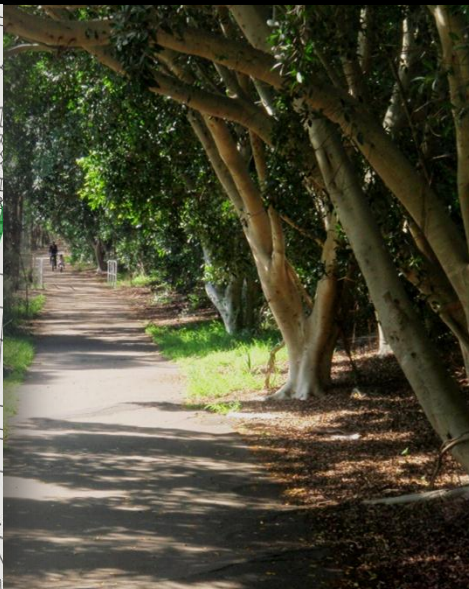
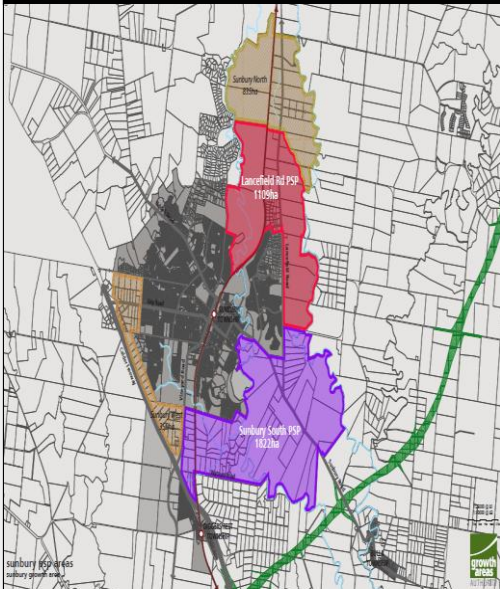


# Retail and Economic Assessment for PSP74 and PSP75 (Sunbury Township)

PREPARED FOR

Metropolitan Planning Authority

Final Report October 2014



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# 1. INTRODUCTION

## 1.1 BACKGROUND

Sunbury is planned to be expanded over time in line with the state government's Growth Corridor Plan and reflecting Hume City Council's aspirations expressed in the HIGAP strategy. The township is expected to grow to around 120,000 residents in the future.

Key objectives of planning strategies for Sunbury include:

- Establish a high level of self-containment in the town over time, with respect to jobs and services; and
- Establish a clear hierarchy of activity anchored by the Sunbury Town Centre as the primary centre in the region.

Achievement of these objectives will require the delivery of a range of retail, commercial, community and industrial activities to provide a mix of integrated activities, services and jobs. The future would provide residents with a diverse and deep pool of jobs and services in the local area.

The two PSPs that are being developed form a package of five PSPs for Sunbury. The current PSPs 74 and 75 will release a significant amount of land for development, estimated to be 850 hectares in the south and 700 hectares in the east, potentially yielding over 45,000 additional residents subject to ultimate land yield, dwelling mix and household composition. The southern precinct is especially strategic from an economic perspective given its location along Sunbury Road and its planned future connection with the proposed Outer Metropolitan Ring Road.

## 1.2 PURPOSE

The purpose of the project as nominated in the project brief is as follows:

- *Establish the required retail floor space and employment floor space potential within the two PSPs and provide advice on any implications for surrounding, planned or existing town centres.*
- *Recommend the preferred location for retail centre/s and other job creating land uses; and any locationally responsive design and siting requirements for new centres (particularly having regard for future transport infrastructure).*
- *Recommend the floorspace required for local convenience, local and major town centres.*
- *Identify the types of retail and commercial (office) uses that would be accommodated in the town centres (including the proposed Commercial-Residential mixed use precinct on Vineyard Road in Sunbury South).*
- *Recommended land areas for employment uses by broad classification types.*

This report builds on previous work undertaken for the study area which includes the Growth Areas Authority Growth Corridor Plan and Hume City Council's Sunbury HIGAP strategy.

## 1.3 INTERPRETATION AND QUALIFICATIONS

The economic guidance shown in this report is indicative with respect to size and location of land uses in the PSP areas. Information for activities outside of the PSP areas is shown to frame the recommendations for the PSP areas and is not intended as detailed planning guidance for those areas.

Other specific qualifications are noted below.

- Retail and Other Floorspace and Site Area Data – The information shown in this report provides a guide to future possibilities to inform planning strategies and decisions – as opposed to being a definitive and final assessment. The information provides an order of magnitude guide based on information known at the time of report preparation. In reality some centres may be bigger and some smaller than shown. The detail of such variations is contingent of the final outcome of local area catchment characteristics including population yields and road networks. More detailed analysis should be undertaken for each potential centre as more information becomes available in the planning process.
- Community Infrastructure Assessment - This report does not provide a comprehensive assessment of community infrastructure needs in the PSP areas. Community infrastructure is assessed at a broad level to identify potential land and job implications for centres. It is understood the Metropolitan Planning Authority will undertake a separate and more detailed assessment of community infrastructure as part of the planning process. This work will include scoping of a proposed major health and tertiary education precinct in Greater Sunbury, which is not assessed in detail in this report.
- Possible Changes - Matters that may impact on the directions of this report include refined information on development cells, population yields, infrastructure connections and retail and other business development trends.
- Business Trends – This report takes into account how retail and other businesses are configured in terms of property and land space at the current time and applies this information to future conditions. This however may change in the future and if so revision to the analysis would be required.
- Best Estimate and Target Scenarios - Two guidance scenarios are shown in this report. One is a best estimate, which reflects possible conditions at full development based on ratios and estimates as shown in this report. The other is a target scenario which provides a guide to the additional non-retail uses that would be required above base conditions to achieve a 1 job per household outcome. This is an aspirational scenario which is provided to inform the planning process.
- Areas Outside of the PSP Areas - This report is focused on PSP areas 75 and 75 but also includes an indicative assessment of all areas within Greater Sunbury for the purposes of guiding the PSP planning areas only. Separate planning and evaluation processes are needed to determine and confirm possible changes in existing and other areas of Greater Sunbury.

- Proposed Locations for Centres and Employment Land Uses - The identified locations for centres and employment land uses shown in the report are indicative only. This report shows recommended role of centres and activities but specific size and location details is intended to be determined in more detailed processes that consider road networks, other infrastructure connections, topography and terrain, land ownership and other relevant matters. These matters must be holistically considered having regard to the recommendations of this report before decisions are made.

## 1.4 REPORT STRUCTURE

This report is structured as follows:

- Section 2 - Study Area Context – This section provides an introduction to the study area location context.
- Section 3 – Policy and Strategy Base - This section provides a summary of the policy, strategy and research base relevant to the area.
- Section 4 - Economic and Social Context – This section provides an overview of existing economic and social conditions in the study area and identifies potential future job needs in the area as it develops over time.
- Section 5 - Land Use and Floorspace Context – This section profiles existing economic land uses and the hierarchy of activities in the study area and profiles the PSP growth areas from an economic planning perspective.
- Section 6 - Future Economic Conditions – This section documents the modelling and assumptions used in the analysis.
- Section 7 – Potential Economic Plan – This section identifies the broad options for the study area having regard to a best estimate scenario and a high growth target scenario.
- Section 8 – Describing the Elements and Issues – This section describes elements of the economic plan and discusses land take, location and design issues.
- Section 9 - Sunbury South PSP – This section identifies a preferred economic structure for the Sunbury South PSP area.
- Section 10 - Lancefield Road PSP – This section identifies a preferred economic structure for the Lancefield Road PSP area.
- Section 11 Conclusions – This section documents the conclusions of the report.
- Section 12 – Implementation – The PSP implementation considerations that relate to this report are summarised in this section.



## 2. STUDY AREA CONTEXT

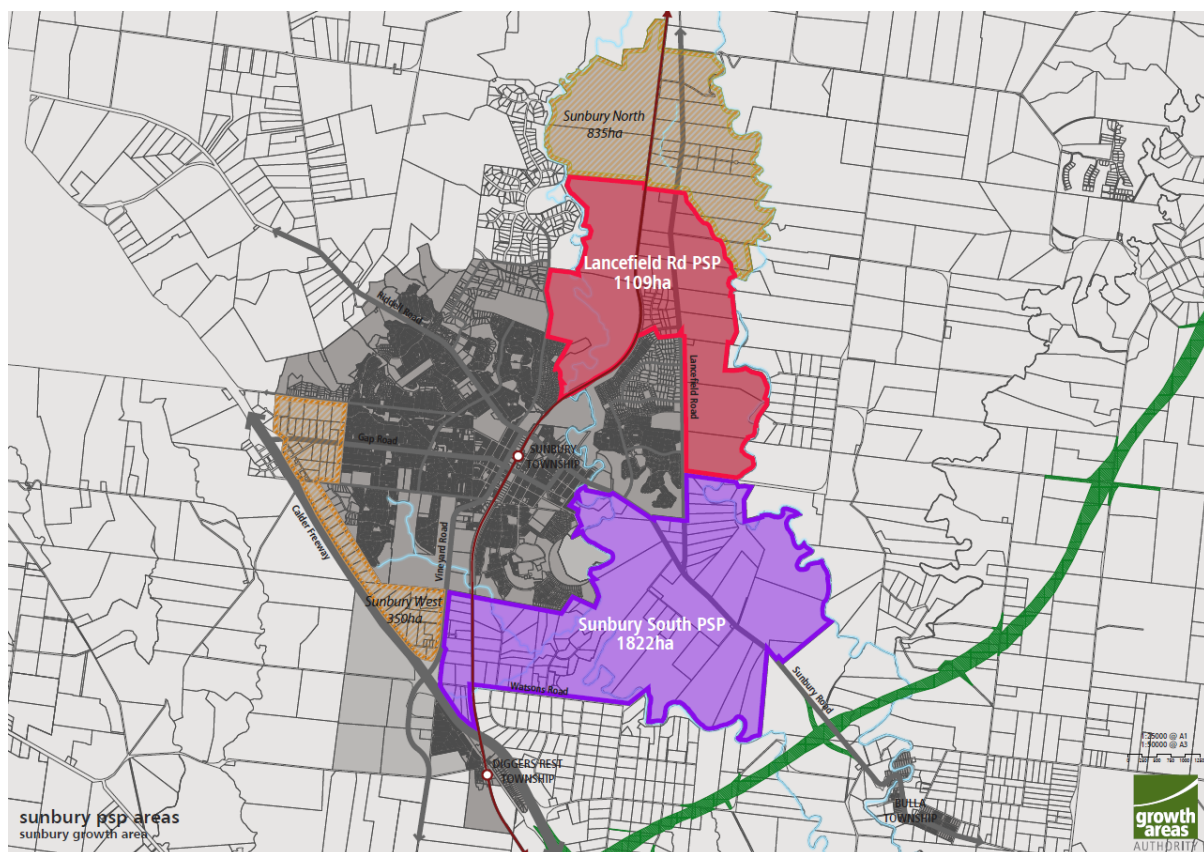
### 2.1 STUDY AREA

This report is focused on two growth areas known as Sunbury South PSP 74 and Lancefield Road PSP 75 as shown in Figure 1 below

Sunbury South has a gross area of 1,822 hectares (ha) and has very good road connections to Melbourne and the Sunbury Town Centre via Sunbury Road (which connects to the Tullamarine Freeway and Town Centre) and the Vineyard Road to Calder Freeway connection. The Sunbury Rail Line (which has electric suburban services to the Sunbury Town Centre) cuts through the western portion of the area.

Lancefield Road has a gross area of 1,109ha and is located on the Lancefield Road corridor to the north-east and includes the country rail line (V-Line services beyond the Sunbury Town Centre). East-west road connections from this area to the Town Centre are limited at present.

**Figure 1 - Study Area**



Source: Metropolitan Planning Authority (2013)

Both precincts are predominantly rural in nature. Low density rural residential uses are located in parts of the area and extractive industries are located in Sunbury South east of Sunbury Road..



The project brief identifies key features relevant to the future planning and development of the two PSP areas as follows:

- Jacksons Creek and Emu Creek corridors (in both PSPs) and tributaries, notably Harpers Creek, will shape development patterns;
- Redstone Hill in Sunbury South and other areas have steep slopes;
- An extractive industry operation is located in Sunbury South; and
- Sunbury Sewerage Treatment Plant is located immediately outside of Sunbury South and may have an impact on development within that precinct.

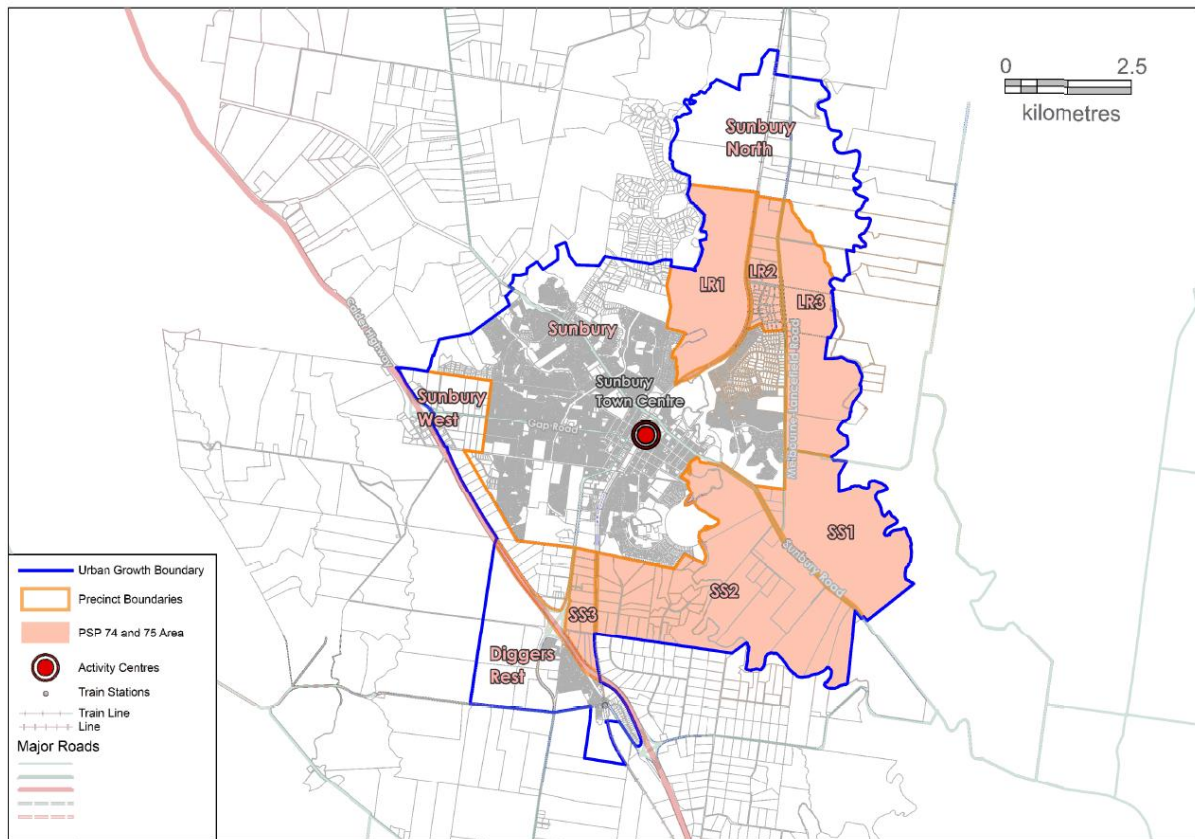
Appendix 1 provides a sample of study area images that show the landscape that will be developed.

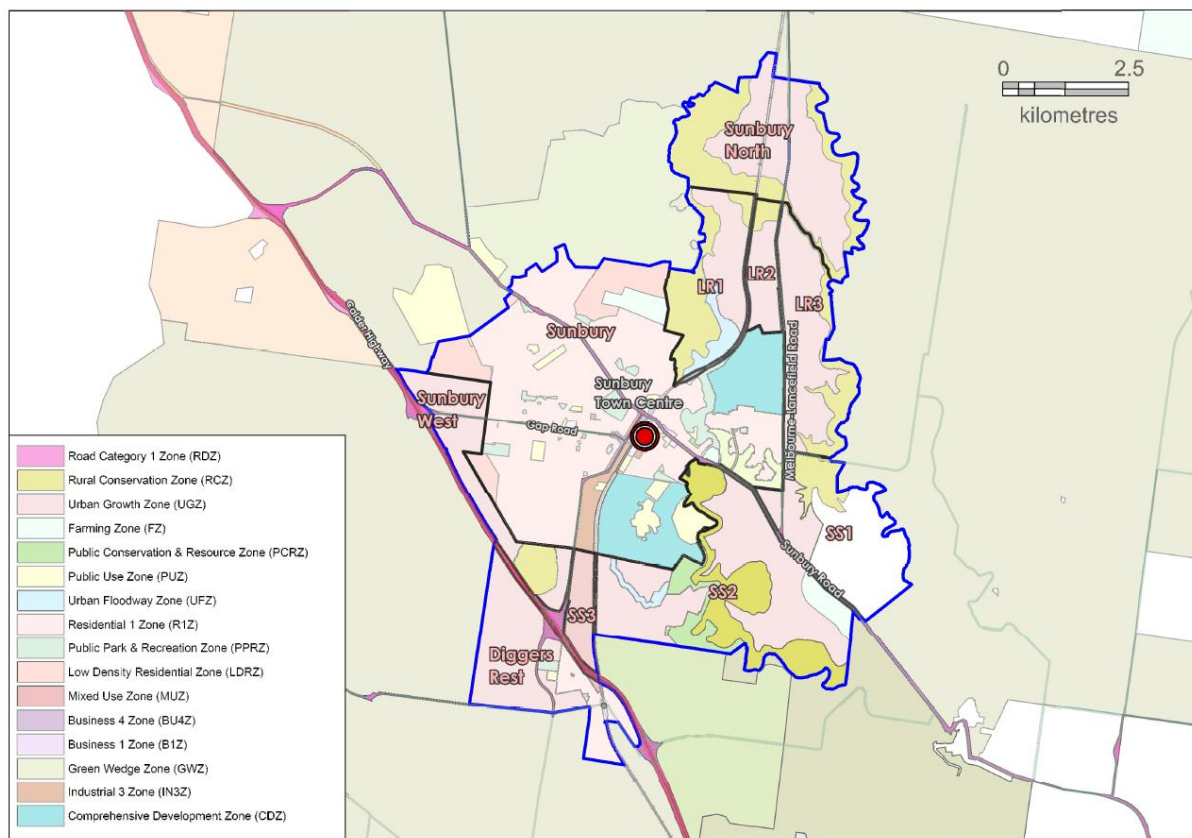
## 2.2 DEVELOPMENT CELLS

For the purpose of this project, the two PSP areas and the broader urban region (called Greater Sunbury) have been divided into development cells for assessment purposes. Many of the future economic activities that will be generated in the area will be population driven and as such small area population assessment is required.

The two PSP areas are divided into three areas each and other areas are defined based on planning boundaries and natural catchments as follows:

- Sunbury South (SS) 1
- Sunbury South (SS) 2
- Sunbury South (SS) 3
- Lancefield Road (LR) 1
- Lancefield Road (LR) 2
- Lancefield Road (LR) 3
- Sunbury Township
- Diggers Rest
- Sunbury West
- Sunbury North

**Figure 2 - Selected Development Cells in Greater Sunbury**

**Figure 3 - Existing Zoning of Selected Development Cells in Greater Sunbury**

## 3. POLICY AND STRATEGY BASE

### 3.1 SUNBURY / DIGGERS REST GROWTH CORRIDOR PLAN

The Sunbury / Diggers Rest Growth Corridor Plan sets out the broad planning framework for Greater Sunbury. Key features of the plan are:

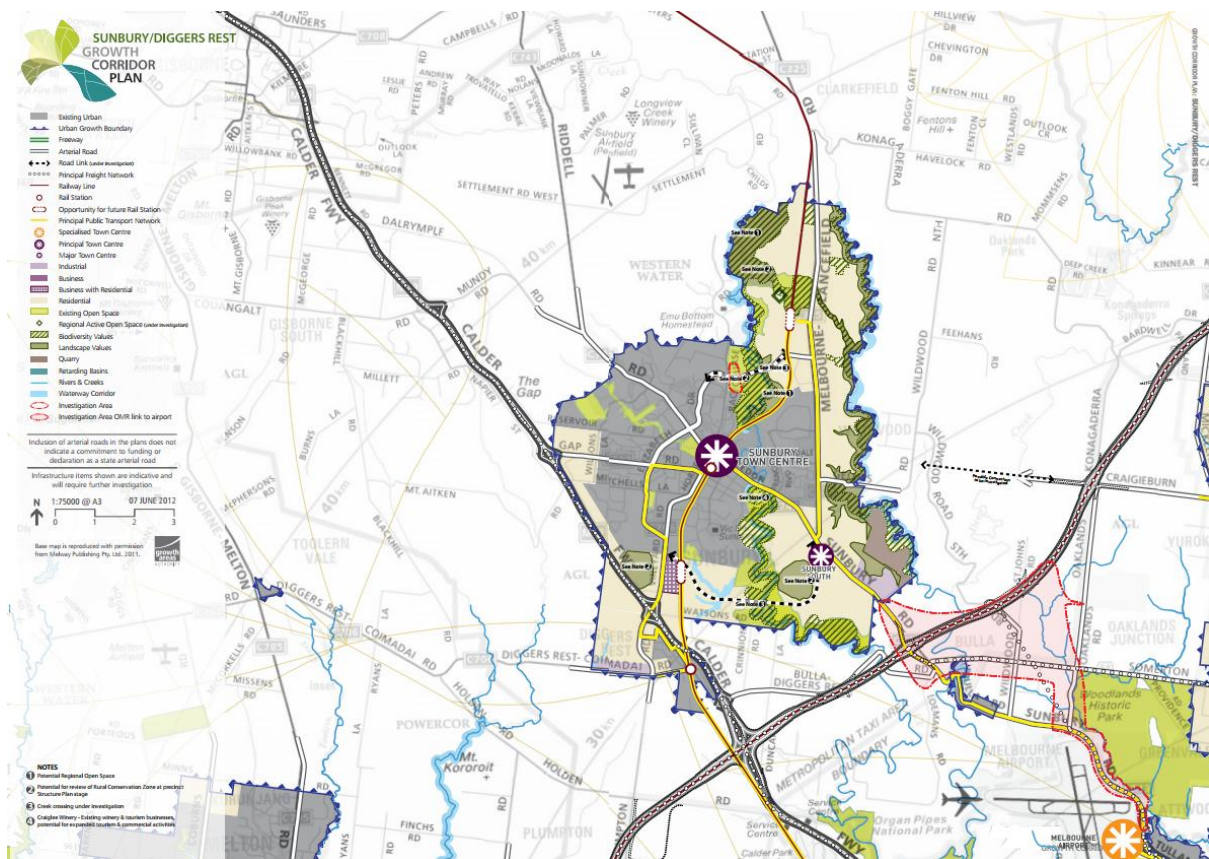
- Reinforcement of Sunbury Town Centre as the Principal Activity Centre in the region;
- Provision of a future Major Town Centre in Sunbury South on the west side of Sunbury Road;
- Provision of a future mixed business / residential precinct in Sunbury South between Vineyard Road and the rail line (nominally 110ha for TODs, office and business services);
- Provision of a new industrial precinct in Sunbury South on the east side of Sunbury Road (100ha gross industrial land);
- Future road connections in the north and south of Sunbury, including road creek crossings and a potential long term Emu Creek crossing connection near Gellies Road to connect areas; and
- Two potential future railway stations are identified in concept plans, one in the Lancefield Road PSP and one in the Sunbury South PSP.

See Figure 4 below for a spatial representation of these concepts.

The Growth Corridor Plan emphasises the desire to improve the range of local jobs and services in the area whilst strengthening the role of Sunbury Town Centre. The Town Centre will be supported by a new distribution of sub-regional and local scale services within the township featured by a new Major Town Centre on Sunbury Road.

The Growth Corridor Plan indicates that Sunbury / Diggers Rest has the capacity to provide between 10,000 and 15,000 new jobs when it is fully developed.

The preservation of the semi-rural and natural setting of the township is a key planning direction.

**Figure 4 - Sunbury / Diggers Rest Growth Corridor Plan**

Source: Growth Areas Authority (2012) Growth Corridor Plans: Managing Melbourne's Growth

## 3.2 PLAN MELBOURNE, METROPOLITAN PLANNING STRATEGY

The Metropolitan Planning Strategy (Plan Melbourne) was released in 2014. Plan Melbourne will guide the city's growth to 2050 with strategies nominated to house, employ, and move more people around the metropolitan area and beyond.

The strategy sets in place a Metropolitan Structure Plan that is defined by a range of economic principles and activities which includes activity centres, transport links and gateways and industrial / employment areas.

Sunbury is nominated to accommodate activity centres. The purpose of such centres is *"to provide access to a wide range of goods and services in centres that are planned and managed by local government. The centres will have jobs and vibrant local economies. Some will serve larger subregional catchments."*

A concept that is introduced in Plan Melbourne is the vision of 20-minute neighbourhoods. The 20-minute neighbourhood is about having access to a range of local services and facilities ideally within 20 minutes of home.

Melbourne Airport is nominated as a key transport and employment hub in the northern region. This strategic asset will be protected from incompatible land uses but adjacent complementary uses will be encouraged.



The northern and western regions of Melbourne have significant industrial land stocks and these will be protected and expanded for further economic development and employment growth.

A major element of Plan Melbourne and other strategic work being undertaken by state agencies is the planned future development of the Outer Metropolitan Ring Road (OMR). The alignment for that link is south of Sunbury and north of Melbourne Airport. Construction of that link would significantly enhance accessibility to and from Sunbury to other economic and urban areas and is likely to accelerate development in the township.

### 3.3 HUME LOCAL PLANNING POLICY FRAMEWORK

The Local Planning Policy Framework (LPPF) acknowledges that Hume City Council has a strong employment base which is largely based on industry and Melbourne Airport related activity.

Sunbury, Broadmeadows, Gladstone Park and Roxburgh Park are recognised as major centres of the municipality and Council is committed to supporting further development of these centres.

An objective of the LPPF is to ensure that the future growth of Sunbury is contained within the confines of the Jackson Creek Valley and that the identity of the town's rural and country style is retained. The strategies are to consolidate and intensify land uses within designated urban areas, encourage orderly expansion of urban development extending outwards from the Town Centre and through protection of Sunbury's heritage and wineries.

Other specific directions in relation to Sunbury are:

- The Sunbury Town Centre is nominated as the primary retail and commercial centre in the Sunbury Region and services predominantly a convenience shopping role. The objective of the Sunbury Town Centre is to support the orderly growth and development and maintain the historic 'rural town' character.
- Retain and enhance office, institutional, civic and community related activities along Macedon Street;
- Retain land south of MacDougall Road (between Vineyard Road and the Railway line) for a future employment area;
- Develop a dense network of convenience based activity centres characterised by a large number of neighbourhood activity centres (anchored by supermarkets) which serve new communities;
- Ensure growth areas within the Sunbury and Hume Growth corridors are planned appropriately to ensure retail is provided in a timely manner;
- Encourage bulky goods and homemaker centres along Vineyard Road in Sunbury;
- The neighbourhood shopping centres local policy indicates that neighbourhood centres typically have 1,500sqm of floorspace and have defined catchments of up to 5,000 persons.



### 3.4 SUNBURY HIGAP SPATIAL STRATEGY

The Hume Integrated Growth Area Plan (HIGAP) for Sunbury is a strategy which aims to manage growth over the next 30 years. HIGAP for Sunbury states that the township has been identified by the state government for major growth. It is forecast that the population will grow to over 100,000 persons. Relevant strategic objectives for Sunbury are to:

- Ensure Sunbury remains separate yet retains its rural feel whilst still being well connected to Melbourne by high quality transport and technology networks;
- Encourage use and development in surrounding non-urban areas that supports and complements the urban area;
- Increase the number and diversity of jobs within Sunbury; and
- Intensify activity in the Town Centre and create new supporting activity centres.

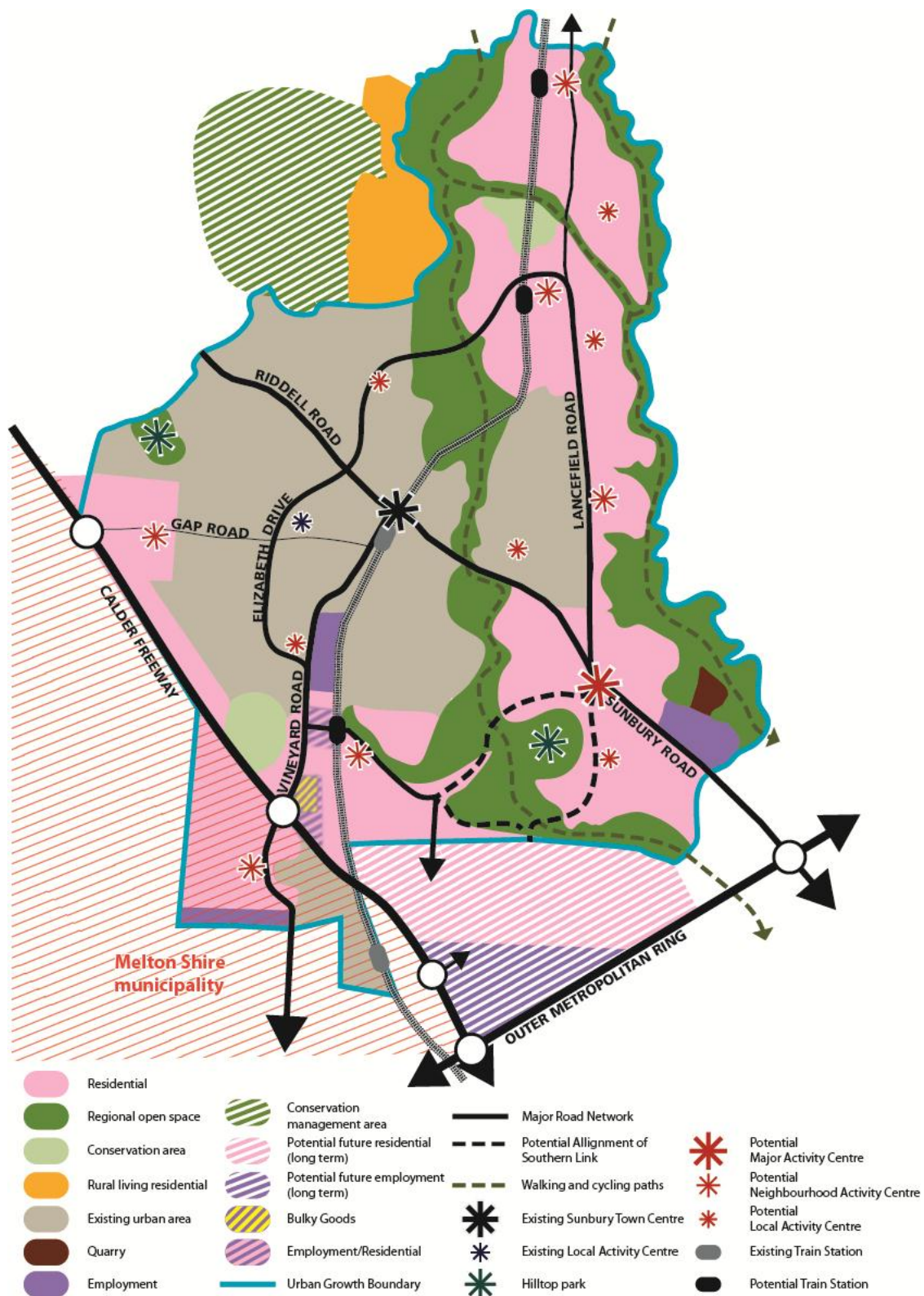
Sunbury HIGAP stipulates that the Sunbury Town Centre will remain the Primary Activity Centre. It indicates that the second largest centre in Sunbury will be the new Major Activity Centre (MAC) located on Sunbury Road. A series of Neighbourhood Activity Centres (NAC) and Local Activity Centres (LAC) will also be developed, primarily in the new development areas.

Other points of interest regarding activity centres in Sunbury include:

- NACs are to be based around a large supermarket with a small range of uses like cafes, restaurants, specialty food shops, real estate agents, small scale offices and medical facilities;
- A multi-purpose community centre, primary school and active sporting facility will also be generally located within or adjoining NACs;
- Medium or higher density housing will also be developed in and on the edge of NACs, especially those near train stations;
- The largest of the NACs will be located in the north east of Sunbury adjacent to a future planned train station. This will also be a favoured location for a future hospital and university / TAFE;
- A bulky goods centre comprising 50,000sqm will be provided on the eastern side of Vineyard Road near the Calder Freeway;
- A future employment area is nominated for Sunbury South on the east side of Vineyard Road;
- The former Victoria University site is nominated for higher education; and
- Major new road connections are required for the overall urban area to be integrated.

Figure 5 shows Hume City Council's growth strategy for Sunbury.

Figure 5 - Hume City Council's Preferred Future Spatial Structure for Sunbury



Source: Hume City Council (2012) Sunbury HIGAP Spatial Strategy

### 3.5 DIGGERS REST PRECINCT STRUCTURE PLAN

The Diggers Rest Precinct Structure Plan (PSP) was prepared by the Growth Areas Authority in 2012. The PSP will form the basis for the future development of the area over time.

The PSP estimates the area will accommodate approximately 11,970 residents at full development. The main economic features of the PSP are:

- A neighbourhood activity centre with up to 6,000sqm retail floorspace;
- 27.5ha of employment land in the south; and
- Community facilities and a school.

Refer to Figure 6 below for details.

The planned activity centre (called Local Town Centre) must be located generally in accordance with the location shown in Figure 6 below and comprise:

- A maximum of one full line supermarket and supporting specialty stores;
- Cafe, restaurant and take-away premises;
- Commercial premises which could include such uses as office, medical, showroom, home office and child care uses;
- Mixed uses which may include home/office and the provision of retail, commercial and/or residential use; and
- Community facilities.

**Figure 6 - Diggers Rest Precinct Structure Plan**

Source: Growth Areas Authority (2012) Diggers Rest Precinct Structure Plan

## 3.6 OTHER RESEARCH

Other research material was reviewed for this report including other economic reports prepared on behalf of various agencies and stakeholders. This includes the Essential Economics Growth Corridor Plans Report which was commissioned by the former Growth Areas Authority to provide advice on activity centre and employment planning in the growth areas.

That report suggests that Melbourne's North (Sunbury) may achieve the employment outcomes shown in Table 1 below.

**Table 1 - Sunbury Potential Employment Distribution**

Type	Low	High
Activity Centre (25-30%)	5,500-6,500	9,000-10,500
Employment (40-45%)	9,000-10,000	14,000-16,000
Community (25-30%)	5,500-6,500	9,000-10,500
<b>Total</b>	<b>22,000</b>	<b>35,000</b>

Source: Essential Economics (2011) Growth Corridor Plans: Activity Centre and Employment Planning

The report indicates that Sunbury should be able to accommodate one or two Major Town Centres (MTC), and a number of smaller Local Town Centres (LTC) with total floorspace expected to range between 120,000sqm and 220,000sqm. The following Table 2 summarises the broad estimate of floorspace potential.

**Table 2 - Broad Estimate of Floorspace Provision in Sunbury (sqm)**

Centre Type	Low	High
<b>Retail Provision</b>		
PTC	0	0
MTC	55,000	110,000
LTC	28,000	42,000
Total	83,000	152,000
<b>Non Retail Provision</b>		
PTC	0	0
MTC	25,000	50,000
LTC	12,000	18,000
Total	37,000	68,000
<b>Total Commercial Space</b>		
PTC	0	0
MTC	80,000	160,000
LTC	40,000	60,000
<b>Total</b>	<b>120,000</b>	<b>220,000</b>

Source: Essential Economics (2011) Growth Corridor Plans: Activity Centre and Employment Planning

## 3.7 DEVELOPMENT CONTROLS

Planning zones in Victoria were reformed in 2013. This includes changes to commercial and industrial zones and residential zones. The zone reforms aim to simplify requirements, allow a broader range of activities and improve the range of zones to better manage growth.

For commercial and industrial zones, a key objective of the reform program was to enable greater investment flexibility within selected zones. Of relevance to this study, the following Table 3 summarises the revised commercial and industrial development controls.



**Table 3 - Summary of Commercial and Industrial Zones**

<b>Commercial</b>			
<b>Previous Zone</b>	<b>New Zone</b>	<b>Zone Purpose</b>	<b>Key Features</b>
Business 1 Zone Business 2 Zone Business 5 Zone	Commercial 1 Zone	<ul style="list-style-type: none"> <li>To promote vibrant mixed use commercial centres for retail, office, business, entertainment and community uses, as well as residential uses at densities complementary to the role and scale of the commercial centre.</li> </ul>	<ul style="list-style-type: none"> <li>Supermarket permitted without permit.</li> <li>30 metre buffer for sensitive uses from industry and warehouses that do not require a permit.</li> <li>Floor area restrictions are removed and provide business flexibility by reducing the need for approvals.</li> </ul>
Business 3 Zone Business 4 Zone	Commercial 2 Zone	<ul style="list-style-type: none"> <li>To develop commercial areas for offices and appropriate manufacturing and industrial and limited retail uses that does not affect the safety and amenity of adjacent, more sensitive uses.</li> </ul>	<ul style="list-style-type: none"> <li>Small scale supermarket up to 1,800sqm without permit.</li> <li>All accommodation (excluding caretaker's home, residential motel/hotel) to be prohibited.</li> <li>30 metre buffer for sensitive uses from industry and warehouses that do not require a permit.</li> <li>Floor area restrictions for office and some retail uses will be removed in many instances to create new opportunities for office and retail growth.</li> </ul>
<b>Industrial</b>			
<b>Zone</b>	<b>Zone Purpose</b>		<b>Key Features</b>
Industrial 1 Zone	<ul style="list-style-type: none"> <li>To provide for the manufacturing industry, the storage and distribution of goods and associated uses in a manner that does not affect the safety and amenity of local communities.</li> </ul>		<ul style="list-style-type: none"> <li>Removal of default floor space area restrictions for office.</li> </ul>
Industrial 2 Zone	<ul style="list-style-type: none"> <li>To provide for the manufacturing industry, the storage and distribution of goods and associated facilities in a manner that does not affect the safety and amenity of local communities.</li> </ul>		<ul style="list-style-type: none"> <li>Removal of default floor space area restrictions for office.</li> </ul>
Industrial 3 Zone	<ul style="list-style-type: none"> <li>To provide for industries and associated uses in specific areas where special consideration of the nature and impacts of industrial uses is required or to avoid inter industry conflict and to allow limited retailing in appropriate locations.</li> </ul>		<ul style="list-style-type: none"> <li>Removal of default floor space area restrictions for office.</li> <li>Allowance for small scale supermarket up to 1,800sqm with 500sqm of associated shops.</li> <li>Allow for commercial opportunities and competition.</li> </ul>

Source: Reformed Zones for Victoria Fact Sheet, New Residential/Commercial/Industrial Zones, July 2013

Source: Department of Planning and Community Development, Zone Descriptions

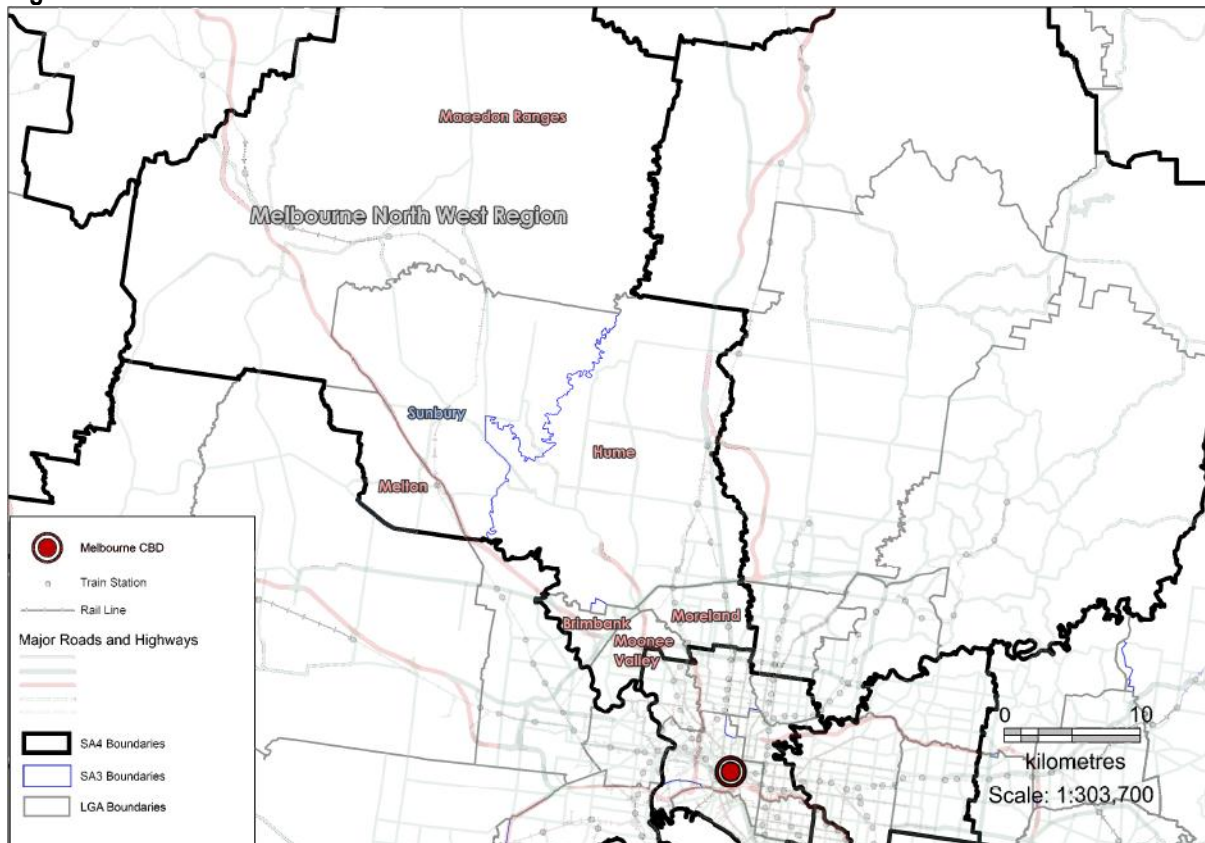


## 4. ECONOMIC AND SOCIAL CONTEXT

This section profiles selected socio-demographic, economic and employment metrics relating to Sunbury and the region for context purposes. The analysis is provided to better understand current conditions and trends which are likely to impact on demand for retail, commercial and industrial land in Sunbury.

To that end, the ABS Sunbury Statistical Area (SA) 3 has been benchmarked against Melbourne's North West Region and Greater Melbourne where possible. The North West Region is shown in Figure 7 below (comprising Hume and parts of surrounding municipalities).

**Figure 7 - Data Areas**



Source: MapInfo and Hill PDA (2014)

## 4.1 SOCIO- DEMOGRAPHIC PROFILE AND TRENDS

### Population

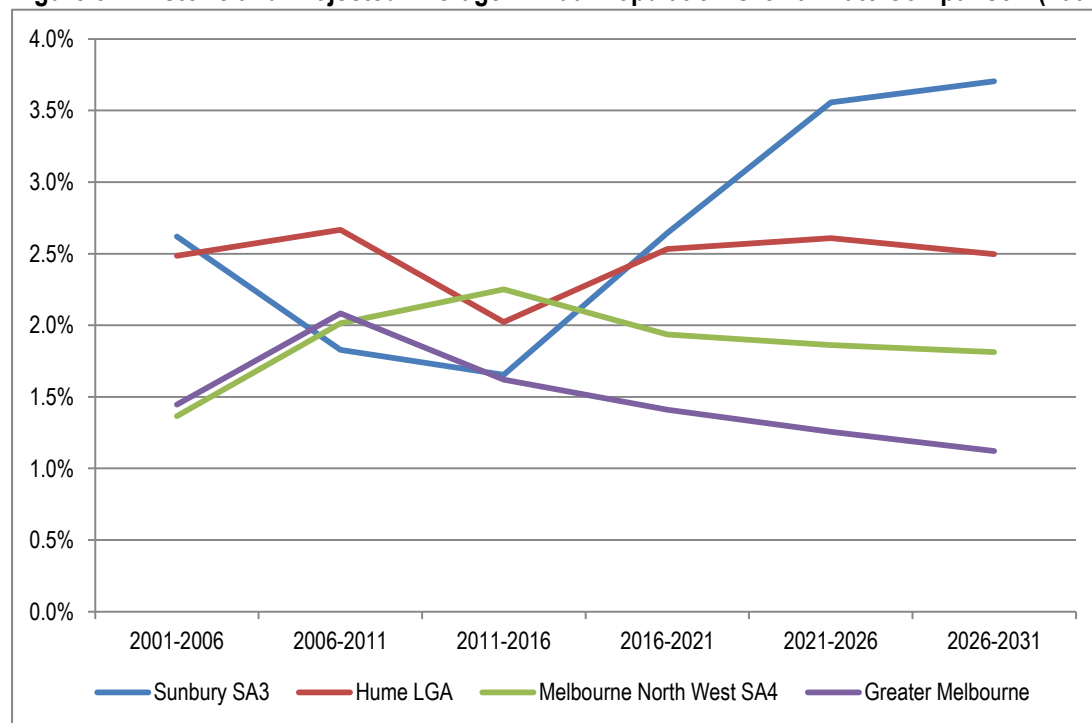
The population of Sunbury SA3 has increased at a rapid rate between 2001 and 2011 from 30,508 to 38,012 persons. The rate of growth during this period was 2.2%pa and this rate is expected to accelerate over time to 2.9%pa, which would be higher than the comparison areas and about double the metropolitan growth rate to 2031. By 2031 Sunbury SA3 is expected to accommodate around 67,200 people.

**Table 4 - Historic and Forecast Population (2001-2031)**

Area	Historic			Forecast				Annual Average Change	
	2001	2006	2011	2016	2021	2026	2031	2001-2011	2011-2031
Sunbury SA3	30,508	34,721	38,012	41,261	47,012	55,989	67,152	2.2%	2.9%
Hume LGA	135,147	152,797	174,290	192,647	218,313	248,316	280,892	2.6%	2.4%
Melb. North West SA4	280,196	299,857	331,282	370,280	407,512	446,864	488,857	1.7%	2.0%
Greater Melbourne	3,500,249	3,760,760	4,169,366	4,518,213	4,845,955	5,157,957	5,453,712	1.8%	1.4%

Source: ERP Publication 3218.0, Victoria in the Future 2012, Forecast .id & Hill PDA (2014)

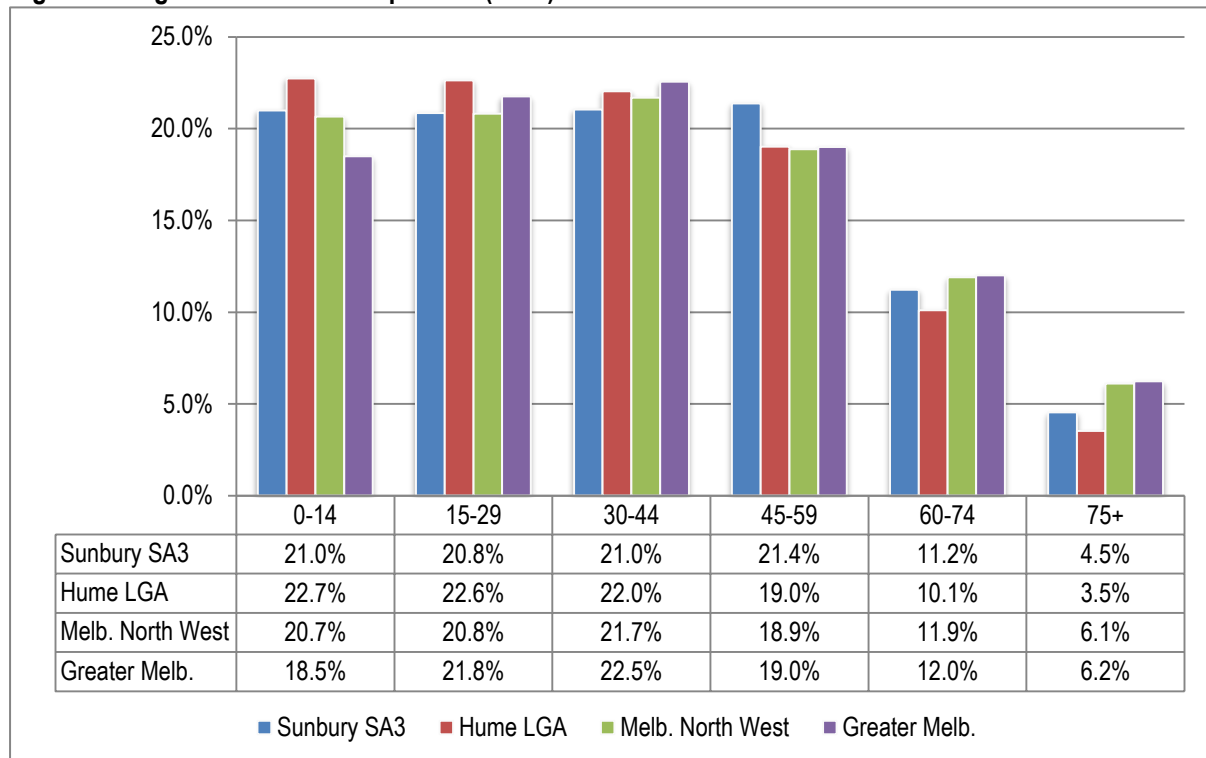
**Figure 8 - Historic and Projected Average Annual Population Growth Rate Comparison (2001-2031)**



Source: ERP Publication 3218.0, Victoria in the Future 2012, Forecast .id & Hill PDA (2014)

### Age Distribution

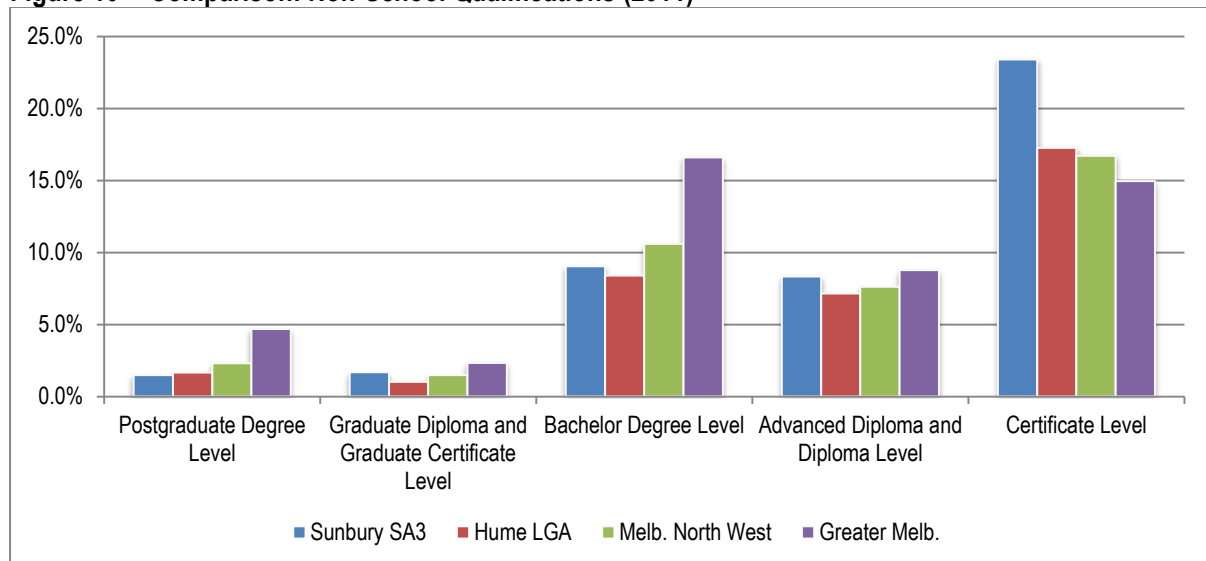
An analysis of the age distribution of residents at 2011 shows that there are few significant differences, with the most notable contrast being a marginally higher proportion of residents aged 45 to 59 years in the Sunbury SA3 (refer to the following Figure 9).

**Figure 9 - Age Distribution Comparison (2011)**

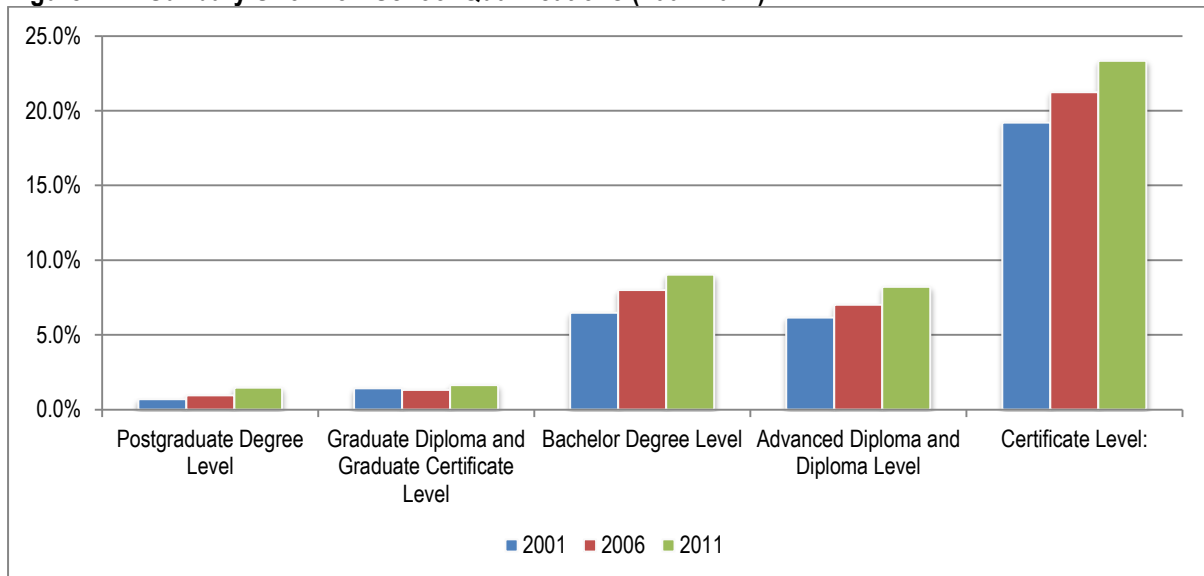
Source: ABS Census, Basic Community Profiles: Hume LGA, Melbourne North West Region, Greater Melbourne SD (2011)

## **Education**

The 2011 profile data on education shows that the Sunbury SA3 population is vocationally oriented, and has a relatively low share of university educated residents compared to the metropolitan area as a whole (see Figure 10). The skills profile of the area is however increasing, as shown in Figure 11.

**Figure 10 - Comparison: Non-School Qualifications (2011)**

Source: ABS Census, Basic Community Profiles (2011)

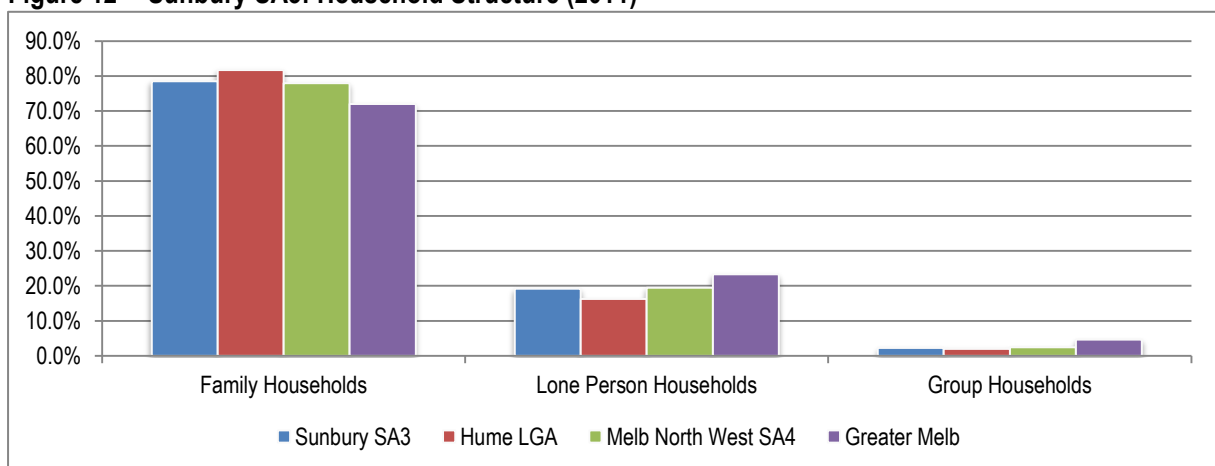
**Figure 11 - Sunbury SA3: Non-School Qualifications (2001-2011)**

Source: ABS Census, Sunbury SA3 Time Series Profile (2011)

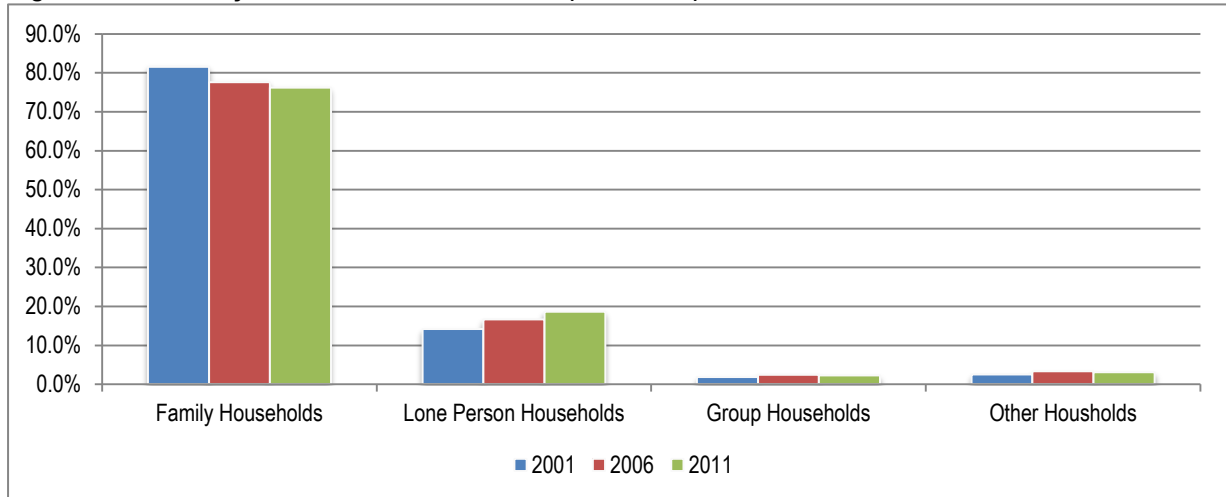
## 4.2 HOUSEHOLDS AND DWELLINGS

### Household Structure

Household structure data shows that all comparison areas have a high proportion of family households (Figure 12). Over the period 2001 to 2011, the Sunbury SA3 experienced a steady rise in the proportion of lone person households (Figure 13), which is a general trend across all areas.

**Figure 12 - Sunbury SA3: Household Structure (2011)**

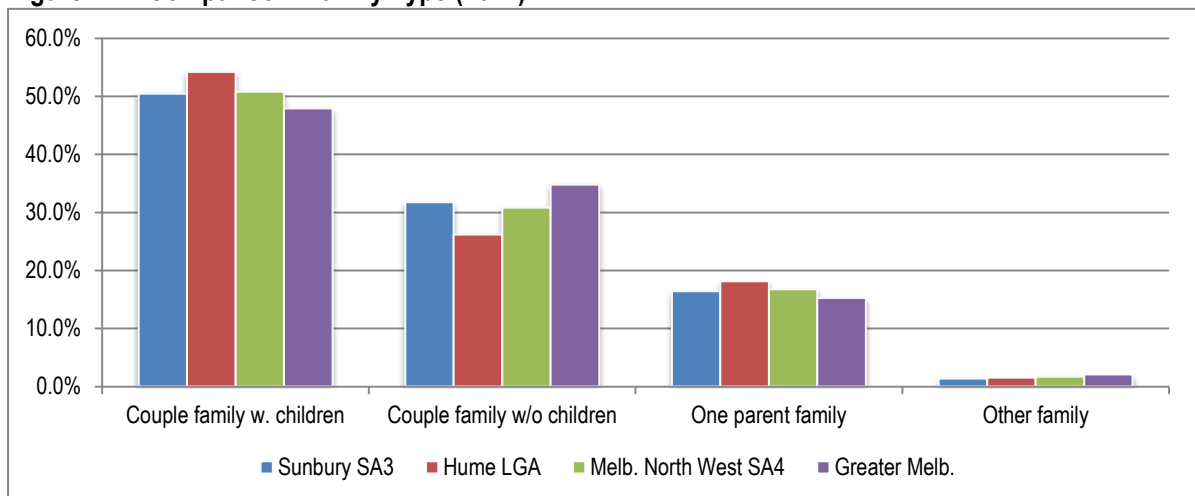
Source: ABS Census, Basic Community Profiles (2011)

**Figure 13 - Sunbury SA3: Household Structure (2001-2011)**

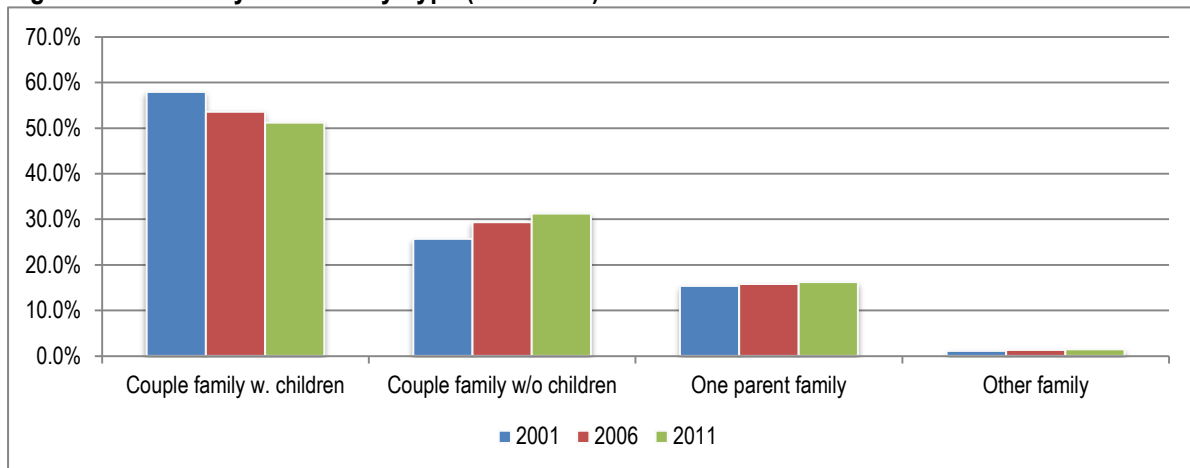
Source: ABS Census, Sunbury SA3 Time Series Profile (2011)

**Family Type**

The comparison of family type distributions shows a high proportion of couple families with children in the comparison areas followed by couple families without children (Figure 14). The latter family type is growing fastest followed by lone parent families (Figure 15).

**Figure 14 - Comparison: Family Type (2011)**

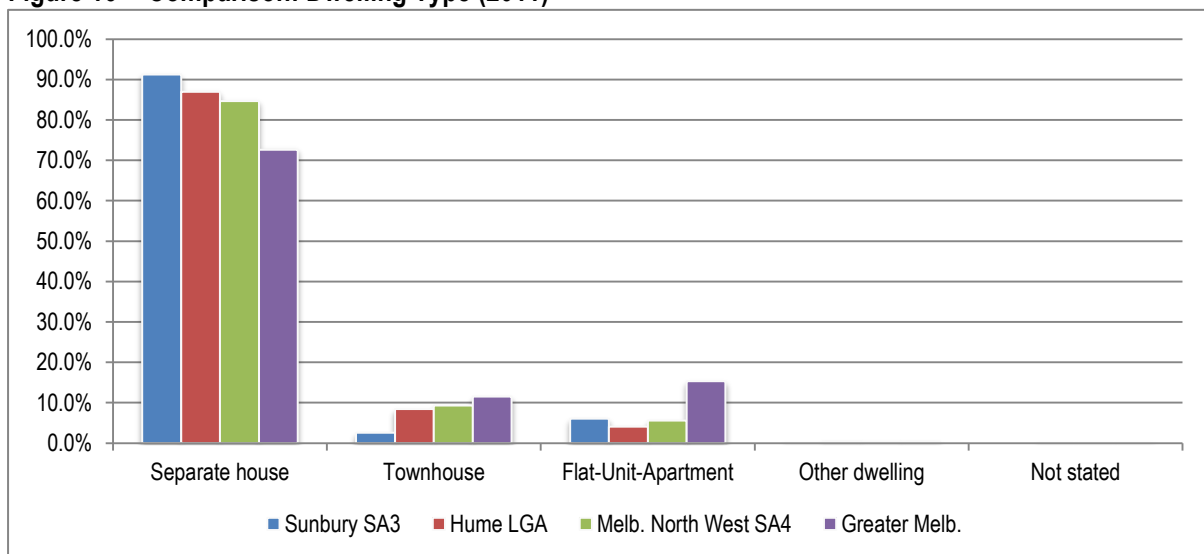
Source: ABS Census, Basic Community Profiles (2011)

**Figure 15 - Sunbury SA3: Family Type (2001-2011)**

Source: ABS Census, Sunbury SA3: Time Series Profile (2011)

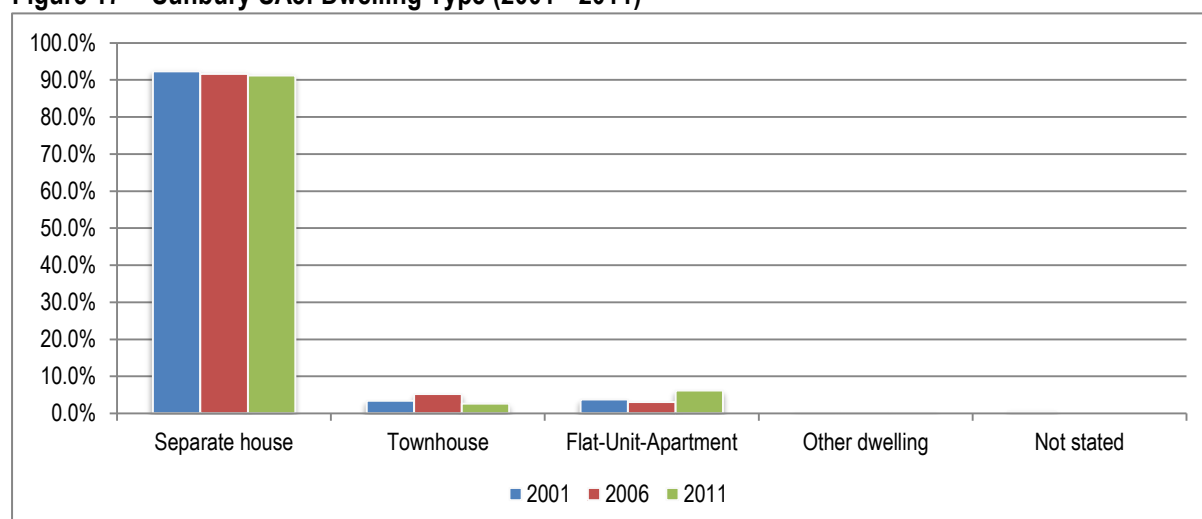
### **Dwelling Type**

In terms of dwelling stock, a stand-out feature of Sunbury SA3 is a relatively high share of separate houses (Figure 16) and relatively little change in this profile in the decade to 2011 (Figure 17). Over 9 in 10 dwellings in the area are separate houses.

**Figure 16 - Comparison: Dwelling Type (2011)**

Source: ABS Census, Basic Community Profiles (2011)



**Figure 17 - Sunbury SA3: Dwelling Type (2001 - 2011)**

Source: ABS Census, Sunbury SA3 Time Series Profile (2011)

## 4.3 RESIDENT EMPLOYMENT PROFILE

Over the period 2006 to 2011 the number of employed residents in the Sunbury SA3 increased by around 2,070 from 16,570 to 18,640 (+12.5%). At 2011, working residents were most commonly employed in retail trade (11.5%) and construction (11%).

This number of working residents employed in manufacturing and information media and telecommunications declined over the data period shown.

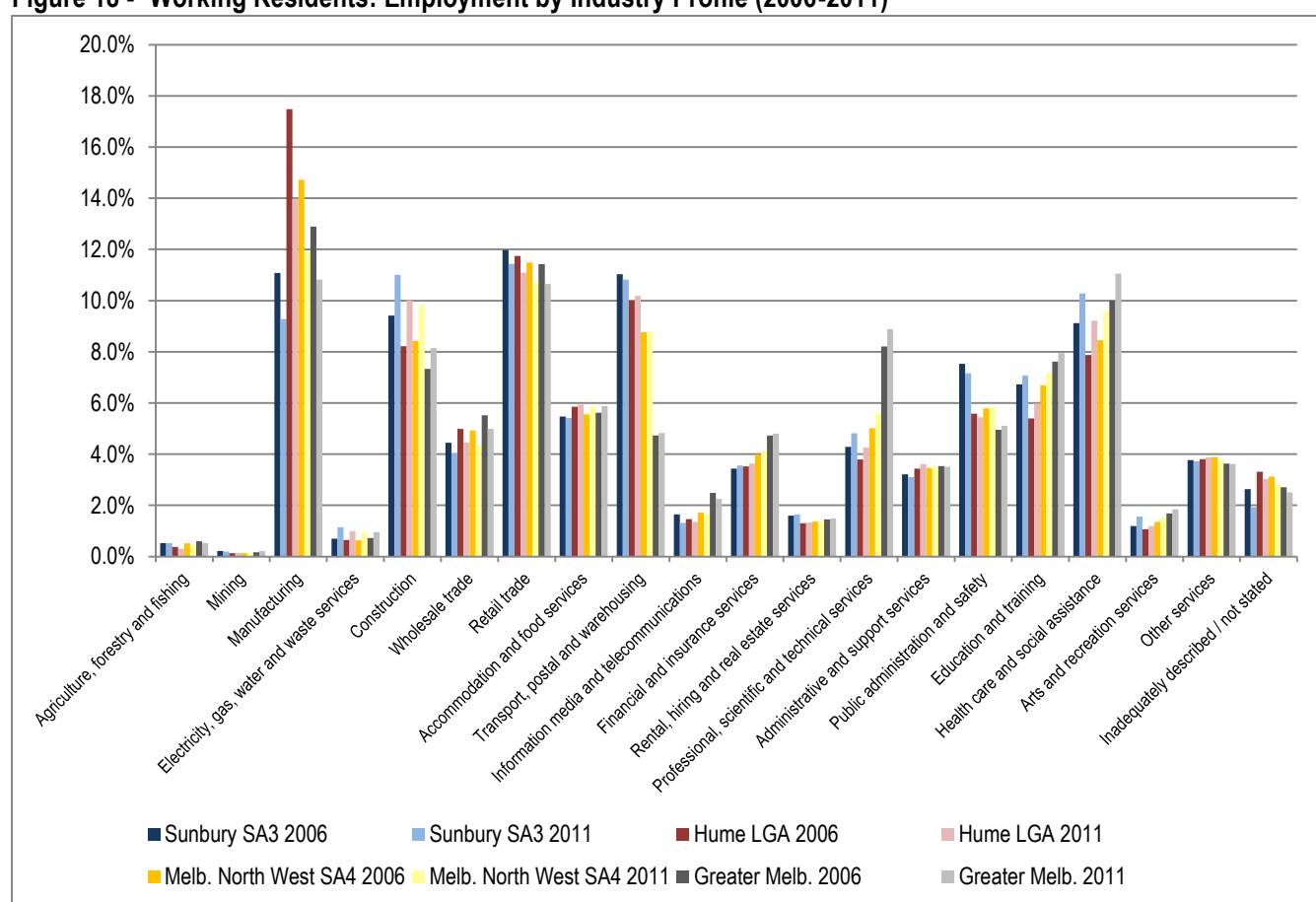
Resident employment grew most strongly in construction (+492 residents workers) and health care and social assistance (+406 persons). Proportionally, strongest growth was experienced in electricity, gas, water and waste services, arts and recreation services and construction.

**Table 5 - Proportion of Resident Workforce by Industry (2006-2011)**

	Sunbury SA3			Hume LGA			Melbourne North West SA4			Greater Melbourne		
	2006	2011	Change	2006	2011	Change	2006	2011	Change	2006	2011	Change
<b>Number of Working Residents</b>	<b>16,566</b>	<b>18,636</b>	<b>2,070</b>	<b>61,130</b>	<b>70,889</b>	<b>9,759</b>	<b>121,691</b>	<b>138,565</b>	<b>16,874</b>	<b>1,703,108</b>	<b>1,920,948</b>	<b>217,840</b>
Agriculture, forestry and fishing	0.5%	0.5%	-0.9%	0.4%	0.3%	-19%	0.5%	0.4%	-14%	0.6%	0.5%	-13%
Mining	0.2%	0.2%	-8.6%	0.1%	0.1%	10%	0.1%	0.2%	24%	0.2%	0.2%	30%
Manufacturing	11.1%	9.3%	-16.3%	17.5%	14.0%	-20%	14.7%	11.9%	-19%	12.9%	10.8%	-16%
Electricity, gas, water and waste services	0.7%	1.1%	63.2%	0.6%	1.0%	54%	0.6%	1.0%	49%	0.7%	1.0%	33%
Construction	9.4%	11.0%	16.9%	8.2%	10.0%	22%	8.4%	9.8%	17%	7.3%	8.1%	11%
Wholesale trade	4.4%	4.0%	-9.2%	5.0%	4.5%	-11%	4.9%	4.4%	-12%	5.5%	5.0%	-10%
Retail trade	12.0%	11.4%	-4.6%	11.7%	11.1%	-6%	11.5%	10.7%	-7%	11.4%	10.6%	-7%
Accommodation and food services	5.5%	5.4%	-1.0%	5.9%	5.9%	1%	5.6%	5.8%	5%	5.6%	5.9%	5%
Transport, postal and warehousing	11.0%	10.8%	-1.9%	10.0%	10.2%	2%	8.8%	8.8%	0%	4.7%	4.8%	2%
Information media and telecommunications	1.6%	1.3%	-20.3%	1.5%	1.4%	-8%	1.7%	1.6%	-5%	2.5%	2.3%	-9%
Financial and insurance services	3.4%	3.6%	3.2%	3.5%	3.6%	3%	4.0%	4.1%	4%	4.7%	4.8%	2%

Rental, hiring and real estate services	1.6%	1.7%	3.7%	1.3%	1.3%	1%	1.4%	1.4%	2%	1.5%	1.5%	2%
Professional, scientific and technical services	4.3%	4.8%	12.3%	3.8%	4.3%	12%	5.0%	5.6%	11%	8.2%	8.9%	8%
Administrative and support services	3.2%	3.1%	-3.6%	3.4%	3.6%	5%	3.5%	3.5%	2%	3.5%	3.5%	-1%
Public administration and safety	7.5%	7.2%	-5.1%	5.6%	5.4%	-2%	5.8%	5.8%	1%	4.9%	5.1%	3%
Education and training	6.7%	7.1%	5.3%	5.4%	6.0%	11%	6.7%	7.2%	7%	7.6%	7.9%	4%
Health care and social assistance	9.1%	10.3%	12.8%	7.9%	9.2%	17%	8.5%	9.6%	13%	10.0%	11.1%	10%
Arts and recreation services	1.2%	1.6%	31.3%	1.1%	1.2%	11%	1.3%	1.5%	13%	1.7%	1.8%	9%
Other services	3.8%	3.7%	-1.3%	3.8%	3.9%	2%	3.9%	3.8%	-2%	3.6%	3.6%	0%
Inadequately described / not stated	2.6%	1.9%	-26.8%	3.3%	3.0%	-9%	3.1%	2.8%	-10%	2.7%	2.5%	-7%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>		<b>100.0%</b>	<b>100.0%</b>		<b>100.0%</b>	<b>100.0%</b>		<b>100.0%</b>	<b>100.0%</b>	

Source: ABS Census, Time Series Profiles (2011)

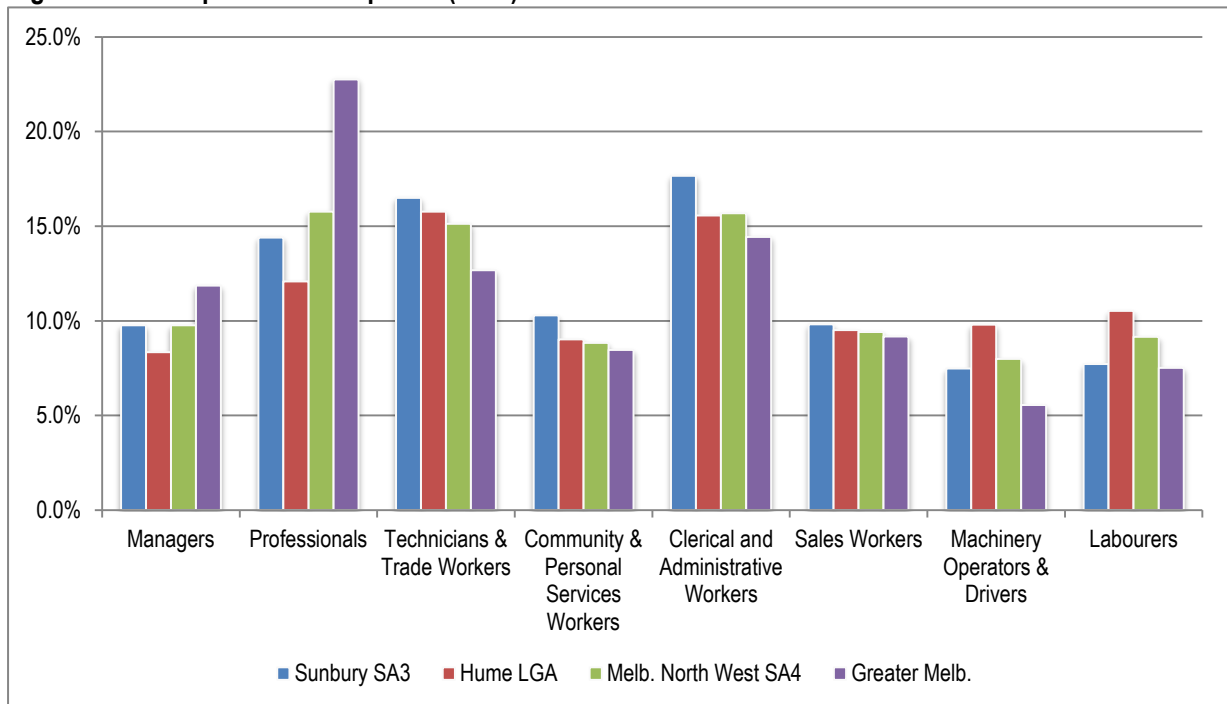
**Figure 18 - Working Residents: Employment by Industry Profile (2006-2011)**

Source: ABS Census, Time Series Profiles (2011)

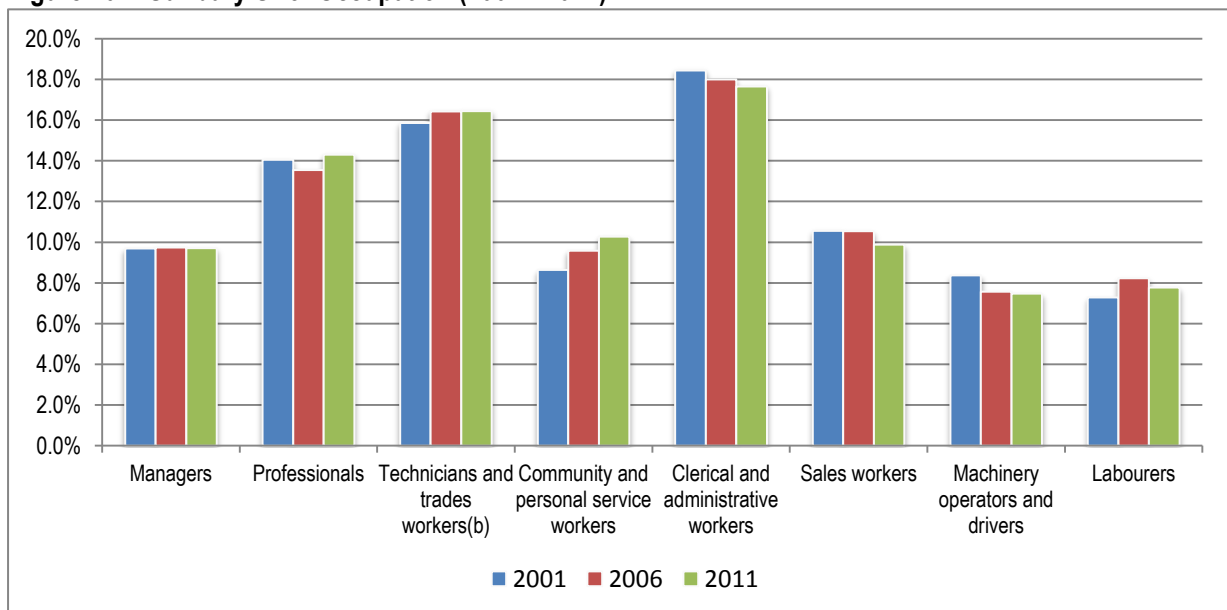
**Labour Force Occupation**

Greater Melbourne has a high proportion of employed residents that are highly skilled. In contrast, Sunbury SA3 has a relatively even skills profile including high shares of technical and clerical working residents (Figure 19).

Over the period 2001 to 2011 there was no significant change in occupations of Sunbury SA3 residents apart from continual growth in community and personal service workers (Figure 20).

**Figure 19 - Comparison: Occupation (2011)**

Source: ABS Census, Basic Community Profiles (2011)

**Figure 20 - Sunbury SA3: Occupation (2001 - 2011)**

Source: ABS Census, Sunbury SA3 Time Series Profile (2011)

## 4.4 ECONOMIC STRUCTURE

### Jobs in the Area

In 2011, the Sunbury SA3 had 6,290 jobs in the area. A comparison with 2006 data is not directly available due to changes in geographic boundaries between 2006 and 2011, however at 2006 the Hume – Sunbury Statistical Local Area (SLA) had approximately 6,020 jobs. If these areas are compared however, the growth rate in jobs is 0.9% pa. The metropolitan growth rate was 2.5% pa.

At 2011 the biggest employment generating industry within the Sunbury SA3 was retail trade (22% or 1,365 jobs), followed by education and training (13%) and health care and social assistance (11%) (refer to Table 6). These sectors are population-driven, which more or less follow the size and composition of the local population.

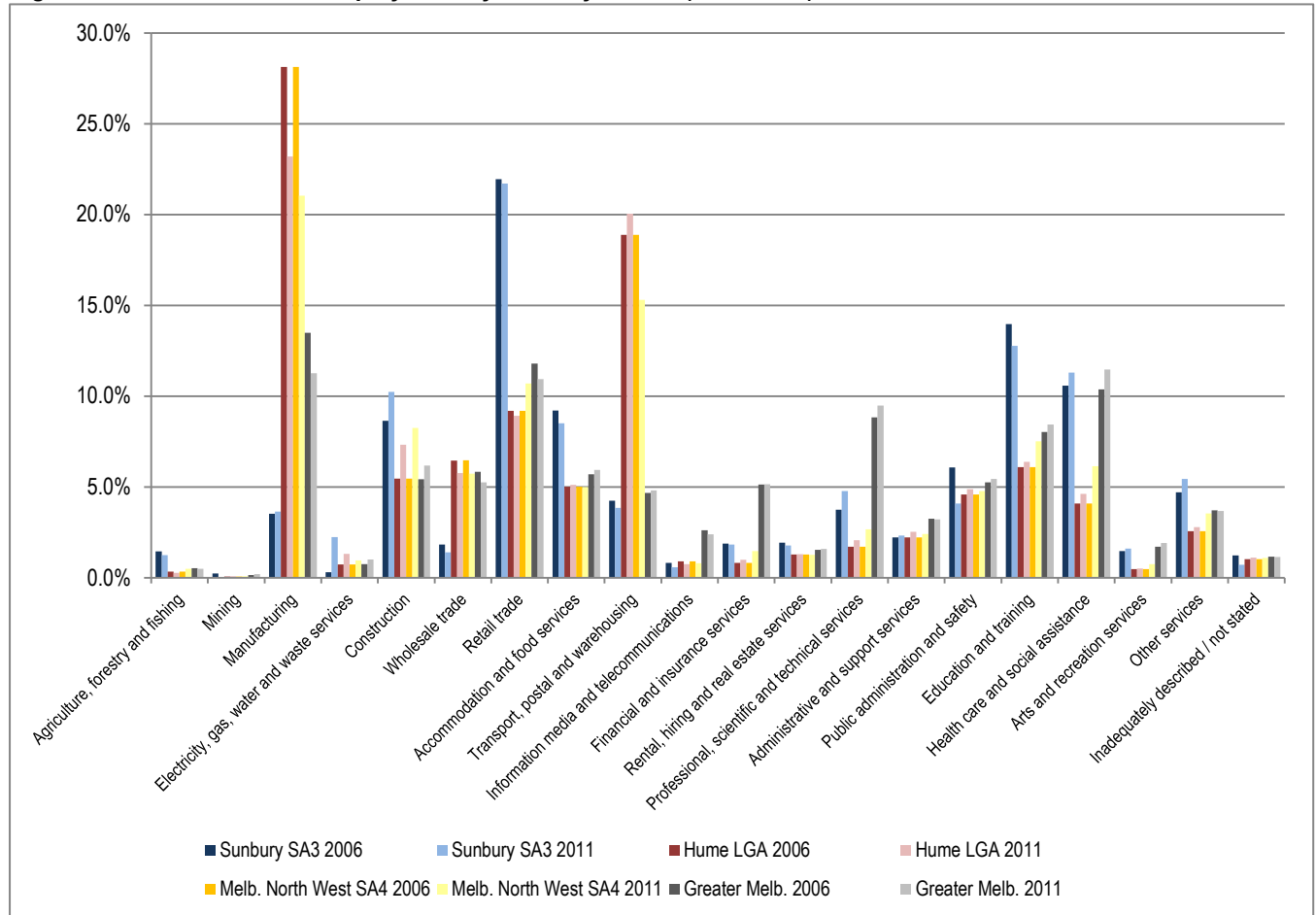
The distribution of jobs in the LGA differs from Sunbury SA3 by having a strong industrial land economy, defined by 23% or 16,660 jobs in manufacturing, followed by transport, postal and warehousing (20% or 14,410 jobs) and construction (7% or 5,260 jobs).

**Table 6 - Place of Work: Employment by Industry Profile (2006-2011)**

	Sunbury SA3			Hume LGA			Melbourne North West SA4			Greater Melbourne		
	2006*	2011	Change	2006	2011	Change	2006*	2011	Change	2006	2011	Change
Number of Jobs	6,024	6,290	266	64,580	71,835	7,255	na	112,863	na	1,549m	1,756m	206,660
Agriculture, forestry and fishing	1.5%	1.2%	-15%	0.3%	0.3%	-17%	0.3%	0.5%	48%	0.5%	0.5%	7%
Mining	0.2%	0.0%	-100%	0.1%	0.1%	24%	0.1%	0.1%	22%	0.2%	0.2%	-20%
Manufacturing	3.5%	3.6%	3%	28.1%	23.2%	-18%	28.1%	21.0%	-25%	11.3%	13.5%	20%
Electricity, gas, water and waste services	0.3%	2.2%	650%	0.7%	1.3%	79%	0.7%	1.0%	30%	1.0%	0.8%	-25%
Construction	8.6%	10.2%	18%	5.5%	7.3%	34%	5.5%	8.3%	51%	6.2%	5.4%	-12%
Wholesale trade	1.8%	1.4%	-23%	6.5%	5.8%	-11%	6.5%	5.7%	-11%	5.3%	5.8%	11%
Retail trade	21.9%	21.7%	-1%	9.2%	8.9%	-3%	9.2%	10.7%	17%	10.9%	11.8%	8%
Accommodation and food services	9.2%	8.5%	-8%	5.0%	5.1%	2%	5.0%	5.0%	0%	5.9%	5.7%	-4%
Transport, postal and warehousing	4.2%	3.8%	-9%	18.9%	20.1%	6%	18.9%	15.3%	-19%	4.8%	4.7%	-3%
Information media and telecommunications	0.8%	0.6%	-30%	0.9%	0.8%	-17%	0.9%	0.8%	-11%	2.4%	2.6%	10%
Financial and insurance services	1.9%	1.8%	-3%	0.8%	1.0%	21%	0.8%	1.5%	80%	5.2%	5.1%	0%
Rental, hiring and real estate services	1.9%	1.8%	-8%	1.3%	1.3%	2%	1.3%	1.3%	-1%	1.6%	1.5%	-4%
Professional, scientific and technical services	3.8%	4.8%	27%	1.7%	2.1%	22%	1.7%	2.7%	57%	9.5%	8.8%	-7%
Administrative and support services	2.2%	2.3%	4%	2.2%	2.5%	14%	2.2%	2.4%	8%	3.2%	3.3%	1%
Public administration and safety	6.1%	4.1%	-33%	4.6%	4.9%	6%	4.6%	4.8%	4%	5.4%	5.3%	-3%
Education and training	14.0%	12.8%	-9%	6.1%	6.4%	5%	6.1%	7.5%	23%	8.4%	8.0%	-5%
Health care and social assistance	10.6%	11.3%	7%	4.1%	4.6%	13%	4.1%	6.1%	50%	11.5%	10.4%	-10%
Arts and recreation services	1.5%	1.6%	9%	0.5%	0.5%	9%	0.5%	0.8%	58%	1.9%	1.7%	-10%
Other services	4.7%	5.4%	16%	2.6%	2.8%	9%	2.6%	3.5%	39%	3.7%	3.7%	1%
Inadequately described / not stated	1.2%	0.7%	-42%	1.0%	1.1%	9%	1.0%	1.1%	7%	1.2%	1.2%	1%
Total	100.0%	100.0%		100.0%	100.0%		100.0%	100.0%		100.0%	100.0%	

Source: ABS Census, Working Population Profiles (2011)

\* Data not available at an SA3 and SA4 level for 2006 so similar geographic areas were used at 2006 including the Hume – Sunbury SLA and Statistical Subdivisions (South Loddon and Hume City).

**Figure 21 - Place of Work: Employment by Industry Profile (2006-2011)**

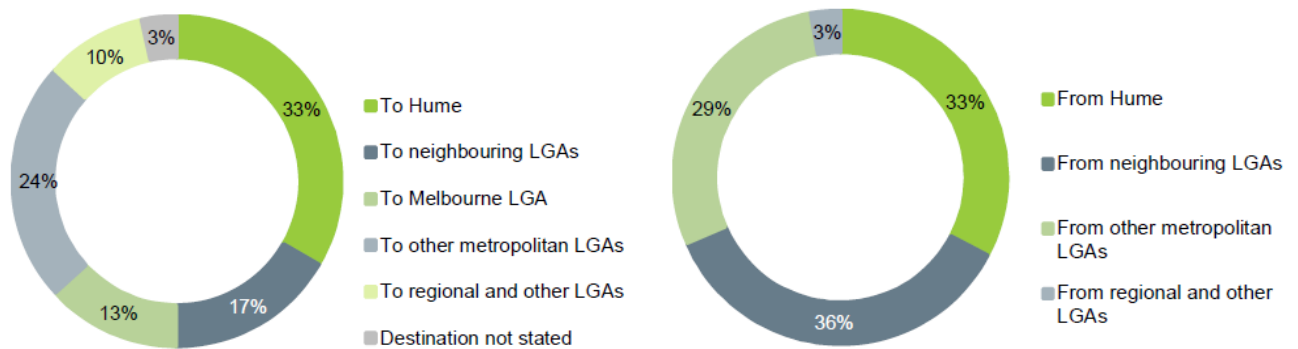
Source: ABS Working Population Profiles (2006-2011)

### **Hume's Labour Force Region**

At 2011, Hume LGA is a net importer of workers, with more jobs available in the LGA (71,840 jobs) than there are working residents (70,890 working residents).

Based on journey to work (JTW) data analysis undertaken by the Department of Transport, the following Figure 22 shows that 33% of Hume LGA working residents also work in the LGA. The remainder travel to a number of other locations for employment including neighbouring LGAs (17%) including Melton, Macedon Ranges, Mitchell, Whittlesea, Moreland and Brimbank, the Melbourne CBD (13%) and other metropolitan LGAs (24%).

In contrast an analysis of workers in the LGA shows that 36% travel from surrounding LGAs, 29% from other metropolitan LGAs and just 3% from regional centres (refer to the following figures).

**Figure 22 - Hume LGA: Work Journeys To and From Hume (2011)**

Source: ABS Census, Time Series Profiles (2011)

## 4.5 SUNBURY CONTAINMENT METRICS

Sunbury has undergone and will continue to experience significant population growth over the period to 2031 and beyond. This strong growth will drive demand for a range of goods and services, in particular housing, retail, education, health and community services.

The area's jobs to population and dwelling ratios are summarised in Table 7 below. This shows that the area is a typical outer suburban area in terms of job provision and that it will be challenging to grow jobs to make up for the existing gap between jobs and dwellings and also to keep pace with expected population and dwelling growth.

The general policy is to strive for one job per dwelling in growth areas.

In broad terms Sunbury would need to add around 6,800 jobs now – or more than double the 2011 count of local jobs - to achieve the target. By 2031 the jobs growth need is around 23,200 and by a nominal full development population of around 120,000 the jobs growth need is around 48,000 above existing conditions.

**Table 7 - Selected Metrics**

Indicator	2011	2031	Full Development
Population	38,012	67,152	120,000
Working Residents	18,636		
Dwellings	13,111	23,156	48,000
Jobs	6,290		
<b>Jobs to Dwelling Ratio</b>	<b>0.48</b>		
<b>Jobs Growth Need to Achieve at Target 1:1</b>	<b>+6,821</b>	<b>+16,866</b>	<b>+41,710</b>
<b>Total Job Need</b>	<b>13,111</b>	<b>23,156</b>	<b>48,000</b>



Shown below in Table 8 are various jobs projections for Sunbury. The first is analysis undertaken by Hume City Council, which estimates that Sunbury could achieve around 30,000 jobs when it achieves 100,000 residents. The Hume analysis suggests there may be around 37,000 households at that time meaning potential for 0.8 jobs per household or dwelling.

The second part of the table shows extrapolation of current jobs based on four growth rates. The first (0.9% pa) is reflective of recent trends. The second (1.7% pa) is double the base rate and the third and fourth rates are triple and quadruple of the base rate. The highest rate shown in these scenarios (3.7% pa jobs growth) would yield around 13,000 jobs in 2031 and 25,000 jobs in 2051.

As noted, 13,000 jobs was required in 2011 to achieve the target and 25,000 jobs in 2051 would be well short of the 48,000 required for full development.

The third part of the table shows modelling scenarios developed for this report. The best estimate is around 31,000 jobs at full development of Greater Sunbury (for approximately 120,000 residents). A target scenario has also been developed that shows how around 49,000 jobs might be achieved.

**Table 8 - Selected Employment Projections for Sunbury**

Employment Methods and Scenarios					
<b>Hume City Council Analysis</b>					
Based on 100,000 Population	29,650				
<b>Trend Based Analysis 2006-2011 at Per Annum Rate</b>					
	0.9%	1.7%	2.6%	3.5%	
To Year 2021	6,858	7,471	8,134	8,848	
To Year 2031	7,477	8,874	10,518	12,448	
To Year 2041	8,152	10,541	13,601	17,511	
To Year 2051	8,887	12,520	17,587	24,633	
<b>Method in This Report (Retail Based Capacity Analysis)</b>					
Capacity Basis Method - Base Scenario	30,981				
Capacity Basis Method - Target Scenario	49,059				

## 5. LAND USE AND FLOORSPACE CONTEXT

### 5.1 ACTIVITY CENTRES

Plan Melbourne sets out a metropolitan hierarchy of activity centres. The hierarchy is shown in Table 9 below including an interpretation of relevant centres and activities.

**Table 9 - Activity Centres Hierarchy and Relevant Centres and Activities**

Typology	Characteristics	Centres	Commercial & Community Uses (including Health Care, Education, Office)
Expanded Central City	To allow the continued location and growth of knowledge-intensive and high skilled firms in the Central City while continuing to be a major area for tourism, retail, residential, entertainment, sporting and cultural activities.	<ul style="list-style-type: none"> <li>■ CBD</li> <li>■ Southbank</li> <li>■ Docklands</li> </ul>	<b>Sunbury Education and Health:</b> <ul style="list-style-type: none"> <li>■ Former Victoria University – Sunbury Campus Site</li> <li>■ Sunbury Day Hospital (Western Health)</li> <li>■ Sunbury Community Hospital</li> <li>■ Sunbury Private Hospital</li> <li>■ Sunbury Corporate Centre</li> <li>■ Sunbury Business Park</li> </ul>
Metropolitan Activity Centre	To maximise access to goods and services in a limited number of major centres with good public transport networks. These centres will play a major service delivery role, including government health, justice and education services, providing a diverse range of jobs, activities and housing for a subregional catchment.	<ul style="list-style-type: none"> <li>■ Broadmeadows</li> <li>■ Dandenong</li> <li>■ Footscray</li> <li>■ Fountain Gate / Narre Warren</li> <li>■ Epping</li> <li>■ Sunshine</li> <li>■ Ringwood</li> <li>■ Box Hill</li> <li>■ Frankston</li> </ul>	
Activity Centre	To provide access to a wide range of goods and services in centres that are planned and managed by local government. The centres will have jobs and vibrant local economies. Some will serve larger subregional catchments.	<b>Hume:</b> <ul style="list-style-type: none"> <li>■ <b>Sunbury Town Centre</b></li> <li>■ Donnybrook Town Centre (planned)</li> <li>■ Roxburgh Park Shopping Centre</li> <li>■ Craigieburn Town Centre</li> <li>■ Gladstone Park Shopping Centre</li> <li>■ Mickleham Town Centre (planned)</li> <li>■ Sunbury South Town Centre (planned)</li> </ul>	
Neighbourhood Centres	To provide neighbourhood access to local goods and services.	<b>Hume:</b> <ul style="list-style-type: none"> <li>■ <b>Gap Road Centre (Sunbury)</b></li> <li>■ Campbellfield Plaza</li> <li>■ Craigieburn East</li> <li>■ Meadow Heights</li> <li>■ Greenvale</li> <li>■ Westmeadows Village</li> <li>■ Dallas</li> <li>■ Olsen Place</li> <li>■ Tullamarine</li> <li>■ Upfield Shopping Centre</li> <li>■ Homestead Place</li> </ul>	

Source: Plan Melbourne (2014) & HillPDA (2014)

Hume City Council's current planning scheme hierarchy is based on the previous metropolitan strategy, Melbourne 2030. This is substantially similar to the Plan Melbourne version as follows:

- Central Activity Area;
- Principal Activity Centres (Broadmeadows);
- Major Activity Centres (including Sunbury Town Centre);
- Neighbourhood Activity Centres (including Gap Road Sunbury); and
- Specialised Activity Centre (Melbourne Airport).

A stock take of existing centres relevant to Sunbury and their profile is provided in Table 10 below. Sunbury is somewhat unique at this time by accommodating almost all retail and commercial activity within the Town Centre. The only other notable nodes are the Gap Road Neighbourhood Activity Centre, Goonawarra Local Centre and the bulky goods precinct along the Vineyard Road corridor.

**Table 10 - Local and Competing Centres**

Centre	Anchors	Retail (sqm)	Total Centre Area (sqm)	Description
<b>Sunbury Town Centre</b>				
Sunbury Town Centre			60,000	Estimated total floorspace in Sunbury Town Centre is approximately 60,000sqm (retail and 31,000sqm non-retail)
Sunbury Square Shopping Centre	Coles	4,077	11,107	Located at 2-28 Evans Street, Sunbury. It had a MAT of \$60m and an annual visitation of 2.3m in 2013. Includes 45 specialty stores.
	Best and Less	1,170		
	First Choice Liquor	900		
Safeway		Est. 3,000	na	Located at 25-47 Horne Street, Sunbury.
Sunbury Terrace Shopping Centre	Harris Scarfe	2,500	3,055	Located at 92-102 Evans Street, Sunbury. Comprises 6 specialty stores.
<b>Other in Sunbury</b>				
Gap Road NAC	Aldi Food Store	2,900		Located at 112-126 Gap Road, Sunbury
Goonawarra LTC	Local shops and community services	<2,000	5,000	Junction of Sunningdale Avenue and Francis Boulevard
Vineyard Road Bulky Goods Precinct	Bunnings, Masters, others	na	na	Vineyard Road and adjacent streets, Sunbury
<b>Other Regional Centres</b>				
Water Gardens	Big W	8,698	138,559	located at 399 Melton Highway, Taylor Lakes. It had a MAT of \$392.4m and 11.4m visitations in 2013. Includes 174 specialty stores.
	Woolworths	8,542		
	Target	7,132		
	Coles	3,715		
Broadmeadows Shopping Centre	Target	7,569	59,969	Located at 1099-1169 Pascoe Vale Road, Broadmeadows. It had a MAT of \$272.8m and 8.8m visitations in 2013. It includes 174 specialty stores.
	Big W	7,567		
	Safeway	3,723		
	Coles	3,441		
	Aldi	1,618		
	Best and Less	1,091		
	JB Hi Fi	1,082		
	First Choice Liquor	1,029		

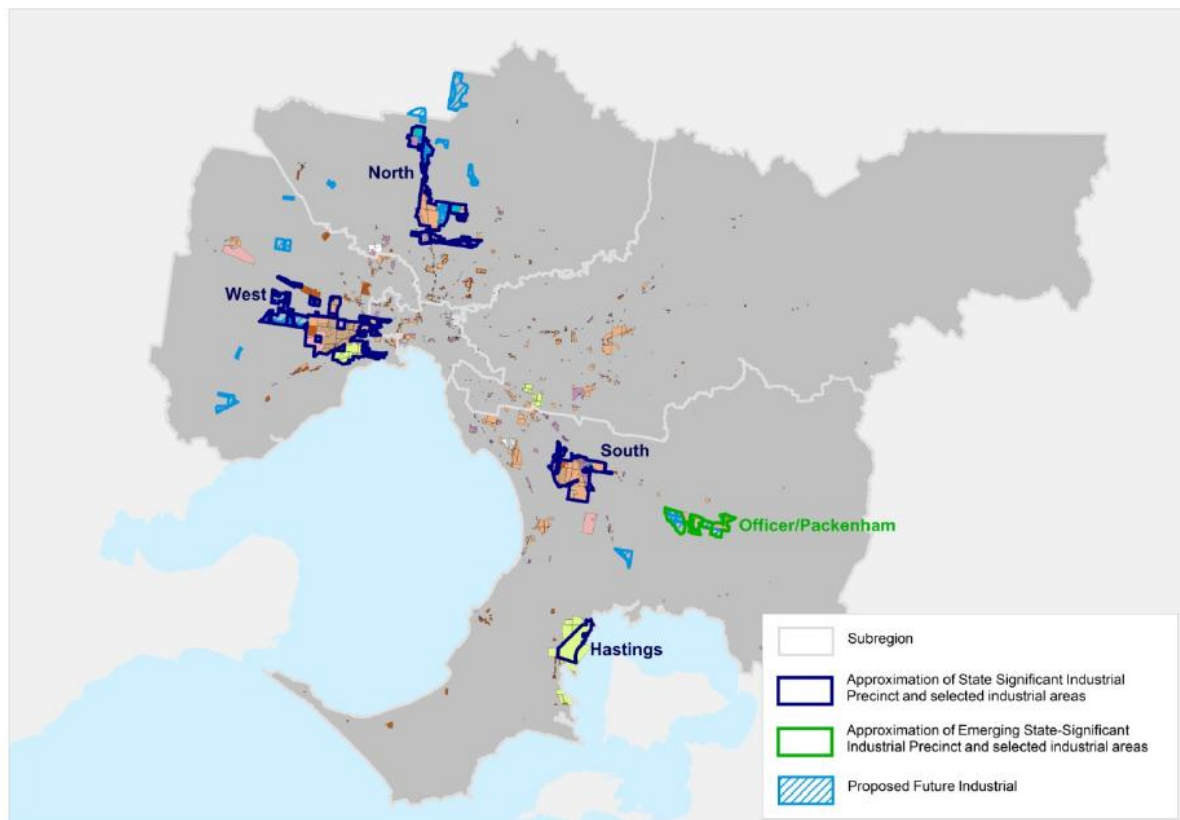
Source: Property Council of Australia Shopping Centre Directory (2013) & HillPDA (2014)

## 5.2 INDUSTRIAL LAND SUPPLY

Sunbury currently accommodates 64.4ha of industrial land of which approximately 36.8ha is occupied. The area is used for a range of light or service industry uses, bulky goods retail and trade supplies. Sunbury is not a major industrial node in Melbourne and it is not planned to be established as one in the future.

The following Figure 23 shows the location of major industrial nodes in the metropolitan area and the relative low stock of industrial land in Sunbury. Sunbury is however located between two of Melbourne's most significant industrial nodes: west and north nodes.

**Figure 23 - Industrial Land in Melbourne**



Source: DTPLI, Urban Development Program (2013)

The Urban Development Program (UDP) by the Department of Planning (DTPLI) monitors supply and absorption of industrial land in metropolitan Melbourne. The following data shows UDP industrial land data at 2013.

The 2013 UDP data indicates that there is 25,654ha of industrial land in metropolitan Melbourne, of which 7,222ha (28%) is vacant. The Northern Subregion, which includes Banyule, Darebin, Whittlesea, Moreland, Nillumbik and Hume LGAs accounted for approximately 18% of all industrial land in Melbourne, representing 4,674ha of land. Hume LGA provided 2,954ha of industrial land (equivalent to 63% of the Northern Subregion total), of which 1,121 or 38% was available for development.

**Table 11 - Industrial Land Supply by Region (2013)**

	Occupied (ha)	Vacant (ha)		Total (ha)	% of Metro. Melbourne
Western Subregion	4,797	2,797	37%	7,594	29.6%
Northern Subregion	3,235	1,439	31%	4,674	18.2%
Eastern Subregion	2,499	195	7%	2,694	10.5%
Southern Subregion	6,918	2,742	28%	9,660	37.6%
Central Subregion	984	49	5%	1,033	4.0%
<b>Total Metropolitan Melbourne</b>	<b>18,433</b>	<b>7,222</b>	<b>28%</b>	<b>25,654</b>	<b>100.0%</b>

Source: DTPLI, Urban Development Program (2013) and Hill PDA (2014)

**Table 12 - Northern and Western Region Industrial Land Supply (2013)**

	Occupied (ha)	Vacant (ha)		Total (ha)	% of Northern Subregion
Banyule	115	3	3%	118	2.5%
Darebin	291	15	5%	307	6.6%
Moreland	266	13	5%	279	6.0%
Nillumbik	30	0.0	0%	30	0.6%
Whittlesea	700	286	29%	986	21.1%
Hume	1,883	1,121	38%	2,954	63.2%
<b>Northern Region</b>	<b>3,235</b>	<b>1,439</b>	<b>31%</b>	<b>4,674</b>	<b>100.0%</b>
Brimbank	1,640	486	23%	2,126	28.0%
Hobsons Bay	1,226	411	25%	1,637	21.6%
Melton	377	929	71%	1,306	17.2%
Moonee Valley	55	1	2%	56	0.7%
Wyndham	1,499	969	39%	2,468	32.5%
<b>Western Region</b>	<b>4,797</b>	<b>2,796</b>	<b>37%</b>	<b>7,593</b>	<b>100.0%</b>

Source: DTPLI, Urban Development Program (2013) and Hill PDA (2014)

Estimated existing and proposed future industrial and related employment land supply in Sunbury is summarised in Table 13 below.

**Table 13 - Existing and Proposed Industrial and Related Employment Land in Sunbury**

	Occupied (ha)	Vacant (ha)		Total (ha)
<b>Existing</b>				
IN3Z	36.8	27.6	43%	64.4
B4Z	7.6	0.0	0%	7.6
<b>Total Existing</b>	<b>44.4</b>	<b>27.6</b>	<b>38%</b>	<b>72.0</b>
<b>Proposed</b>				
Diggers Rest Industrial		27.5		
Sunbury South Industrial		100.0		
Commercial Mixed Use		110.0		
<b>Total Proposed</b>		<b>237.5</b>		

## 5.3 PROPOSED DEVELOPMENTS

An investigation into the development pipeline in Sunbury indicates two large scale residential developments, comprising the Racecourse Road Mixed Use Development and Rosenthal Residential Estate, both of which propose neighbourhood activity centres. A small neighbourhood centre is also proposed on Bellview Drive and Outlook Way.

In addition to these proposals, there are two bulky goods retail centres investments being constructed in Sunbury with scheduled completion by mid 2014. These are the development of a Masters store and development of a new Bunnings store (replacing an existing facility). Refer to Table 14 below for details.

**Table 14 - Development Pipeline in Sunbury (2014)**

Project	Type of development (retail, office etc)	Project Details	Approx. Value	Expected Completion	Status
Jacksons Hill Estate Neighbourhood Activity Centre Lot 13 Bellview Dr And Outlook Wy, Sunbury	Retail	<ul style="list-style-type: none"> <li>Development of a mixed use Neighbourhood Activity Centre</li> <li>Site is approximately 13,321sqm</li> </ul>	\$50m	Early 2016	Submit Proposals for Development
Rosenthal Residential Estate 100 Vineyard Rd, Sunbury	Residential	<ul style="list-style-type: none"> <li>1284 lot residential subdivision</li> </ul>	\$38.5m	Mid 2019	Subdivision Application
Racecourse Road Mixed Use Development 275 Racecourse Rd, Sunbury	Residential & Retail	<ul style="list-style-type: none"> <li>6 star rated energy efficient homes, will comprise a mixture of semi-rural, sub urban and urban living housing</li> <li>Will include a small scale neighbourhood retail centre.</li> </ul>	\$20m	Late 2016	Rezoning Application
Bunnings Warehouse Sunbury 95 Vineyard Rd, Sunbury	Retail – Bulky Goods	<ul style="list-style-type: none"> <li>Situated in Sunbury Business Park. Construction of a Bunning's Warehouse</li> </ul>	\$15.3m	Mid 2014	Commenced Construction
Masters Home Improvements Sunbury Business Park 105 Vineyard Rd, Sunbury	Retail – Bulky Goods	<ul style="list-style-type: none"> <li>Construction of a Masters Home Improvements Store</li> </ul>	\$10m	Mid 2014	Commenced Construction

Source: Cordell Connect (2014) & HillPDA (2014)



## 6. FUTURE ECONOMIC CONDITIONS

### 6.1 METHOD

The approach taken to identify a potential future economic plan is to:

- Identify a potential activity centre hierarchy based on a retail thresholds model developed for Sunbury;
- Assess the potential for associated activities and jobs to locate in centres co-located with retail activity, namely office and community service uses; and
- Assess industrial and related commercial development potential based on modelling methods.

The method uses a nominal 'full development' population capacity estimate as the basis for the analysis. This enables the end state to be understood. Various stages leading up to the planning horizon can be identified up to the end state as required.

The approach considers Greater Sunbury overall so as to understand the two PSP areas in context. More detail on the PSP areas is provided later in this report.

### 6.2 EXISTING CONDITIONS

The potential for Sunbury and the PSP areas to capture jobs will depend on:

- The population size and composition of the area, including the skills profile of the area; and
- The economic structure and attributes of Sunbury and its potential to perform roles in the economy.

These variables have been profiled in earlier sections of this report and suggest that Sunbury is performing moderately well in terms of generating population-driven jobs for the town but has not as yet generated a significant pool of higher order jobs in business services for example. This outcome relates to its current position as a satellite town accommodating around 37,000 people (2014 estimate) and also being integrated with and relying upon the broader metropolitan economy for jobs and services.

Some of the key indications are shown below.

**Table 15 - Key Indicators (2014 Estimate)**

Key Indicators:	Existing
Population	36,647
Dwellings	12,637
Jobs	6,377
Jobs Per Dwelling	0.5
Local Retail Space Per Person sqm	1.6

## 6.3 FULL DEVELOPMENT CAPACITY ESTIMATE

The future economic plan for the area can take a growth trajectory especially as the population breaks through population thresholds and is thus able to support more economic activity. A long term high growth scenario is shown in the following Table 16. This shows a long term future outcome around 120,000 people in Greater Sunbury. In this report this population outcome is considered 'full development' for which an economic plan is developed.

The capacity estimate is based on development cells as shown in Figures 2 and 3 of this report.

The method to derive the population estimates was as follows.

- GIS Mapinfo analysis was undertaken to determine land area by zone type in each cell. This was used to estimate gross area and net developable area (NDA) in each cell.
- The NDA was divided into predominantly residential land versus predominantly employment land. The division was based on zoning information or strategic planning information where possible.
- The existing count of dwellings was estimated for each cell based on count of dwelling lots and checked by reference to ABS Census information.
- The full development dwelling estimate was derived by applying assumed future dwelling densities to the residential land area of each cell. This takes into account existing conditions and land uses. For residential land the average density is assumed to be between 13.5 and 15 dwellings per hectare of net residential land in the PSP areas subject to this report. Lower densities are applied to other areas based on observations and planning frameworks.
- The population capacity was calculated from the number of dwellings by applying 2.5 persons per dwelling at full development.
- Other assumptions are shown in the table and in the notes to the table.

It should be noted that this approach provides an estimate based on the method and assumptions used. There is a risk to the recommendations and the planning process should this scale not be achieved or if it is over-achieved. Based on information reviewed for this report, it is felt that the full development estimate shown in this report may be at the high end of a reasonable range.

Another factor worth noting is timing of development. Sunbury currently has around 37,000 residents and may have around 68,000 residents by 2031. The achievement of 120,000 residents is therefore likely to be a very long term proposition based on the best information available at the time of report writing.

Table 16 - Estimated Long Term Full Development Conditions

Development Cell	Gross Area (GA)	Net Developable Area (NDA)		Residential NDA		Employment and Other Uses NDA		Existing Dwellings (2011)	Residential Development Capacity at Density (d/ha)		Population Capacity at Dwelling Size (p/d)
	ha	ha	% of GA	ha	% of NDA	ha	% of NDA	no.	no.	d/ha	2.5
<i>Sunbury South</i>											
SS1	542.1	458.5	84.6%	98.1	21.4%	360.4	78.6%	5	1,471	15.0	3,678
SS2	1,139.0	636.3	55.9%	540.9	85.0%	95.4	15.0%	43	8,113	15.0	20,282
SS3	108.2	108.2	100.0%	92.0	85.0%	16.2	15.0%	13	1,380	15.0	3,449
<b>Total Sunbury South</b>	<b>1,789.3</b>	<b>1,203.0</b>	<b>67.2%</b>	<b>730.9</b>	<b>60.8%</b>	<b>472.1</b>	<b>39.2%</b>	<b>61</b>	<b>10,964</b>	<b>15.0</b>	<b>27,409</b>
<i>Lancefield Road</i>											
LR1	434.1	170.6	39.3%	145.0	85.0%	25.6	15.0%	1	2,175	15.0	5,438
LR2	147.9	124.0	83.8%	105.4	85.0%	18.6	15.0%	38	1,581	15.0	3,953
LR3	483.7	361.0	74.6%	306.9	85.0%	54.2	15.0%	6	4,603	15.0	11,507
<b>Total Lancefield Road</b>	<b>1,065.7</b>	<b>655.6</b>	<b>61.5%</b>	<b>557.3</b>	<b>85.0%</b>	<b>98.3</b>	<b>15.0%</b>	<b>45</b>	<b>8,359</b>	<b>15.0</b>	<b>20,897</b>
<i>Other Areas</i>											
Township (Existing)	2,715.0	2,317.6	85.4%	1,833.2	79.1%	421.5	18.2%	11,560	14,666	8.0	36,664
Sunbury West	362.8	295.9	81.6%	251.5	85.0%	44.4	15.0%	66	3,396	13.5	8,489
Sunbury North	849.6	481.6	56.7%	409.4	85.0%	72.2	15.0%	23	5,527	13.5	13,817
Diggers Rest	543.1	451.4	83.1%	415.9	92.1%	35.6	7.9%	882	5,614	13.5	14,035
<b>Total Other Areas</b>	<b>4,470.5</b>	<b>3,546.6</b>	<b>79.3%</b>	<b>2,910.0</b>	<b>82.1%</b>	<b>573.7</b>	<b>16.2%</b>	<b>12,531</b>	<b>29,202</b>	<b>10.0</b>	<b>73,006</b>
<b>Total Greater Sunbury</b>	<b>7,325.6</b>	<b>5,405.2</b>	<b>73.8%</b>	<b>4,198.2</b>	<b>77.7%</b>	<b>1,144.1</b>	<b>21.2%</b>	<b>12,637</b>	<b>48,525</b>	<b>11.6</b>	<b>121,312</b>
<b>Assumptions</b>											
<i>NDA is based on urban development zones including UGZ</i>											
<i>Residential area is current residential zones plus % (as shown) of UGZ / developable area</i>											
<i>Employment and Other Uses area is current employment zones plus % (as shown) of UGZ / developable area</i>											
<i>SS1's Special Use Zone is assumed to be for employment purposes</i>											

## 6.4 POTENTIAL STAGES

For the development capacity and timing uncertainty reasons noted above, it is recommended that the planning process adopt recommendations based on thresholds of development as follows.

- Stage 1 – approximately 70,000 residents. This accords with the population scenario for Sunbury according to the Growth Corridor Plan.
- Stage 2 – approximately 100,000 residents. This accords with the population scenario for Sunbury according to Hume City Council analysis.
- Stage 3 – full development of approximately 120,000 residents. This accords with the population capacity scenario derived for this report.

Information on likely timing of development by cell is not available. As such, an assumed roll out of development was made and this is shown in Table 17 below. Other scenarios are possible,

**Table 17 - Assumed Population by Development Cell and Stage**

Development Cell	Population at Stage 1	Population at Stage 2	Population at Stage 3
<i>Sunbury South</i>			
SS1	1,655	3,311	3,678
SS2	9,127	18,254	20,282
SS3	1,552	3,104	3,449
<b>Total Sunbury South</b>	<b>12,334</b>	<b>24,668</b>	<b>27,409</b>
<i>Lancefield Road</i>			
LR1	2,447	4,894	5,438
LR2	1,779	3,557	3,953
LR3	5,178	10,356	11,507
<b>Total Lancefield Road</b>	<b>9,404</b>	<b>18,808</b>	<b>20,897</b>
<i>Other Areas</i>			
Township (Existing)	36,664	36,664	36,664
Sunbury West	4,245	8,489	8,489
Sunbury North	102	205	13,817
Diggers Rest	7,018	14,035	14,035
<b>Total Other Areas</b>	<b>48,029</b>	<b>59,393</b>	<b>73,006</b>
<b>Total Greater Sunbury</b>	<b>69,767</b>	<b>102,869</b>	<b>121,312</b>

## 6.5 RETAIL HIERARCHY AND FLOORSPACE

In order to understand the demand for retail floorspace in Sunbury, it is first necessary to calculate the quantum of retail expenditure generated by residents. Household expenditure used in the estimation of retail floorspace demand was sourced from:

- ABS Household Expenditure Survey (HES) 2003-04 (updated to 2014) which provides household expenditure by broad commodity type by household income quintile; and
- Marketinfo 2012 data which is generated by combining and updating data from the ABS Census and the ABS HES using “*microsimulation modelling techniques*”.

The following table identifies expenditure per capita for Sunbury (suburb) residents by retail store type. At 2014, Sunbury residents spent approximately \$13,830 per person on retail goods and services. Almost a third (32%) of all retail expenditure from Sunbury residents is outlaid on supermarket and grocery store retailing, followed by bulky goods retailing (18%) and other personal and household goods retailing (12%).

**Table 18 - Sunbury Expenditure per Capita by Retail Store Type (2014)**

Retail Store Type	2014	
	\$ / capita	%
Supermarkets & Grocery Stores	4,437	32.1%
Specialty Food Stores	935	6.8%
Fast-Food Stores	828	6.0%
Restaurants, Hotels and Clubs*	1,047	7.6%
Department Stores	919	6.6%
Apparel Stores	1,114	8.1%
Bulky Goods Stores	2,467	17.8%
Other Personal & Household Goods Retailing	1,705	12.3%
Selected Personal Services**	382	2.8%
<b>Total</b>	<b>13,834</b>	<b>100%</b>

Source: MarketInfo 2012 and HillPDA (2014)

The next step in the model is to identify retail distribution variables for different levels in the retail hierarchy.

Typically, in existing and new urban areas a network of activity centres is delivered that are broadly classified according to not only the total quantum of retail floorspace but also the key anchor retail tenants at the centre. As identified in Table 19 below, in the case of Greater Sunbury activity can be broadly designated across core centre types, including:

- **Regional:** Regional centres contain a wide variety of retail goods and services, along with office based uses and are focal points for the community. The retail mix generally includes a department store, discount department stores (DDS'), supermarkets, a broad range of specialty store retailing (generally comprising household goods, clothing / footwear and retail services) and cafes / restaurants. Regional centres can vary in size markedly but the average is around 70,000sqm generating \$455m in turnover.

- **Sub-Regional:** Comprises a significant quantum of retail floorspace, typically being anchored by at least one DDS, full-line supermarkets and complemented by around 40-80 specialty stores offering household goods, clothing / footwear and retail services. Sub-regional centres generally have an average size of 25,000sqm generating \$188m in turnover.
- **Large Neighbourhood:** Large neighbourhood centres generally accommodate between 5,000-10,000sqm of retail floorspace and are anchored by at least one full-line supermarket that is complemented by a range of specialty store retailing (typically 20-40 stores) which predominantly provides for convenience goods, retail services, café / restaurant space and a limited range of discretionary retailing. The average is 7,000sqm generating \$60m in turnover.
- **Small Neighbourhood:** Small neighbourhood centres generally cater to a walkable catchment, providing for day-to-day or convenience retailing. These centres can typically contain up to 5,000sqm of retail floorspace and are anchored by a smaller format supermarket or large grocery store. They have a limited range of specialty store retailing (no more than 20 stores) which tend to be focused on retail service provision (e.g. hair dresser, laundromat, clothing alterations / repairs) and take-away food / cafes. The average is 3,500sqm generating \$30m in turnover.
- **Bulky Goods:** These centres contain larger format retail stores that are presented in showroom type facilities offering “big box” retailing such as furniture, hardware, sporting / camping goods, automotive parts and homewares / manchester. Standalone bulky goods centres are generally located on arterial road or highway locations beyond traditional activity centres due to the importance of private vehicle visibility and access for purchases. There is a wide variety in centre sizes with some smaller bulky goods centres containing just one or two stores, however typically these centres accommodate 40,000sqm of retail floorspace generating \$140m in turnover.

**Table 19 - Potential Retail Hierarchy Typology**

Centre Type	Typical Retail Store Composition	Retail Store Floorspace per Store	Average Retail Floorspace
Regional	<ul style="list-style-type: none"> <li>1 department store</li> <li>2-3 discount department stores</li> <li>2-3 supermarkets</li> <li>4-5 mini majors</li> <li>80 – 150 specialties</li> </ul>	<ul style="list-style-type: none"> <li>10,000 – 20,000sqm</li> <li>6,000 – 10,000sqm</li> <li>3,000 – 4,500sqm*</li> <li>400 – 800sqm</li> <li>80 -100sqm</li> </ul>	<ul style="list-style-type: none"> <li>70,000sqm average</li> </ul>
Sub-Regional	<ul style="list-style-type: none"> <li>1-2 discount department stores</li> <li>2-3 supermarkets</li> <li>3-4 mini-majors</li> <li>40 - 80 specialty stores</li> </ul>	<ul style="list-style-type: none"> <li>6,000 – 10,000sqm</li> <li>3,000 – 4,500sqm</li> <li>400 – 800sqm</li> <li>80 -100sqm</li> </ul>	<ul style="list-style-type: none"> <li>25,000sqm average</li> </ul>
Large Neighbourhood	<ul style="list-style-type: none"> <li>1 full-line supermarket</li> <li>1 small supermarket</li> <li>20 – 40 specialty stores</li> </ul>	<ul style="list-style-type: none"> <li>3,000 – 4,500sqm</li> <li>1,500 – 2,500sqm</li> <li>80 -100sqm</li> </ul>	<ul style="list-style-type: none"> <li>7,000sqm average</li> </ul>
Small Neighbourhood	<ul style="list-style-type: none"> <li>1 large grocery store / small supermarket</li> <li>&lt;20 specialty stores</li> </ul>	<ul style="list-style-type: none"> <li>500 – 1,000sqm</li> <li>80 -100sqm</li> </ul>	<ul style="list-style-type: none"> <li>3,500sqm average</li> </ul>
Bulky Goods	<ul style="list-style-type: none"> <li>Large format retail stores</li> </ul>	<ul style="list-style-type: none"> <li>2,000 – 12,000sqm</li> </ul>	<ul style="list-style-type: none"> <li>40,000sqm average</li> </ul>



Based on a number of sources including the Property Council Guide to Shopping Centres and retail centre benchmarks and past surveys, the following *future* distribution assumption is used to guide the thresholds model:

- 10% net escape spending will be the outcome for Sunbury at full development. This allows for expenditure flows out of Sunbury to central Melbourne, other large centres and at places of work and holiday, off-set partially by inflow of expenditure from areas beyond Sunbury.
- 35% of expenditure retained in the area will flow to the regional centre, nominally department store anchored. This is based on typical benchmarks for such centres.
- 10% of expenditure will flow to stand alone bulky goods stores. These may be adjacent to centres or in external bulky goods nodes.
- 25% of expenditure will flow to discount department store anchored sub-regional centres.
- 20% will flow to supermarket anchored neighbourhood centres.

Using typical centre sizes and required turnover rates, as shown in Appendix 2, it is possible to define a retail centre hierarchy identifying the number of centres by type and typical size possibilities based on different population thresholds.

This method suggests that Greater Sunbury could support (figures are rounded) the following retail structure at each of the three stages of development.

**Table 20 - Potential Retail Hierarchy by Stage**

Stage and Indicative Population		Stage 1	Stage 2	Stage 3
		70,000	100,000	120,000
	<i>no.</i>	<i>Total Retail Floorspace sqm</i>		
Regional Centre (DS)	1	52,000	77,000	91,000
Sub-Regional Centre (DDS)	2	20,000	30,000	32,000
		13,000	18,000	25,000
Neighbourhood Centre (SM)	8	5,000	5,000	5,000
		5,000	5,000	5,000
		5,000	5,000	5,000
		5,000	5,000	5,000
		5,000	5,000	5,000
			5,000	5,000
			5,000	5,000
				5,000
Local Centres	Various			
Bulky Goods (Stand Alone)	1 or 2	28,000	41,000	48,000

The model shows two options for neighbourhood centres: a larger number of smaller centres nominally 3,500sqm average size and a smaller number of larger such centres, nominally 7,000sqm average size. At full development Greater Sunbury could support about 12 smaller centres or about 6 larger such centres. In this analysis, based on specific sub-area analysis, it is felt that 8 centres of average 5,000sqm retail floorspace would be an appropriate allocation for the future community.

The actual floorspace of each supermarket centre in the PSP areas may be higher or lower than the nominal 5,000sqm guide based on specific local area catchment conditions, which are not yet determined. This detail can be assessed following design of the areas and identification of more detailed catchment conditions and dwelling and population yields.

In addition to those centres, a number of smaller local centres, which could accommodate a small supermarket or grocery store and some speciality stores, could also be provided. These are identified at a broad level for the PSP areas later in this report. Again, specific sizing depends on local area conditions.

## 6.6 OFFICE AND COMMUNITY FACILITY FLOORSPACE

In order to identify potential demand for non-retail floorspace in centres, defined as office and community facilities floorspace, it has been assumed that non-retail facility space would make up a share of total floorspace within centres. The shares vary by centre type in the hierarchy and are based on observations for centres in other locations and cross-checked with reference to job projections and other data.

As noted in Section 1.3 above, this report does not provide a comprehensive assessment of community infrastructure needs in the PSP areas. Community infrastructure is assessed at a broad level to identify potential land and job implications for centres.

The PCA Guide to Shopping Centres provides a land use profile of single owner retail facilities. For neighbourhood centres, the typical attributes are overall size of 5,100sqm with retail the dominant use. Office space averages only approximately 300sqm, or around 6% of centre area. Such office uses are typically local catchment based activities such as tax agents, solicitors and real estate services. 'Other' uses also occupy a similar amount of space (around 300sqm on average) in neighbourhood centres. The average size of tenancies is about 100sqm each.

Profile data for larger sub-regional centres was also reviewed. Interestingly, for these larger centres office and other uses is not much greater than neighbourhood centres, at around 600sqm. Other uses typically comprise tavern, medical centre, amusement parlour, childcare centre, hotel, restaurant, gymnasium, community centre, cinema, social club, education centre, bowling alley and similar other uses.

Data for multi-owner CBD or strip retail centres is more difficult to obtain. Nevertheless, in such settings the mix of uses is greater, with more non-retail activity typically present.

Other assumptions are provided by work undertaken by Essential Economics as part of the *Growth Corridor Plans: Activity Centre and Employment Planning* report which noted that "a range of data sources have been reviewed to understand the typical provision of commercial office and other uses at large activity centres...These datasets show that non-retail provision in higher-order retail centres can vary considerably, from just 10-15% in a stand-alone, single-ownership centre, to 50% or more in a multi-ownership, main street style centre (and particularly where the centre has evolved over time)".<sup>1</sup>

<sup>1</sup> Source: *Growth Corridor Plans: Activity Centre and Employment Planning*, Essential Economics (2011)

It is understood that in work undertaken by Essential Economics for the former Growth Areas Authority (GAA) in relation to the Hume and Casey-Cardinia growth areas, an allocation of 15% was provided for non-retail floorspace within neighbourhood centres.<sup>2</sup>

The baseline benchmarks used in this analysis to cater for office and community facility activity, jobs and floorspace within activity centres are shown in Table 21 below.

Two scenarios are provided:

- Base conditions, which represents typical suburban conditions; and
- Target scenario, which shows a more optimistic outcome which would help achieve the target 1 job per dwelling.

**Table 21 - Non-Retail Uses as a Ratio to Retail Floorspace Within Activity Centres**

Use	Base Scenario			Target Scenario		
	Office	Community	Total Non-Retail	Office	Community	Total Non-Retail
Regional	25%	25%	50%	125%	125%	250%
Sub-Regional	20%	10%	30%	100%	50%	150%
Neighbourhood	12.50%	7.50%	20%	62.50%	37.50%	100%
Bulky Goods	-	-	-	-	-	-

Additional office and community facility activity would occur outside of activity centres, and the job modelling undertaken for this report makes an additional allowance for such dispersed jobs.

## 6.7 SHOWROOM USES

Showrooms and motor vehicle retailing and services has not been included as part of the retail demand projections given these uses tend to locate in showroom clusters beyond the bounds of activity centres. At the 2011 Census, there were approximately 18,660 jobs in Victoria in this sector, equivalent to a ratio of 297 residents per job (based on 2011 Estimated Resident Population for Victoria).

At full population capacity in Greater Sunbury, this would translate to 429 jobs in this sector. The City of Melbourne Census of Land Use and Employment (CLUE) has identified that within showroom sectors, for every job there is 88sqm of floorspace. Greater Sunbury may therefore require approximately 36,000sqm of showroom / motor vehicle related floorspace at full development.

<sup>2</sup> Source: *Growth Corridor Plans: Activity Centre and Employment Planning*, Essential Economics (2011)

**Table 22 - Allowance for Main Road Showroom Uses**

Retail trade	Total Jobs in Victoria	Victoria Estimated Resident Population 2011	Residents / Job	Full Capacity Population	Jobs at Full Capacity	CLUE Employment Ratio	Total Floorspace Requirement (sqm)
Motor vehicle and motor vehicle parts retailing	18,655	5,537,817	296.9	121,312	409	88	35,962

Source: ABS Publication 3218.0 Estimated Resident Population, ABS Census Working Population Profile Victoria, City of Melbourne Census of Land Use and Employment

## 6.8 INDUSTRIAL LAND NEEDS

The potential demand for industrial land in Greater Sunbury has been estimated based on the application of existing rates of occupied industrial land per person (PPOH). As the following Table 23 shows, there are currently 1,027 residents per occupied industrial hectare in Greater Sunbury. A comparison with broader areas shows that this ratio is significantly higher than the rate in the Hume LGA (99 persons PPOH), the Northern Region (261 PPOH) and Western Region (147 PPOH) and across the whole of metropolitan Melbourne (230 PPOH).

**Table 23 - Occupied Industrial Land to Resident Ratios**

Area	Industrial Emphasis Indicator		
	Occupied Industrial Hectares (ha) (2012-2013)	Data Area Population (2012-2013)	Persons Per Occupied Industrial Hectare (ha) (PPOH)
Sunbury	36.8	37,726	1,027
Hume	1,833	182,105	99
Northern Region	3,235	845,269	261
Western Region	4,797	704,802	147
<b>Total Metropolitan Melbourne</b>	<b>18,433</b>	<b>4,241,284</b>	<b>230</b>

Note: It should be noted that the industrial land ratio is a guide. Occupied land would also include some non-core industrial uses utilising industrial land such as large format retail and some commercial uses.

Table 24 shows potential demand for industrial land based on different PPOH scenarios. This shows that applying the current PPOH ratio for Sunbury would result in demand for around 118ha of industrial land at full residential development capacity. Application of the existing Northern Region PPOH ratio to future potential resident population would yield demand for 464ha of industrial land.

The decision to aim for a share of future industrial land is in large part a policy decision for Sunbury given it is not a major industrial node at the current time. This analysis assumes that industrial land in Sunbury will continue to perform a local role, and not seek to service Melbourne's broader regional or metropolitan needs.

**Table 24 - Total Occupied Industrial Demand Based on Population and PPOH Ratios (ha)**

Area	PPOH	Population			
		40,000	70,000	100,000	121,312
Scenario 1 Sunbury Average	1,027	39	68	97	118
Scenario 3 - Northern Region Average	261	153	268	383	464
Scenario 4 - Metropolitan Average	230	174	304	435	527

The total planned provision of industrial land in Greater Sunbury is approximately 192ha, as shown in Table 25. The stock is based on core industrial land defined by existing zoned industrial land, along with approved land as part of the Diggers Rest PSP and proposed provision in the Sunbury Growth Corridor Plans.

This provision (192ha) is sufficient to meet the baseline need of the town in the future (118ha).

**Table 25 - Total Industrial Supply (Occupied, Vacant and Planned)**

Area	Industrial Land
Sunbury (Occupied and Vacant) ha	64.4
Diggers Rest (Planned by Approved PSP) ha	27.5
Indicative Sunbury Provision in Growth Corridor Plan	100.0
<b>Total (ha)</b>	<b>191.9</b>

Note: This stock does not count proposed mixed use commercial land and bulky goods land.

Shown below is an estimate of the current profile of industrial activity in Sunbury. This is based on allocating jobs by industry sector to industrial sub-sectors and applying ratios for floorspace and site area based on typical sub-sector characteristics. This is an estimate only and suggests the land profile as shown in Table 26.

**Table 26 - Existing Industrial Activity Profile in Sunbury**

	Jobs		Floorspace		Business Site Area		Industrial Area	
Manufacturing	231	17.2%	21,381	12.1%	3.1	9.7%	3.6	9.9%
Freight Oriented	328	24.5%	72,160	41.0%	17.7	54.6%	19.3	52.4%
Service Industry	644	48.0%	66,010	37.5%	8.1	25.0%	10.0	27.1%
Utilities	138	10.3%	16,560	9.4%	3.5	10.7%	3.9	10.6%
<b>Total Industrial</b>	<b>1,341</b>	<b>100.0%</b>	<b>176,111</b>	<b>100.0%</b>	<b>32.4</b>	<b>100.0%</b>	<b>36.8</b>	<b>100.0%</b>

Future conditions may not replicate current conditions, as the industrial economy of Sunbury grows and changes.

For the purpose of providing guidance to the PSP process, it is assumed that the Sunbury industrial land profile will change and move towards the current metropolitan Melbourne industrial land profile. This takes into account the existing role of Sunbury and the likelihood that change will converge to the metropolitan profile, which is more mature and diverse. The mid-point between the current Sunbury profile and current metropolitan profile is adopted as the future composition of industrial activity in the area for planning purposes. This is shown in Figure 27 below.

**Table 27 - Adopted Future Industrial Activity Profile in Sunbury**

	2011 Sunbury Profile	2011 Metro Profile	Adopted Profile
	%	%	%
Manufacturing	9.9%	19.9%	14.9%
Freight Oriented	52.4%	66.3%	59.3%
Service Industry	27.1%	10.7%	18.9%
Utilities	10.6%	3.2%	6.9%
<b>Total Industrial</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

The next step in the process is to determine need for land by type of activity. This is shown below for two land take scenarios – one for Sunbury based need of 118ha (as calculated above) and one for the planned provision of 192ha.

**Table 28 - Potential Industrial Land Provision Scenarios**

	Adopted Profile		Assumed Average Lot Size and Number of Lots	
	%	ha	sqm	no.
<b>Base Need - 118ha</b>				
Manufacturing	14.9%	17.6	2,000	88
Freight Oriented	59.3%	70.0	5,000	140
Service Industry	18.9%	22.3	1,000	223
Utilities	6.9%	8.1	5,000	16
<b>Total Industrial</b>	<b>100.0%</b>	<b>118.0</b>		<b>467</b>
<b>Planned Provision - 192ha</b>				
Manufacturing	14.9%	28.6	2,000	143
Freight Oriented	59.3%	113.9	5,000	228
Service Industry	18.9%	36.2	1,000	362
Utilities	6.9%	13.2	5,000	26
<b>Total Industrial</b>	<b>100.0%</b>	<b>191.9</b>		<b>759</b>

The base need scenario (118ha) suggests a need for around 470 lots configured as shown in the table above. The planned 192ha scenario requires around 760 lots. The average lot size is approximately 2,500sqm.

For the planned provision scenario, this approach suggests the following land use allocation:

- About 29 hectares could be allocated for manufacturing activity nominally comprising 143 lots of average size average 2,000sqm;
- About 114 hectares could be allocated to freight oriented industrial uses nominally comprising 228 lots of average size 5,000sqm;
- About 36 hectares could be allocated to service industry uses nominally comprising 362 lots of average size 1,000sqm; and
- About 13 hectares could be allocated to utility and miscellaneous uses nominally comprising 26 lots of average size 5,000sqm;



## 6.9 OTHER ACTIVITIES

Other economic activities included in the analysis are:

- Local Shop Nodes;
- Home Based Business; and
- Other Activities.

Local shop nodes comprise around 500 – 2,500sqm of retail space – say 1,500sqm average - located in 'gaps' in the retail hierarchy. The potential allocation of these is identified later in this report.

Home based business could comprise business services, personal services, retail / wholesale trading businesses or light industrial type businesses.

Other activities refers to jobs not captured in the categories noted above and could include schools, higher education, child care facilities and community services that are spread across urban areas.

The modelling utilises job density (jobs per sqm of floorspace) and site coverage ratio assumptions. Appendix 3 shows assumptions used for the above matters.

## 7. POTENTIAL ECONOMIC PLAN

The potential full development economic plan is shown in the graphic below as Figure 24 and in the following Table 31. The economic plan has the following economic elements noted as A to J.

Activity Type		Specific Centre / Location
A	Existing Regional Activity Centre	A1 Sunbury Town Centre
B	Potential Sub-Regional Activity Centre	B1 Potential Sunbury South SRAC B2 Potential Lancefield Road SRAC
C	Existing Neighbourhood Activity Centre	C1 Gap Road Aldi Centre C2 Goonawarra Local Centre
D	Proposed Neighbourhood Activity Centre	D1 Proposed Racecourse Road NAC D2 Proposed Elizabeth Avenue NAC D3 Proposed Diggers Rest NAC
E	Potential Neighbourhood Activity Centre	E1 Potential Lancefield Road NAC E2 Potential Sunbury South NAC E3 Potential Sunbury West NAC E4 Potential Sunbury North NAC
F	Existing Industrial / Employment Area	F1 Existing Sunbury Industrial / Employment Area
G	Proposed Industrial / Employment Area	G1 Proposed Sunbury South Employment Area G2 Potential Bulky Goods (including Existing) G3 Potential Showroom / Motor Vehicle Uses G4 Proposed Diggers Rest Employment Area
H	Local Shop Nodes	Some Locations Shown (in and around PSP Areas)
I	Home Based Business	Locations Not Shown
J	Other Activities	Locations Not Shown D3 Proposed Diggers Rest NAC

Note that this economic plan relates to full development and is one scenario and others may apply.

Potential details of each element are shown in the data table (Table 31).

The best estimate outcome for jobs is approximately 31,000 jobs in relation to 49,000 dwellings, generating a ratio of 0.64 jobs per dwelling. Details are shown in Table 29 below.

**Table 29 - Key Indicators - Best Estimate Scenario at Full Development**

Key Indicators:	Existing	Potential
Population	36,647	121,312
Dwellings	12,637	48,525
Jobs	6,306	30,981
Jobs Per Dwelling	0.50	0.64
Local Retail Space Per Person sqm	1.6	2.0

Achievement of 1 job per dwelling requires office and community service based jobs to be higher than shown in the base estimate. Retail is not able to deliver significantly more jobs beyond the best estimate as a relatively high provision rate is included in the model. This also assumes industrial activity is retained to meet local demand.

A scenario to meet the aspirational target of 1 job per dwelling is shown in Tables 30 and 32. Under such a scenario the economic plan does not necessarily change but rather centres and economic nodes get bigger by attracting more office and commercial uses to achieve the target.

One way of achieving this target is as follows:

- Office uses to be 125% of retail floorspace in the regional centre, 100% of retail in sub-regional centres and 63% of retail in neighbourhood centres;
- Community service uses to be 125% of retail floorspace in the regional centre, 50% of retail in sub-regional centres and 38% of retail in neighbourhood centres; and
- Other dispersed jobs would increase as well to help achieve the target.

**Table 30 - Key Indicators - Target Scenario at Full Development**

Key Indicators:	Existing	Potential
Population	36,647	121,312
Dwellings	12,637	48,525
Jobs	6,306	49,059
Jobs Per Dwelling	0.50	1.01
Local Retail Space Per Person sqm	1.6	2.0

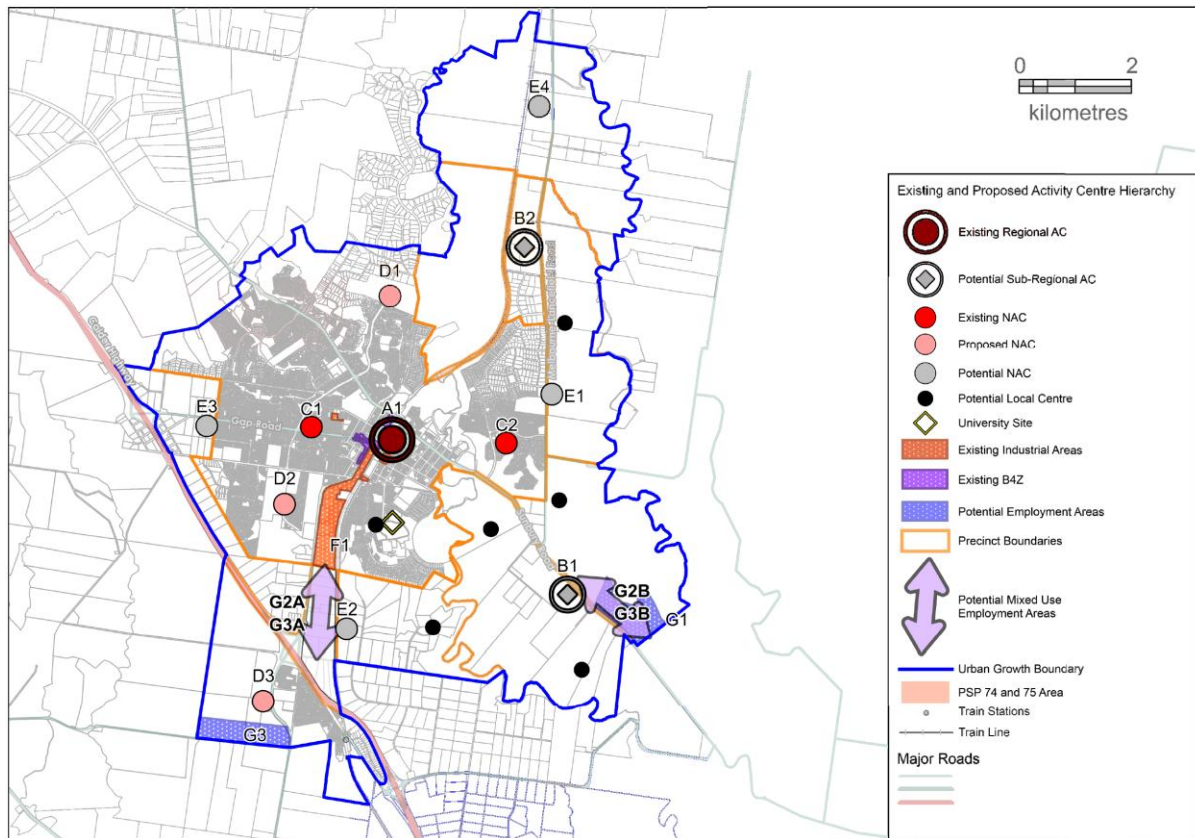
**Figure 24 - Potential Full Development Economic Plan (Indicative Locations Shown)**

Table 31 - Potential Full Development Economic Plan Scenario 1 (Best Estimate)

			Existing Conditions			Potential Future Conditions Scenario									
Activity Type		Specific Centre / Location	Site Area	Floorspace (All Activities)	Estimated Jobs	Retail Floorspace	Major Bulky Goods	Office Floorspace	Community Services Floorspace	Industrial Floorspace	Showroom Floorspace	Total Floorspace	Estimated Jobs	Site Area at Convent. Density (0.4:1.0)	Site Area at Urban Density (0.8:1.0)
			ha	sqm	no.	sqm	sqm	sqm	sqm	sqm	sqm	sqm	no.	ha	ha
A	Existing Regional Activity Centre	A1 Sunbury Town Centre	33.5	55,000	2,200	91,000	0	22,750	22,750	0	0	136,500	4,929	34.1	17.1
B	Potential Sub-Regional Activity Centre	B1 Potential Sunbury South SRAC	-	-	-	32,000	0	6,400	3,200	0	0	41,600	1,493	10.4	5.2
		B2 Potential Lancefield Road SRAC	-	-	-	25,000	0	5,000	2,500	0	0	32,500	1,167	8.1	4.1
C	Existing Neighbourhood Activity Centre	C1 Gap Road Aldi Centre	0.8	2,600	52	5,000	0	625	375	0	0	6,000	210	1.5	0.8
		C2 Goonawarra Local Centre	1.5	5,000	90	2,000	0	250	150	0	0	2,400	84	0.6	0.3
D	Proposed Neighbourhood Activity Centre	D1 Proposed Racecourse Road NAC	-	-	-	5,000	0	625	375	0	0	6,000	210	1.5	0.8
		D2 Proposed Elizabeth Drive NAC	-	-	-	5,000	0	625	375	0	0	6,000	210	1.5	0.8
		D3 Proposed Diggers Rest NAC	-	-	-	5,000	0	625	375	0	0	6,000	210	1.5	0.8
E	Potential Neighbourhood Activity Centre	E1 Potential Lancefield Road NAC	-	-	-	5,000	0	625	375	0	0	6,000	210	1.5	0.8
		E2 Potential Sunbury South NAC	-	-	-	5,000	0	625	375	0	0	6,000	210	1.5	0.8
		E3 Potential Sunbury West NAC	-	-	-	5,000	0	625	375	0	0	6,000	210	1.5	0.8
		E4 Potential Sunbury North NAC	-	-	-	5,000	0	625	375	0	0	6,000	210	1.5	0.8
F	Existing Industrial / Employment Area	F1 Existing Sunbury Industrial / Employment Area	64.5	147,200	1,840	0	0	0	0	257,800	0	257,800	3,223	64.5	64.5
G	Proposed Industrial / Employment Area	G1 Proposed Sunbury South Employment Area	-	-	-	0	0	0	0	400,000	0	400,000	5,000	100.0	100.0
		G2 Potential Bulky Goods (including Existing)	-	-	-	0	48,000	0	0	0	0	48,000	960	12.0	6.0
		G3 Potential Showroom / Motor Vehicle Uses	-	-	-	0	0	0	0	0	35,962	35,962	409	9.0	4.5
		G4 Proposed Diggers Rest Employment Area	-	-	-	0	0	0	0	110,000	0	110,000	1,375	27.5	27.5
H	Local Shop Nodes	Locations Not Shown	-	-	-	6,000	0	0	0	0	0	6,000	200	1.5	0.8
I	Home Based Business	Locations Not Shown	-	-	632	0	0	0	0	0	0	-	2,426	-	-
J	Other Activities	Locations Not Shown	-	-	1,492	0	0	0	0	0	0	-	8,032	-	-
TOTAL			-	-	6,306	196,000	48,000	39,400	31,600	767,800	35,962	1,118,762	30,981	279.7	235.8

Note: The figures in this table are for the purpose of assisting with planning the size and location of activities in PSP 74 and 75; all figures are indicative.

Table 32 - Potential Full Development Economic Plan Scenario 2 (Target)

			Existing Conditions			Potential Future Conditions Scenario									
Activity Type		Specific Centre / Location	Site Area	Floorspace (All Activities)	Estimated Jobs	Retail Floorspace	Major Bulky Goods	Office Floorspace	Community Services Floorspace	Industrial Floorspace	Showroom Floorspace	Total Floorspace	Estimated Jobs	Site Area at Convent. Density (0.4:1.0)	Site Area at Urban Density (0.8:1.0)
			ha	sqm	no.	sqm	sqm	sqm	sqm	sqm	sqm	sqm	no.	ha	ha
A	Existing Regional Activity Centre	A1 Sunbury Town Centre	33.5	55,000	2,200	91,000	0	113,750	113,750	0	0	318,500	12,513	79.6	39.8
B	Potential Sub-Regional Activity Centre	B1 Potential Sunbury South SRAC	-	-	-	32,000	0	32,000	16,000	0	0	80,000	3,200	20.0	10.0
		B2 Potential Lancefield Road SRAC	-	-	-	25,000	0	25,000	12,500	0	0	62,500	2,500	15.6	7.8
C	Existing Neighbourhood Activity Centre	C1 Gap Road Aldi Centre	0.8	2,600	52	5,000	0	3,125	1,875	0	0	10,000	385	2.5	1.3
		C2 Goonawarra Local Centre	1.5	5,000	90	2,000	0	1,250	750	0	0	4,000	154	1.0	0.5
D	Proposed Neighbourhood Activity Centre	D1 Proposed Racecourse Road NAC	-	-	-	5,000	0	3,125	1,875	0	0	10,000	385	2.5	1.3
		D2 Proposed Elizabeth Drive NAC	-	-	-	5,000	0	3,125	1,875	0	0	10,000	385	2.5	1.3
		D3 Proposed Diggers Rest NAC	-	-	-	5,000	0	3,125	1,875	0	0	10,000	385	2.5	1.3
E	Potential Neighbourhood Activity Centre	E1 Potential Lancefield Road NAC	-	-	-	5,000	0	3,125	1,875	0	0	10,000	385	2.5	1.3
		E2 Potential Sunbury South NAC	-	-	-	5,000	0	3,125	1,875	0	0	10,000	385	2.5	1.3
		E3 Potential Sunbury West NAC	-	-	-	5,000	0	3,125	1,875	0	0	10,000	385	2.5	1.3
		E4 Potential Sunbury North NAC	-	-	-	5,000	0	3,125	1,875	0	0	10,000	385	2.5	1.3
F	Existing Industrial / Employment Area	F1 Existing Sunbury Industrial / Employment Area	64.5	147,200	1,840	0	0	0	0	257,800	0	257,800	3,223	64.5	64.5
G	Proposed Industrial / Employment Area	G1 Proposed Sunbury South Employment Area	-	-	-	0	0	0	0	400,000	0	400,000	5,000	100.0	100.0
		G2 Potential Bulky Goods (including Existing)	-	-	-	0	48,000	0	0	0	0	48,000	960	12.0	6.0
		G3 Potential Showroom / Motor Vehicle Uses	-	-	-	0	0	0	0	0	35,962	35,962	409	9.0	4.5
		G4 Proposed Diggers Rest Employment Area	-	-	-	0	0	0	0	110,000	0	110,000	1,375	27.5	27.5
H	Local Shop Nodes	Locations Not Shown	-	-	-	6,000	0	0	0	0	0	6,000	200	1.5	0.8
I	Home Based Business	Locations Not Shown	-	-	632	0	0	0	0	0	0	-	2,426	-	-
J	Other Activities	Locations Not Shown	-	-	1,492	0	0	0	0	0	0	-	14,017	-	-
TOTAL			-	-	6,306	196,000	48,000	197,000	158,000	767,800	35,962	1,402,762	49,059	350.7	271.3

Note: The figures in this table are for the purpose of assisting with planning the size and location of activities in PSP 74 and 75; all figures are indicative.

## 8. DESCRIBING THE ELEMENTS AND ISSUES

### 8.1 ECONOMIC PLAN ELEMENTS

#### **A - Existing Regional Activity Centre**

##### **A1 Sunbury Town Centre**

For Sunbury Town Centre to achieve the role under this plan it would need to accommodate in the order of 136,000sqm (best estimate) to around 319,000sqm (target) floorspace.

Land take could range from as low as 17 hectares (best estimate growth at urban density scenario) to as much as 80 hectares (target growth at conventional density scenario). The best estimate growth at conventional density scenario requires around 34 hectares.

Sunbury, with a population around 120,000, could support a regional retail centre around 91,000sqm (retail) in size, with an additional 45,000sqm of office and community service space (best estimate).

##### *Alternatives -*

The main alternatives for consideration are that Sunbury Town Centre does not grow to this size due to development and / or land constraints and as such regional demand:

- Is released in another centre or centres in the town; or
- Is not captured in Sunbury.

If the demand is captured in Sunbury, the most likely alternative location is the proposed Sunbury South centre, which is located at a strategic position near the junction of Sunbury Road and Lancefield Road and between the main population mass of the town on one of the two connections to Melbourne. The Sunbury Road corridor is planned to also connect to the future Outer Metropolitan Ring Road.

##### *Retail Staging –*

The staging of the core retail space in the regional centre is market driven but based on retail benchmarks the allocation could be as shown in Table 33 below.



**Table 33 - Potential Retail Staging, Sunbury Town Centre**

Stage and Indicative Population	Stage 1	Stage 2	Stage 3
	70,000	100,000	120,000
	<i>Total Retail Floorspace sqm</i>		
Regional Centre (DS)	52,000	77,000	91,000

It is noted that Hume City Council has undertaken work that shows a higher potential provision of retail space in the Town Centre based on existing stock of space plus potential future growth.

The above estimate of 91,000sqm (and stages leading to that figure) relates to effective retail space that is occupied and trades at industry averages, in this case \$6,500 / sqm pa.

Main street and CBD centres (with multiple ownership) like the existing Sunbury Town Centre often contain floorspace beyond benchmark figures as more space is used at lower trading levels and offered at a lower rent. As new space is added to the centre some former core retail space becomes low rent space. This means that more low rent seeking retailers and non-core retail uses have greater potential to locate in the centre. This is good for economic development, jobs growth and business formation.

This pattern needs to be taken into account when interpreting retail demand analysis. The analysis shown in this report quotes floorspace potential for Sunbury Town Centre using benchmark figures, and does not assess in any detail the potential for low rent seeking businesses in addition to core retail space.

Nevertheless, the point here is that 91,000sqm of core retail space is the estimate for Sunbury Town Centre with a population around 120,000. Other space may be provided in addition to that for a range of related uses.

## **B - Potential Sub-Regional Activity Centre**

### **B1 Potential Sunbury South SRAC**

Sunbury, with a full development population around 120,000, could support a regional retail centre and two sub-regional centres.

The Sunbury South centre is nominated in the Growth Corridor Plan as a Major Town Centre and could be developed as the second largest activity node in Greater Sunbury, nominally with 32,000sqm retail and around 42,000sqm total size (best estimate) at full development. Appendix 2 describes how the retail space figure was derived.

For Sunbury to achieve the 1 job per dwelling target, this centre would need to play a role and delivering additional office and community uses, potentially being around 80,000sqm in size (but retail remaining at 32,000sqm).

Land take could range from as low as 5 hectares (best estimate growth at urban density scenario) to as much as 20 hectares (target growth at conventional density scenario). The best estimate growth at conventional density scenario requires around 11 hectares.

#### *Alternatives -*

The main alternatives for consideration are that this centre:

- Grows in excess of this nominal size at the expense of the Sunbury Town Centre, due to demand not being able to be released in Sunbury Town Centre;
- The (E1) Potential Lancefield Road NAC competes with this centre for demand over time and takes demand from this centre and the potential (B2) Potential Lancefield Road SRAC; and
- There may be opportunities to allocate some of the floorspace nominated for this centre to other parts of the immediate Sunbury South area – to achieve a better geographic spread of uses and services.

These matters can be managed by staging and capping where required.

#### *Retail Staging –*

The staging of the core retail space in the Sunbury South sub-regional centre could be capped to enable the retail system in the region to develop. Floorspace caps could be staged as shown in Table 34 below.

**Table 34 - Retail Staging, Potential Sunbury South SRAC**

Stage and Indicative Population	Stage 1	Stage 2	Stage 3
	70,000	100,000	120,000
	<i>Total Retail Floorspace sqm</i>		
Sub-Regional Centre - Sunbury South	20,000	30,000	32,000

#### **B2 Potential Lancefield Road SRAC**

As noted, Sunbury with a full development population around 120,000 could support a regional retail centre and two sub-regional centres.

There is potential to progressively build up a Lancefield Road centre to sub-regional size, to service the wider northern sector of Sunbury including Sunbury North, Lancefield Road and existing township areas. It is noted that such a designation does not fully align with the Growth Corridor Plan however that plan was based on a lower population threshold than has been assessed in this report.

The Lancefield Road centre could be developed as the third largest activity node in Greater Sunbury, nominally with 25,000sqm retail and around 33,000sqm total size (best estimate) at full development. Appendix 2 describes how the retail space figure was derived.

For Sunbury to achieve the 1 job per dwelling target, this centre would need to play a role and delivering additional office and community uses, potentially being around 63,000sqm in size (but retail remaining at 25,000sqm).

Land take could range from as low as 4 hectares (best estimate growth at urban density scenario) to as much as 16 hectares (target growth at conventional density scenario). The best estimate growth at conventional density scenario requires around 8 hectares.

#### *Alternatives -*

The suggested sizing and location this centre is subject to further assessment of the creek crossing, rail line crossing and train station location.

The main alternative for consideration is that this centre is out performed by centres to the south, and does not achieve the nominal sized noted above. If that occurred, it could be established as a large supermarket based node.

There may be opportunities to allocate some of the floorspace nominated for this centre to other parts of the immediate Lancefield Road area – to achieve a better geographic spread of uses and services.

#### *Retail Staging –*

The staging of the core retail space in the Lancefield Road sub-regional centre could be capped to enable the retail system in the region to develop. Floorspace caps could be staged as shown in Table 34 below.

**Table 35 - Retail Staging, Potential Lancefield Road SRAC**

Stage and Indicative Population	Stage 1	Stage 2	Stage 3
	70,000	100,000	120,000
	<i>Total Retail Floorspace sqm</i>		
Sub-Regional Centre - Lancefield Road	13,000	18,000	25,000

### **C - Existing Neighbourhood Activity Centre**

#### **C1 Gap Road Aldi Centre**

This is an existing supermarket centre comprising a 2,900sqm Aldi Store adjacent to a function centre, petrol filling and community services.

There may be potential to further improve the area over time, by integrating the supermarket with surrounding uses and potentially adding some other services.

#### **C2 Goonawarra Local Centre**

This is an existing local centre comprising local retail and community uses.

The centre is located in an internal road network and its catchment is largely established. As such the centre may experience some but limited future growth from retail sectors.

## **D - Proposed Neighbourhood Activity Centre**

### **D1 Proposed Racecourse Road NAC**

This centre is proposed by a proponent to be a neighbourhood activity centre anchored by a supermarket along with supporting speciality retail, local offices and community services. This potential is subject to catchment development and more detailed planning.

### **D2 Proposed Elizabeth Drive NAC**

This centre is proposed by a proponent to be a neighbourhood activity centre anchored by a supermarket along with supporting speciality retail, local offices and community services. This potential is subject to catchment development and more detailed planning.

### **D3 Proposed Diggers Rest NAC**

This centre is planned as part of the Digger Rest PSP to be a neighbourhood activity centre anchored by a supermarket along with supporting speciality retail, local offices and community services. The nominal size is around 6,000sqm retail plus other uses.

## **E - Potential Neighbourhood Activity Centre**

### **E1 Potential Lancefield Road NAC**

This centre could be a neighbourhood activity centre anchored by a supermarket along with supporting speciality retail, local offices and community services. The nominal size could be around 6,000sqm total. The retail provision could be around 5,000sqm. Site area need may be around 1.5ha using conventional density assumptions. This potential is subject to catchment development and more detailed planning.

#### *Alternatives –*

A consideration regarding this centre is timing of delivery in relation to the potential Sunbury South SRAC and the potential Lancefield Road SRAC.

It is possible that this centre may lay claim to expand beyond the nominal size suggested here if its catchment develops earlier than the two sub-regional catchments.

Early provision can be facilitated within reason but only up to the indicative size nominated in this report.

### **E2 Potential Sunbury South NAC**

This centre could be a neighbourhood activity centre anchored by a supermarket along with supporting speciality retail, local offices and community services. The nominal size could be around 6,000sqm total. The retail provision could be around 5,000sqm. Site area need may be around 1.5ha using conventional density assumptions. This potential is subject to catchment development and more detailed planning.

*Alternatives –*

The optimal location of E2 is subject to further assessment of terrain, buffers, drainage, future potential railway station locations, creek crossing and railway line crossing.

**E3 Potential Sunbury West NAC**

This centre could be a neighbourhood activity centre anchored by a supermarket along with supporting speciality retail, local offices and community services. The nominal size could be around 6,000sqm total (5,000sqm retail). This potential is subject to catchment development and more detailed planning.

**E4 Potential Sunbury North NAC**

This centre could be a neighbourhood activity centre anchored by a supermarket along with supporting speciality retail, local offices and community services. The nominal size could be around 6,000sqm total (5,000sqm retail). This potential is subject to catchment development and more detailed planning.

**F - Existing Industrial / Employment Area****F1 Existing Sunbury Industrial / Employment Area**

This area comprises 64.5ha of which 36.8ha is deemed developed. The uses in the area include light industry and bulky goods and showroom uses. The area is a light industrial area that services the Greater Sunbury area.

This area could continue in this role for the long term, and play a part in delivering services and jobs to the region.

*Alternatives –*

There may be a case to consider exploring re-use of some industrial land areas close to the Sunbury Town Centre for activity centre uses in the longer term.

This may be feasible after new industrial and bulky goods areas are developed and capacity exists for businesses to relocate. This could free up land for activity centre development close to the Town Centre and train station.

Note however it is beyond the scope of this study to determine which sites around the town centre would be suitable for reallocation or when. By retaining the planned scenario quantum of land in the PSP areas, this would enable flexibility for this more detailed exploration of the reallocation of existing sites around the town centre to be realised.

## **G - Proposed Industrial / Employment Area**

### **G1 Proposed Sunbury South Employment Area**

This area is proposed to accommodate 100ha of industrial or employment land in Sunbury South on the east side of Sunbury Road. The area will have good access to planned linkages to the planned Outer Metropolitan Ring Road.

The planned scenario identifies a total of 192 hectares of industrial land which includes 100ha in this location. Based on the analysis in this report this is considered appropriate.

In terms of structure of the area, there is merit in utilising the Sunbury Road frontage for showroom or bulky goods retail uses (see discussion for G2 and G3 below) and facilitating core industrial activity within the non-road frontage part of the precinct.

### **G2 Potential Bulky Goods (including Existing)**

The full development scenario provides for around 48,000sqm of stand-alone bulky goods retail in Sunbury. This relates to demand for the Greater Sunbury area and outside of other activity centres.

The land take for this activity is 12ha (best estimate at conventional density). At urban density the land take is 6ha.

This activity can be associated with retail centre uses and industrial or employment area uses. Some of the activity can be expected to gravitate to an activity centre whereas some would gravitate to industrial or employment areas.

A potential model is for larger format and showroom style developments to locate along main road corridors whereas higher density based activity to located within activity centres,

#### *Alternatives -*

The main consideration is location for this activity. Two potential locations are identified for designation as specialised bulky goods and showroom precincts (i.e. non-centres based) in this assessment:

- Land south of the existing industrial zoned land on Vineyard Road; and
- Utilisation of the Sunbury Road frontage (east side) along the front of the proposed employment precinct and potentially extending north along the road frontage to be adjacent to and integrated with the potential Sunbury South SRAC.

There is merit in facilitating both precincts to stimulate choice and market competition.

### **G3 Potential Showroom / Motor Vehicle Uses**

The full development scenario provides for around 36,000sqm of showroom (mainly motor vehicle related) activity in Greater Sunbury in addition to bulky goods retail.

The land take for this activity is 9ha (best estimate at conventional density). At urban density the land take is 5ha.

This activity can be associated with bulky goods and employment area uses:

#### *Alternatives -*

Like bulky goods, the two potential locations are:

- Continuation of the existing Vineyard Road bulky goods / employment cluster to the south; and
- Utilisation of the Sunbury Road frontage (east side) along the front of the proposed employment precinct and potentially extending north along the road frontage to be adjacent to and integrated with the potential Sunbury South SRAC.

There is merit in facilitating both precincts to stimulate choice and market competition.

### **G4 Proposed Diggers Rest Employment Area**

This area has been nominated in the Diggers Rest PSP to focus on small / light industry and related commercial uses covering 27.5 hectares.

### **H - Local Shop Nodes**

Local shop nodes comprise around 500 – 2,500sqm of retail space – say 1,500sqm average - located in 'gaps' in the retail hierarchy. The provision of such facilities should be encouraged where possible.

Such nodes should be capped in size so as not to compromise the planned neighbourhood activity centre system. Some locations are shown on the economic plan.

### **I - Home Based Business**

Home based business could comprise business services, personal services, retail / wholesale trading businesses or light industrial type businesses. The operation of such businesses should be encouraged where possible. Potential locations are all residential areas.

### **J - Other Activities**

This defines jobs not captured in the categories noted above and could include schools, higher education, child care facilities and community services that are spread across urban areas.



There is potential to re-use the former university site in Sunbury as a mixed use urban village incorporating an activity centre. The area has historic buildings and sweeping views across Sunbury and beyond. It offers a unique development opportunity for the town. The concept could be education and business activities integrated with high density housing and retail and entertainment uses in an integrated urban village. The area could have small business and creative industry spaces and be a generator of new job outcomes in the area.

## 8.2 LOCATION AND DESIGN ISSUES

The main location and design issues that have been identified are as follows:

- The location requirements for the B1 Potential Sunbury South SRAC and relationship to employment land;
- The location requirements for B2 Potential Lancefield Road SRAC and location in relation to Lancefield Road and a potential future rail station;
- The allocation of land and uses in the employment areas and proposed mixed use employment area along Vineyard Road and relationship to Sunbury Town Centre; and
- The location of the E2 Potential Sunbury South NAC.

### **Location and Design - B1 Potential Sunbury South SRAC**

The Growth Corridor Plan nominates this centre for a location on the west side of Sunbury Road. This position is supported by this report.

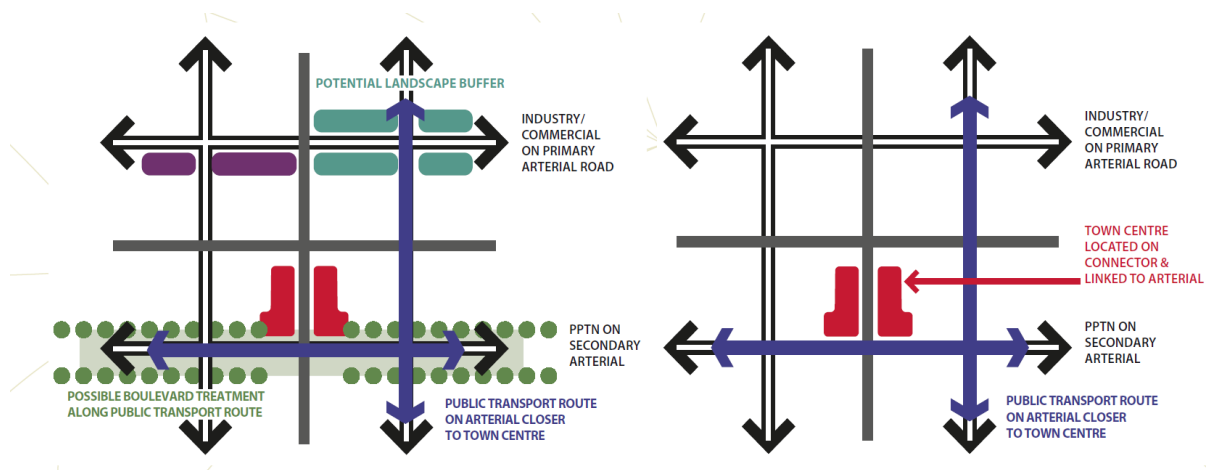
The position of the centre is nominally shown in this report. The centre could be moved up or down Sunbury Road to some extent. Key considerations are as follows.

- Distance from the Sunbury Town Centre – It is important to ensure that a good separation is made between the main centres so catchments do not unnecessarily overlap. A mid-point location along the Sunbury South frontage and at least 4 kilometres from the Town Centre is nominally shown in this report. Furthermore, this area is generally flat as opposed to hilly terrain further north.
- Internal Collector Road Capacity - The design of the centre should be structured around an internal connector road that links through the middle of the Sunbury South cell 2 through to cell 3 (potentially linking the potential NAC in Sunbury South) and to Vineyard Road. This concept is shown in Precinct Structure Plan Guidelines (see Figure 25 below). This link should serve the cells and link residential areas in Sunbury South to the proposed centre via the road. Similarly, a link into cell 1 of Sunbury South would also be desirable to more or less connect with the link road. Without such links, the catchment may be insufficient to support the centre of the size nominated in this report.
- Land Use Configuration - The centre could have frontage onto Sunbury Road for exposure reasons, which would benefit some main road seeking businesses (see below). However most pedestrian focused activity should be positioned along the internal connector link so as to promote a high amenity pedestrian environment. The centre should be fully integrated and offer the capacity for

customers to park in zones and walk to numerous businesses without having to drive for multiple purposes.

- Surrounding Land Uses – Higher density housing is an appropriate supporting land use that could be delivered around and within the centre.
- Relationship to Industrial Uses – This centre would not have any significant functional relationship with, or need to be located near, the proposed industrial area in Sunbury South. The uses and activities are effectively separate.
- Main Road Business Uses – The Sunbury Road frontage on both the east and west sides could be designed to accommodate main road business uses. The uses could include offices, showrooms and bulky goods retail uses. Such uses could bleed into the frontage of the proposed industrial area and take advantage of the main road location.

**Figure 25 - Precinct Structure Plan Guidance for Centre Location**



Source: MPA

### **Location and Design - B2 Potential Lancefield Road SRAC**

A similar model for this sub-regional centre is proposed in this report. The centre could be structured around an east-west internal connector link from Lancefield Road and be structured along that link but with frontage to Lancefield Road and elongated to connect with a future rail station. The distance between Lancefield Road and the rail line is approximately 600 metres.

Key considerations are as follows.

- Distance from the Sunbury Town Centre - As discussed above, the nominal location is at least 4 kilometres from the Town Centre.
- Internal Collector Road Capacity - The centre will require east-west links to be established through all three cells of this PSP area to ensure the catchment is sufficient to support the centre of the size nominated in this report. This centre will also draw from northern and southern trade along the existing Lancefield Road corridor.

- Land Use Configuration - This centre could have frontage onto Lancefield Road for exposure reasons, which would benefit some main road seeking businesses. However most pedestrian focused activity can be positioned along the internal east-west connector link – near but not necessarily on Lancefield Road - so as to promote a high amenity pedestrian environment. The rail station can also be utilised for community uses, offices and some associated retail activity. The core retail offer could be positioned off the Lancefield Road junction. The rationale for this approach is based on the fact that road networks mainly define retail activity.
- Surrounding Land Uses – Higher density housing is an appropriate supporting land use that could be delivered around and within the centre.
- Main Road Business Uses – The Lancefield Road frontage could also be designed to accommodate main road business uses like offices, showrooms and bulky goods retail uses. This could also include the east side.
- Further Assessment – As noted above, the suggested sizing and location this centre is subject to further assessment of the creek crossing, rail line crossing and train station location.

### **Location and Design – Industrial and Mixed Use Areas**

The total planned allocation of industrial, bulky goods and mixed use employment land (outside of activity centres) is shown in Table 13 of this report as 238ha. Of this sum, about 110ha is earmarked for the proposed mixed use precinct along the Vineyard Road corridor.

- Potential of Mixed Use Employment Areas – The Vineyard Road area is nominated to accommodate commercial / office and other employment uses in the Growth Corridor Plan. This report also suggests that a similar type of precinct be considered for the Sunbury Road frontage near the proposed sub-regional activity centre and along the Sunbury South industrial area frontage. This report calculates that in total Greater Sunbury may need only 33ha of such land between the two precincts. This was calculated as follows:
  - About 21ha of land will be absorbed outside of activity centres for bulky goods and showroom uses;
  - Office floorspace will be around 195,000sqm at the high end (or target scenario) and this may consume around 24ha of land (at a 0.8 site coverage ratio);
  - Office activity is assumed to be able to be accommodated within activity centres however the reality is some will be located out of centre. Assuming half is located out of centre it would mean that up to 12ha office may seek an out of centre location in Sunbury;
  - Therefore the total out of centre mixed use allocation is 33ha for office, bulky goods and showroom uses; and
  - This means that the 110ha allocation for the Vineyard Road precinct should be re-examined, with potentially only a portion being required for employment uses.
- Potential Re-use of Industrial Land Near the Sunbury Town Centre - Of the proposed future industrial land component, about 74ha is above the base Greater Sunbury need (i.e. 192ha planned

versus 118ha base need). There is scope to investigate whether some land (within this 74ha margin) can be better utilised for other economic and activity centre uses in particular land near the Sunbury Town Centre.

- Suggested Profile of Industrial Land - The suggested profile of industrial land is shown earlier in this report – refer to Table 28 for details.

### **Location and Design - E2 Potential Sunbury South NAC**

A consideration regarding this centre is location. The centre could be located either on the east or west side of the rail line.

Either option is possible however a west side position would require a good connection to the east side given the bulk of the nominal catchment is located to the east. Another consideration is use of the land between the rail line and Vineyard Road. As noted above, this section of land may in full or part be used for employment purposes.

As the primary purpose of this centre is to serve a residential catchment, which is mainly on the east side of the rail line, it is recommended that this centre be positioned on the east side of the rail line and potentially integrated with a future passenger rail station. As noted above, the optimal location of E2 is subject to further assessment of terrain, buffers, drainage, future potential railway station locations, creek crossing and railway line crossing matters.

## 9. SUNBURY SOUTH PSP

The recommended economic plan for the Sunbury South PSP is as follows. This is designed to fit the overall Greater Sunbury economic structure as shown earlier in this report.

Figure 26 shows an indicative spatial concept for the economic plan.

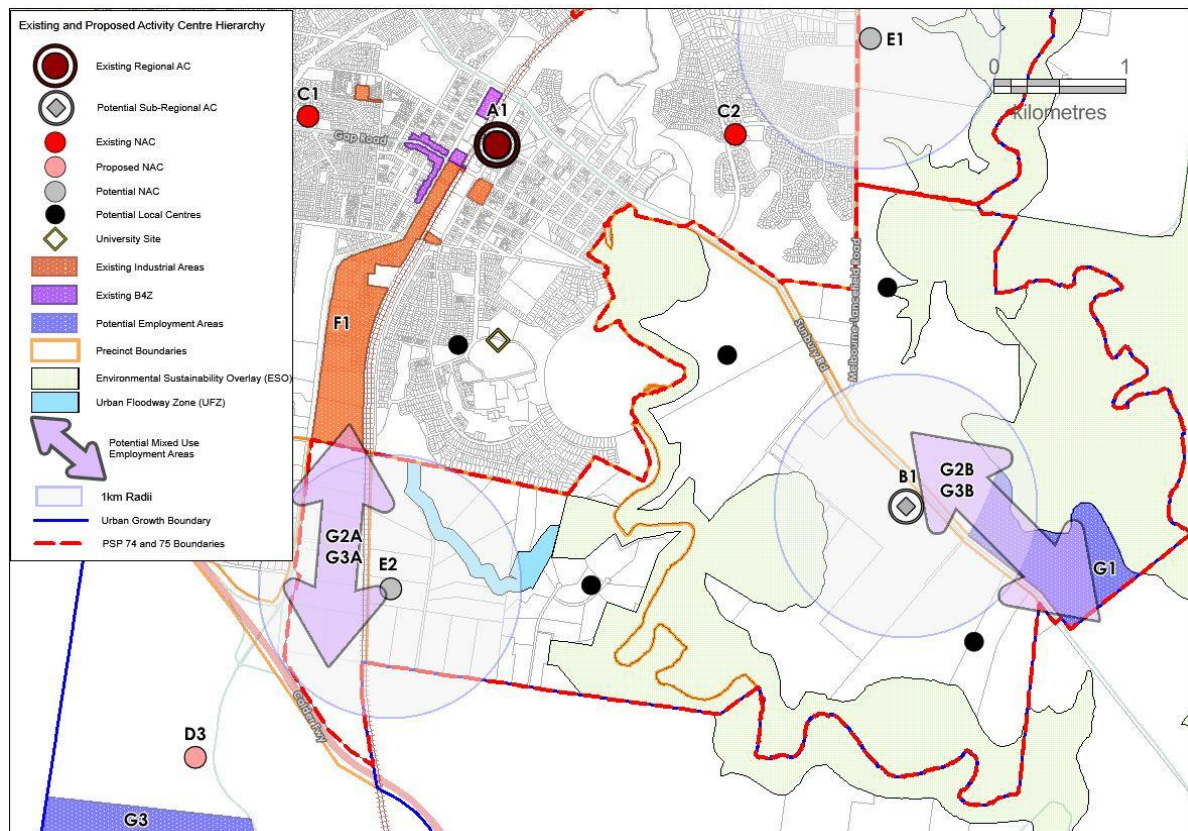
The main features are:

- Potential Sunbury South SRAC – located on the west side of Sunbury Road;
- Potential Sunbury South NAC – located on the east side of the rail line in the growth area;
- Proposed Sunbury South Employment Area – as shown in the Growth Corridor Plan on the east side of Sunbury Road;
- Potential Bulky Goods - potentially on both the Sunbury Road and Vineyard Road corridors;
- Potential Showroom / Motor Vehicle Uses – potentially on both the Sunbury Road and Vineyard Road corridors;
- Local Shop Nodes – potentially 4 nodes located in gaps of the activity centre system outside of the 1 kilometre zone of planned centres;
- Home Based Business; and
- Other Activities - such as schools, child care facilities and other services.

Table 36 shows the details for each element of the economic plan. This provides rounded estimates for floorspace, jobs and site area – and where necessary ranges - based on the analysis shown in the previous report sections.

This plan is indicative and subject to the qualifications and assumptions noted throughout this report.

Figure 26 - Sunbury South PSP Economic Plan (Indicative Locations Shown)



Note: This plan is indicative and has been developed for the purpose of assisting with planning the size and location of activities in the PSP area.

Table 36 - Sunbury South PSP Economic Plan at Full Development

		Potential Future Conditions Scenario									
Specific Centre / Location	Retail Floorspace	Indicative Retail Profile		Major Bulky Goods	Office Floorspace	Community Services Floorspace	Industrial Floorspace	Showroom Floorspace	Total Floorspace (Rounded)	Estimated Jobs (Rounded)	Site Area Estimate
	sqm	Guide Only		sqm	sqm	sqm	sqm	sqm	sqm	no.	ha
B1 Potential Sunbury South SRAC	32,000	1-2 discount department stores	6,000 – 10,000sqm	Subject to Demand	6,400 to 32,000	3,200 to 16,000	NA	Subject to Demand	41,000 to 80,000	1,500 to 3,200	10 (range 5 to 20)
		2-3 supermarkets	3,000 – 4,500sqm								
		3-4 mini-majors	400 – 800sqm								
		40 - 80 specialty stores	80 -100sqm								
E2 Potential Sunbury South NAC	5,000	1 full-line supermarket	3,000 – 4,500sqm	NA	600 to 3,200	350 to 1,900	NA	NA	6,000 to 10,000	200 to 400	1.5 (range 0.8 to 2.5)
		1 mini major	400-800sqm								
		20 specialty stores	80 -100sqm								
G1 Proposed Sunbury South Employment Area	Local Shop Potential	Convenience Stores	80-400sqm	Potentially on Sunbury Road Frontage	Subject to Demand	NA	400,000	Potentially on Sunbury Road Frontage	400,000	5,000	100
G2 Potential Bulky Goods (including Existing)	Local Shop Potential	Convenience Stores	80-400sqm	48,000	Subject to Demand	NA	Subject to Demand	Subject to Demand	48,000	960	12
G3 Potential Showroom / Motor Vehicle Uses	Local Shop Potential	Convenience Stores	80-400sqm	Subject to Demand	Subject to Demand	NA	Subject to Demand	36,000	36,000	400	9
Local Shop Nodes	4 Nodes	1 grocery store / small supermarket	1,500sqm major approx.	NA	Subject to Demand	Subject to Demand	NA	NA	1,500 / Node (approx.)	140	0.5 / Node
		<10 specialty stores	80 -100sqm								
Home Based Business	-	-	-	-	-		-		-	550	-
Other Activities	-	-	-	-	-	Non Centres Based Education and Other Services	-		-	3,000 to 3,700	-

Note: Retail floorspace caps required for retail floorspace.

Note: This plan is indicative and has been developed for the purpose of assisting with planning the size and location of activities in the PSP area.



## 10. LANCEFIELD ROAD PSP

The recommended economic plan for the Lancefield Road PSP is as follows. This is designed to fit the overall Greater Sunbury economic structure as shown earlier in this report.

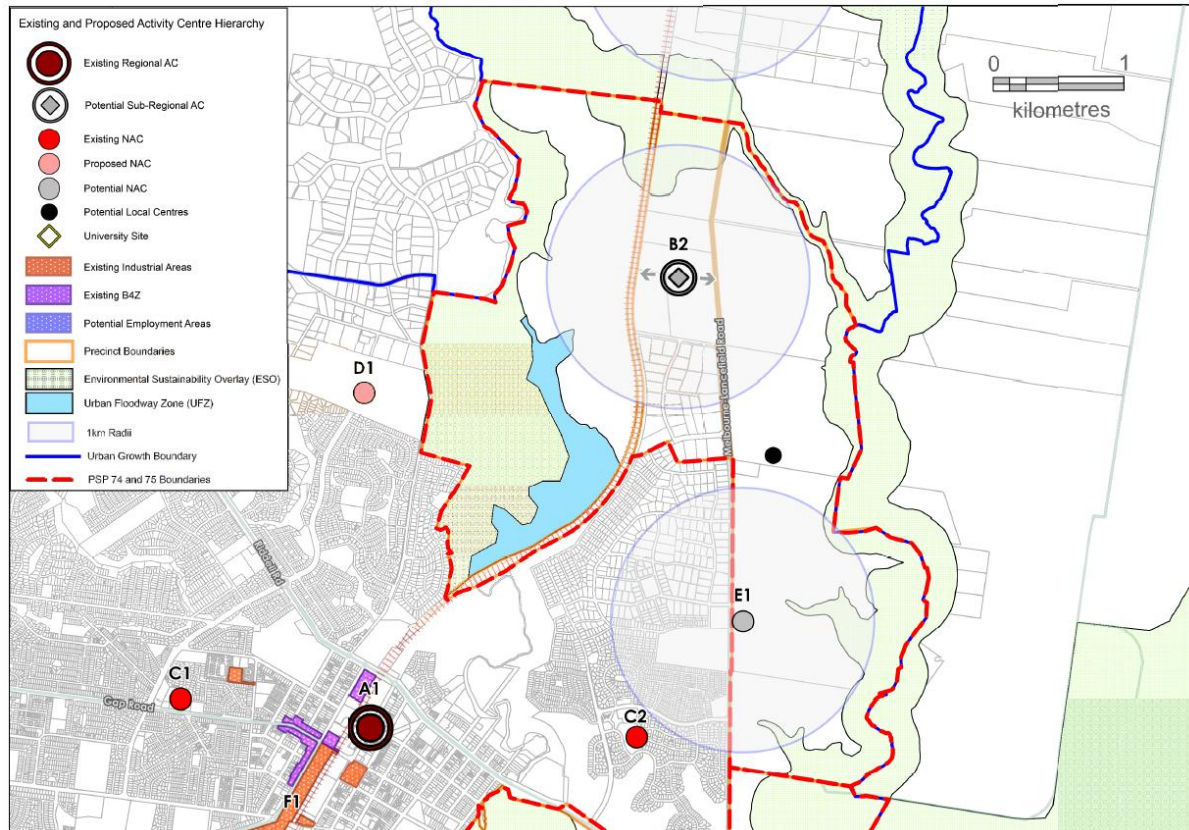
Figure 27 shows an indicative spatial concept for the economic plan.

The main features are:

- Potential Lancefield Road SRAC – located on the west side of Lancefield Road between the Lancefield Road frontage connecting to a rail station;
- Potential Lancefield Road NAC – located on the east side of Lancefield Road;
- Local Shop Nodes – potentially 1 node located in a gap of the activity centre system outside of the 1 kilometre zone of planned centres;
- Home Based Business; and
- Other Activities - such as schools, child care facilities and other services.

Table 36 shows the details for each element of the economic plan. This provides rounded estimates for floorspace, jobs and site area – and where necessary ranges - based on the analysis shown in the previous report sections.

This plan is indicative and subject to the qualifications and assumptions noted throughout this report.

**Figure 27 - Lancefield Road PSP Economic Plan (Indicative Locations Shown)**

Note: This plan is indicative and has been developed for the purpose of assisting with planning the size and location of activities in the PSP area.

Table 37 - Lancefield Road PSP Economic Plan at Full Development

	Potential Future Conditions Scenario										
Specific Centre / Location	Retail Floorspace	Indicative Retail Profile		Major Bulky Goods	Office Floorspace	Community Services Floorspace	Industrial Floorspace	Showroom Floorspace	Total Floorspace (Rounded)	Estimated Jobs (Rounded)	Site Area Estimate
	sqm	Guide Only		sqm	sqm	sqm	sqm	sqm	sqm	no.	ha
B2 Potential Lancefield Road SRAC	25,000	1-2 discount department stores	6,000 – 10,000sqm	Subject to Demand	5,000 to 25,000	2,500 to 12,500	NA	Subject to Demand	32,000 to 63,000	1,100 to 2,500	8 (range 4 to 16)
		2-3 supermarkets	3,000 – 4,500sqm								
		3-4 mini-majors	400 – 800sqm								
		40 - 80 specialty stores	80 -100sqm								
E1 Potential Lancefield Road NAC	5,000	1 full-line supermarket	3,000 – 4,500sqm	NA	600 to 3,200	350 to 1,900	NA	NA	6,000 to 10,000	200 to 400	1.5 (range 0.8 to 2.5)
		1 mini major	400-800sqm								
		20 specialty stores	80 -100sqm								
Local Shop Nodes	1 Node	1 grocery store / small supermarket	1,500sqm major approx.	NA	Subject to Demand	Subject to Demand	NA	NA	1,800 (approx.)	60	0.5
		<10 specialty stores	80 -100sqm								
Home Based Business	-	-	-	-	-		-		-	400	-
Other Activities	-	-	-	-	-	Non Centres Based Education and Other Services	-		-	600 to 1,300	-

Note: Retail floorspace caps required for retail floorspace.

Note: This plan is indicative and has been developed for the purpose of assisting with planning the size and location of activities in the PSP area.

# 11. CONCLUSION

This report provides an economic plan for the Sunbury South PSP area and Lancefield Road PSP area in the context of Greater Sunbury. The economic plan has the following economic elements noted as A to J.

<b>Activity Type</b>		<b>Specific Centre / Location</b>
A	Existing Regional Activity Centre	A1 Sunbury Town Centre
B	Potential Sub-Regional Activity Centre	B1 Potential Sunbury South SRAC B2 Potential Lancefield Road SRAC
C	Existing Neighbourhood Activity Centre	C1 Gap Road Aldi Centre C2 Goonawarra Local Centre
D	Proposed Neighbourhood Activity Centre	D1 Proposed Racecourse Road NAC D2 Proposed Elizabeth Avenue NAC D3 Proposed Diggers Rest NAC
E	Potential Neighbourhood Activity Centre	E1 Potential Lancefield Road NAC E2 Potential Sunbury South NAC E3 Potential Sunbury West NAC E4 Potential Sunbury North NAC
F	Existing Industrial / Employment Area	F1 Existing Sunbury Industrial / Employment Area
G	Proposed Industrial / Employment Area	G1 Proposed Sunbury South Employment Area G2 Potential Bulky Goods (including Existing) G3 Potential Showroom / Motor Vehicle Uses G4 Proposed Diggers Rest Employment Area
H	Local Shop Nodes	Some Locations Shown (in and around PSP Areas)
I	Home Based Business	Locations Not Shown
J	Other Activities	Locations Not Shown D3 Proposed Diggers Rest NAC

Delivering the economic plan is likely to yield the Base Estimate outcome shown in Table 38 below. This relates to a 'full development' scenario for the study area. A more aspirational Target Scenario is also shown which, if achieved, would yield the target 1 job per dwelling for the Greater Sunbury area overall.

Much of the future economic activity in Sunbury is likely to be focused in the Town Centre and Sunbury South areas.

**Table 38 - Summary of Economic Estimates at Full Development**

	BASE ESTIMATE	TARGET ESTIMATE
	<b>GREATER SUNBURY</b>	
Population	121,312	121,312
Dwellings	48,525	48,525
Jobs	30,981	49,059
Jobs Per Dwelling	0.6	1.0
Local Retail Space Per Person sqm	2.0	2.0
	<b>SUNBURY SOUTH PSP</b>	
Population	27,409	27,409
Dwellings	10,964	10,964
Jobs	11,827	14,367
Jobs Per Dwelling	1.1	1.3
Local Retail Space Per Person sqm	0.7	0.7
	<b>LANCEFIELD ROAD PSP</b>	
Population	20,897	20,897
Dwellings	8,359	8,359
Jobs	2,504	4,541
Jobs Per Dwelling	0.3	0.5
Local Retail Space Per Person sqm	0.3	0.3

Note that the economic guidance shown in this report is indicative with respect to size and location of land uses in the PSP areas. Information for activities outside of the PSP areas is shown only to frame the recommendations for the PSP areas and is not intended as detailed planning guidance for those areas. Refer to Section 1.3 Interpretation and Qualifications for more information on how to interpret the findings of this report.

## 12. IMPLEMENTATION

This report identifies the suggested economic plan for the two PSP areas subject to this report. Important implementation considerations are noted below.

It is recommended that the Target Scenario shown in this report be used to guide the planning process. This scenario strives to achieve 1 job per dwelling in the long term.

This report shows one way of striving for this target. Planning agencies should work with developers and businesses to strive for the target, Alternative directions (to those shown in this report) should be considered where necessary.

The economic plan in this report works to a full development scenario of 120,000 residents. There are however development capacity and timing uncertainty risks associated with this population yield and this plan. It is therefore recommended that the planning process adopt recommendations based on thresholds of development as follows.

- Stage 1 – approximately 70,000 residents.
- Stage 2 – approximately 100,000 residents.
- Stage 3 – full development of approximately 120,000 residents.

The activity centre system is integral to the delivery of the economic plan. It is therefore recommended that retail floorspace caps be used for all centres in the hierarchy (excluding the Sunbury Town Centre) so as to give effect to the intended hierarchy in this plan. The caps should be based on the stages noted above, and thus the initial caps should be linked to achieve a population threshold of 70,000 residents. Changes to caps should be considered when the threshold population is achieved.

This report has concluded that there is capacity to review the quantum of land allocation for industrial and mixed use employment uses along the Vineyard Road Corridor. The future direction of that area should be re-examined, with potentially only a portion being required for employment uses.

Many of the recommendations in this report are based on estimates of land, dwelling and population yield. There is capacity to refine recommendations and directions as more information on those elements becomes available. It is recommended that this refinement process be undertaken as the planning process evolves.



# APPENDICES

## APPENDIX 1 - STUDY AREA IMAGES

### Sunbury South

Towards the proposed employment area, the land on either side of Sunbury Road is relatively flat. Land begins to undulate and appears to be steep towards Jacksons Creek. East of Sunbury Road is similar and becomes undulating towards the quarry.





### **Lancefield Road**

The topography on both sides of Lancefield Road is relatively flat. The western side of Lancefield road has notable amounts of detached residential housing up until Rawes Road.



## Sunbury

The images below show the type of retail space available on Evans Street in Sunbury. The quality and layout of shops are typical and comprise a mixture of cafes, restaurants and shopfront retail. The train station is also located off Evans Street.



## **Industrial Precinct**

The industrial area accommodates car yards and bulky goods on Vineyard Road and Horne Street. Users of the bulky goods area includes AutoBahn, Beaurepairs, PJ Pet Warehouse. There is some newly developed bulky goods / retail establishments adjacent to the petrol station on Horne Street. The area is predominantly developed however there are some vacant sites available.





### **Former University**

The former university site is elevated in comparison to the rest of Sunbury. As shown in the panoramic photo below, the elevation provides the area with sweeping views across the landscape. There are some new townhouse developments on Heights Road which benefits from such views. The university precinct accommodates heritage buildings.



## APPENDIX 2 – GREATER SUNBURY RETAIL THRESHOLDS MODEL

				External	Regional Centre (DS)				Bulky Goods	Sub-Regional Centre (DDS)			Small Neighbourhood Centre (SM)			OR	Large Neighbourhood Centre (SM)			Total		
Average Centre Size				na		70,000			40,000			25,000			3,500			7,000				
Average RTD				\$6,500		\$6,500			\$3,500			\$7,500			\$8,500		\$8,500	\$8,500				
Average Required Turnover				na		\$455,000,000			\$140,000,000			\$187,500,000			\$29,750,000			\$59,500,000				
Average Retail Expenditure Per Capita	\$13.834																					
Percent Capture of Retail Expenditure			100%	10%		35%			10%			25%			20%		20%					
	Population	Households	Total Expenditure	Turnover	Floorspace	Turnover	No. of Centres of Average Size	Floorspace	Turnover	No. of Centres of Average Size	Floorspace	Turnover	No. of Centres of Average Size	Floorspace	Turnover	No. of Centres of Average Size	Floorspace	Turnover	No. of Centres of Average Size	Floorspace	Total Floorspace Generated from Area Across Retail System	FSPF
Sunbury South		2.9																				
SS1	3,678	1,268	\$50,886,640	\$5,088,664	783	\$17,810,324	0.04	2,740	\$5,088,664	0.04	1,454	\$12,721,660	0.07	1,696	\$10,177,328	0.34	1,197	\$10,177,328	0.17	1,197	7,870	2.1
SS2	20,282	6,994	\$280,582,053	\$28,058,205	4,317	\$98,203,718	0.22	15,108	\$28,058,205	0.20	8,017	\$70,145,513	0.37	9,353	\$56,116,411	1.89	6,602	\$56,116,411	0.94	6,602	43,396	2.1
SS3	3,449	1,189	\$47,711,737	\$4,771,174	734	\$16,699,108	0.04	2,569	\$4,771,174	0.03	1,363	\$11,927,934	0.06	1,590	\$9,542,347	0.32	1,123	\$9,542,347	0.16	1,123	7,379	2.1
Total Sunbury South	27,409	9,451	\$379,180,429	\$37,918,043	5,834	\$132,713,150	0.29	20,417	\$37,918,043	0.27	10,834	\$94,795,107	0.51	12,639	\$75,836,086	2.55	8,922	\$75,836,086	1.27	8,922	58,646	2.1
Lancefield Road																						0
LR1	5,438	1,875	\$75,227,563	\$7,522,756	1,157	\$26,329,647	0.06	4,051	\$7,522,756	0.05	2,149	\$18,806,891	0.10	2,508	\$15,045,513	0.51	1,770	\$15,045,513	0.25	1,770	11,635	2.1
LR2	3,953	1,363	\$54,678,885	\$5,467,889	841	\$19,137,610	0.04	2,944	\$5,467,889	0.04	1,562	\$13,669,721	0.07	1,823	\$10,935,777	0.37	1,287	\$10,935,777	0.18	1,287	8,457	2.1
LR3	11,507	3,968	\$159,186,109	\$15,918,611	2,449	\$55,715,138	0.12	8,572	\$15,918,611	0.11	4,548	\$39,796,527	0.21	5,306	\$31,837,222	1.07	3,746	\$31,837,222	0.54	3,746	24,621	2.1
Total Lancefield Road	20,897	7,206	\$289,092,557	\$28,909,256	4,448	\$101,182,395	0.22	15,567	\$28,909,256	0.21	8,260	\$72,273,139	0.39	9,636	\$57,818,511	1.94	6,802	\$57,818,511	0.97	6,802	44,712	2.1
Other Areas																						0
Township (Existing)	36,664	12,643	\$507,208,157	\$50,720,816	7,803	\$177,522,855	0.39	27,311	\$50,720,816	0.36	14,492	\$126,802,039	0.68	16,907	\$101,441,631	3.41	11,934	\$101,441,631	1.70	11,934	78,447	2.1
Sunbury West	8,489	2,927	\$117,443,631	\$11,744,363	1,807	\$41,105,271	0.09	6,324	\$11,744,363	0.08	3,356	\$29,360,908	0.16	3,915	\$23,488,726	0.79	2,763	\$23,488,726	0.39	2,763	18,164	2.1
Sunbury North	13,817	4,764	\$191,145,035	\$19,114,504	2,941	\$66,900,762	0.15	10,292	\$19,114,504	0.14	5,461	\$47,786,259	0.25	6,372	\$38,229,007	1.29	4,498	\$38,229,007	0.64	4,498	29,563	2.1
Diggers Rest	14,035	4,840	\$194,162,127	\$19,416,213	2,987	\$67,956,744	0.15	10,455	\$19,416,213	0.14	5,547	\$48,540,532	0.26	6,472	\$38,832,425	1.31	4,569	\$38,832,425	0.65	4,569	30,030	2.1
Total Other Areas	73,006	25,174	\$1,009,958,950	\$100,995,895	15,538	\$353,485,632	0.78	54,382	\$100,995,895	0.72	28,856	\$252,489,737	1.35	33,665	\$201,991,790	6.79	23,764	\$201,991,790	3.39	23,764	156,205	2.1
Total Greater Sunbury	121,312	41,832	\$1,678,231,936	\$167,823,194	25,819	\$587,381,177	1.29	90,366	\$167,823,194	1.20	47,949	\$419,557,984	2.24	55,941	\$335,646,387	11.28	39,488	\$335,646,387	5.64	39,488	259,564	2.1

### Basis for Sub-Regional and Neighbourhood Centre Size Guidance

#### Potential Sunbury South Sub-Regional Activity Centre

At full development, this centre is assumed to capture:

- 100% of sub-regional level space generated from within the three Sunbury South cells, being approximately 12,700sqm;
- 100% of sub-regional level space generated from within Diggers Rest, being approximately 6,500sqm;
- 60% of sub-regional level space generated from within the Township area, being approximately 10,200sqm; and
- 50% of sub-regional level space generated from within Sunbury West, being approximately 2,000sqm.

The total is rounded to 32,000sqm sub-regional space at full development.

It should be noted that in reality there will be sub-regional escape from all of the nominated areas noted above and there will be sub-regional capture from other areas, including from the south. On balance however the numbers shown here provide a guide to the base level of space that can be supported from the local area to the nearest centre in the hierarchy.

### **Potential Lancefield Road Sub-Regional Activity Centre**

At full development, this centre is assumed to capture:

- 100% of sub-regional level space generated from within the three Lancefield Road cells, being approximately 9,600sqm;
- 100% of sub-regional level space generated from within Sunbury North, being approximately 6,400sqm;
- 40% of sub-regional level space generated from within the Township area, being approximately 6,800sqm; and
- 50% of sub-regional level space generated from within Sunbury West, being approximately 2,000sqm.

The sub-total of the Lancefield Road cells and Sunbury North is approximately 16,000sqm of sub-regional space. In order for the centre to be bigger, it would need to draw from the Township and Sunbury West as noted above this is contingent on road and bridge connections. The additional supportable sub-regional space from the Township and Sunbury West is approximately 8,800sqm. The total is rounded to 25,000sqm sub-regional space at full development assuming development of connections.

It should be noted that in reality there will be sub-regional escape from all of the nominated areas noted above and there will be sub-regional capture from other areas, including from the north outside of the study area such as from Macedon Ranges. On balance however the numbers shown here provide a guide to the base level of space that can be supported from the local area to the nearest centre in the hierarchy.

## **Neighbourhood Centres**

The floorspace allocated to neighbourhood centres is apportioned across potential locations based on average neighbourhood centre sizes. In reality some may be bigger and some smaller than shown. The detail of such variations is contingent of the final outcome of local area catchment characteristics including population yields and road networks. More detailed analysis should be undertaken for each potential centre as more information becomes available in the planning process.

## APPENDIX 3 – SELECTED RATIOS

Adopted Floorspace Ratios (SQM / Job)	
Retail	30
Bulky Goods Retail	50
Office	20
Community Services	30
Industrial	80
Showroom	88
Adopted Site Coverage Ratios (Floorspace as a % of Site Area)	
Conventional	40.0%
Urban	80.0%
Other Assumptions	
Local Shop Nodes Capture of Retail Space	2.0%
Home Based Business per Dwelling	5.0%
Other Jobs Not Counted in Economic Plan	35.0%



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