited, approximately 70 percent was attributed to Main Street Retail along Queen Street.
- Big Box Retail, that included floorspace for Station Plaza and St Marys Shopping Village Centre was approximately 17 percent of the total.
- A small portion of floorspace related to Local Health and Education uses which largely centred on St Marys Public School
- Retail Trade and Accommodation and Food Services are the two most significant ANZSIC uses, representing 26 percent and 19 percent respectively.
- Health Care and Social Assistance, Administrative and Support Services and Other Services are also well represented, albeit only around the 8 percent mark.
- Other Services have been propelled by a significant amount of hair salons and barbers, beauticians and nail salons.
- The vacancy rate within the study area is four percent of the BLC. This is a normal level and represents neither an oversupply nor an undersupply of vacant floorspace (two to five percent).

The population serving role of St Marys Town Centre, evident in ABS economic profiling data analysis, is reinforced through the floorspace audit. The audit showed the prominence of Retail Trade and Accommodation and Food Servicing industries.

There is a prominence of employment and social assistance services which conveys these businesses play an important support role for the local community and that growth in relevant job areas for community members are required.

There is a prominence of Personal Services in the Town Centre. Several hair salons, barber shops, nail salons and beauticians were noted. Development of other industry and business types may be beneficial for the Town Centre.

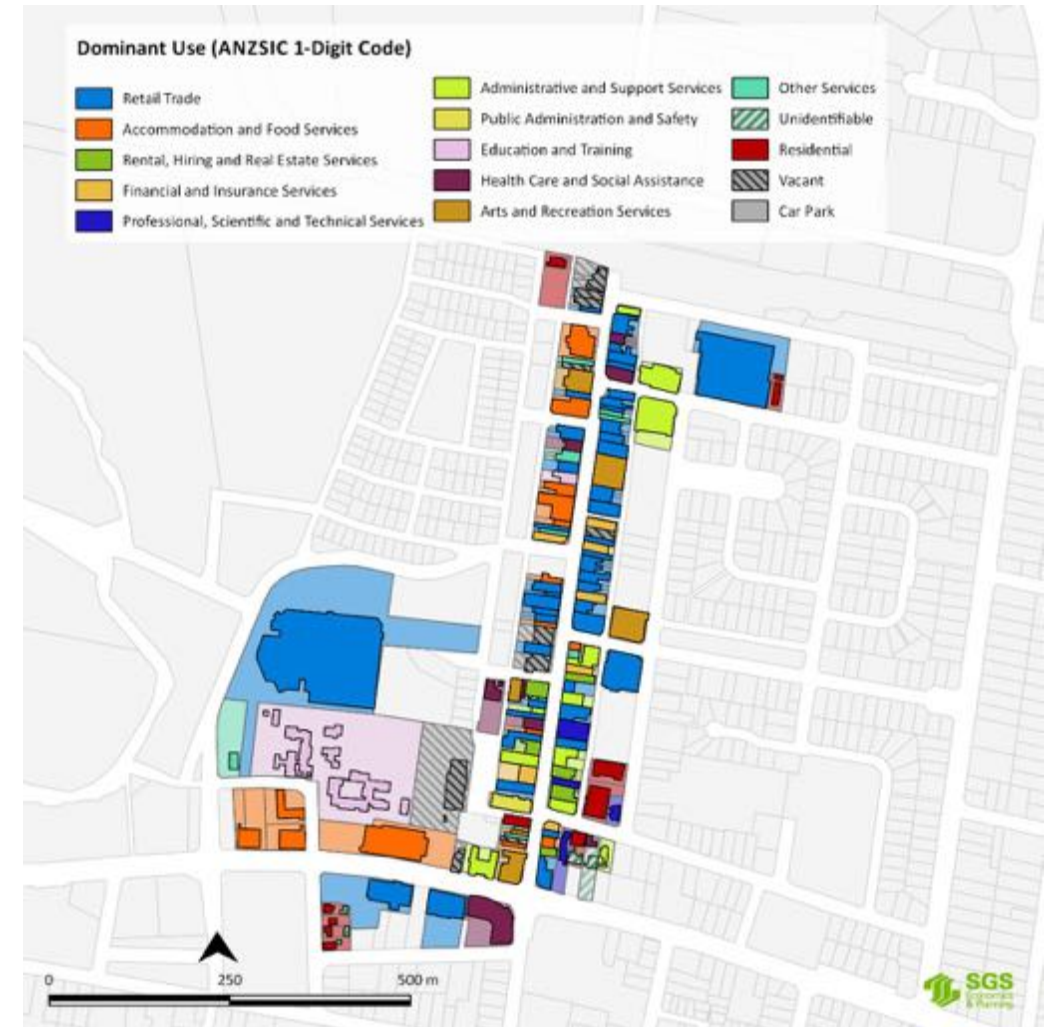


Figure 20: Audit area by industry type

Audit Results – ANZSIC and BLC

The table provides a breakdown of the collated floorspace, disaggregated by industry of current use (ANZSIC) and SGS Broad Land-use Classifications (BLCs).

ANZSIC ↓ BLC →	Main Street Retail	Big Box Retail	Local Health and Education	Subtotal	Residential	Car Park	Total
G – Retail Trade	23,733	18,632	-	42,365	-	-	42,365
H – Accommodation and Food Services	17,506	683	-	18,189	-	-	18,189
K – Financial and Insurance Services	4,305	-	-	4,305	-	102	4,408
L – Rental, Hiring and Real Estate Services	3,020	-	-	3,020	-	-	3,020
M – Professional, Scientific and Technical Services	1,928	-	-	1,928	-	204	2,132
N – Administration and Support Services	6,783	-	-	6,783	-	-	6,783
O – Public Administration and Safety	2,822	-	-	2,822	-	-	2,822
P – Education and Training	2,127	-	7,465	9,592	-	-	9,592
Q – Health Care and Social Assistance	7,725	72	-	7,787	-	-	7,787
R – Arts and Recreation Services	4,425	-	-	4,425	-	-	4,425
S – Other Services	6,116	534	-	6,650	-	-	6,650
Subtotal	80,481	19,921	7,465	107,867	-	306	108,173
X - Unidentifiable	800	-	-	800	246	-	1,046
Residential	1,382	-	-	1,382	7,609	-	8,991
Vacant	7,165	2,080	-	9,245	-	102	9,347
<i>Vacant (% of BLC)</i>	4%	5%	-	4%	-	-	7%
Total	89,828	22,001	7,465	119,294	7,855	408	127,577

Table 3: Audit floorspace results by ANZSIC and BLC

Broad Land Use Classification (BLC)

SGS Economic and Planning developed the Broad Land Use Classification as a method of grouping land and building typologies that share similar characteristics and which may play host to similar land uses.

ABS ANZSIC Codes

ANZSIC codes assign an individual business entity with an industry related to the predominant activity for that business entity. Business entities include companies, non-profit organisations, government departments and enterprises. ANZSIC Codes allow data on businesses to be grouped and analysed by users

Notional Floorspace Capacity - Method

Observing the audit outputs and using the current planning controls framework, the potential, theoretical yield for retail and commercial development of the St Marys Town Centre core study area was assessed. This allows for the notional floorspace capacity to be identified if all available sites were to be developed and to compare with the future demand under different scenarios and any gaps identified.

This analysis took place in the following stages:

1. **Available land** was first determined. Available land represents all land where development is possible and on which commercial development is permissible. Land exclusions included heritage items, carparks (manual designation), Council owned land classified as community land and other parks. Lang Park and Kokoda Park were excluded based on the potential contribution of these parks to the urban tree canopy and Civic Precinct identified in the Structure Plan.

2. The **potential yield** calculation was conducted, in which the yield of all available sites if they were to be developed is calculated.

3. The **net yield** calculation was conducted, in which the existing commercial floorspace on each site is subtracted from the potential yield to generate the amount of additional floorspace, known as the 'net yield'.

The following assumptions have been used to show the likely range of notional development capacity based upon different commercial proportions:

Low scenario: Commercial floorspace will be delivered with an effective FSR of 0.5:1, accounting for retail development to occupy some of the ground floor along with circulation space, building entrances, building services and entrances to underground garages. This scenario could also reflect delivery of some non-residential floorspace above the ground floor.

Medium scenario: Commercial floorspace will be delivered with an effective FSR of 0.7:1, accounting for ground-floor retail development and an increased proportion of lettable floorspace on the ground floor and first floor. This scenario is considered to be the most likely.

High scenario: Each development will deliver the greater of the existing amount of commercial floorspace or an effective commercial FSR of 0.7:1. This means that no redevelopment may reduce the existing amount of commercial floorspace.



Figure 21: Notional floorspace capacity, available land

Notional Floorspace Capacity - Results

The net yield results for the St Marys Centre are shown in the table.

Redevelopment for the purpose of shop-top and mixed-use housing would be expected to decrease the amount of available commercial floorspace, when factoring in circulation space, lobbies, elevators, entrances to carparks, servicing spaces and stairwells.

If shopping centres are excluded, the low scenario would create a net loss of commercial floorspace in St Marys, while the medium and high scenario would create an increase.

If shopping centres were included, there would be an increase in commercial floorspace under the low scenario if all sites were to be developed, and a larger increase in the medium scenario.

If some residential development was created under redevelopment of the shopping centre sites, as is proposed in the planning proposal applying to the Station Plaza, there would be a negative capacity for commercial floorspace.

Under the high scenario, there is an increase in commercial floorspace under all scenarios.

Protecting retail and commercial floorspace in Queen Street would be a key priority.

Site type	Scenario	Number of sites	Land Area (sqm)	Current commercial floorspace (sqm)	Potential Yield (sqm)	Net Yield (sqm)
Available sites (not shopping centres)	Low	144	125,779	70,674	62,890	-7784
	Medium				88,046	17,372
	High				93,771	23,097
Unavailable sites	All	62	114,576	32,500	32,500	0
Shopping Centres	All	2	53,390	22,001	42,712	20,711

Table 4: Notional floorspace capacity outputs

The public at-grade carparks behind Queen Street could be considered as appropriate sites to offer developable commercial floorspace in the future as St Marys Town Centre grows. This would allow for larger floorplates for commercial floorspace. Planning and the use of these sites could be staged, beginning with carparks close to the station precinct and then around the civic precinct, as further demonstrated in the Structure Plan and Economic Strategy. Replacement of carparking under a parking plan would be important for this change of land use to be realised.



7 Future Growth Scenarios

First Future Scenario – Retail and Commercial Floorspace Demand

Projecting the future demand for retail and commercial floorspace in St Marys Town Centre was assessed under two scenarios: the first future scenario was where St Marys continued to grow on its population serving trajectory.

To determine the impact that this growth scenario will have on floorspace for St Marys Town Centre, the level of retail expenditure over time for St Marys was examined. A retail gravity model was employed that factors in household expenditure, demographics and relationships between different centres.

The gravity model helps to reveal how much floorspace demand for each individual centre will be realised into the future based on its location and existing consumer behaviours and preferences.

For retail floorspace, as shown in Table 5, beyond 2036, total retail floorspace demand in St Marys Town Centre is expected to grow by an additional 12,401 sqm between 2036-46 and a further increase of about 12,308 sqm by 2056 when the total floorspace demand will reach around 91,000 sqm.

For commercial floorspace, as shown in Table 6, projections out to 2056 estimate that there may be total demand for 101,552 sqm of commercial floorspace within the St Mary's Town Centre. From 2036 to 2056, in total, there is expected to be additional demand for 22,173 sqm of commercial floorspace within the St Marys Town Centre.

Table 5: Retail floorspace demand, St Marys 2016-2056 first future scenario

Retail Category	2016	2021	2026	2031	2036	2046	2056	Change 2016-56
Supermarket	10,352	10,078	10,847	11,731	12,578	15,829	19,226	8,875
Other Food	2,854	2,983	3,249	3,389	3,580	4,506	5,438	2,584
Hospitality & Services	16,635	14,351	15,090	15,334	15,946	18,140	20,194	3,560
Clothing & Soft Goods	4,049	3,755	4,073	4,325	4,619	5,807	7,020	2,971
Household Goods	5,645	5,325	5,727	6,195	6,652	8,972	11,388	5,743
Other Retail	14,754	13,509	14,487	14,454	14,647	15,871	16,940	2,186
Department Stores	7,685	7,657	8,039	7,950	8,307	9,605	10,831	3,146
Total	61,974	57,657	61,511	63,377	66,329	78,730	91,038	29,064

Table 6: Commercial floorspace demand, St Marys 2016-2056 first future scenario

Floorspace	2016	2021	2026	2031	2036	2046	2056	Change 2016-56
Accommodation & Food Services	18,189	17,873	17,759	18,038	18,766	21,836	24,890	6,701
Financial & Insurance Services	4,408	4,799	5,398	5,792	6,148	6,844	7,426	3,018
Rental, Hiring & Real Estate Services	3,020	3,243	3,056	3,063	3,229	3,653	4,048	1,028
Professional, Scientific & Technical Services	2,132	2,093	2,644	2,908	3,157	3,690	4,197	2,065
Administrative & Support Services	6,783	7,114	8,200	8,844	9,221	10,080	11,022	4,239
Public Administration & Safety	2,822	3,053	3,277	3,496	3,749	4,209	4,581	1,759
Education & Training	9,592	10,491	10,960	11,769	12,622	14,718	16,788	7,196
Health Care & Social Assistance	7,787	8,472	8,935	9,628	10,458	12,488	14,503	6,716
Arts & Recreation Services	4,425	4,752	4,617	4,781	5,090	5,766	6,405	1,980
Other Services	6,650	6,777	6,896	6,728	6,940	7,382	7,693	1,043
Total	65,808	68,666	71,743	75,047	79,379	90,666	101,552	35,744

First Future Scenario: Retail & Commercial Floorspace Gap Analysis

The potential yield of floorspace in St Marys Town Centre (related to slide 35 and 36), revealed the following:

- Under a low scenario the potential yield for retail and commercial floorspace under current controls would be approximately 138,102sqm.
- Under a medium scenario the potential yield for retail and commercial floorspace under current controls would be approximately 163,258sqm.
- Under a high scenario the potential yield for retail and commercial floorspace under current controls would be approximately 168,983sqm.

Therefore, comparing the potential floorspace yield against the projected retail and commercial floorspace demand under the First Future Scenario (data from slide 38, collated in Table 7), a floorspace gap analysis suggests:

- Under a low scenario for redevelopment, floorspace would potential run out slightly before 2031.
- For a medium or high scenario of redevelopment, floorspace would potentially run out between 2036 and 2046.

This reflects a need to protect the retail and commercial core of St Marys Town Centre and consider how future land use can cater for increased need of such floorspace.

Floorspace Demand (sqm)	2016	2021	2026	2031	2036	2046	2056	Change 2016-56
Retail Floorspace	61,974	57,657	61,511	63,377	66,329	78,730	91,038	29,064
Commercial Floorspace	65,808	68,666	71,743	75,047	79,379	90,666	101,552	35,744
Total Floorspace Demand	127,782	126,323	133,254	138,424	145,708	169,396	192,590	64,808

Table 7: Total floorspace demand to 2056

Alternate Future Scenario: Western Sydney Future Urban Structure

SGS has developed a scenario for the whole of Sydney to help us understand the effects of significant investment and growth of population and employment across Western Sydney (see slide 41). The scenario is based on a strategic view of Western Sydney, solidifying its place as a major economic contributor to Sydney.

SGS has modelled the enabling infrastructure for this scenario as starting to come online from 2036 to 2056 (related to the drivers of change infrastructure).

Over this period, the level and nature of employment and population across Greater Sydney will change and redistribute. The West will attract more population and employment on the whole, as firms which would have located elsewhere in Sydney, now find it viable to locate in the West, see Figure 22 and 23.

These macro shifts have some flow on implications for St Marys and indicate some growth may occur.

Figure 22: Potential growth scenario to 2056 for Western Sydney - Population

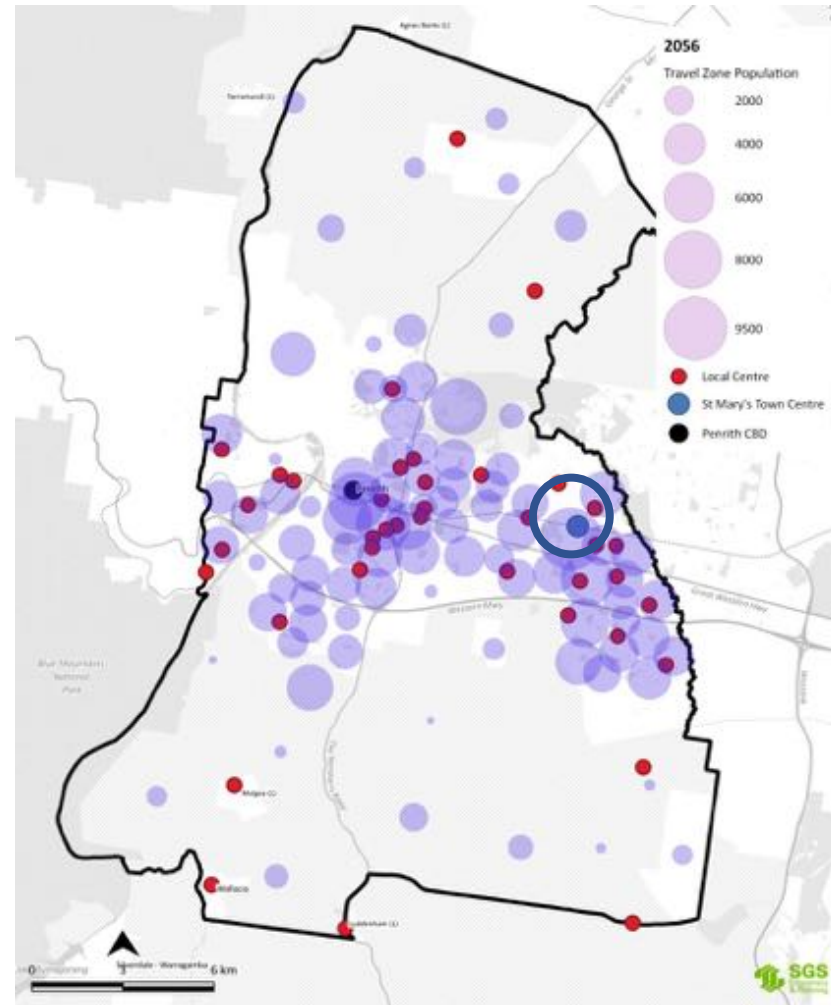
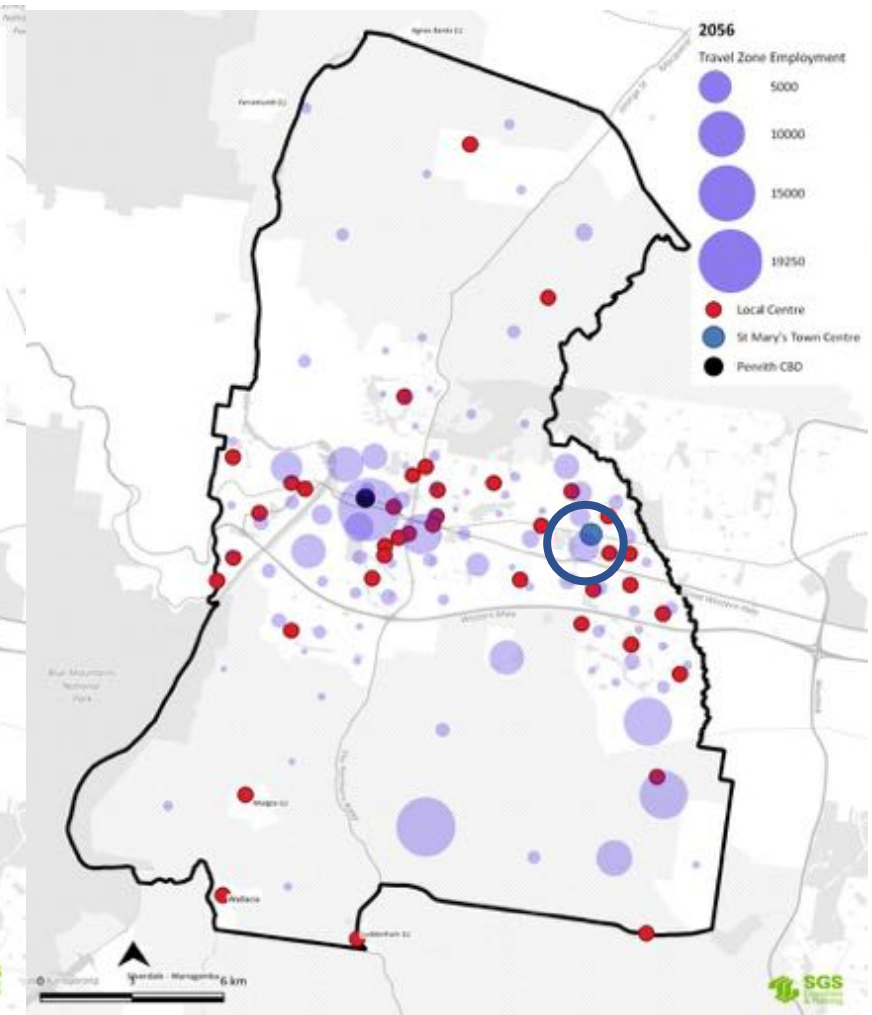


Figure 23: Potential growth scenario to 2056 for Western Sydney - Employment



Alternate Future Scenario: St Marys

The Western Sydney results (related to slide 40) were disaggregated down to a relevant travel zone level to relate to the St Marys study area. St Marys Station South travel zone was used as a proxy as it largely aligns, see Figure 24.

Population for St Marys is around 3,000 people higher at 2056 under this scenario, see Figure 25.

The difference in employment for St Marys Station South under the scenario is around 1,000 additional jobs in the area by 2056, see Figure 26.



Figure 24: Travel zone St Marys Station South

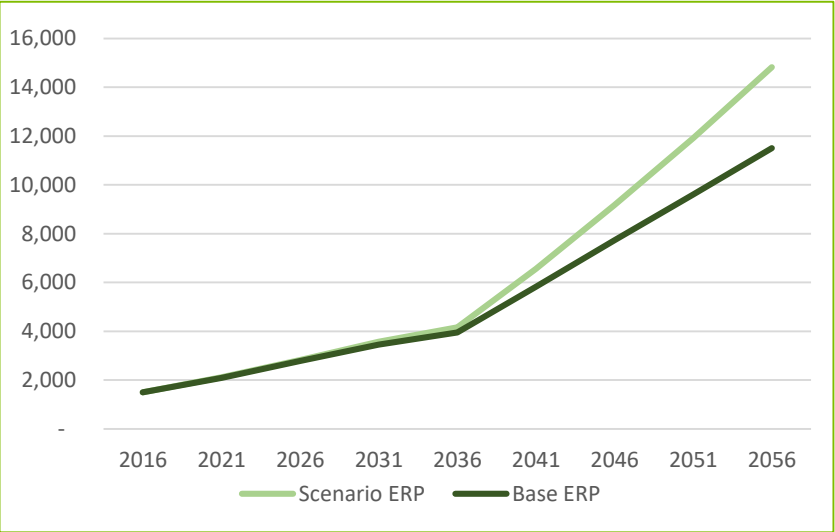


Figure 25: St Marys Station South - Population

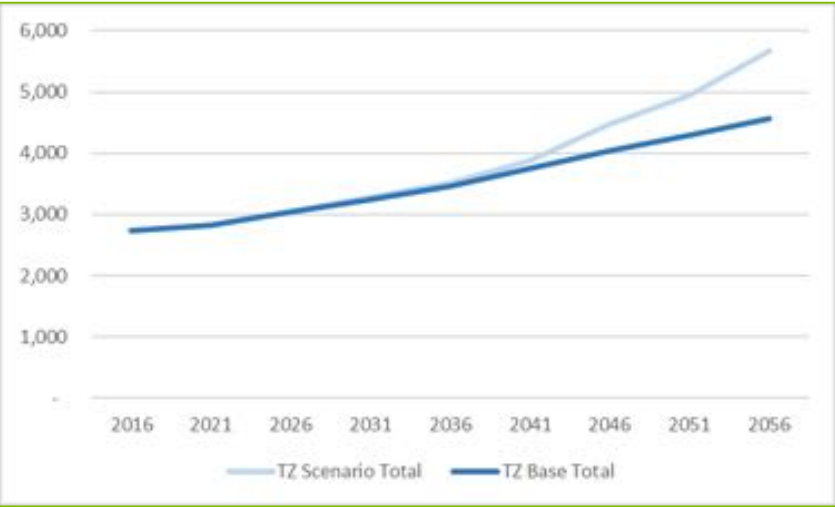


Figure 26: St Marys Station South - Employment

Alternate Future Scenario – Retail and Commercial Floorspace Demand

Based on the outputs discussed on slide 41, the projected demand for retail and commercial floorspace to 2056 was calculated again.

Total retail floorspace demand under the alternative projections is expected to be 7,066 sqm between 2016 and 2036, with a further 38,443 sqm of floorspace demanded between 2036-56, see Table 8 .This amounts to a total floorspace demand of 45,509 sqm between 2016 and 2056 under the alternative model.

Total commercial floorspace demand in St Marys Town Centre is expected to grow by around 14,971 sqm between 2016 and 2036, this is expected to be followed by an additional demand for about 42,360 sqm of commercial floorspace between 2036 and 2056, with total floorspace demand growth approximately 57,331 between 2016 and 2056, see Table 9.

Retail Category	2016	2021	2026	2031	2036	2046	2056	Change 2016-2056
Supermarket	10,352	10,143	10,989	12,037	13,168	17,923	23,226	12,874
Other Food	2,854	2,997	3,284	3,471	3,744	5,130	6,635	3,781
Hospitality and Services	16,635	14,406	15,212	15,617	16,522	19,843	23,186	6,551
Clothing and Soft Goods	4,049	3,775	4,120	4,431	4,829	6,532	8,394	4,345
Household Goods	5,645	5,350	5,791	6,344	6,946	10,207	13,894	8,249
Other Retail	14,754	13,566	14,623	14,747	15,221	17,435	19,521	4,767
Department Stores	7,685	7,689	8,114	8,106	8,610	10,611	12,628	4,943
Total	61,974	57,926	62,134	64,752	69,040	87,680	107,483	45,509

Table 8: Retail floorspace gap analysis to 2056 under alternate scenario

Floorspace	2016	2021	2026	2031	2036	2046	2056	Change 2016-2056
Accommodation and Food Services	18,189	17,305	17,619	18,205	19,118	22,953	27,953	9,764
Financial and Insurance Services	4,408	5,030	5,691	6,149	6,536	7,728	9,694	5,286
Rental, Hiring and Real Estate Services	3,020	3,169	2,980	3,029	3,197	3,932	5,128	2,108
Professional, Scientific and Technical Services	2,132	1,941	2,533	2,790	3,008	3,678	4,778	2,646
Administrative and Support Services	6,783	5,990	6,940	7,584	7,926	9,375	11,910	5,127
Public Administration and Safety	2,822	3,398	3,677	3,960	4,260	5,109	6,492	3,670
Education and Training	9,592	10,878	11,339	12,526	13,705	18,393	22,145	12,553
Health Care and Social Assistance	7,787	7,791	8,452	9,337	10,325	14,480	18,182	10,395
Arts and Recreation Services	4,425	4,390	4,348	4,550	4,865	5,750	6,909	2,484
Other Services	6,650	7,497	7,660	7,567	7,838	8,751	9,947	3,297
Total	65,808	67,389	71,238	75,696	80,779	100,150	123,139	57,331

Table 9: Commercial floorspace gap analysis to 2056 under alternate scenario

Alternate Scenario: Retail & Commercial Floorspace Gap Analysis

Again noting, notional floorspace capacity (slide 36) suggested for 'shop-top' redevelopment for the high street and including shopping centres:

- Under a low scenario the potential yield for retail and commercial floorspace under current controls would be approximately 138,102sqm .
- Under a medium scenario the potential yield for retail and commercial floorspace under current controls would be approximately 163,258sqm
- Under a high scenario the potential yield for retail and commercial floorspace under current controls would be approximately 168,983sqm.

Using this notional capacity data and potential floorspace yield (slide 36), and the projected retail and commercial floorspace demand under the alternate scenario (data from slide 42, collated in Table 10), a floorspace gap was assessed.

When considering future demand for retail and commercial floorspace under the alternate future scenario, this indicates that under a low scenario for redevelopment, floorspace would potential run out slightly before 2031. For a medium or high scenario of redevelopment, floorspace would not run until after 2036.

Again, this reflects a need to protect the retail and commercial core of St Marys Town Centre and consider how future land use can cater for increased need of such floorspace.

Table 10: Total floorspace demand to 2056 under alternate scenario

Floorspace Demand	2016	2021	2026	2031	2036	2046	2056	Change 2016-56
Retail Floorspace	61,974	57,926	62,134	64,752	69,040	87,680	107,483	45,509
Commercial Floorspace	65,808	67,389	71,238	75,696	80,779	100,150	123,139	57,331
Total Floorspace Demand	127,782	125,315	133,372	140,448	149,819	187,830	230,622	102,840
Difference from base case*	0	-1,008	118	2,024	4,111	18,434	38,032	-

Note that this difference is calculated between the alternative scenario demand projections and floorspace demand calculated from updated TZP projections which are not publicly available, but which consider growth between 2011 and 2016. For this reason, these demand projections are not directly comparable to those in Section 3.2.

From Economic Analysis Study to Economic Strategy

The findings from the Economic Analysis Study are then used to develop an Economic Strategy for St Marys Town Centre, as shown in the flow chart below.

Qualitative & quantitative data analysis conducted for current day St Marys and future St Marys, including the two scenarios.

Results presented in the **Economic Analysis Study** and **Structure Plan**.

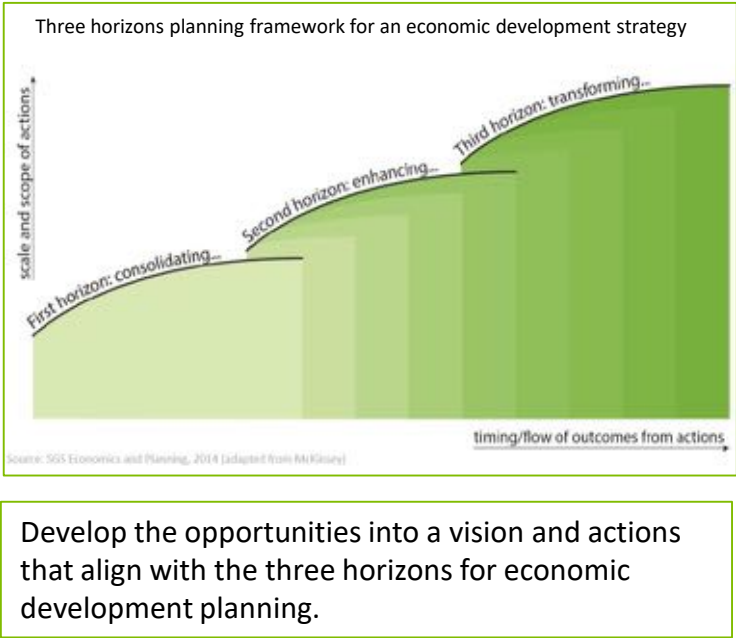


First Future Scenario – Population Serving Retail Centre

This scenario saw St Marys continuing to develop and grow along its population servicing trajectory, as a town centre servicing the local community in largely a retail capacity.

Alternate Future Scenario – Strategic Centre

The alternate scenario saw St Marys develop into a Strategy Centre for the Western Parkland City that diversifies its role and function to include retail and commercial elements.



St Marys Town Centre Economic Strategy

Development of short, medium and long term actions to assist the transformation of St Marys Town Centre into a Strategic Centre, aligned with the three horizon model and relating to timing of transport infrastructure investments.

8 Economic Strategy

An Economic Strategy for St Marys Town Centre

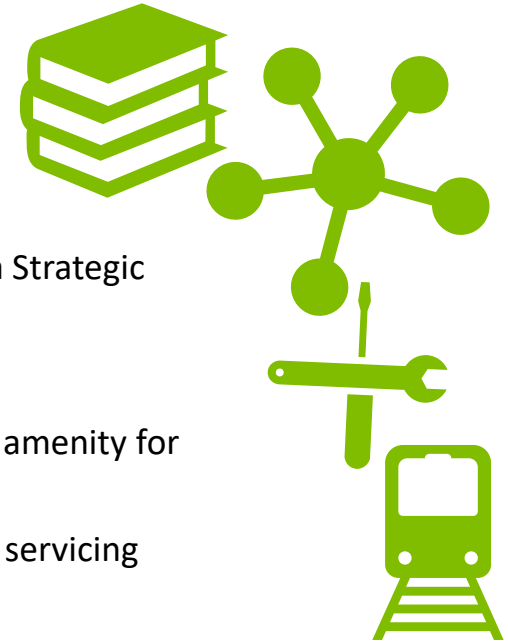
The Economic Strategy develops an approach to transform the St Marys Town Centre in the long-term into a Strategic Centre, as proposed under the Sydney Metropolis of Three Cities Plan.

As a Strategic Centre, St Marys will:

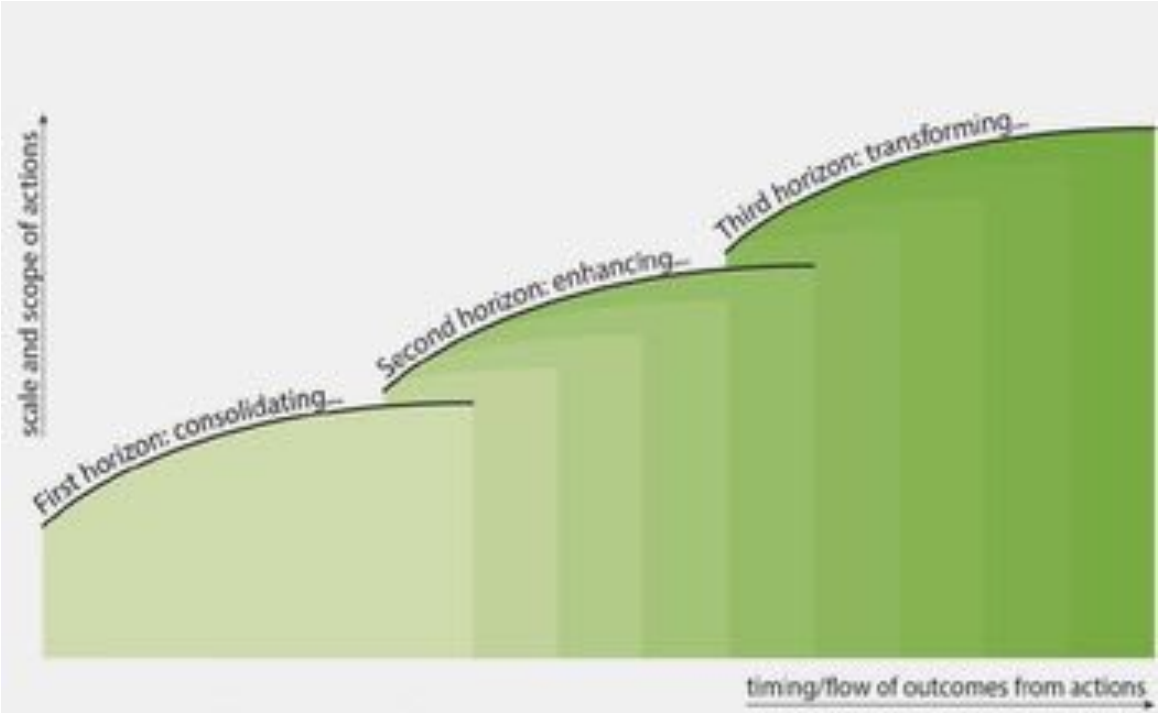
- Be a mixed-use strategic centre, that incorporates residential as well as employment land uses with high amenity for living and working.
- Will need to attract a diverse range of employment land uses, in addition to the growth of its population servicing functions such as higher order retail, health and education.
- Focus will be on building on the areas of strength such as manufacturing, transport and logistics and providing knowledge and technical services that add value to these sectors and service the proposed growth in the Western Economic Corridor, including WSA.
- Be a catalyst for urban renewal and diversification of employment will be the role of St Marys as a key transport hub in the Western Parkland City.


To achieve the above, the Economic Strategy identifies a vision, priorities and actions for St Marys Town Centre. The vision, priorities and actions have been developed in alignment with the Three Horizons timeframe (slide 47); the components of Economic Transformation (slide 48); and the elements of a strategic centre (slide 49). Refer to the following three slides for further explanation of these aspects.

Slides 50-77 contains the Economic Strategy vision, priorities and actions over the Three Horizons timeframe for St Marys Town Centre to support its progress towards being a Strategic Centre for Western Sydney.



Timeframes for an Economic Strategy: ‘Three Horizons’



Short Term	Medium Term	Long Term
Present to 2026	2026 – 2036	2036 - 2056
Consolidating strong foundations and the current strengths for future growth as a strategic centre	Enhancing St Marys in alignment with development of the drivers of change: WSA, Aerotropolis and NSRL	Transforming St Marys into a Strategic Centre for the Western Parkland City
		

Components for Economic Transformation

A successful economic strategy should deliver on the following through priorities and actions:

- Quality of Place
- Diversity & Inclusion
- Affordability
- Critical Mass
- Infrastructure
- Accessibility
- Anchor Institutions
- Competitive Advantage
- Collaboration



Figure 27: Components of economic transformation

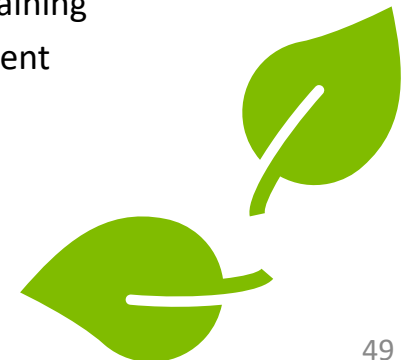
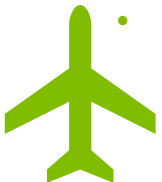
What is a Strategic Centre?



- A strategic centre is a location which attracts high levels of private sector investment
- Centres have a mix of activities, including a balance of commercial and retail activities, as well as incorporation of residential uses.
- High levels of amenity and strong walking and cycling networks for active transport
- Strength of employment knowledge-based employment, in addition to a population-servicing role and employment

For St Marys this will mean:

- Balanced retail & commercial employment, and the retention of capacity for significant long term employment expansion
- Diversification into professional, technical and scientific types of employment that support the surrounding Western Economic Corridor growth of manufacturing, transport and logistics businesses and activity
- Increase in businesses in the food and accommodation services, as part of the role for servicing the Western Economic Corridor and providing services to support visitors as part of the rail interchange facilities
- Growth in the already strong sectors of public administration as well as healthcare and education and training
- Retention of long-term capacity for office development, whilst allowing for some mixed use redevelopment incorporating residential into the centre
- Focus on amenity as well as walking and cycling networks for the centre, and
- Supporting the following vision, priorities and actions (see following slides).



St Marys Vision

The Future Role and Function of St Marys

*St Marys is a **resilient hub of connectivity**, grounded in its **rich history, local industry** and growing diversity. A spirited centre with a sense of place and belonging, St Marys embodies the **opportunity for growth and change**, offering **smart connections** within the centre as well as to the Greater Sydney region and Western Sydney Airport and Aerotropolis.*



St Marys will be one of the **strategic centres for employment growth and services** for the City of Penrith. The centre will complement the strategic centres of Penrith City Centre and the health and education precincts of Kingswood and Werrington.



St Marys will continue to be a **mixed-use centre** for local residents and workers with well designed residential development, retention of the traditional main street character, development of a central civic precinct and active transport linkages to surrounding educational and recreational opportunities, including South Creek regional park, schools and the university.



St Marys will **leverage the investment in transport**, and its accessible location as a key rail interchange for the Western Parkland City, to attract employment generating activities and services to locate in the centre.



St Marys will operate as a **higher-order retail** and service centre for the eastern areas of Penrith City as well as being a location for **knowledge, research and innovation businesses** that add value to the growth of the Western Economic Corridor and Western Sydney Airport. These businesses will build on existing industrial and manufacturing uses.

St Marys Priorities

1. Establish an **employment target** based on the aspirations for growth as a Strategic Centre in the Western Parkland City to 2056.
2. Establish a **partnership** between State and Local Government to deliver the new rail interchange on the North South Rail link as a catalyst for urban renewal, and link to the Western Sydney Airport.
3. Encourage well designed **mixed-use** residential renewal while protecting opportunities for medium to longer term commercial, knowledge and professional service employment growth.
4. Retain the **traditional 'main street' core** as part of the future character of the Strategic Centre, with development of strong linkages east-west from Queen Street to adjoining major sites.
5. Develop a **civic precinct** at the heart of the Strategic Centre, including community and cultural facilities as well as spaces for community events.



Figure 28: Examples commercial and civic precincts

St Marys Priorities

6. Utilise Council's **land assets** in the centre to facilitate urban renewal and attraction of knowledge and professional employment and services in the medium to long term.
7. Improve **north-south connections** over the rail line for better integration, and higher intensity employment use of the employment lands to the north of St Mary's railway station, as part of providing additional employment growth capacity.
8. Encourage a **specialisation** in the centre of knowledge-based and technical and research & development focused businesses adding value and servicing the advanced manufacturing and transport and logistics sectors within the Western Economic Corridor.
9. Establish a **high amenity centre** for living and working, including major expansion of tree canopy cover to reduce heat in the centre, public domain and in the Western City Parkland.
10. Develop a **multi-modal transport hub** with intermediate 'district' transport links, including active transport, into the strategic centre, for servicing of the Werrington-Kingswood education and health precinct.



Figure 29: Examples civic precinct and industrial/commercial development

Future Precincts

- Queen Street is reinforced as the main spine of the Town Centre providing excellent retail and pedestrian amenity. Greater activity and density is concentrated closer to the station.
- A Civic Precinct is envisioned at the heart of St Marys, building on the aspirations of existing controls and capable of supporting future populations of the area. The Precinct develops a series of civic and community spaces that reconnect Queen Street to the South Creek corridor and beyond.
- The Town Centre is expected to expand and deliver increased commercial activity, as well as housing choice supported by good amenity, retail activity and local connections.



The identified precincts build on the existing Town Centre structure. It intensifies uses and activity in important locations in anticipation of the new rail link, while also celebrating the high street character and creating a new civic heart.

- Station precinct**
Areas of highest density within the centre, highly accessible to current and future public transport.
- Queen Street North**
A focus on pedestrian amenity and high retail activity.
- Queen Street South**
Most accessible to neighbourhoods to the south, best parking and vehicle access.
- Civic precinct**
Organisation of public uses including key open spaces, community uses, and provides a civic focus to the centre.
- Southern corridor**
A vehicular movement corridor with a visible commercial offering.
- Community**
An existing community precinct to be reviewed with Civic precinct.
- Leisure precinct**
Provision of a recreational and environmental green corridor.
- Employment**
Existing light industrial areas with the potential for denser employment uses.
- Glossop Street precinct**
Medium to high density residential neighbourhoods within walking distance of public transport and Queen Street.
- Duration cottages**
Remnants of St Marys' socio-industrial history.

Short Term Actions: Consolidating strong foundations

Action	Precinct	Lead	Partner
S1. Protect the character and the commercial potential of Queen Street by: <ul style="list-style-type: none"> -Revising character controls for precincts in the Strategic Centre -Setting residential development away from the Queen Street frontage (see Action In Detail, slide 63) -Requiring ground and first floor mixed use floorspace to be for employment related uses, including the eventual redevelopment of Council at grade carparks (see Action in Detail, slide 66) 	Queen Street North; Queen Street South	Council	
S2. Improve retail activation and linkages by: <ul style="list-style-type: none"> -Establishing strong east-west laneways from Queen Street to major sites and carparking -Promoting dual retailing frontages for Queen Street properties, including public domain improvements on rear lanes 	Queen Street North; Queen Street South	Council	
S3. Improve carpark amenity and laneways east and west of Queen Street, with public domain enhancements and clear links in the right locations to neighbouring areas, for example to the Glossop Street Precinct	Queen Street North; Queen Street South	Council	
S4. Establish a partnership with Transport for NSW about future renewal and configuration of the rail station precinct and bus interchange at St Marys station (see Action in Detail, slide 64)	Station	Council	TfNSW
S5. Develop a plan and commence a first stage to consolidate Council at-grade carparks around the station (see Action in Detail, slide 66)	Station	Council	
S6. Master plan, with major land-holders, the future establishment of a new Civic Precinct and related spaces at the heart of St Marys	Civic	Council	Major land holders
S7. Investigate the relocation of existing and new community and cultural facilities to form part of a new Civic Precinct	Civic, Community and other related	Council	
S8. Revise planning controls to ensure residential development is set back from the highway	Southern	Council	
S9. Develop an active transport connection east-west from the Town Centre along Charles Hackett Drive as a 'green corridor' connecting to South Creek regional parkland and recreation	Leisure	Council	
S10. Develop targets to increase tree canopy and reduce heat impacts in the Town Centre, including updating development controls and a staged tree planting program in the public domain, parks and in at grade carparking areas	All	Council	
S11. Collaborate with the NSW Land and Housing Corporation on the renewal of the current social housing stock adjoining the St Marys Strategic Centre	Glossop Street; Duration	Council	NSW Land and Housing Corporation
S12. Establish a funding plan for the development of the Strategic Centre, including use of contributions plans and value sharing mechanisms and other income		Council	
S13. Develop and implement a strategy that improves community safety through measures such as public domain improvements, like lighting and active shop fronts, to assist development of the night-time economy	All	Council	
S14. Share the vision for St Marys with local business chambers and local communities to ensure all stakeholders are working towards a coordinated development pathway for St Marys.	All	Council	Local stakeholders

Present to 2026

Structure Plan

Stage 1 (2026) - Immediate actions

Improving St Marys today and safeguarding the future character and amenity of the precinct to support increased growth with the arrival of the new rail link (Stages 2 and 3).

Key actions

- 1 Focus activation of lanes and car parks - Streetscape projects and through getting the right outcomes from private development
- 2 Provide routes and through site links in right locations - New DCP controls required. Preferred location of through site links shown in plan adjacent.
- 3 Review Queen Street built form and land use character - The DCP requires review in light of DAs and changed market conditions. Further information on this is shown in the Queen Street Typology Testing in Section 2.6 of this document.
- 4 Prioritise high density mixed use near station - Some increases to height and density may be appropriate.
- 5 Prioritise green east-west connection - Plan and implement improvements to Charles Hackett Drive as the key link from St Marys to the west including consideration of future changes to link in Stage 2.
- 6 Plan for Great Western Highway - Review planning controls to ensure residential development is set back from the highway.



2.3 Future town centre character precedents

Stage 1 focus

1 Station precinct



Improving connections: Chawson interchange, Chawson



Integrated with other uses: Chawson interchange, Chawson



Using private sites + activation: Central Road Precinct, Victoria



Distinctive places: Jewell Precinct, Brunswick

Queen Street



High quality public domain: Queen Street, St Marys



Active through open connections: Burwood, NSW



Build form and street scale: Glen, Hawthorne



Improving connections to near town: Glenview Lane, Mudgee Bay



Medium Term Actions: Enhancing accessibility as a catalyst for renewal

Action	Precinct	Lead	Partner
M1. Collaborate with Transport for NSW on the design and delivery of the interchange to ensure improved north-south accessibility across the rail corridor is provided, multi-modal transport facilities support the station node and adequate safety measures are included in urban design to support greater safety and passive surveillance during day and night.	Station	TfNSW	Council
M2. Masterplan urban renewal of the Station Precinct, including redevelopment of the Council carparking near the future rail interchange for commercial and employment uses (see Action in Detail, slide 64, 66)	Station	Council	
M3. Revise planning framework for the IN1 zone to the immediate north of the rail station, for higher intensity employment related land use that supports the strategic centre (see Action in Detail, slide 68)	Employment	Council	
M4. Develop the first stage of the new Civic Precinct for the Strategic Centre, including use of the consolidated council carparks (see Action in Detail, slide 66), develop the Precinct with consideration to day and night uses.	Civic	Council	
M5. Consider the alternate uses for community sites south of the Great Western Highway	Southern	Council	
M6. Collaborate with private sector and government to establish a knowledge, research and innovation centre in St Marys as a focus for networking and growth of the advanced manufacturing, transport and logistics capacity in the Western Economic Corridor	As relevant	Council	Private sector and Government
M7. Establish a property plan, which compliments the carparking plan, for the staged redevelopment of Council land assets for attraction of employment-related land uses	As relevant	Council	
M8. Complete a first stage in the consolidation of Council carparking and Council property plan to leverage land assets for development of employment in the strategic centre	Station	Council	
M9. Plan for strong intermediate transport links between St Marys and the Penrith health and education precincts	Leisure	Council	TfNSW
M10. Develop branding and marketing for the Strategic Centre as being accessible to opportunities of the Western Economic Corridor for manufacturing, transport and logistics	As relevant	Council	
M11. Complete upgrades to the public domain and parkland in and surrounding the Town Centre, including active transport linkages as social infrastructure for a higher density residential population	As relevant	Council	

2026 to 2036

Structure Plan

Stage 2 (2036) - Delivery of new rail link

Planning for growth of St Marys around the arrival of the new rail link including building employment, residential and community uses and improving amenity around this.

Key actions

- 1 New interchange with North South Rail Link - on delivery this should improve links, station access and focus on provision of high-quality amenity
- 2 Improved connection across rail
- 3 Increase employment density
- 4 Use Council car park sites for targeted uses - sites near the station are more suited for development
- 5 Civic Place - consolidate Council-owned parks and car parking sites to create a new civic space. Integrate development with surrounding land holdings where possible. New roads may be provided to break up the block
- 6 Community services - review role of existing community services with new Civic Place (see 5)
- 7 Increase residential density in accessible places
- 8 Plan for intermediate transport link towards Werrington/Kingswood



2026 to 2036

Future town centre character precedents

Stage 2 focus

1 Civic precinct



Great open space, Paul Keating Park, Warragwilly



Mix of community facilities and open space, Chesham Leisure Centre, Chesham



High quality development, Bay Street, Geelong



Mix of public space buildings, Northern Plaza, Monash University

2 Commercial uses



Incubators adjacent to amenities, The Dock, Sydney



Mix of production, office and retail, Black Star Factory, Moseley Park



Mid-small-mid scale investment, Auckland



Dense employment uses in industrial zone, Italy



3 Landscape quality



Green, active streets, Bourke Street, Darling Hills



Great pedestrian amenity, Crown Street, Darling Hills

Long Term Actions: Transformation and growth as a strategic centre

Action	Precinct	Lead	Partner
L1. Complete the final stage in the consolidation of Council carparking and Council property plan to leverage land assets for development of employment in the strategic centre.	As relevant	Council	
L2. Review commercial growth and capacity, and consider: <ul style="list-style-type: none"> • Expansion of higher density employment related development north of the rail corridor (see Action in Detail, slide 68) • Review the retail specialisation and night-time economy to ensure it relates to the identity of St Marys Town Centre • Increased commercial density along the Great Western Highway frontage • Medium to high density residential redevelopment in the Glossop Street precinct for residential population close to centre (see Action in Detail, slide 67) • Additional residential capacity in neighbouring areas to the west of Queen Street • Further mixed use residential incorporated into the Town Centre core areas and major sites, with 2 levels employment related activities. 	Station; Queen Street North; Queen Street South; Southern; Glossop Street	Council	
L3. Collaborate with the TfNSW on the delivery of the North South Rail Link to the north west of Sydney, including Rouse Hills and Schofields.	Station	TfNSW	Council
L4. Facilitate location of anchor employer for the strategic centre, focused on adding value through knowledge and innovation to the transport, logistics and the manufacturing sectors in the Western Economic Corridor	As relevant	Council	Relevant stakeholders
L5. Continue programs for improving social infrastructure, including community/cultural facilities, recreation, parkland and tree canopy and active transport for a growing centre.	As relevant	Council	
L6. Actively monitor and review employment generation and type, including the broader growth of the Western Economic Corridor and WSA – particularly in manufacturing, transport and logistics knowledge and innovation.	As relevant	Council	
L7. Establish partnership with university/TAFE and private sector for location of student accommodation and services in the mixed-use strategic centre.	As relevant	Council	Tertiary Education Sector

Structure Plan

Stage 3 (2056) - Future potential

These potential further outlets for growth are likely to not change in role significantly to Stage 2. They should however be included within future reviews of the centre as needs change over time.

Key actions

-  **Commercial growth** - potential for expansion of medium to high density commercial north of the station.
-  **Residential growth** - potential for expansion of medium to high density residential.
-  **Additional residential capacity** - potential for medium density residential within the Durston Cottages precinct.
-  **Highway commercial** - Potential to increase commercial density along Great Western Highway.





9 Actions in Detail

Action In Detail

Setting residential development away from the Queen Street frontage

2.7 Queen Street typology testing

The structure plan Stage 1 includes to 'Review Queen Street built form and land use character'. This is based on Architectus' review of the discrepancy between recent DA approvals and the existing DCP as well as the need to consider the future of these sites in providing employment floorspace towards St Mary's employment potential.

The following testing forms a basis for future considerations on this issue.

Option A and B describe what is currently being approved (based on approved development on 151-153 Queen Street) against a building envelope under current planning controls.

Alternative typologies test different massing configurations and land use scenarios. General considerations include:

- A 3-storey street wall height is considered to be a good scale for Queen Street.
- A 3-4m front setback (compliant with DCP).
- Minimum 3m rear setback to allow for additional footpath space along the rear lane.
- A minimum 3m setback for levels above street wall.
- Adequate building separation compliant with the Apartment Design Guide (ADG).
- A retail ground floor with potential commercial uses on the 1st level fronting Queen Street (as per DCP). Note this improves commercial capacity however impacts on viability.

General testing assumptions

Maximum height	5 to 9 storeys
Site dimensions	24m x 50m (44m x 50m for option E)
Total FSR	2.5:1 (except for Scenario A)
Commercial FSR	0.8:1 - 1.1:1 (except for commercial-only options)

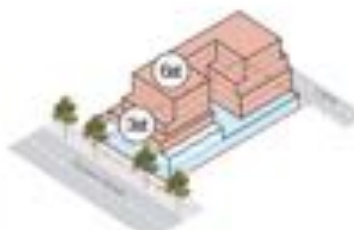
† Subject to detailed built form testing

Existing built form potential



A. Current DA approval (approx 2.5:1 FSR)

- ✓ Best viability
- ✗ Some variation from SEPP 65 separation requirements
- ✗ Bulky form
- ✗ Little commercial use being delivered



B. Strict application of controls (2.5:1 FSR)

- ✓ Requirement for 2nd storey commercial (see figure E16.5 in the DCP) provides some future retail capacity
- ✗ Bulky form may create problematic streetscape if replicated over length

Alternative typologies



C. Alternative street wall (2.5:1 FSR)

- ✓ Some improvement to articulation and bulk



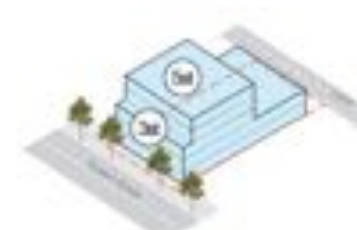
D. Height focus to lane (2.5:1 FSR)

- ✓ Best solar access to Queen Street
- ✗ May have separation issues if future buildings developed across lane
- ✗ Relies on significant improvement to lane



E. Tower form (2.5:1 FSR)

- ✓ Best amenity for residents
- ✗ Greater amalgamation requirements
- ✗ Viability issues



F. Commercial-only (2.5:1 FSR)

- ✓ Best protection of commercial capacity
- ✗ Viability concerns. Unlikely to see development in short to medium term.
- ✗ Planning risk. Removal of residential potential requires OPE review/sign-off

Action In Detail

Renewal for the Station Precinct

Council will collaborate with, and develop an agreement with Transport for NSW to deliver an interchange that ensures integrated transport and land use planning and supports urban renewal of the surrounding precinct.

Integrated transport and land use planning will involve preparation of a masterplan for the surrounding precinct and subsequent changes to the LEP and DCP.

The Station Precinct planning will seek to achieve the following:

- Redevelopment of the existing bus interchange, Council car-parking and the current rail station and land to the immediate north as part of a redevelopment proposal.
- Develop of high quality pedestrian connection north-south through the interchange to connection the St Marys Town Centre to the industrial and commuter parking precinct to the north.
- Facilitation of space for services that will support the interchange role, including retail and accommodation land uses for visitors.
- Development of office space as part of the interchange precinct, with the opportunity for attraction of small to medium sized businesses to locate in a highly accessible location.
- Development of a rail-bus hub to connect to the surrounding district.
- Creation of a high quality public domain with public spaces and shade to support the interchange uses.
- Involvement of the Western Sydney Development Authority as an opportunity for collaboration and to consolidate land holdings for redevelopment.

Figure 31: Example Newcastle interchange



Action In Detail

Use of Council Land for Employment Diversification

St Marys has the advantage that it has considerable land used for at grade carparking to the east and west of Queen Street. There is the opportunity over time to redevelopment this land for employment related land uses, whilst consolidating parking into a central location to support the Town Centre.

It is proposed that Council develop a plan for the redevelopment of these sites over the long term, with the following priorities:

- In the short term it is proposed that Council develop a plan and invest in improving the public domain, appearance, linkages and shade for the current carparking areas.
- In the short term investigate use of the Council carpark assets (green zone 1, see slide 66) close to the proposed rail interchange into a masterplan for future renewal of this Station Precinct. The interchange will provide a catalyst for future development and Council should seek to ensure initial opportunities for commercial floorspace are provided in an accessible location to support. There are opportunities for the urban renewal in the Station Precinct to have high quality urban design, public domain as well as a residential component in an accessible location.
- In the short and medium term, as part of the planning for the Civic Precinct at the heart of St Marys, plan for the consolidation of public carparking in this central location (yellow zone 2, see slide 66). For long term, it is proposed to retain the Council carparking land assets, located between the Civic Precinct and Queen Street, for future commercial and office development capacity. Mixed use development of these lands would not be encouraged. This area is in a central location close to the proposed Civic Precinct, and would support long term development.
- In the medium to long term, Council could investigate the potential for mixed use development of the Council land assets located to the east and west of Queen Street (pink zone, see slide 66). There may be opportunities for these to retain the two storeys of retail and commercial development, while also building opportunities for higher density apartments to be incorporated close into the Town Centre. To achieve this redevelopment, focus on activating the rear of the Queen Street allotments will be required, as will the development of a high quality laneway public domain. Through site linkages should be retained with any further development.



Action In Detail

Use of Council Land for Employment Diversification

2.4 Use of Council land

Fareth City Council own a number of sites within the town centre including existing surface car parks, as well as Kokoda Park and Lang Park, much of which has been reclassified as operational land.

There is an opportunity to utilise Council's land assets to support the future growth of St Mary's town centre. This will most likely occur as a staged process (described adjacent), where sites considered most suitable for development are those that may coincide with renewal around the station and the Civic Precinct.

1 Short term



Commercial office spaces. City work, Melbourne

2 Civic precinct



Accommodating Civic Precinct

3 Other lands



Accommodating professional services. Marquess Park



Key plan - Council land

Mixed use development is considered appropriate adjacent to the future interchange, however maximising employment potential. There is the opportunity to kick-start commercial uses with the right user. This may come in the form of a commercial podium within the station precinct, accommodating incubators and small office spaces that support knowledge jobs.

The proposed Civic Precinct consists of land owned by council, including Kokoda Park, Lang Park and adjacent car parks.

A master plan should be developed to promote the right outcomes for the precinct. This should include consideration of:

1. A local high-quality park.
2. Getting the right mix of uses, including the potential consolidation of Council's community facilities as well as new desired commercial uses.
3. Activation of public spaces.
4. Breaking up the large street block.
5. Consolidation of parking.
6. Providing the desired connection along Charles Hackett Drive.
7. Working with landowners to achieve common objectives.

Other Council land to the east and south of the centre and north of Charles Hackett Drive are considered to be of lesser priority in the short to medium term. They may be held until later for delivery and could provide uses such as stand alone offices that may not be viable today.

Action In Detail

Accommodating Residential Floorspace

St Marys has the potential to deliver future residential density within 5 to 10-minute walking distance to the train station. Residential uses should generally be provided outside of any commercial need, but also allow capacity to grow for the future to meet demand in viable forms.

This can be provided within two key areas:

- **Glossop Street Precinct:** A densification of residential uses immediately adjacent the town centre and station. This can range from town houses to mid-rise and high density apartments.
- **Mixed use:** The lots along Queen Street and large shopping centre sites have the potential to provide mixed use development, retail and commercial on lower levels with residential above. Greater densities are accommodated closer to the station.



General assumptions	
3-6 storey apartments	1:1 - 2:1 FSR
7+ storey apartments	3:1 - 4:1 FSR
Mixed use (3-6 storeys)	1.5:1 - 1.7:1 Residential FSR
Mixed use (7+ storeys)	2:1 - 3:1 Residential FSR

*Subject to detailed built form testing

1 Glossop Street Precinct



Townhouses, The Gordon, Flemington



5.5 storey residential development, Floralid Park, Forest Lodge



6 storey residential development, Valentin Place, Thornbury

2 Mixed use



Mixed-use shopping housing, Mordialloc Road, Mordialloc



High density mixed-use, East Village, Victoria Park

Action In Detail

Accommodating Commercial Floorspace

Four areas have been identified that are considered suitable to accommodate future commercial floor space within St Marys. These include:

1. Queen Street
2. Station precinct
3. Council car park sites
4. IN2 zone north of the rail



Key plan - potential commercial areas and types



IN2 small-scale mixed use, Auckland

1 Queen Street

- See 2.6 for discussion of potential Queen Street typologies.
- Likely uses - ground floor retail (small footplates) plus office above (small footplate).
- Increasing office use likely to impact on viability of mixed use developments.
- Approximate commercial FSR* 0.3:1 (ground floor retail only), up to 1:1 (3 storeys) or 2.5:1 (entirely zoned commercial).



Commercial podium, East Village, Victoria Park

2 Station precinct

- Increased levels of commercial use as compared to majority of Queen Street may be possible (e.g. medical, childcare, gym, accommodation).
- Likely small footplates except for shopping centre site.
- Approximate commercial FSR* 1:1-2:1 (for 2-5 storeys commercial use).



State alone office, 6 Town Park Drive, Macquarie Park

3 Council car parks

- Commercial development on car park sites has potential to accommodate uses to support Council's aspiration.
- Good office footplates are possible however the relationship of buildings to neighbouring uses (Queen Street and residential behind) can be problematic.
- Approximate commercial FSR* - 2.5:1 (5 storey office building).




Mix of production spaces, office and retail, Block One, Pecky headquarters, Moore Park

4 IN2 zone

- Accommodating denser employment uses may be a priority particularly in accessible locations.
- This may be components related to industrial uses (e.g. support services to freight and logistics, knowledge jobs, etc.).
- Large office footplates possible.
- This should be considered within the wider strategic objectives for preserving employment lands.
- Approximate commercial FSR* - 1:1-2:1 (mixed buildings with ancillary office components).

*Subject to detailed built form testing



St Marys

10 Implementation & Monitoring |

Delivery of Economic Transformation

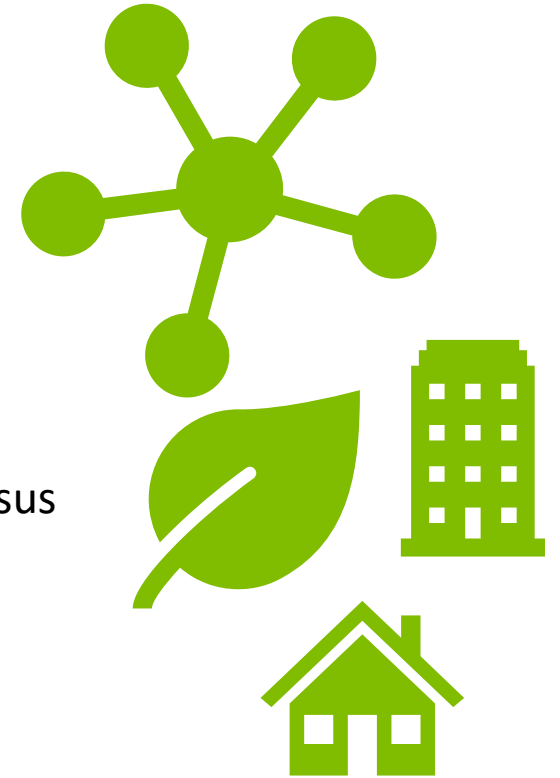
- Changes to the planning framework are proposed and regular five year 'progress' reviews should be programmed
- Utilisation of public assets to facilitate transformation is a key part of strategy and a strategic business case should be prepared as the basis for this reuse
- Public and private sector partnerships & investment will require collaboration over the long term and formal arrangements should be established.
- Leveraging off the establishment of the St Marys transport interchange as catalyst for change will require surrounding precinct planning alongside interchange design
- Creation of a centre that also has a high quality environment, public domain, social and cultural facilities and recreational opportunities will require funding – including contributions plans
- Investment in human resources, skills and education should be part of complementary city-wide ED strategies
- Performance monitoring should be undertaken regularly – based on performance indicators

Figure 32: Components of economic transformation



Performance Indicators

1. Employment by industry type - review at each 5 year census
2. Town centre floorspace - regular 5 year audit
3. Effective job density - accessibility mapping
4. Population living in the centre & surrounds - at each 5 year census
5. Travel mode share change for public & active transport
6. Partnerships & collaborations - review against strategy
7. Tree canopy cover & heat monitoring
8. Centre user survey including night-time - regular 5 years survey
9. Provision of affordable and social housing within 800m of centre
10. Development activity - completion by type/value, dwellings & floorspace





6 Big Ideas to Progress for St Marys Town Centre


1. Establish a **DEVELOPMENT AGREEMENT** between Council and Transport for NSW to facilitate urban renewal of station precinct as part of the new transport interchange development.
2. Facilitate long-term employment development through program of **REUSE** of Council at-grade carparking assets.
3. Develop a Civic Place that is the **CENTRE OF FOCUS** for St Mary's Strategic Centre.
4. Partnership with private sector to establish at St Marys as a **HUB and NETWORK** for knowledge, innovation and research businesses for manufacturing, freight and logistics in the western economic corridor.
5. Work to attract relocation of an **ANCHOR** private sector business **INSTITUTION** working to add value in the manufacturing, transport and/or logistics sector (including leveraging councils land assets for attraction).
6. Fund a major program of tree canopy and planting and **PARKLAND AND PUBLIC DOMAIN UPGRADE** to reduce heat will be critical to long-term success as a strategic centre.





Summary: Vision, Priorities and Actions

Vision	Priorities	Actions	Short	Med	Long	Economic Outcome
<p>St Marys will be one of the strategic centres for employment growth and services for the City of Penrith. The centre will complement the strategic centres of Penrith City Centre and the health and education precincts of Kingswood and Werrington</p> 	<p>Establish an employment target based on the aspirations for growth as a Strategic Centre in the Western Parkland City to 2056</p>	S8. Revise planning controls to ensure residential development is set back from the highway	●			Critical Mass Infrastructure
		S12. Establish a funding plan for the development of the Strategic Centre, including use of contributions plans and value sharing mechanisms and other income	●			Critical Mass Infrastructure
		S14: Share the vision for St Marys with local business chambers and local communities to ensure all stakeholders are working towards a coordinated development pathway for St Marys.	●			Collaboration
		M2. Masterplan urban renewal of the Station Precinct, including redevelopment of the Council carparking near the future rail interchange for commercial and employment uses.		●		Critical Mass Quality of Place Competitive Advantage
		M3. Revise planning framework for the IN1 zone to the immediate north of the rail station, for higher intensity employment related land use that supports the strategic centre.		●		Critical Mass Competitive Advantage

Vision	Priorities	Actions	Short	Med	Long	Economic Outcome
<p>St Marys will leverage the investment in transport, and its accessible location as a key rail interchange for the Western Parkland City, to attract employment generating activities and services to locate in the centre</p> 	<p>Establish a partnership between State and Local Government to deliver the new rail interchange on the North South Rail Link as a catalyst for urban renewal, and link to the Western Sydney Airport</p>	S4. Establish a partnership with Transport for NSW about future renewal and configuration of the rail station precinct and bus interchange at St Marys station.	●			Collaboration Infrastructure Competitive Advantage Accessibility
		L3. Collaborate with the TfNSW on the delivery of the North South Rail Link to the north west of Sydney, including Rouse Hills and Schofields.			●	Collaboration Infrastructure Competitive Advantage Accessibility
	<p>Improve north-south connections over rail line for better integration, and higher intensity employment use of the employment lands to the north of St Mary's railway station, as part of providing additional employment growth capacity.</p>	M1. Collaborate with Transport for NSW on the design and delivery of the interchange to ensure improved north-south accessibility across the rail corridor is provided, multi-modal transport facilities support the station node and adequate safety measures are included in urban design to support greater safety and passive surveillance during day and night.		●		Collaboration Infrastructure Competitive Advantage Accessibility Diversity & Inclusion
	<p>Develop a multi-modal transport hub with intermediate district transport links into the strategic centre, including for servicing of the Werrington-Kingswood education and health precinct.</p>	M9. Plan for strong intermediate transport links between St Marys and the Penrith health and education precincts		●		Quality of Place Infrastructure Accessibility

Vision	Priorities	Actions	Short	Med	Long	Economic Outcome
<p>St Marys will operate as a higher-order retail and service centre for the eastern areas of Penrith City as well as being a location for knowledge, research and innovation businesses that add value to the growth of the Western Economic Corridor and Western Sydney Airport and build on existing industrial and manufacturing uses.</p> 	Utilise Council's land assets in the centre to facilitate urban renewal and attraction of knowledge and professional employment and services in the medium to long term.	S5. Develop a plan and commence a first stage to consolidate Council at-grade carparks around the station.	●			Critical Mass Infrastructure
		M7. Establish a property plan, which compliments the carparking plan, for the staged redevelopment of Council land assets for attraction of employment-related land uses		●		Critical Mass Infrastructure Affordability Diversity & Inclusion
		M8. Complete a first stage in the consolidation of Council carparking and Council property plan to leverage land assets for development of employment in the strategic centre.		●		Critical Mass Infrastructure
		L1. Complete the final stage in the consolidation of Council carparking and Council property plan to leverage land assets for development of employment in the strategic centre.			●	Critical Mass Infrastructure
	Encourage a specialisation in the centre of knowledge-based and technical and research and development focused businesses adding value and serving the advanced manufacturing and transport and logistics sectors within the Western Economic Corridor	M6. Collaborate with private sector and government to establish a knowledge, research and innovation centre in St Marys as a focus for networking and growth of the advanced manufacturing, transport and logistics capacity in the Western Economic Corridor		●		Collaborate Diversity & Inclusion
		M10. Develop branding and marketing for the Strategic Centre as being accessible to opportunities of the Western Economic Corridor for manufacturing, transport and logistics		●		Competitive Advantage Accessibility
		L4. Facilitate location of anchor employer for the strategic centre, focused on adding value through knowledge and innovation to the transport, logistics and the manufacturing sectors in the Western Economic Corridor			●	Anchor Institutions Collaboration
		L6. Actively monitor and review employment generation and type, including the broader growth of the Western Economic Corridor and WSA – particularly in manufacturing, transport and logistics knowledge and innovation.			●	Diversity & Inclusion

Vision	Priorities	Actions	Short	Med	Long	Economic Outcome
<p>St Marys will continue to be a mixed-use centre for local residents and workers with well designed residential development, retention of the traditional main street character, develop of a central civic precinct and active transport linkages to surrounding educational and recreational opportunities, including South Creek regional park, schools and the university.</p> 	Encourage well designed mixed-use residential renewal while protecting opportunities for medium to longer term commercial, knowledge and professional service employment growth.	<p>S1. Protect the character and the commercial potential of Queen Street by:</p> <ul style="list-style-type: none"> -Revising character controls for precincts in the Strategic Centre -Setting residential development away from the Queen Street frontage. -Requiring ground and first floor mixed use floorspace to be for employment related uses, including the eventual redevelopment of Council at grade carparks. 	●			Quality of Place Diversity & Inclusion Competitive Advantage
		S11. Collaborate with the NSW Land and Housing Corporation on the renewal of the current social housing stock adjoining the St Marys Strategic Centre	●			Collaboration Diversity & Inclusion Affordability
		L7. Establish partnership with university/TAFE and private sector for location of student accommodation and services in the mixed-use strategic centre.			●	Collaboration Diversity & Inclusion
		<p>L2. Review commercial growth and capacity, and consider:</p> <ul style="list-style-type: none"> • Expansion of higher density employment related development north of the rail corridor. • Review the retail specialisation and night-time economy to ensure it relates to the identity of St Marys Town Centre • Increased commercial density along the Great Western Highway frontage • Medium to high density residential redevelopment in the Glossop Street precinct for residential population close to centre. • Additional residential capacity in neighbouring areas to the west of Queen Street • Further mixed use residential incorporated into the Town Centre core areas and major sites, with 2 levels employment related activities. 			●	Critical Mass
	Retain the traditional 'main street' core as part of the future character of the Strategic Centre, with development of strong linkages east-west from Queen Street to adjoining major sites.	<p>S2. Improve retail activation and linkages by:</p> <ul style="list-style-type: none"> -Establishing strong east-west laneways from Queen Street to major sites and carparking -Promoting dual retailing frontages for Queen Street properties, including public domain improvements on rear lanes 	●			Quality of Place Accessibility
		S3. Improve carpark amenity and laneways east and west of Queen Street, with public domain enhancements and clear links in the right locations to neighbouring areas, for example to the Glossop Street Precinct	●			Quality of Place Accessibility

Vision	Priorities	Actions	Short	Med	Long	Economic Outcome
<p>St Marys will be a mixed-use centre continued</p> 	Develop a civic precinct at the heart of the Strategic Centre, including community and cultural facilities as well as spaces for community events.	S6. Master plan, with major land-holders, the future establishment of a new Civic Precinct and related spaces at the heart of St Marys.	●			Collaboration Quality of Place
		S7. Investigate the relocation of existing and new community and cultural facilities to form part of a new Civic Precinct	●			Quality of Place
		M4. Develop the first stage of the new Civic Precinct for the Strategic Centre, including use of the consolidated council carparks, develop the Precinct with consideration to day and night uses.		●		Critical Mass Infrastructure Quality of Place
	Establish a high amenity centre for living and working, including major expansion of tree canopy cover to reduce heat in the centre, public domain and in the Western City Parkland.	S9. Develop an active transport connection east-west from the Town Centre along Charles Hackett Drive as a 'green corridor' connecting to South Creek regional parkland and recreation	●			Quality of Place Accessibility
		S10. Develop targets to increase tree canopy and reduce heat impacts in the Town Centre, including updating development controls and a staged tree planting program in the public domain, parks and in at grade carparking areas	●			Quality of Place
		M11. Complete upgrades to the public domain and parkland in and surrounding the Town Centre, including active transport linkages as social infrastructure for a higher density residential population		●		Quality of Place
		L5. Continue programs for improving social infrastructure, including community/cultural facilities, recreation, parkland and tree canopy and active transport for a growing centre.			●	Quality of Place
		S13. Develop and implement a strategy that improves community safety through measures such as public domain improvements, like lighting and active shop fronts, to assist development of the night-time economy	●			Quality of Place Accessibility Infrastructure

Attachment A: St Marys Structure Plan



architectus

Urban analysis and structure plan

St Marys town centre



Prepared for: SGS
Date: July 15, 2019

Urban analysis and structure plan

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Project and report	St Marys town centre	
Date	July 15, 2019	
Client	SGS	
Document no.	\\architectus.local\DFS\Projects\180415.00\Docs\C_Client	
Version and date issued	Issue A (Internal draft) - 25/01/19	Approved by: Oscar Stanish
	Issue B (Draft to client) - 01/02/19	Approved by: Oscar Stanish
	Issue C (Issue to Council) - 28/02/19	Approved by: Oscar Stanish
	Issue D (Final issue) - 02/04/19	Approved by: Oscar Stanish
	Issue E (Final issue revised) - 15/07/19	Approved by: Oscar Stanish
Report contact	Oscar Stanish Associate, Urban Design	
This report is considered a draft unless signed by a Director or Principal	Approved by:	

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	1.3	Current planning controls 8
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Introduction

Purpose

Architectus has been engaged to provide urban design analysis and structure planning in support of SGS Economics and Planning (SGS) engagement by Penrith Council to provide an Economic Profile and Economic Development Strategy for St Marys Town Centre.

The focus of the broader study is to:

- 1. Undertake an Economic Activity Study to identify the future role and function of St Marys in the hierarchy of centres as a result of the significant rail interchange and identify strengths and opportunities to fundamentally change the strategic position of the Town Centre over time.
- 2. Prepare an Economic Development Strategy that captures current and future strengths and opportunities.

This report supports the above strategy through presenting urban design opportunities and constraints and following this a structure plan for the future of St Marys. This is focussed around the anticipated growth of St Marys as a Strategic Centre with the delivery of the proposed north-south rail link connection.

Study area

The core study area consists of the land bounded within the St Marys town centre boundary (indicated in red on the adjacent map). It is bounded by the railway corridor to the north, Great Western Highway and Sainsbury Street to the south, Gidley Street to the east and Charles Hackett Drive and Carinya Avenue to the west.

Secondary areas (indicated in green on the adjacent map), include land immediately adjacent the centre, considered important to the future structure and connectivity of the area.



1 Analysis

This section consists of a detailed analysis of the existing context of St Marys town centre in order to distil key issues and opportunities for its future. This includes:

- Understanding its strategic context.
- Current planning and DCP controls.
- Existing urban structure, form and quality.

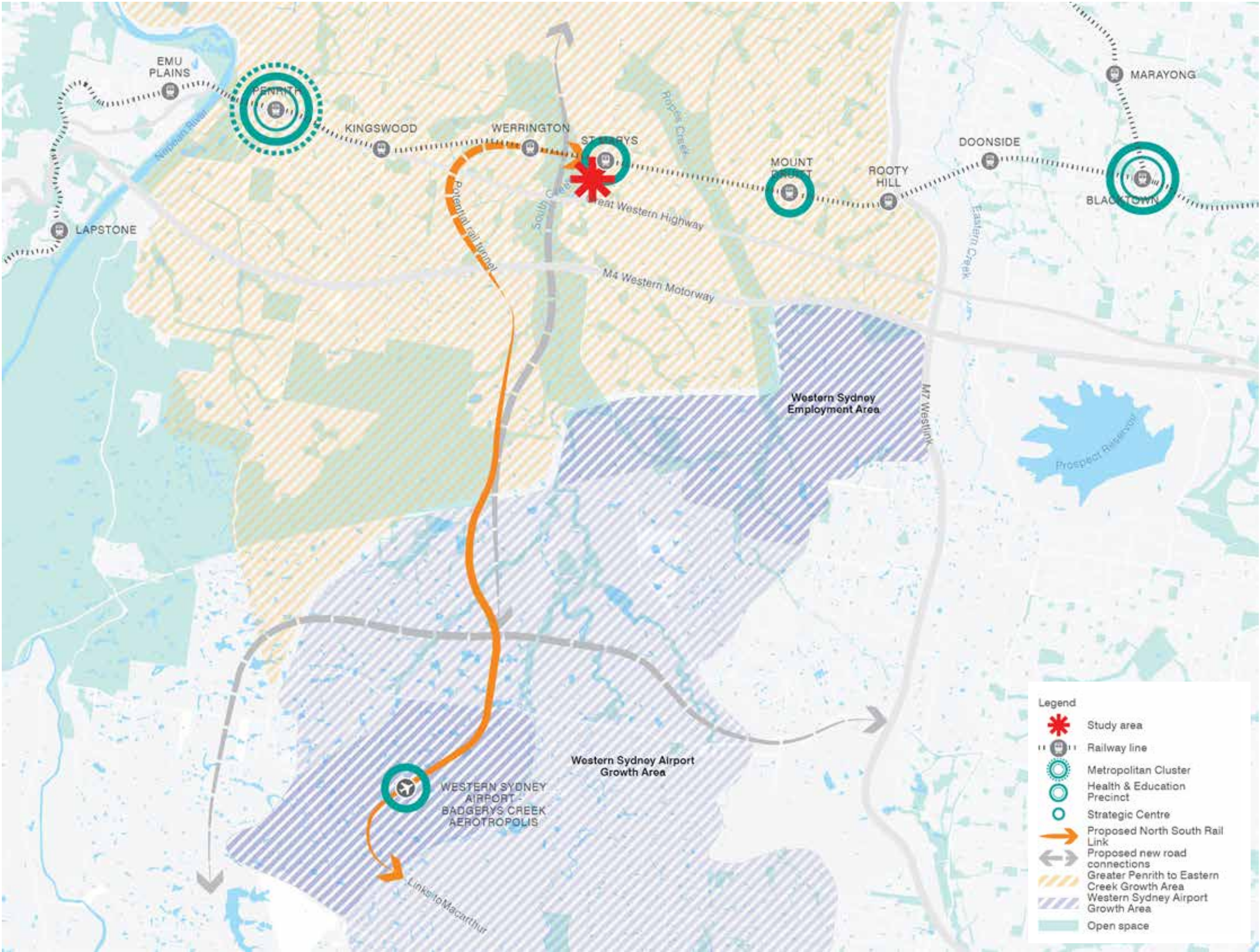
1.1 Strategic context

The study area, St Marys town centre, is located to the west of Greater Sydney, at 7km from Penrith, 22km from Parramatta CBD and 42km from Sydney CBD.

St Marys has been identified within the *Greater Sydney Region Plan 'A Metropolis of Three Cities'* and the *Western City District Plan* as playing an important role in the future of the Western City, emerging as a Strategic Centre and supporting the growth of Greater Penrith, the Western Sydney Airport and Badgerys Creek Aerotropolis.

A significant piece in the future of St Marys is the planned North South Rail Link that intends to connect St Marys to the proposed Western Sydney Airport, and reconnecting to the existing train line at Macarthur. The delivery of the western economic corridor will create new jobs, homes and infrastructure.

Within this context, St Marys is poised to strengthen as a centre with convenient connections to other centres of growth, contributing to the 30-minute city objective.



Metropolitan context diagram
Information source: NSW Government, Greater Sydney Region Plan 2018, North South Rail Link 2018.

Analysis

1.2 Green Grid

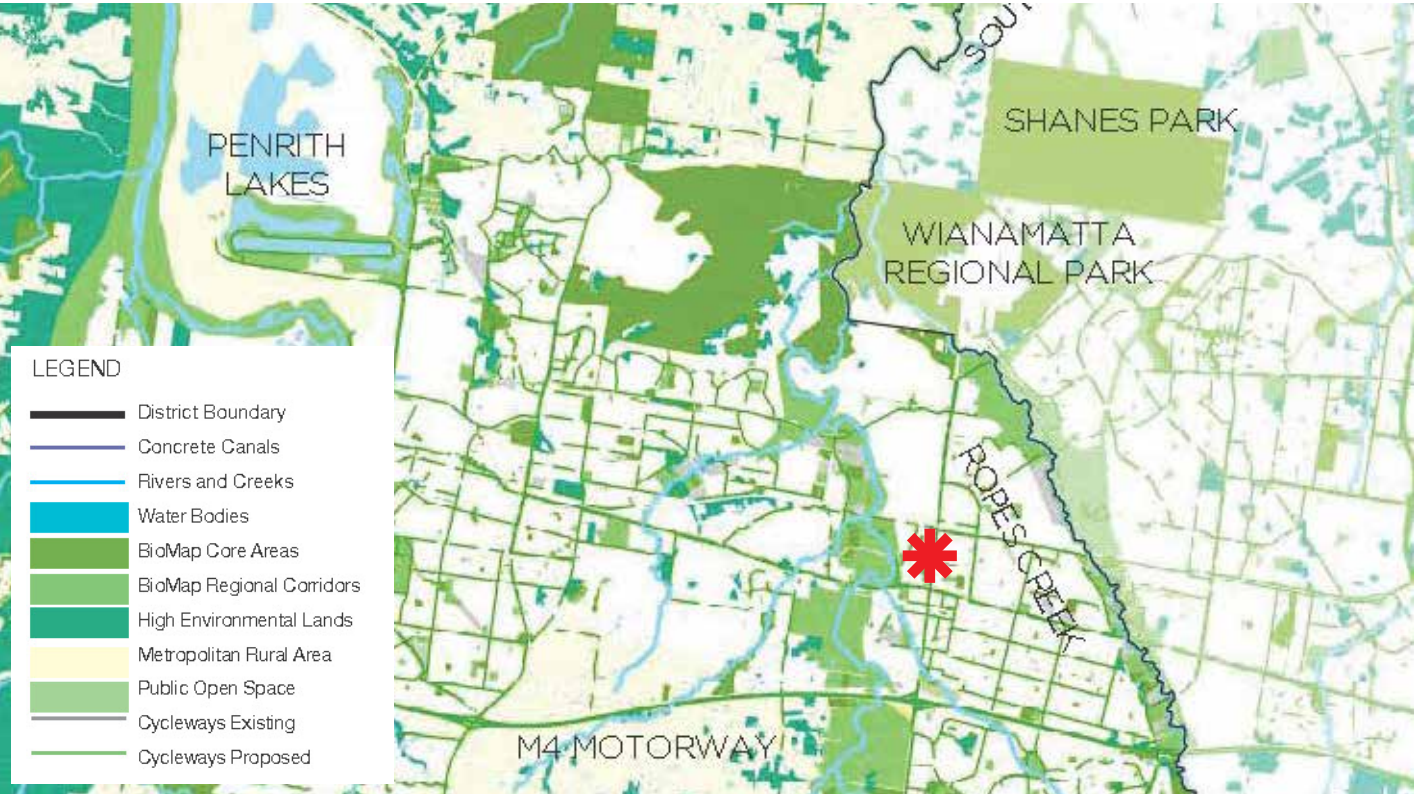
The Green Grid is an ongoing strategy that intends to realise the potential of Greater Sydney’s environmental and recreational assets.

South Creek Corridor

The South Creek Corridor, located 800m west of St Marys town centre is a district open space asset identified as a preliminary Green Grid priority project.

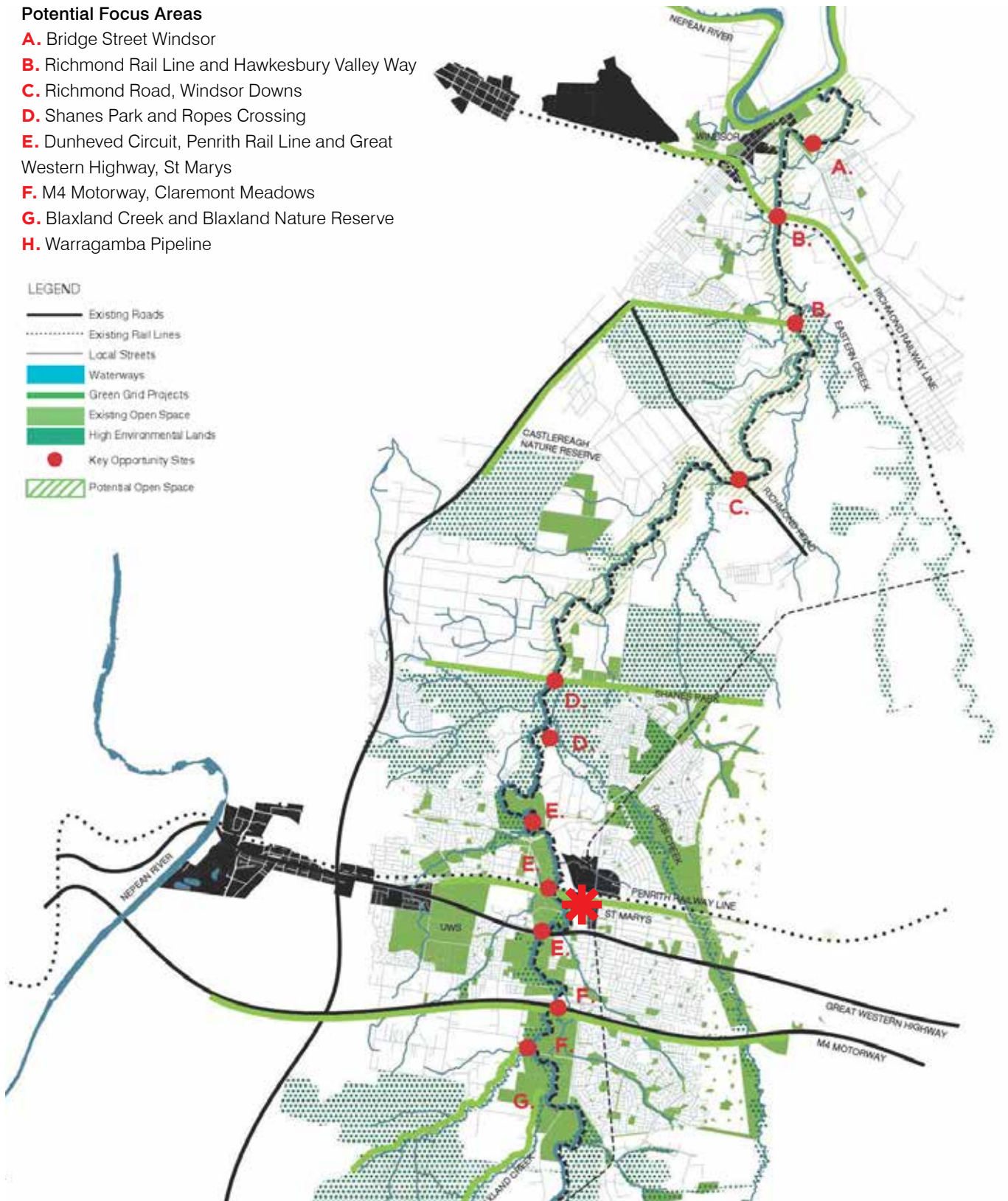
The corridor forms part of the district's hydrological, ecological and recreational grid. As St Marys becomes a more strategically significant centre, the South Creek Corridor has the potential to act as a regional open space corridor supporting the future population of the area.

There is a key opportunity to improve walking and cycling connections and accessibility to the corridor given its close proximity to the centre.



West District Green Grid
Source: NSW Government, Sydney Green Grid 2017.

Study area

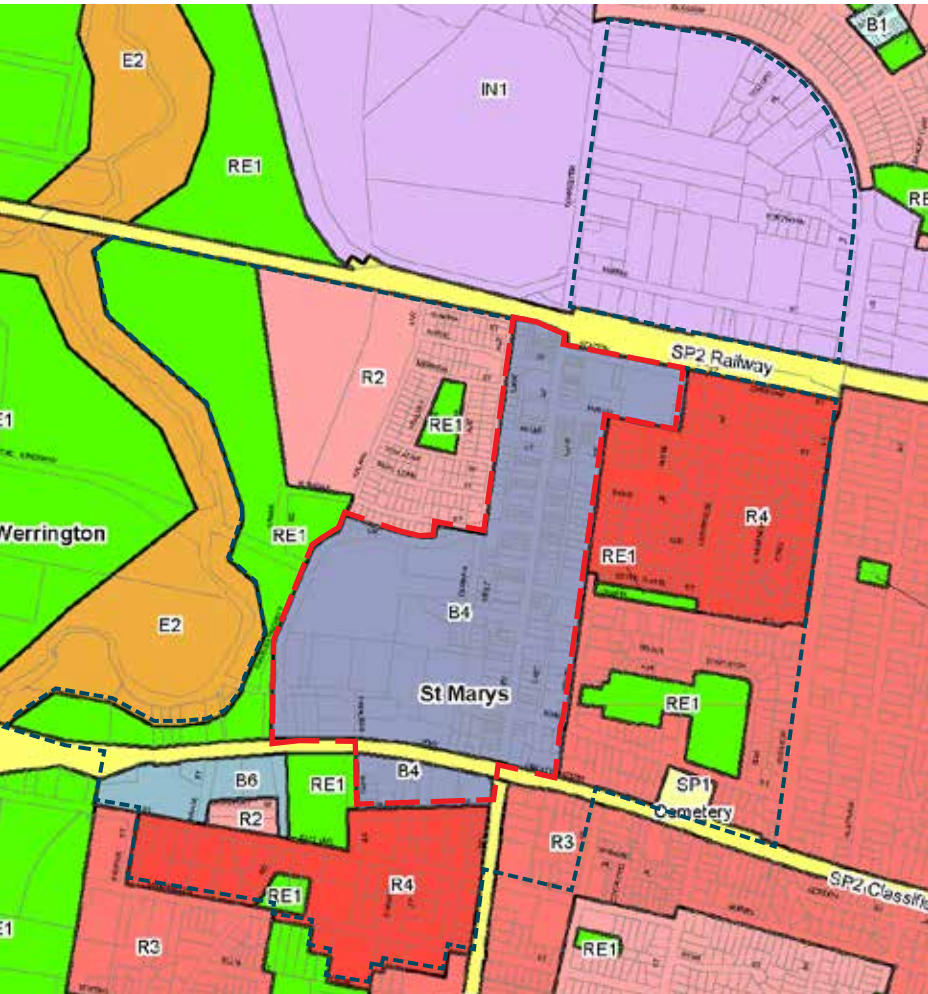


South Creek Corridor preliminary priority project
Source: NSW Government, Sydney Green Grid 2017.

Study area

1.3 Current planning controls

The Penrith Local Environmental Plan 2010 applies to the St Marys town centre. Relevant planning controls include:



Land Use zoning

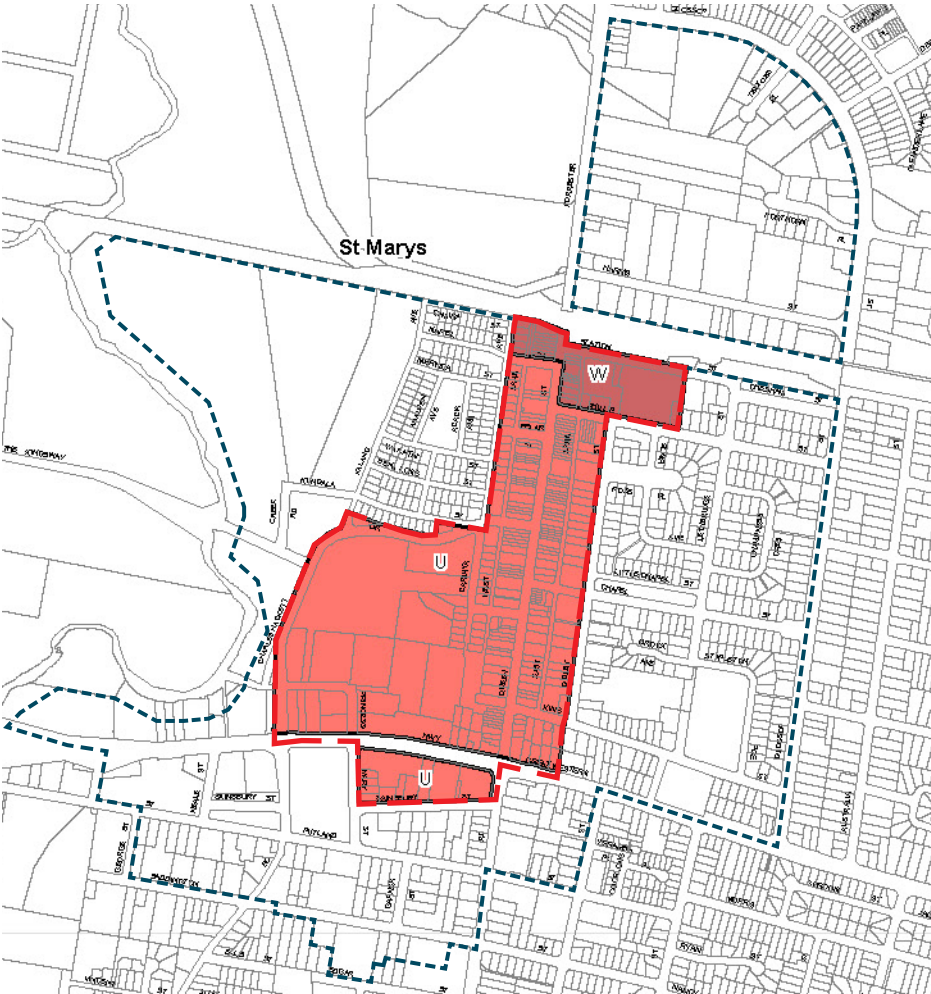
- General B4 Mixed Use zone across the town centre.
- High density residential permitted to the east of the centre adjacent the railway.
- Low density residential applied to the west of the centre, at the site of the Duration Cottages.
- A recreation and ecological corridor is situated to the west of the centre.
- Industrial zoning north of the station.

Legend

Core study area boundary

Secondary study area boundary

Diagram source: Penrith Local Environmental Plan 2010



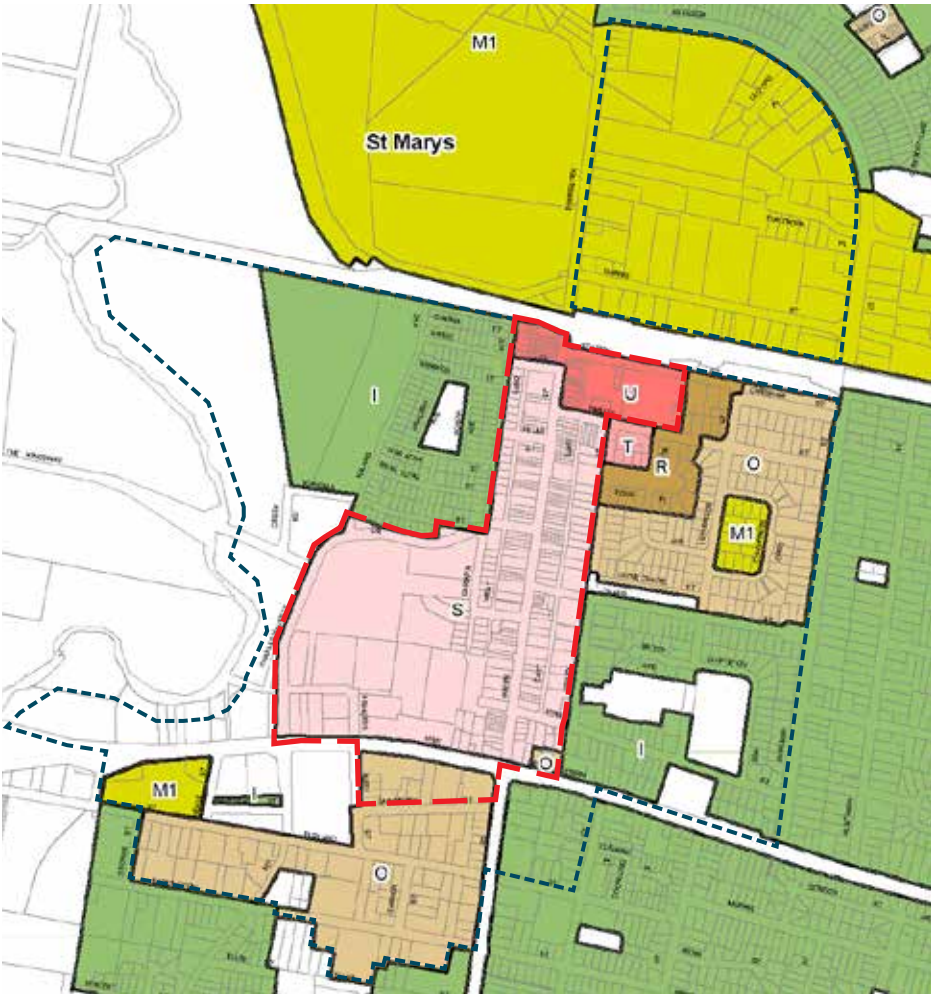
Floor Space Ratio

Floor Space Ratio (FSR) controls currently only apply to the St Marys town centre. This includes:

- A predominant FSR of 2.5:1 across the centre.
- 3.5:1 FSR on land adjacent to the station.

Legend

Core study area boundary

Secondary study area boundary

Height of Building

- A building height of 24m (6 to 7 storeys) is applied to most of the town centre.
- 32m (8 to 9 storeys) applied to land immediately south of the railway.
- 15m (4 storeys) permitted to the south of the centre.
- Surrounding residential lots allow between 8.5m to 21m (2 to 6 storeys), with greater height positioned closer to the railway station.

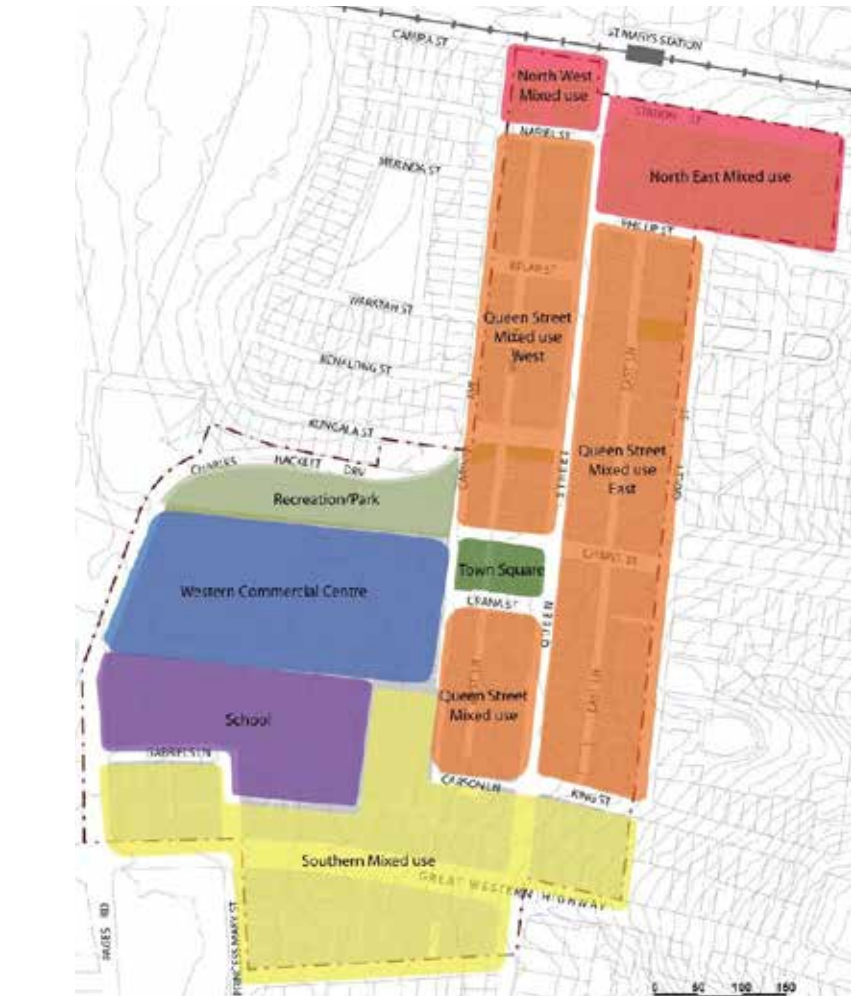
Legend

Core study area boundary

Secondary study area boundary

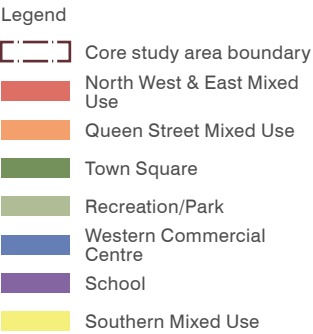
1.4 DCP controls

The Penrith Development Control Plan 2014 outlines urban design and built form guidelines for the St Marys town centre. Key controls include:



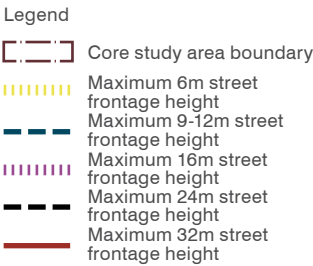
Town Centre Character Precincts

- The DCP identifies 7 precincts that constitutes the town centre. Key features include:
- Greater density is focused in the mixed use precincts adjacent the station.
 - Queen Street is retained as the town spine.
 - A new town square is proposed at a centralised location along Queen Street.
 - A commercial centre to the west.
 - Mixed use corridor along Great Western Highway to mark the southern gateway into the town centre.



Street Frontage Heights

- Street frontage height controls include:
- Predominantly 9-12m (2 to 3 storeys) street wall height along Queen Street.
 - Maximum street wall height of 32m (8-9 storeys) fronting Station Street.
 - Maximum street wall height of 16m (4 storeys) from lots adjacent to the station and along Great Western Highway.



Existing and Desired Links

- Proposed pedestrian connections include:
- New east-west through site links connecting Queen Street with surrounding areas in the form of pedestrian lanes, arcades, mid-block links.
 - A pedestrian east-west link along Chapel Street towards Charles Hackett Drive. Potential for new roadway.
 - A new link connecting to Ross Place.
 - Aligning links to form clear and safe pedestrian paths.

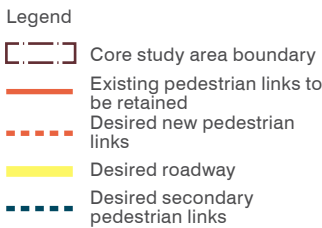


Diagram source: Penrith Development Control Plan 2014

1.5 Local context

St Marys town centre has the foundations of a vibrant centre, providing local services and amenities within a 10 minute walk, and well-connected to nearby centres.

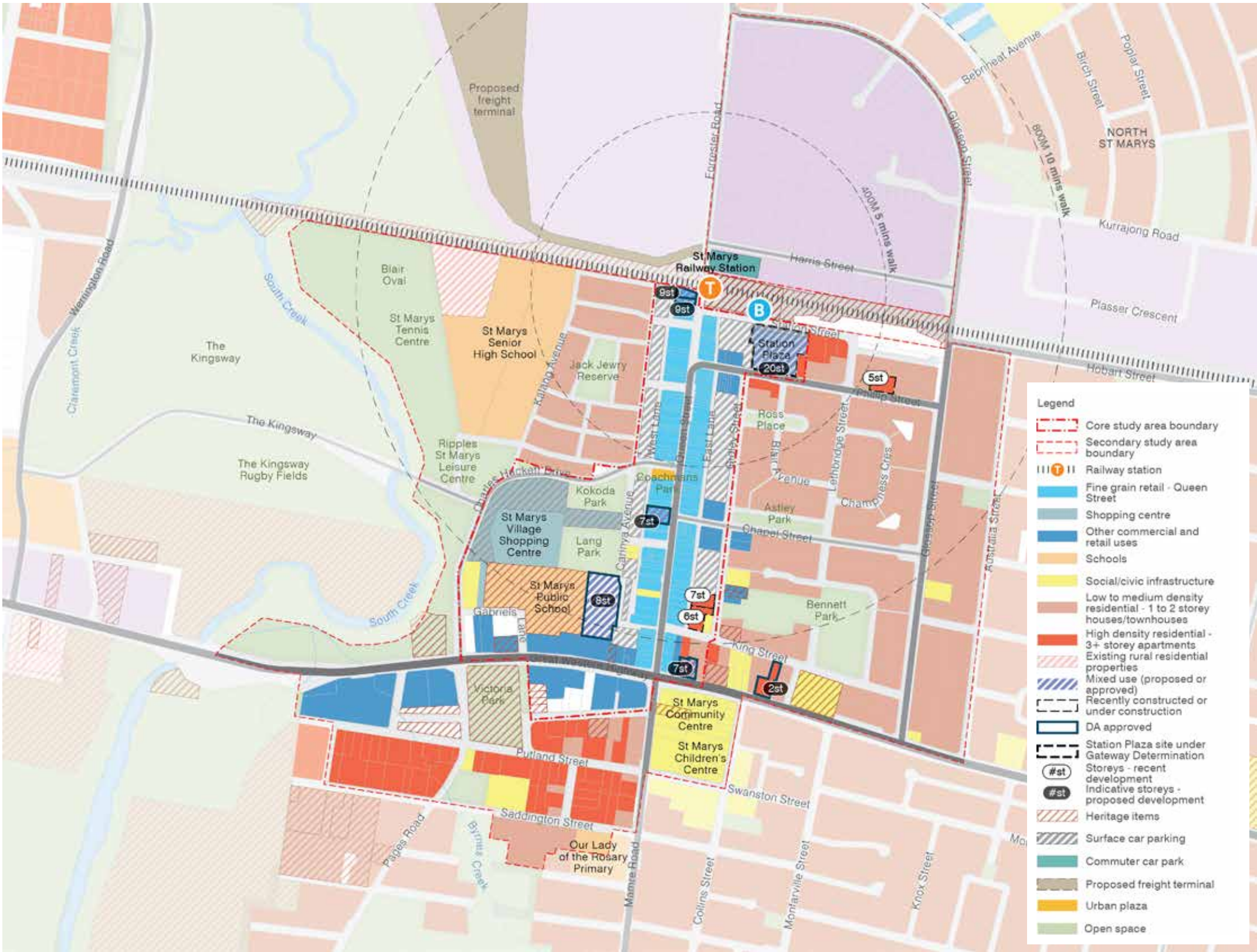
St Marys is bisected by the rail corridor; St Marys town centre and its adjoining residential neighbourhoods stretch south, while industrial areas are situated north of the station. The South Creek corridor creates a strong landscape presence to the west.

Key features of St Marys town centre include:

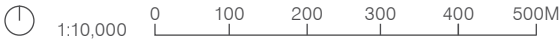
- Predominantly characterised by low scale retail and commercial uses including a north/south fine grain main street, Queen Street, that stretches for 850m providing local services and amenities.
- Surface car parking on either side of the retail street promotes car use and provides a distinct barrier between Queen Street and the surrounding area.
- Two local shopping centres are situated off the main retail street to the north and west of the centre, accessed across large areas of car parking.
- Large footprint commercial/warehouse typologies, and small shopping complexes are situated off the high street and along Great Western Highway.
- The local area is supported by social infrastructure including schools, a community hub to the south and a number of district and local parks.
- Beyond the town centre lies existing low to medium density residential, primarily consisting of detached dwellings and townhouses. To the south and west of the centre lies 3 to 4 storey walk up apartment buildings.

Recent and proposed development

Recent and approved development generally consists of 6 to 9 storey residential or mixed use development. The largest development is currently under Gateway Determination and proposes a 20 storey mixed use development on the Station Plaza shopping centre site adjacent to the station.



Local context diagram



Analysis

Local context



01



02



03



04



05



06



07



08



09

- 01 Good quality pedestrian amenity along Queen Street.
- 02 The eastern approach to St Marys Village Shopping Centre.
- 03 Interface between Council car parking and rear frontages of retail properties has the potential to be improved.
- 04 Coachmans Park, a town square situated along Queen Street.
- 05 A through site link breaking up the block, connecting Queen Street, car parks and residences.
- 06 A lack of active frontages along Great Western Highway.
- 07 Astley Park has the potential to offer pedestrian connections and recreational activities.
- 08 Recent residential development along King Street and Gidley Street of up to 6 to 7 storeys.
- 09 Existing housing stock predominantly consists of detached dwellings, townhouses and 3 storey walk ups.

Analysis

1.6 Movement and access

St Marys has the potential to be a highly connected and walkable centre, providing enhanced public transport and active links with less emphasis on car use.

Public transport

St Marys is serviced by the main T1 Western Line, providing regular services linking Penrith, Parramatta CBD and Sydney CBD. A bus interchange adjacent to the station provides local services.

St Marys has been identified as a future interchange to the North South Rail Link, that is planned to provide links through Western Sydney Airport to Macarthur.

Key roads

The southern edge of the town centre is traversed by the busy Great Western Highway, which provides one of the principle east-west regional connections across Greater Sydney. Other key roads within and around the centre include Queen Street (which also functions as St Marys' main retail street), Phillip Street and Glossop Street to the east of the centre.

Despite the area's good public transport connections, the centre offers plentiful car parking provisions, predominantly situated along East and West Lane.

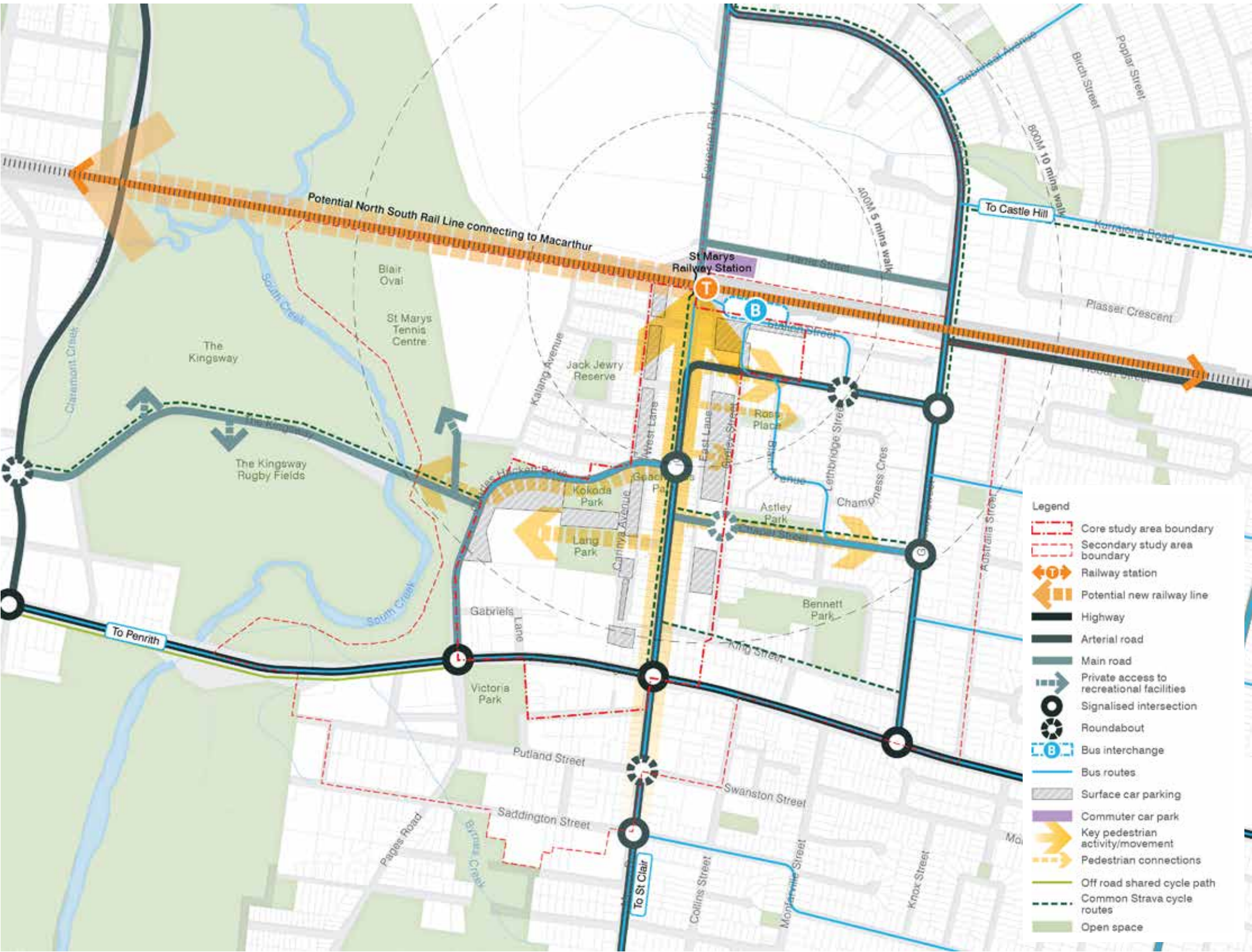
Cycling

Cycling infrastructure is poor within St Marys town centre, and only caters to on road shared paths. The off road shared path along Great Western Highway has been upgraded in some sections.

Pedestrian connections

Pedestrian activity is concentrated along Queen Street, which provides the retail amenity of the centre and is the primary walkable route towards the station.

Other key pedestrian linkages include through Kokoda Park and Lang Park which connects to the shopping centre, as well as to the parklands and sporting facilities beyond. To the east, through site links and arcades create connections between Queen Street, car parks and residential neighbourhoods, however these are of varying quality.



Public transport, movement and access diagram

1:10,000 0 100 200 300 400 500M

Analysis

Movement and access



- 01 Queen Street is a main road that also functions as the main retail spine and centre of activity in the town centre. It also caters to pedestrian movement to and from the station.
- 02 The southern end of the town centre is traversed by Great Western Highway, a busy regional connector.
- 03 Laneways provide service access for retail tenancies fronting Queen Street.
- 04 The entry to the train station at the northern end of Queen Street.
- 05 A pedestrian path leading to the St Marys Village Shopping Centre flanked by Lang Park and car parking.
- 06 Charles Hackett Drive functions as key pedestrian and vehicle route towards The Kingsway and other sporting facilities.

1.7 Public domain and pedestrian amenity

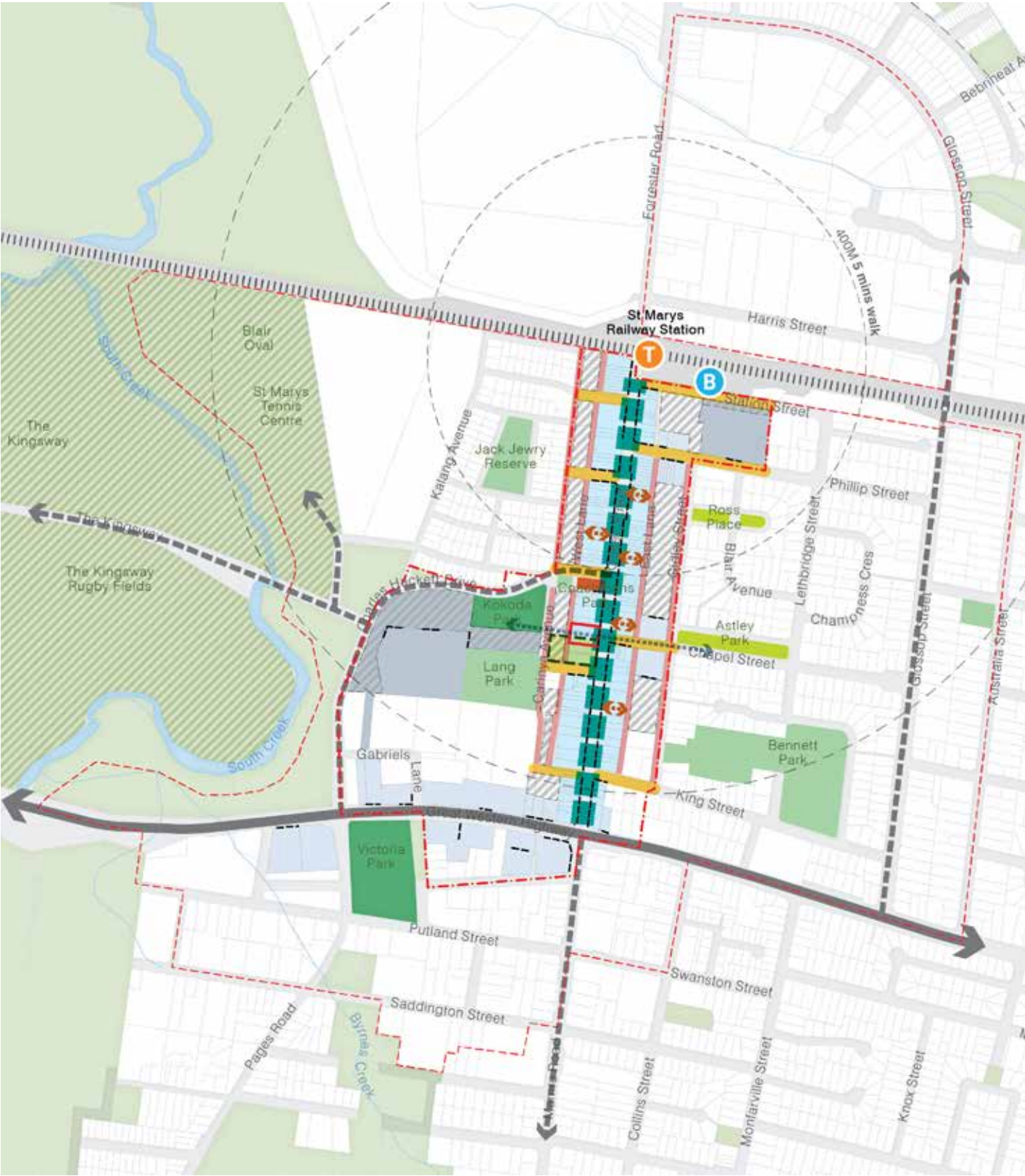
The public domain is currently of mixed quality. Parts of the centre lack the pedestrian amenity, activity and permeability that creates a truly walkable centre.

Key public domain strengths of the centre include:

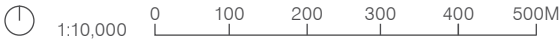
- **Queen Street:** A north-south main street that benefits from solar access to both sides of street. Recent upgrades to Queen Street has provided a high quality pedestrian environment with wide footpaths, seating, generous landscaped verges and street trees, and public art. Along with the low scale, fine grain retail frontages this creates a vibrant, amenable and safe streetscape for pedestrians.
- **Through site links:** Existing through site links and arcade links through Queen Street retail break up the block and provide convenient connections to adjacent car parking areas and surrounding residential neighbourhoods.
- **Town square:** Coachmans Park creates a civic focus to Queen Street, and provides an urban plaza for the community to gather.
- **Town parks:** Other good quality parks include Kokoda Park and Victoria Park which provide landscaping, playgrounds, trees and passive recreational space.

Key areas of improvement include:

- **Connective streets:** There is an opportunity to improve the east-west streets connecting into Queen Street. These are of varying quality though generally lack activation, awnings and street trees.
- **Car park interface:** The centre is currently typified by surface car parks that run behind the Queen Street retail. The car parks increase the walking distance to shops and services while also providing a poor pedestrian environment. There is an opportunity to realign connections through the car parks and improve landscaping and activation.
- **Surrounding local parks:** Local parks on the edges of the centre can be upgraded to act as green pedestrian connections and provide additional recreational opportunities.
- **Provision of linkages through redevelopment:** There is an opportunity for future development to facilitate desired links through the centre. This could be in the form of active through site links across the high street, or green connections through larger sites which improves the centre's walkability and permeability.
- **Conflict between proposed town square and link and approved DA:** There is an existing strategic vision and need for a larger town square within St Marys and would need to be reconsidered due to the conflict with the approved DA (151-159 Queen Street) situated at the same location.



Public domain and pedestrian amenity diagram



Analysis

Public domain and pedestrian amenity



01



02



03



04



05



06

- 01 Wide footpaths, planting, seating and public art along Queen Street.
- 02 Small plaza at the entrance to the railway station with a cul-de-sac cutting through the space.
- 03 Through site link connecting Queen Street with car parking.
- 04 Laneways behind Queen Street that predominantly provide loading and service access. However these are well used by pedestrians walking from surrounding residential neighbourhoods or car parking areas.
- 05 Dedicated council car parks behind the retail tenancies along Queen Street. Poor pedestrian amenity.
- 06 Vehicles dominate Great Western Highway; predominantly inactive with large warehouse spaces and inconsistent commercial uses. Lack of street trees.

1.8 Ownership and development context

St Marys town centre has the capacity to accommodate future change and is largely unencumbered by development limitations resulting from ownership.

Council-owned sites

Penrith City Council own a number of lots within the town centre, including large areas of car parking along Carinya Avenue and Gidley Street. Both Kokoda Park and Lang Park are also under Council ownership. These two open space sites and adjacent car parks have been recently reclassified to operational land.

Council car park sites have the potential to change in the future in response to shifting car parking needs and other land use demands. This is particularly relevant within the context of the North South Rail Link.

Queen Street

Existing built form

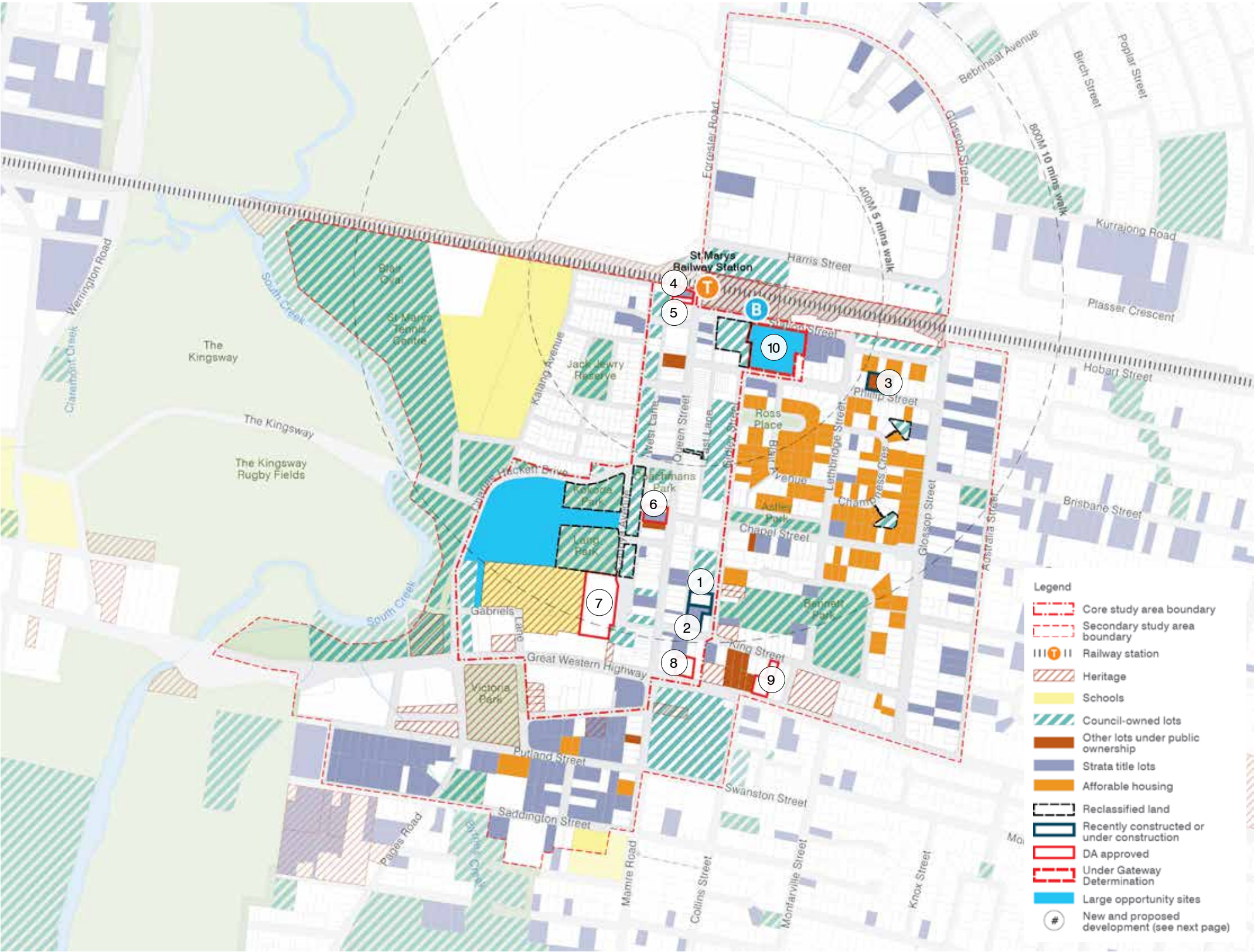
The current building stock along Queen Street is of mixed quality, predominantly consisting of 1 to 2 storey fine grain retail and commercial uses. The high street has the potential to not only accommodate new development but also improve building quality and street interface, whilst retaining street character.

Future development

The pattern of approved development along Queen Street (see adjacent page) sees bulky street wall types with poor streetscape outcomes that may create a problematic precedent were it to be repeated along the rest of Queen Street. See section 2.3 for a detailed study of built form typologies.



Existing built form character - Queen Street



Development context diagram

1.9 Recent and future development



39-41 Gidley Street

- Residential development
- Maximum height 7 storeys
- Recently constructed



51-53 King Street

- Residential development
- Maximum height 6 storeys
- Recently constructed



11-15 Phillip Street

- Residential development
- Maximum height 5 storeys
- Recently constructed



1-7 Queen Street

- Mixed use development
- Maximum height 9 storeys
- 5 storey street wall height
- Approved



9-11 Queen Street

- Mixed use development
- Maximum height 9 storeys
- 5 storey street wall height
- Approved



151-159 Queen Street

- Mixed use development
- Maximum height 7 storeys
- Approved



12 Carson Lane

- 4 residential flat buildings
- Maximum height 8 storeys
- Approved



337-339 Great Western Highway

- Mixed use development
- Maximum height 7 storeys
- 4 storey street wall
- Approved



317-319 Great Western Highway & 30 King Street

- Townhouse development
- Maximum height 2 storeys
- Approved



33-43 Phillip Street

- Mixed use development
- Maximum height 20 storeys
- 6 storey podium
- FSR 5:1
- Gateway Determination

1.10 Topography and flooding

Topography

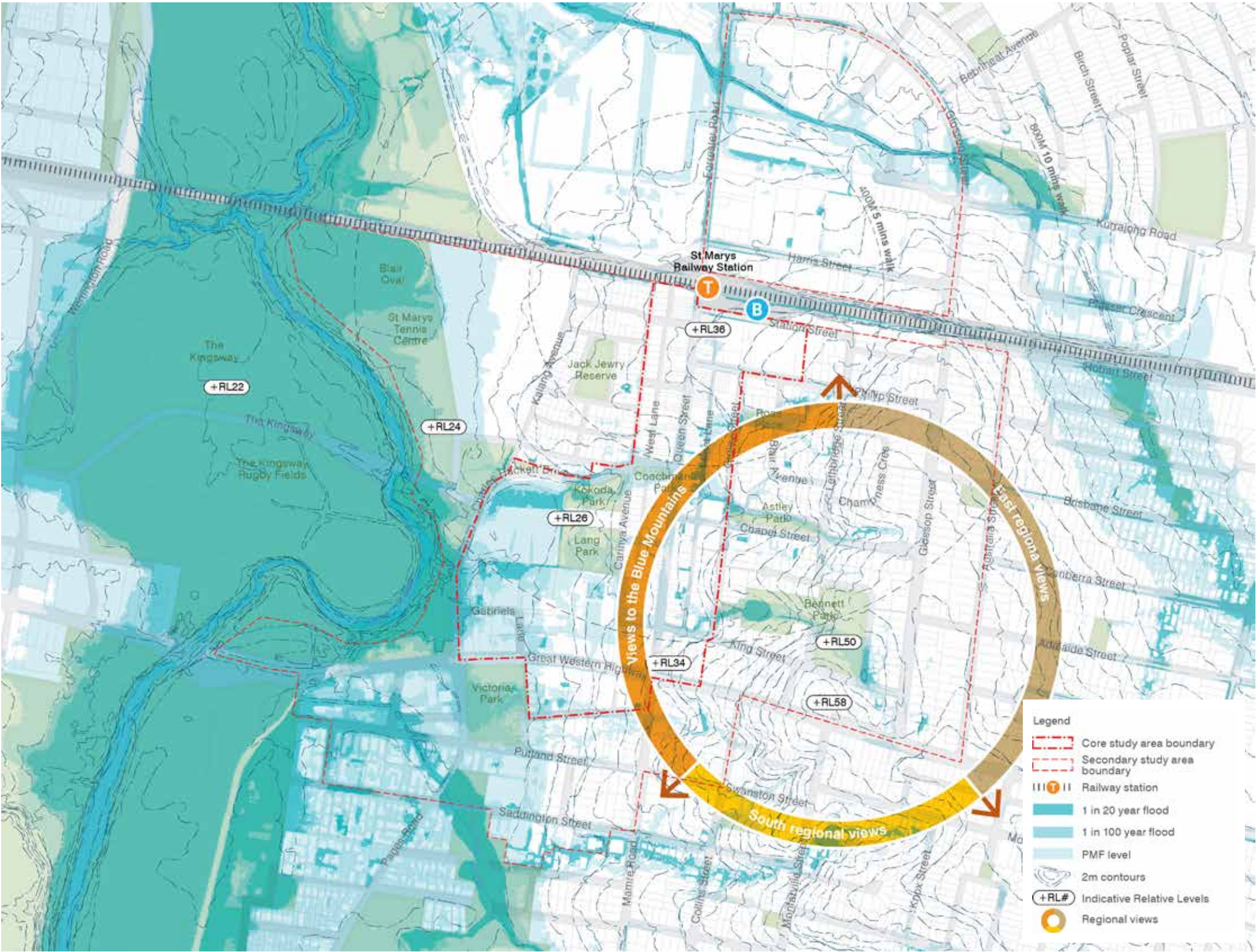
St Marys town centre is bounded by the South Creek corridor on the west. The area contained within the centre is located on a gently sloping terrain from east to west towards the river.

The land ascends more significantly from Gidley Street towards Glossop Street, which allows for regional views looking west towards the Blue Mountains. Queen Street lies within the middleground of this view and any future development would have an impact on the future skyline and scenic qualities of this view corridor.

Flooding

The adjacent diagram overlays the flooding impacts in a 1 in 20 year flood, 1 in 100 year flood and in a Probable Maximum Flood (PMF) level event were South Creek to flood.

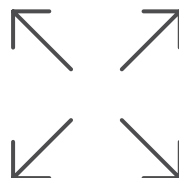
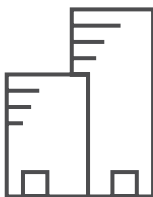
The town centre is generally affected in a PMF event to the south and south west areas of the centre.



Topography and flooding diagram

1:10,000 0 100 200 300 400 500M

1.11 Key issues and opportunities



Place and identity

Issues	
×	Approved DA conflicts with DCP identified town square.
Opportunities	
+	Queen Street forms attractive and legible focus for the centre.
+	Identify different precincts with individual identity and focus.
Opportunities - long term (with new rail link)	
+	Utilise Kokoda Park, Lang Park and car parking to strengthen civic/community 'heart' of new St Marys.

Built form and land use

Issues	
×	Approved DAs don't support retail high street character.
Opportunities	
+	Refine structure of centre in light of land use expectations.
+	Ensure high street character is right.
+	Potential for height and density in strategic locations.
+	Operational Council land may provide potential for targeted development.
Opportunities - long term (with new rail link)	
+	New rail interchange may be integrated with other land uses.

Connections

Issues	
×	Poor east-west connections.
Opportunities	
+	Provision of targeted through site links in Queen Street retail.
+	Improve east-west links to residential and open space.
Opportunities - long term (with new rail link)	
+	Strategic links to other existing and future centres (e.g. Penrith Health and Education Precinct).

Car parking

Issues	
×	Poor pedestrian environment.
×	Disparate parking locations.
Opportunities	
+	Targeted and staged development of sites to meet future land use need and improve qualitative concerns.
+	Improve activation of carparks from nearby sites.
+	Targeted improvements in amenity to key pedestrian links.
Opportunities - long term (with new rail link)	
+	New rail link will bring changes to car parking and land use needs - need for further change.



Image: Coachmans Park, St Marys

2 The Structure Plan and supporting concepts

Following detailed analysis, this section investigates the potential future structure and character of St Marys. This includes:

- Structure plan scenarios for the short, medium and long term.
- Future character precincts within and around St Marys town centre.
- The future of commercial uses.
- The future residential uses.
- Built form typology options for Queen Street.

2.1 Structure Plan

St Marys is a strategic centre positioned to grow with increased jobs and housing choice taking advantage of a planned new railway link. Building on its heart of Queen Street, St Marys will evolve to a more walkable centre with a diverse range of uses, great transport connections, community spaces and recreation.

The future structure of St Marys is divided into three stages, coinciding with the 20 and 40-year vision set out in the *Greater Sydney Region Plan*.



Stage 1 (2026)
Immediate actions

Improving St Marys today and safeguarding the future character and amenity of the precinct to support increased growth with the arrival of the new rail link .



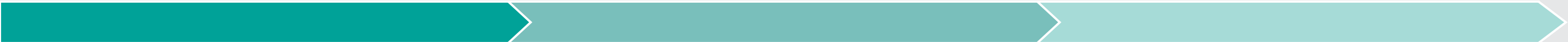
Stage 2 (2036)
Delivery of new rail link

Planning for growth of St Marys around the arrival of the new rail link including building employment, residential and community uses and improving amenity around this.



Stage 3 (2056)
Future potential

A long term structure plan for St Marys that reinforces its role and function as a strategic centre.



The Structure Plan and supporting concepts

Structure Plan

Stage 1 (2026) - Immediate actions

Improving St Marys today and safeguarding the future character and amenity of the precinct to support increased growth with the arrival of the new rail link (Stages 2 and 3).

Key actions

- 1 Focus activation of lanes and car parks - Streetscape projects and through getting the right outcomes from private development.
- 2 Provide arcades and through site links in right locations - New DCP controls required. Preferred location of through site links shown in plan adjacent.
- 3 Review Queen Street built form and land use character - The DCP requires review in light of DAs and changed market conditions. Further information on this is shown in the Queen Street Typology Testing in Section 2.6 of this document.
- 4 Prioritise high density mixed use near station - Some increases to height and density may be appropriate.
- 5 Primary green east-west connection - Plan and implement improvements to Charles Hackett Drive as the key link from St Marys to the west, including consideration of future changes to link in Stage 2.
- 6 Plan for Great Western Highway - Revise planning controls to ensure residential development is set back from the highway.



Stage 1 (2026) - Key areas for consideration and actions











The Structure Plan and supporting concepts

Structure Plan

Stage 2 (2036) - Delivery of new rail link

Planning for growth of St Marys around the arrival of the new rail link including building employment, residential and community uses and improving amenity around this.

Key actions

-  New interchange with North South Rail Link - on delivery this should improve links, station access and focus on provision of high quality amenity.
-  Improved connection across rail.
-  Increase employment density.
-  Use Council car park sites for targeted uses - sites near the station are more suited for development.
-  Civic Place - consolidate Council-owned parks and car parking sites to create a new civic space. Integrate development with surrounding land holdings where possible. New roads may be provided to break up the block.
-  Community services - review role of existing community services with new Civic Place (see 5).
-  Increase residential density in accessible places.
-  Plan for intermediate transport link towards Werrington/Kingswood.



Stage 2 (2036) - Key areas for consideration and actions

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The Structure Plan and supporting concepts

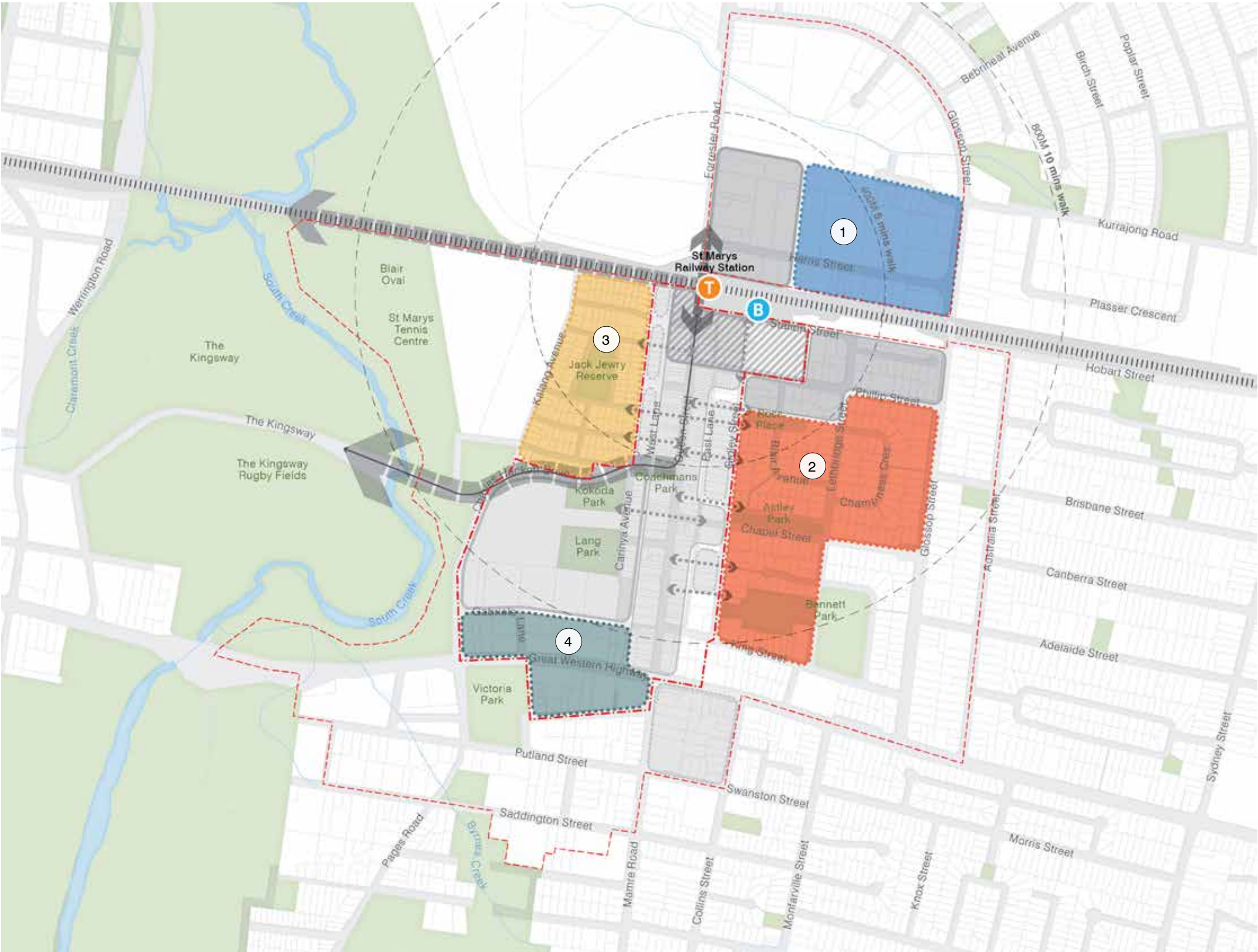
Structure Plan

Stage 3 (2056) - Future potential

These potential further outlets for growth are likely to not change in role significantly to Stage 2. They should however be included within future reviews of the centre as needs change over time.

Key actions

- 1 Commercial growth - potential for expansion of medium to high density commercial north of the station.
- 2 Residential growth - potential for expansion of medium to high density residential.
- 3 Additional residential capacity - potential for medium density residential within the Duration Cottages precinct.
- 4 Highway commercial - Potential to increase commercial density along Great Western Highway.



Stage 3 (2056) - Key areas for consideration and actions



2.2 Future precincts

The vision for St Marys builds on its existing structure and intensifies uses and activity in important locations in response to the arrival of the new rail link, while also celebrating its high street character and creating a new civic heart in the centre of town.

Queen Street is reinforced as the main town centre spine providing excellent retail and pedestrian amenity. Greater activity and density is concentrated closer to the station placing people with a 2-5 minute walk of public transport.

A Civic precinct is envisioned at the heart of St Marys, building on the aspirations of existing controls and capable of supporting future populations of the area. This precinct establishes a series of civic and community spaces that reconnect Queen Street with the South Creek corridor and district links beyond.

The centre is expected to expand and deliver increased commercial activity as well as housing choice supported by good amenity, retail activity and local connections.

St Marys into the future is structured as a collection of precincts, each with a distinct character and use.

- Station precinct**
Areas of highest density within the centre, highly accessible to current and future public transport.
- Queen Street North**
A focus on pedestrian amenity and high retail activity.
- Queen Street South**
Most accessible to neighbourhoods to the south, best parking and vehicle access.
- Civic precinct**
Organisation of public uses including key open spaces, community uses, and provides a civic focus to the centre.
- Southern corridor**
A vehicular movement corridor with a visible commercial offering.
- Community**
An existing community precinct to be reviewed with Civic precinct.
- Leisure precinct**
Provision of a recreational and environmental green corridor.
- Employment**
Existing light industrial areas with the potential for denser employment uses.
- Glossop Street precinct**
Medium to high density residential neighbourhoods within walking distance of public transport and Queen Street.
- Duration cottages**
Remnants of St Marys' socio-industrial history.



Precinct diagram

The Structure Plan and supporting concepts

2.3 Future town centre character precedents

Stage 1 focus

1 Station precinct



Improving connections. Chatswood Interchange, Chatswood.



Integrated with other uses. Chatswood Interchange, Chatswood.



Utilising private sites - activation. Ormond Road Precinct, Victoria.



Distinctive places. Jewell Precinct, Brunswick.

23 Queen Street



High quality public domain. Queen Street, St Marys



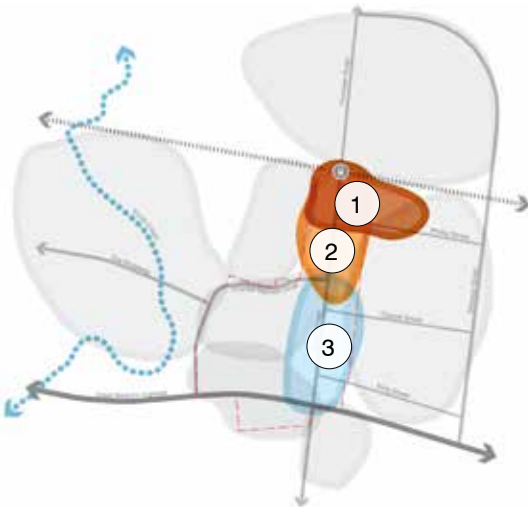
Active through site connections. Boheme, Bondi.



Built form and street scale. Sierra, Hawthorne.



Improving connections to rear lane. Grosvenor Lane, Neutral Bay.



The Structure Plan and supporting concepts

Future town centre character precedents

Stage 2 focus

1 Civic precinct



Civic open space. Paul Keating Park, Bankstown.



Mix of community facilities and open space. Chatswood Concourse, Chatswood.



High quality development. Bay Street, Glebe.



Mix of park/plaza/buildings. Northern Plaza, Monash University.

2 Commercial uses



Incubators adjacent to amenities. We work, Sydney.



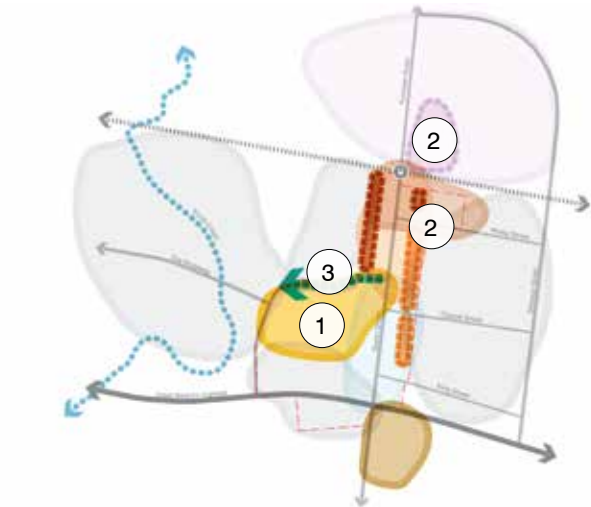
Mix of production, office and retail. Black Star Pastry, Moore Park.



Infill small-mid scale mixed use. Auckland.



Denser employment uses in industrial zone. Italy.



3 Landscape quality



Green, active streets. Bourke Street, Surry Hills.



Good pedestrian amenity. Crown Street, Surry Hills.

The Structure Plan and supporting concepts

2.4 Use of Council land

Penrith City Council own a number of sites within the town centre including existing surface car parks, as well as Kokoda Park and Lang Park, much of which has been reclassified as operational land.

There is an opportunity to utilise Council's land assets to support the future growth of St Mary's town centre. This will most likely occur as a staged process (described adjacent), where sites considered most suitable for development are those that may coincide with renewal around the station and the Civic Precinct.

1 Short term



Commercial office spaces. We work, Melbourne.

2 Civic precinct



A consolidated Civic Precinct.

3 Other lands



Accommodating professional services. Macquarie Park.



Key plan - Council land

Mixed use development is considered appropriate adjacent to the future interchange, however maximising employment potential. There is the opportunity to kick-start commercial uses with the right user. This may come in the form of a commercial podium within the station precinct, accommodating incubators and small office spaces that support knowledge jobs.

The proposed Civic Precinct consists of land owned by council, including Kokoda Park, Lang Park and adjacent car parks.

A master plan should be developed to promote the right outcomes for the precinct. This should include consideration of:

1. A focal high quality park.
2. Getting the right mix of uses, including the potential consolidation of Council's community facilities as well as new desired commercial uses.
3. Activation of public spaces.
4. Breaking up the large street block.
5. Consolidation of parking.
6. Providing the desired connection along Charles Hackett Drive.
7. Working with landowners to achieve common objectives.

Other Council land to the east and south of the centre and north of Charles Hackett Drive are considered to be of lesser priority in the short to medium term. They may be held until later for delivery and could provide uses such as stand alone offices that may not be viable today.

The Structure Plan and supporting concepts

2.5 Accommodating commercial floor space

Four areas have been identified that are considered suitable to accommodate future commercial floor space within St Marys. These include:

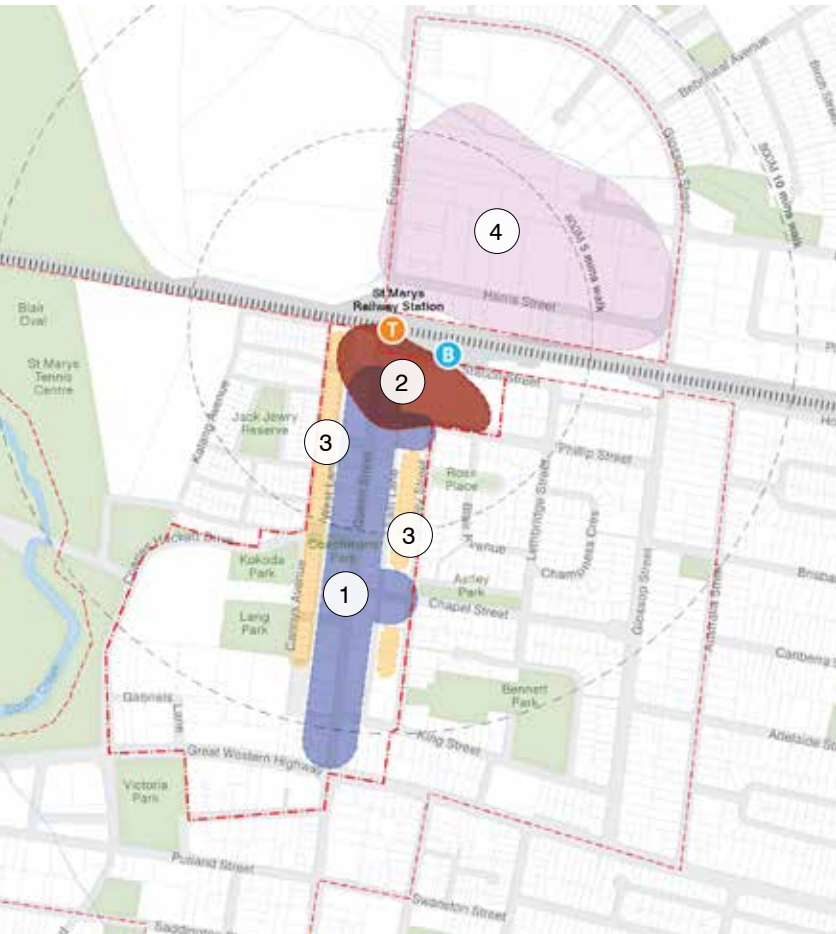
- 1. Queen Street
- 2. Station precinct
- 3. Council car park sites
- 4. IN2 zone north of the rail.



Infill small-mid scale mixed use. Auckland



Commercial podium. East Village, Victoria Park.



Key plan - potential commercial areas and types

1 Queen Street

- See 2.6 for discussion of potential Queen Street typologies.
- Likely uses - ground floor retail (small floorplate) plus office above (small floorplate).
- Increasing office use likely to impact on viability of mixed use developments.
- **Approximate commercial FSR* 0.3:1 (ground floor retail only), up to 1:1 (3 storeys) or 2.5:1 (entirely zoned commercial).**



Stand alone office. 6 Eden Park Drive, Macquarie Park.

3 Council car parks

- Commercial development on car park sites has potential to accommodate uses to support Council's aspiration.
- Good office floorplates are possible however the relationship of buildings to neighbouring uses (Queen Street and residential behind) can be problematic.
- **Approximate commercial FSR* - 2.5:1 (5 storey office building).**

2 Station precinct

- Increased levels of commercial use as compared to majority of Queen Street may be possible (e.g. medical, childcare, gym, accommodation).
- Likely small floorplates except for shopping centre site.
- **Approximate commercial FSR* 1:1-2:1 (for 2-5 storeys commercial use).**



Mix of production spaces, office and retail. Black Star Pastry headquarters, Moore Park.

4 IN1 zone

- Accommodating denser employment uses may be a priority particularly in accessible locations.
- This may be components related to industrial uses (e.g. support services to freight and logistics, knowledge jobs, etc.).
- Large office floorplates possible.
- This should be considered within the wider strategic objectives for preserving employment lands.
- **Approximate commercial FSR* - 1:1-2:1 (mixed buildings with ancillary office components).**

*Subject to detailed built form testing

The Structure Plan and supporting concepts

2.6 Accommodating residential floorspace

St Marys has the potential to deliver future residential density within 5 to 10 minute walking distance to the train station. Residential uses should generally be provided outside of any commercial need, but also allow capacity to grow for the future to meet demand in viable forms.

The can be provided within two key areas:

- **Glossop Street Precinct:** A densification of residential uses immediately adjacent the town centre and station. This can range from town houses to mid-rise and high density apartments.
- **Mixed use:** The lots along Queen Street and large shopping centre sites have the potential to provide mixed use development; retail and commercial on lower levels with residential above. Greater densities are accommodated closer to the station.

General assumptions

3-6 storey apartments	1:1 - 2:1 FSR
7+ storey apartments	3.1 - 4:1 FSR
Mixed use (3-6 storeys)	1.5:1 - 1.7:1 Residential FSR
Mixed use (7+ storeys)	2:1 - 3:1 Residential FSR

*Subject to detailed built form testing



Key plan - residential areas

1 Glossop Street Precinct



Townhouses. The Gordon, Paddington.

2 Mixed use



Mid-rise shop top housing. Marrickville Road, Marrickville.



4-5 storey residential development. Harold Park, Forest Lodge.



High density mixed use. East Village, Victoria Park.



8 storey residential development. Maiden Place, Thornton.

2.7 Queen Street typology testing

The structure plan Stage 1 includes to ‘Review Queen Street built form and land use character’. This is based on Architectus’ review of the discrepancy between recent DA approvals and the existing DCP as well as the need to consider the future of these sites in providing employment floorspace towards St Mary’s employment potential.

The following testing forms a basis for future considerations on this issue.

Option A and B describe what is currently being approved (based on approved development on 151-159 Queen Street) against a building envelope under current planning controls.

Alternative typologies test different massing configurations and land use scenarios. General considerations include:

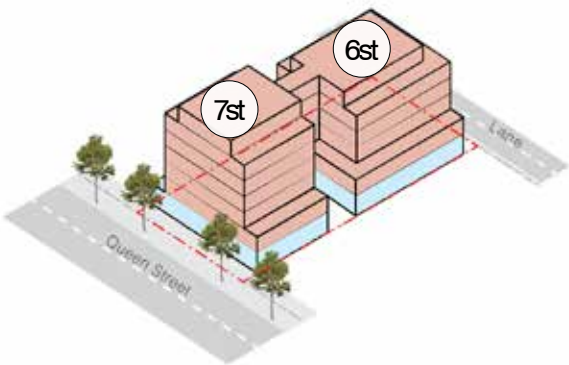
- A 3 storey street wall height is considered to be a good scale for Queen Street.
- A 3-4m front setback (compliant with DCP).
- Minimum 3m rear setback to allow for additional footpath space along the rear lane.
- A minimum 3m setback for levels above street wall.
- Adequate building separation compliant with the Apartment Design Guide (ADG).
- A retail ground floor with potential commercial uses on the 1st level fronting Queen Street (as per DCP). Note this improves commercial capacity however impacts on viability.

General testing assumptions

Maximum height	5 to 9 storeys
Site dimensions	24m x 50m (44m x 50m for option E)
Total FSR	2.5:1 (except for Scenario A)
Commercial FSR	0.8:1 - 1.1:1 (except for commercial-only option)

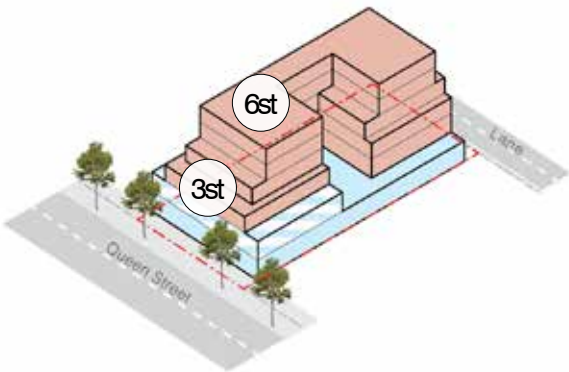
*Subject to detailed built form testing

Existing built form potential



A. Current DA approval (approx 2.6:1 FSR)

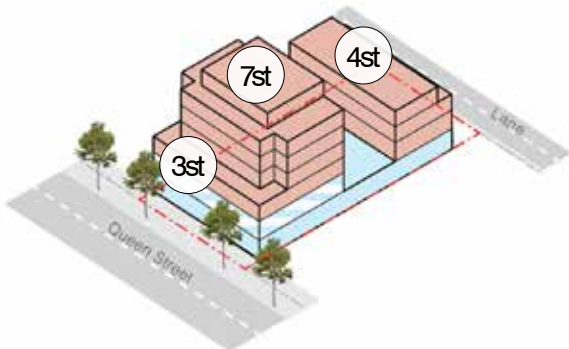
- ✓ Best viability.
- ✗ Some variation from SEPP 65 separation requirements.
- ✗ Bulky form.
- ✗ Little commercial use being delivered.



B. Strict application of controls (2.5:1 FSR)

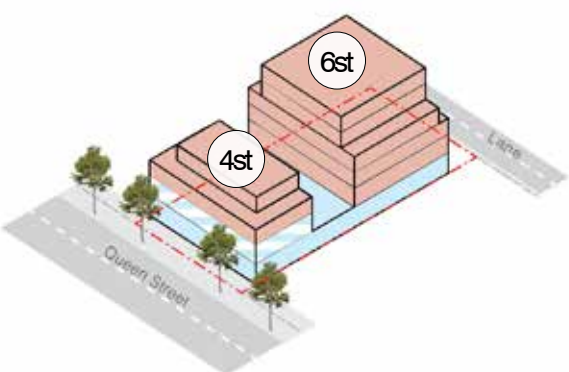
- ✓ Requirement for 2nd storey commercial (see figure E15.5 in the DCP) provides some future retail capacity.
- ✗ Bulky form may create problematic streetscape if replicated over length.

Alternative typologies



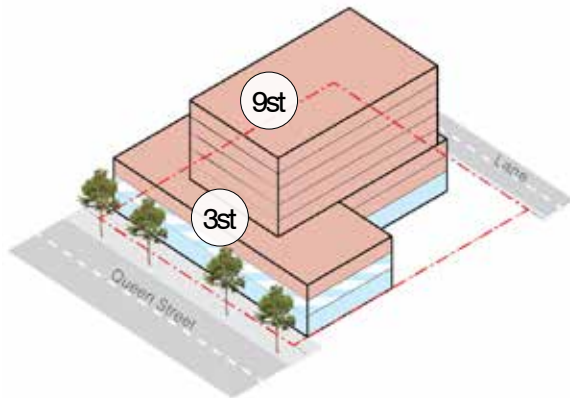
C. Alternative street wall (2.5:1 FSR)

- ✓ Some improvement to articulation and bulk.



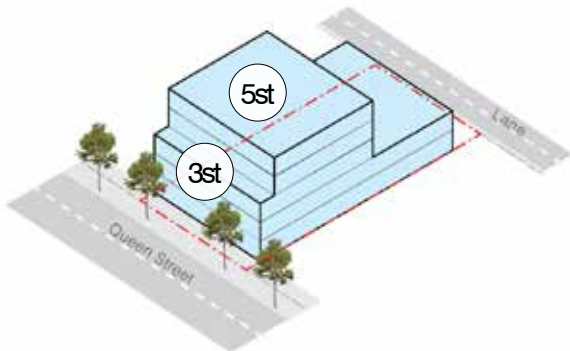
D. Height focus to lane (2.5:1 FSR)

- ✓ Best solar access to Queen Street.
- ✗ May have separation issues if future buildings developed across lane.
- ✗ Relies on significant improvement to lane.



E. Tower form (2.5:1 FSR)

- ✓ Best amenity for residents.
- ✗ Greater amalgamation requirements. Viability issues.



F. Commercial-only (2.5:1 FSR)

- ✓ Best protection of commercial capacity.
- ✗ Viability concerns. Unlikely to see development in short to medium term.
- ✗ Planning risk. Removal of residential potential requires DPE review/sign-off.

The Structure Plan and supporting concepts

2.8 Summary and conclusion

This report has been prepared by Architectus to provide urban design analysis and structure planning in support of SGS Economics and Planning's engagement by Penrith Council to provide an Economic Profile and Economic Development Strategy for St Marys Town Centre. This work focusses on the anticipated growth of St Marys as a Strategic Centre with the delivery of the proposed north-south rail connection.

Key outcomes of the urban design analysis in this document include that:

- DCP controls including those identifying a new town square and built form controls for Queen Street conflict with what has been approved by recent DAs and require review.
- There is poor east-west connectivity in the centre and poor pedestrian environments away from Queen Street including many of the car parks.
- The wealth of operational Council land in the centre provides the opportunity for targeted change, both towards urban design outcomes and through delivery of new buildings.
- Arrival of the new rail connection will bring significant growth and with this may come opportunities for development of a redefined Civic Precinct, further change on Council land and the potential to look at improved secondary transport connectivity.

The structure plan developed in this section is based around the three following stages.

- **Stage 1 (2026) - Immediate actions:** To improve the vibrancy, connectivity and pedestrian amenity of the centre. This targets new development on key sites adjacent the station and along Queen Street and recommends reconsideration of some existing controls including new through-site links and public domain outcomes. Elements of the existing DCP require review.

- **Stage 2 (2036) - Delivery of new rail link:** Strategies in the context of new rail link and interchange. This includes accommodating increased commercial capacity within the centre, densification around the station, and the creation of a distinct civic and community focal point (Civic Place).
- **Stage 3 (2056) - Long term potential:** Allowing for additional intensification of commercial and residential uses as demand evolves over the following years.

In support of the structure plan the following additional supporting concepts have been provided:

- **Character precincts and town centre character precedents** describing the intended structure and character of St Marys into the future.
- Urban design input regarding **accommodating commercial floorspace** and **accommodating residential floorspace**. In support of SGS' demand projections, this identifies different potential locations for delivery of these uses and built form typologies which may be supported in each area.
- **Queen street typology testing.** Options have been developed to describe the potential future of this key area, which is critical as the urban design focus of the centre which may provide both residential and commercial/employment floorspace.

Image: Queen Street, St Marys



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