



ESSENTIAL ECONOMICS

# **Hume Planning Scheme Amendment C207**

**Expert Witness Statement**

**of**

**Nicholas Brisbane, B Economics**

**Director, Essential Economics Pty Ltd**

**14 August 2017**

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# 1 INTRODUCTION

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## Professional Details

- 1.1 My name is Nicholas Brisbane and I practice as a Senior Economist and Director at Essential Economics Pty Ltd of 96 Pelham Street, Carlton.
- 1.2 I hold the degree of Bachelor of Economics from Monash University. A copy of my CV is attached to this statement.

## Area of Expertise

- 1.3 My area of professional expertise is urban and regional economics and the assessment of economic impacts on local and regional economies associated with development projects. An area of particular professional activity is the economic analysis of the demand and supply for retail, commercial and industrial land as input to strategic planning for Local and State Government.
- 1.4 I have undertaken economic assessments for both public and private sector clients.
- 1.5 My opinions expressed herein are, to the context relevant, made by me in reliance upon my above expertise.

## Instructions

- 1.6 I have been instructed in this matter by Ms Susan Thompson of TW Consulting Town Planning & Development Services. Ms Thompson is acting on behalf of Charles Lloyd Property Australia Pty Ltd who have an interest in land at 700 Sunbury Road, Sunbury.
- 1.7 Charles Lloyd Property Australia Pty Ltd are submitting to the Panel that land at 700 Sunbury Road, Sunbury, be zoned to allow for bulky goods retailing and associated uses. The land is currently designated for residential uses in the Sunbury South Precinct Structure Plan (November, 2016).
- 1.8 My instructions in this matter are as follows:
  - (a) Review the Sunbury South and Lancefield Road PSPs and associated documents
  - (b) Assess the subject site for its appropriateness for homemaker/bulky goods retailing and associated uses
  - (c) Undertake a review of existing and planned homemaker/bulky goods retailing serving the Sunbury area
  - (d) Assess the demand for bulky goods retail and associated uses at the subject site
  - (e) Prepare an Expert Witness Statement that summarises the findings of the above research and analysis.

## Preparation

1.9 In preparing this statement:

- (a) I understand, as a witness giving evidence (by report, or otherwise) in a proceeding as an expert, that I have a duty to assist the Panel and that this duty overrides any obligation that I may have to any party to the proceeding or to any person who is liable for my fee or expenses in this matter.
- (b) I have neither received nor accepted any instructions to adopt or reject any particular opinion in preparing this evidence.
- (c) I rely on the research and analysis presented in my evidence.
- (d) I have reviewed all the relevant documents, to my knowledge, that informed the preparation of the Sunbury South PSP including the following:
  - Sunbury South Precinct Structure Plan (November, 2016)
  - Lancefield Road Precinct Structure Plan (November, 2016)
  - HillPDA, Retail and Economic Assessment for PSP74 and PSP75 (Sunbury Township (October 2017)
  - Expert Witness Statement of Mr Henry Turnbull (11 August, 2017)
- (e) I have made all the enquiries which I believe are desirable and appropriate that no matters of significance which I regard as relevant have, to my knowledge, been withheld from the Panel.
- (f) I have viewed the subject site and other existing and potential bulky goods locations in the Sunbury area.

My statement draws on the analysis, research and discussion provided in the Strategy.

## This Statement

1.10 This Statement comprises the following sections:

Section 2: Sunbury South Precinct Structure Plan

Section 3: Subject Site and Proposed Uses

Section 4: Comment on the Suitability of the Subject Site for Proposed Uses

Section 5: Strategic Importance of Subject Site

Section 6: Bulky Goods Competitive Environment

Section 7: Demand for Bulky Goods Floorspace

Section 8: Implications of Commercial Use at 720 Sunbury Road

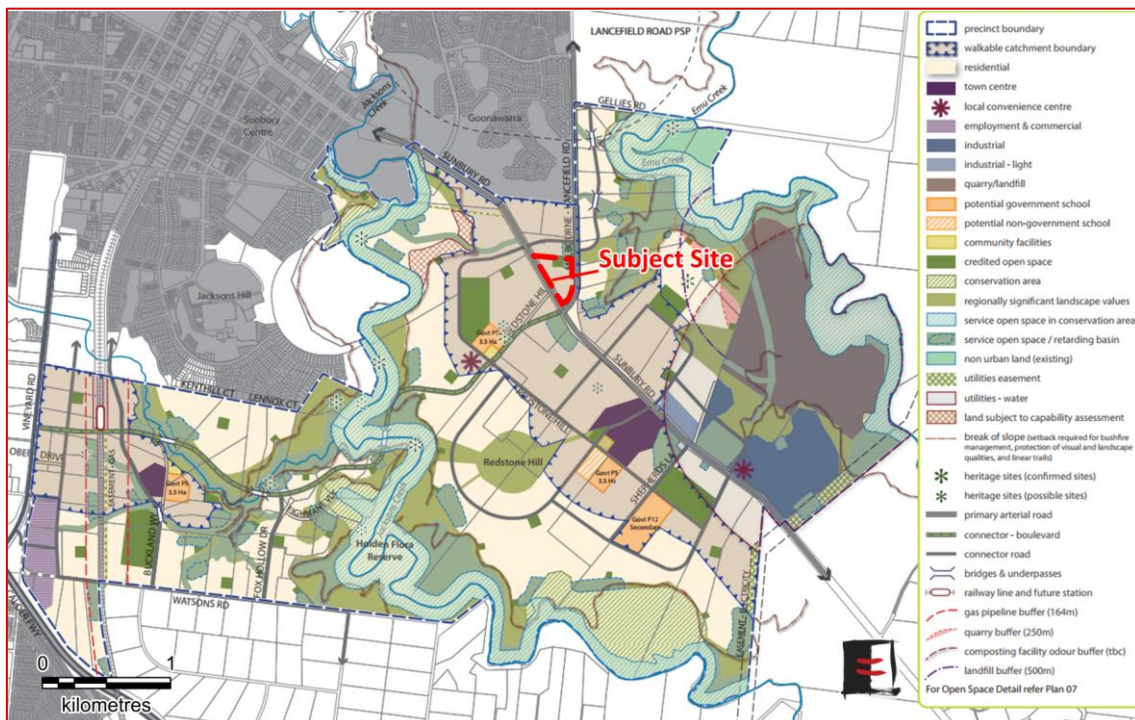
Section 9: Implications for the Sunbury South PSP and Subject Site

Section 10: Conclusions

## 2 SUNBURY SOUTH PRECINCT STRUCTURE PLAN

- 2.1 The Subject Site (700 Sunbury Road, Sunbury) is subject to the draft Sunbury South Precinct Structure Plan (PSP) and is identified for a 'residential' use. The location of the subject site in the context of the Sunbury South PSP is shown in Figure 1.
- 2.2 The relevant features of the Sunbury South PSP in the context of my review are the following:
- Planned to accommodate up to 11,800 households
  - Comprise a population of more than 33,000 persons
  - Provide for approximately 4,480 local jobs
  - Contain a Major Town Centre (Redstone Hill), one Local Town Centre (Harpers Creek) and two Local Convenience Centres
  - Comprise two major employment areas on Sunbury Road and Vineyard Road.
  - The Sunbury Road employment area is designated as 'industrial' and 'industrial – light'
  - The Vineyard Road employment area is designated as 'employment & commercial'. The *Vineyard Road Employment Area Concept Plan* identifies approximately 4.3ha of land for 'restricted retail' uses and the balance for 'commercial/industrial' uses.

Figure 1: Sunbury South PSP and the Subject Site



- 2.3 The VPA engaged HillPDA to undertake a retail and economic assessment for the Sunbury South and Lancefield Road PSPs. The purpose of this assessment was to:
- Establish the required retail floor space and employment floorspace potential within both PSPs
  - Recommend the preferred location for retail centre/s and other job creating land uses
  - Recommend the floorspace required for major, local and local convenience town centres
  - Identify the types of retail and commercial (office) uses that would be accommodated in the town centres (Including the proposed precinct on Vineyard Road in Sunbury South)
  - Recommend land areas for employment uses.

*(VPA, Sunbury South and Lancefield Road – Background Report, November 2016)*

- 2.4 The HillPDA report recommended the following in relation to the potential for ‘bulky goods’:

*“Potential Bulky Goods - potentially on both the Sunbury Road and Vineyard Road corridors with a total floor area of 48,000m<sup>2</sup> to include a potential convenience store, major bulky good space, office space (subject to demand), industrial space and showroom space (both subject to demand)”*

*(VPA, Sunbury South and Lancefield Road – Background Report, November 2016)*

- 2.5 I refer to the HillPDA report later in my Statement.

### 3 SUBJECT SITE AND PROPOSED USES

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#### Overview of the Subject Site

- 3.1 The 'subject site' is located at 700 Sunbury Road, Sunbury, and is referred to as 'site 76' in the Sunbury South PSP. The subject site has a total area of approximately 6.3ha and is bounded by Sunbury Road, Lancefield Road and the property at 720 Sunbury Road, Sunbury, to the north.
- 3.2 The site's location on Sunbury Road and Lancefield Road ensure that it is easily accessible to existing and future residents in the established Sunbury urban area, as well as future residents in the Sunbury South and Lancefield Road PSPs, and beyond.
- 3.3 The Sunbury South PSP designates the majority of the land as 'residential', with a small proportion of the land (less than 1ha) designated as 'waterway and drainage reserve' and 'local network park'.
- 3.4 The location of the subject site in the context of the Sunbury South PSP is shown in Figure 1.

#### Proposed Land Use

- 3.5 Charles Lloyd Property Australia Pty Ltd submit to the Panel that the land use for the subject site be changed from 'residential' to an appropriate designation that would allow for the following employment uses:
- Bulky goods/homemaker retailing (e.g. large format non-food retailers such as stores selling furniture, hardware, recreation goods, white goods, electrical goods etc)
  - Restricted retailing/showroom uses (e.g. trade supplies stores)
  - A limited provision of floorspace for ancillary land uses that typically co-locate with bulky goods/homemaker centres, such as a service station, fast food/convenience retailing.

The above uses are consistent with those provided in the Commercial 2 Zone (C2Z).

- 3.6 It is my view that the provision of the above uses at the subject site will fulfil a 'gap' in uses currently not well provided for in the Sunbury South and Lancefield Road PSPs.
- 3.7 In addition, these uses are not intended to compete with uses planned for the future Redstone Stone Hill Major Town Centre (MTC) or any other Town or Convenience Centre planned in the Sunbury South or Lancefield Road PSPs. Consequently, the development of the subject site for bulky goods will not impact the viability of other planned Town or Convenience Centres.



## 4 COMMENT ON THE SUITABILITY OF THE SUBJECT SITE FOR PROPOSED LAND USES

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4.1 Successful bulky goods precincts typically have the following characteristics:

- High levels of exposure to passing traffic
- High levels of accessibility
- Access to a regional catchment
- Sufficient size to accommodate a critical mass of retailers/businesses.

A review of how the subject site meets the above criteria is provided below.

### Exposure to passing traffic

4.2 The subject site will be one of the most exposed sites to passing vehicular traffic in the Sunbury South and Lancefield Road PSPs, having direct exposure to both Sunbury Road and Lancefield Road.

### Accessibility to the site

4.3 The subject site will be accessible via both Sunbury Road (via a service lane) and Lancefield Road. I refer to the Expert Witness Statement of Mr Henry Turnbull of the TraffixGroup:

*“from a traffic engineering perspective the site at 700 Sunbury Road is suitable for a commercial use” (p. 1)*

4.4 Advice on improving the accessibility to the subject site is provided in Mr Turnbull’s Expert Witness Statement and includes identifying the potential for a proportion of land to the north (720 Sunbury Road) for ‘commercial’ use, in addition to the subject site.

4.5 I address the implications of including a proportion of land at 720 Sunbury Road for commercial use in Section 8.

### Access to a regional catchment

4.6 Bulky goods retailing at the subject will have access to a wide regional catchment of more than 120,000 people upon full development of the Greater Sunbury area (refer Section 7 of my Statement) which comprises the following locations:

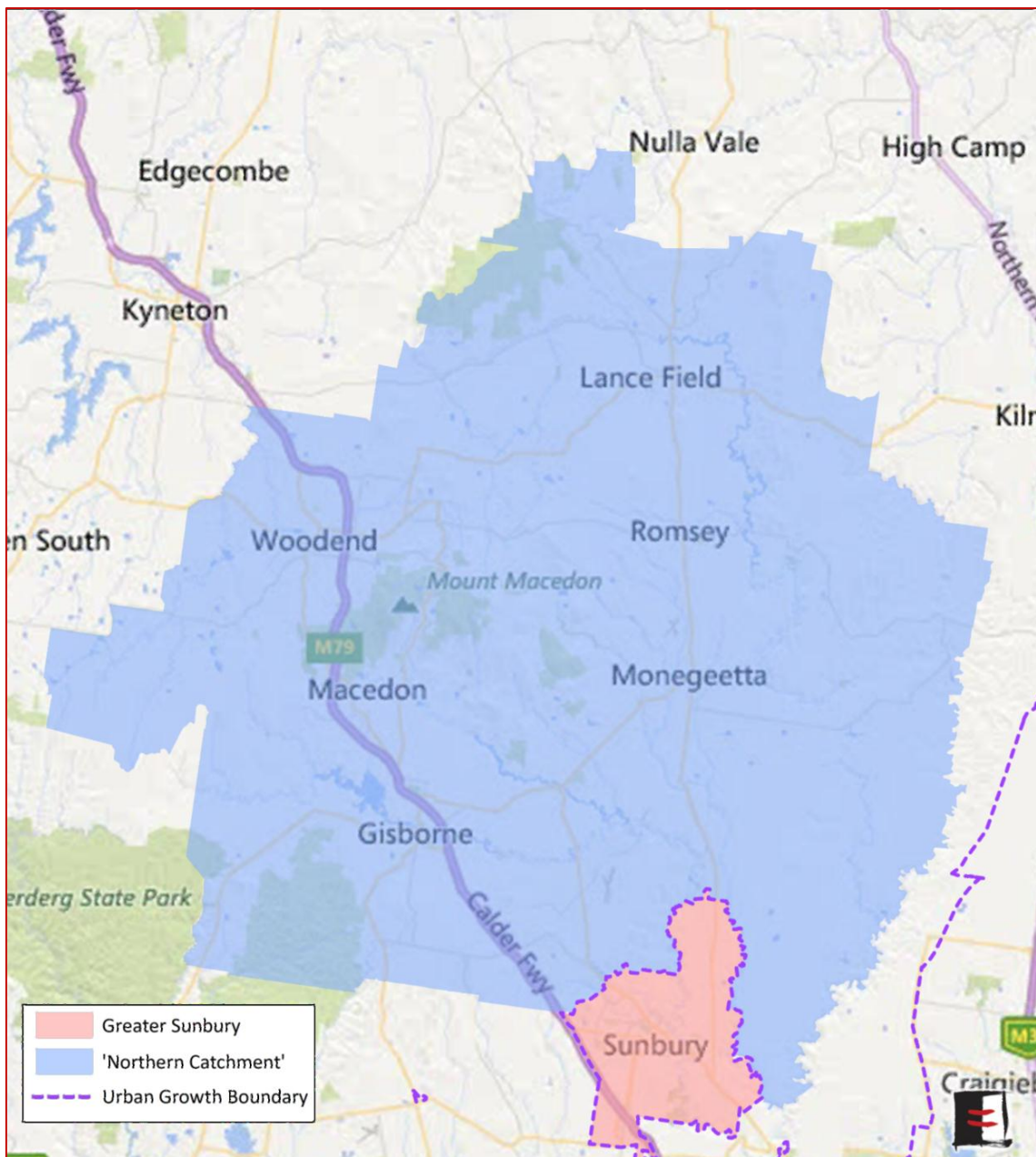
- Existing urban areas of Sunbury
- Sunbury South PSP
- Lancefield Road PSP
- Diggers Rest PSP

- Future Sunbury North PSP area
- Future Sunbury West PSP area.

In addition, bulky goods retailing at the subject site will also serve residents in the rural areas to the north including the townships of Gisborne, Riddell, Woodend, Romsey and Lancefield.

Figure 2 shows the regional catchment that would be served by bulky goods retailing at the subject site including the Greater Sunbury area and the 'northern catchment'.

**Figure 2: Bulky Goods Regional Catchment**



Produced by Essential Economics using MapInfo, StreetPro and Bingmaps

### **Sufficient size to accommodate a critical mass of retailers/businesses**

- 4.7 The subject site is 6.3h in area. Excluding areas nominated as 'waterway and drainage reserve' and 'local network park', approximately 5.3ha of land would be available for bulky goods development.
- 4.8 A review of information contained in the Victorian Shopping Centre Directory (Property Council of Australia), shows that the site coverage of bulky goods or homemaker centres is typically in the order of 40%. Applying this figure to the 5.3ha of available land for development at the subject site shows that more than 21,000m<sup>2</sup> of bulky goods floorspace could be accommodated on the site.
- 4.9 Bulky goods centres typically require in the order of 20,000m<sup>2</sup> of floorspace (or 5ha of land assuming a 40% development efficiency) in order to accommodate the critical mass of retailers/businesses that would make the centre a retail 'destination'. Without a critical mass of retailers, or at least one major anchor retailer, bulky goods centres/precincts tend to struggle and be less competitive than those that have a range of retailers.
- 4.10 As illustrated above, the subject site is of sufficient size to accommodate more than 20,000m<sup>2</sup> of bulky goods floorspace.

### **Comment on the suitability of the subject site for bulky goods retailing**

- 4.11 In my view, the subject site has the characteristics of a successful bulky goods precinct, and in particular it has the following attributes:
- High levels of exposure
  - Convenient access to the site
  - Central location to a large regional catchment
  - Sufficient size to accommodate a major anchor tenant and/or a range of bulky goods retailers.

## 5 STRATEGIC IMPORTANCE OF SUBJECT SITE

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- 5.1 The subject site should be considered a strategic site in terms of providing for future commercial and employment generating uses.
- 5.2 The Growth Areas Authority's (now the Victorian Planning Authority) *Precinct Structure Planning Guidelines* states the following:

*"The provision of local jobs is particularly important for growing communities. We should be aspiring to provide one job within the region for every new household." (p. 2)*

- 5.3 One of the objectives stated in the Guidelines is *"to provide for local employment and business activity"*. The Guidelines then state that *"we can attract businesses to the area and create local employment if...the provision of jobs within the precinct and region is maximised"* (p. 13)

- 5.4 The subject site's location on two major arterial roads (Sunbury Road and Lancefield Road) means any future uses would benefit from the following:

- Significant exposure to passing vehicular traffic
- Access to a regional catchment which includes the existing urban areas of Sunbury, future PSPs areas of Sunbury South and Lancefield Road, and areas further north along Lancefield Road including the townships of Romsey and Lancefield.

High levels of exposure and access to regional catchments are desirable features when planning for successful employment areas, including bulky goods retailing.

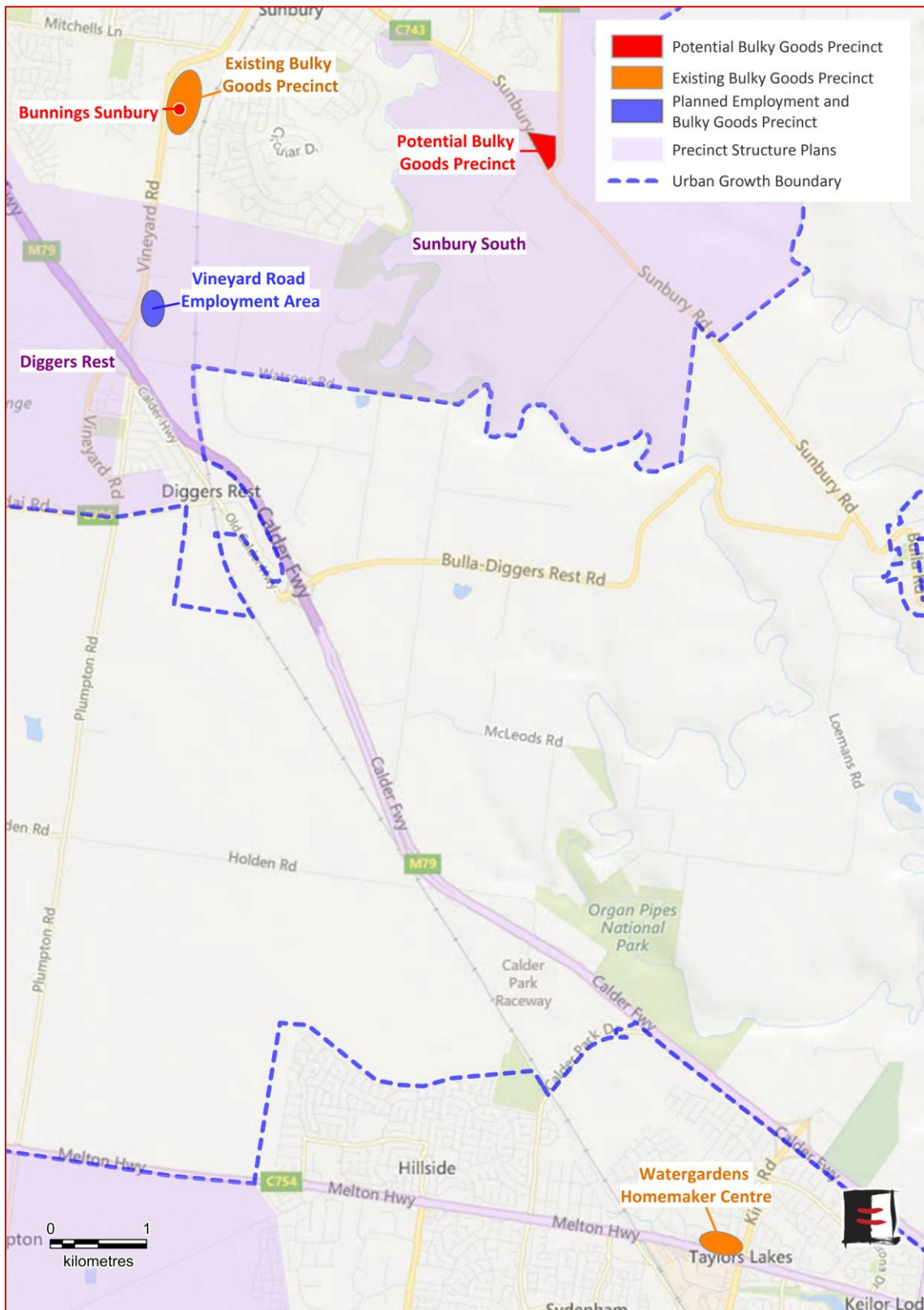
- 5.5 According to the Sunbury South PSP, approximately 11,800 households will eventually be developed in the PSP area (p. 13) and this compares to an anticipated provision of approximately 4,480 jobs (p. 30). This represents a local job to household ratio of 0.38 jobs per household and is well below the aspiration of one job for every new household in the region.
- 5.6 HillPDA identified a job to dwelling ratio for Sunbury of 0.48 jobs per dwelling in 2011, and noted that it *"will be challenging to grow jobs to make up for the existing gap between jobs and dwellings"* (p. 32).
- 5.7 In the context of a low job to household ratio and the advantages of the subject site in terms of attracting employment generating uses, the subject site should be viewed as a strategic site for the purposes of generating local employment for future residents.
- 5.8 Assuming the development of 21,000m<sup>2</sup> of bulky goods floorspace, the subject site could accommodate approximately 260 direct jobs (including full-time, part-time and casual positions) based on the industry benchmark of 80m<sup>2</sup> per job for bulky goods retailing.

## **6 BULKY GOODS COMPETITIVE ENVIRONMENT**

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- 6.1 The existing and future competitive environment for a bulky goods centre at the subject site is shown in Figure 3 and discussed below.

**Figure 3: Bulky Goods Competitive Environment**



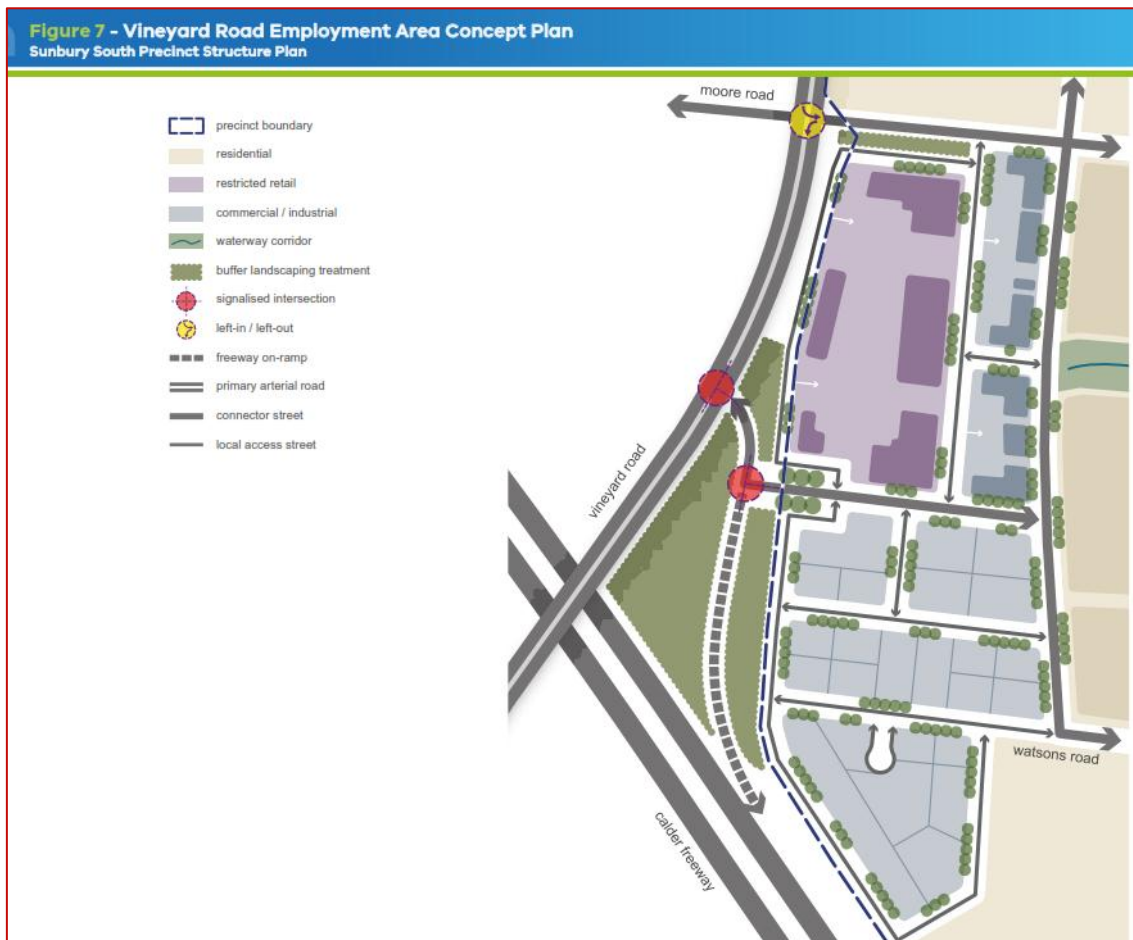
Produced by Essential Economics using MapInfo and BingMaps

## Sunbury South PSP

- 6.2 The Sunbury South PSP provides limited guidance on the future provision of bulky goods retailing in the Sunbury South area apart from identifying ‘restricted retail’ in the *Vineyard Road Employment Area Concept Plan* on page 33.
- 6.3 Analysis of the *Vineyard Road Employment Area Concept Plan* indicates an area of approximately 4.3ha of land for ‘restricted retail’ and the balance of the area (approximately 10.2ha) for ‘commercial/industrial’ uses. It is therefore assumed only a proportion of the Vineyard Road Employment Area is intended to be used for ‘restricted retailing’.
- 6.4 Assuming site coverage of 40%, the land identified in the *Vineyard Road Employment Area Concept Plan* as ‘restricted retail’ could accommodate an estimated 17,200m<sup>2</sup> of bulky goods retailing. It is acknowledged that the Concept Plan provides guidance to the future use at this location and that more detailed planning for the area will be undertaken at the time of development.
- 6.5 The prospect of bulky goods retailing along Vineyard Road was identified in the *Sunbury HIGAP Spatial Strategy* (Hume City Council, 2012), which identified the opportunity for approximately 50,000m<sup>2</sup> of bulky goods floorspace in this location (p. 17).
- 6.6 Figure 4 shows the *Vineyard Road Employment Area Concept Plan* as shown in the Sunbury South PSP.



**Figure 4: Vineyard Road Employment Area Concept Plan**



Source: VPA, Sunbury South PSP, November 2016

- 6.7 Apart from Vineyard Road, the PSP does not provide any further direction for bulky goods retailing in the precinct. The subject site provides an opportunity for bulky goods retailing along both the Vineyard Road and Sunbury Road corridors, as recommended in the HillPDA report (refer paragraph 2.4 of my Statement).
- 6.8 Based on my reading of the PSP, it is envisaged that the Sunbury Road Employment Area is intended to accommodate 'industrial' and 'light industrial uses', as opposed to bulky goods retailing.

### **Lancefield Road and Diggers Rest PSPs**

- 6.9 The Lancefield Road and Diggers Rest PSPs do not plan for bulky goods or restricted retailing within the respective PSP areas.



## Existing Sunbury Area

- 6.10 Bulky goods, or homemaker retailing, in the existing urban area of Sunbury is generally located along Vineyard Road and Horne Street. The majority of bulky goods retailing is located on Industrial 3 Zone (IN3Z) land along Vineyard Road, although bulky goods retailing also exists on Mixed Use Zone (MUZ) and Commercial 2 Zoned (C2Z) land along Horne Street (which is an extension of Vineyard Road).
- 6.11 The main bulky goods retail area is located at the intersection of Vineyard Road and McDougall Road, approximately 2km north of the planned Vineyard Road employment area. This area contains approximately 16,200m<sup>2</sup> of retail and non-retail uses based on a survey homemaker and bulky goods retailing I undertook in July 2017. Major tenants include Bunnings Warehouse, The Good Guys, Repco Auto Centre, Total Tools, PetStock, Godfreys, and the Sunbury Mower & Chainsaw Centre.
- 6.12 Based on my floorspace survey, I estimate a total of approximately 21,000m<sup>2</sup> of bulky goods and homemaker retail floorspace exists throughout the urban areas of Sunbury.
- 6.13 In addition to the areas described above, a vacant building of approximately 11,960m<sup>2</sup> exists to the south of Bunnings. This building formerly accommodated Masters, which has now closed. This building is located on IN3Z land. Vacant IN3Z exists to the south of this site and forms part of the 'Sunbury Business Park'.

## Watergardens Town Centre

- 6.14 Watergardens Town Centre contains a major bulky goods precinct. Located approximately 14km to the south of Sunbury (direct distance), Watergardens contains approximately 45,000m<sup>2</sup> of bulky goods floorspace (based on analysis of aerial photography) which includes Bunnings, Officeworks, Harvey Norman, Spotlight, Fantastic Furniture, Adriatic Furniture, Petbarn, Anaconda, BCF, and The Good Guys.

## 7 DEMAND FOR BULKY GOODS FLOORSPACE

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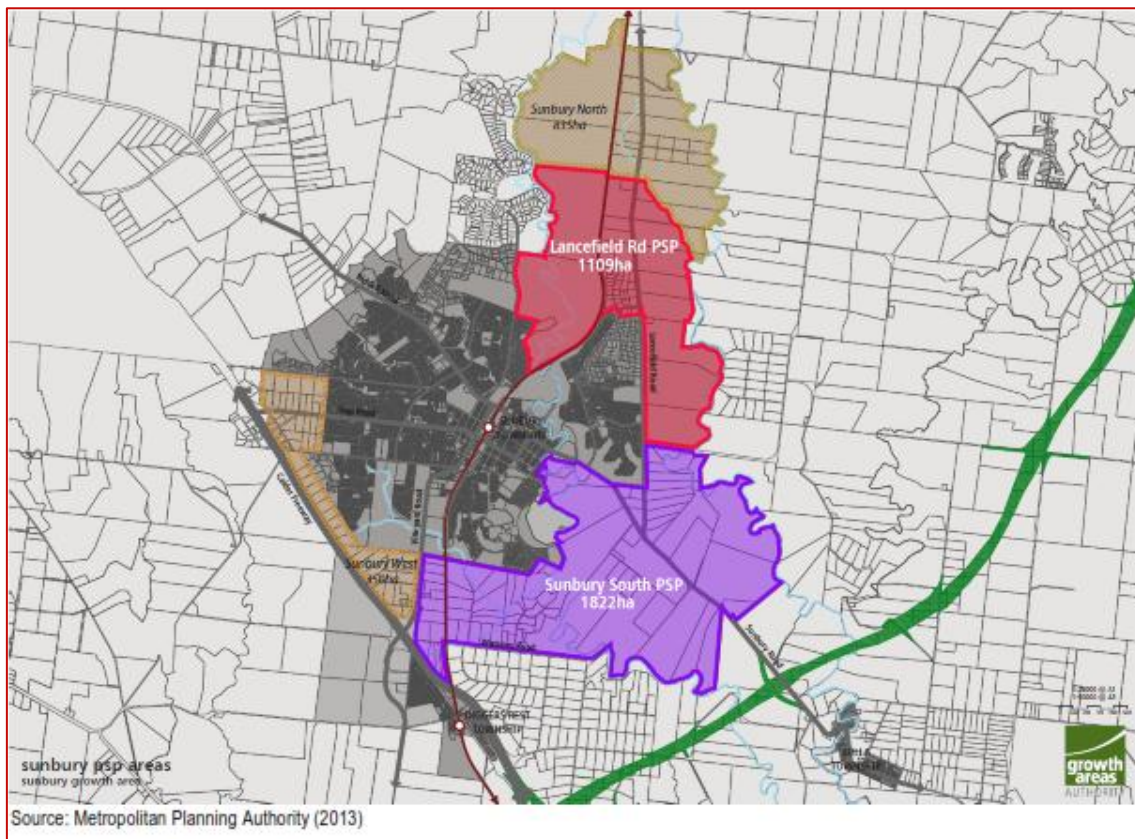
- 7.1 This section describes estimated of demand for bulky goods retail floorspace in Sunbury.

### **Retail and Economic Assessment for PSP74 and PSP75 (HillPDA, October 2014)**

- 7.2 HillPDA prepared the *Retail and Economic Assessment for PSP74 and PSP75 (October, 2014)*, which is the supporting document guiding the demand for retail and employment floorspace in the Sunbury South and Lancefield Road PSPs.
- 7.3 The assessment was based on an estimate of the population capacity within the Urban Growth Boundary that surrounds Sunbury (refer Figure 5 below). This area is referred to as Greater Sunbury and includes the following areas:
- Existing urban areas of Sunbury
  - Sunbury South PSP
  - Lancefield Road PSP
  - Diggers Rest PSP
  - Future Sunbury North PSP area
  - Future Sunbury West PSP area.

Combined, HillPDA estimate Greater Sunbury to have a population capacity of 120,000 persons as full-development and notes that this is considered to be a “long term proposition”. I have reviewed this population estimate in light of the most recent available information and believe it represents a conservatively low estimate of the population capacity of Greater Sunbury. This analysis is provided later in Section 7.

Figure 5: Greater Sunbury – Basis for HillPDA Assessment



7.4 In regard to ‘bulky goods’, HillPDA forecast demand at capacity of approximately 48,000m<sup>2</sup> of floorspace, which could be accommodated in one or two stand-alone bulky goods centres. The following two locations were identified by HillPDA (p. 63) as being appropriate:

- Land identified in the Sunbury South PSP along Vineyard Road
- Land to the east of Sunbury Road, on land identified as ‘industrial’ in the Sunbury South PSP.

HillPDA notes that *“there is merit in facilitating both precincts to stimulate choice and market competition”*. I agree with this comment.

7.5 I have reviewed the assessment by HillPDA in relation to the forecast demand for bulky goods floorspace and I am of the view that it reflects a conservative estimate of demand. I elaborate on this aspect later in my Statement.

### Greater Sunbury Capacity Population

7.6 As identified in paragraph 7.3 of my Statement, HillPDA estimated a capacity population for Greater Sunbury of approximately 120,000 persons. I have prepared an updated capacity population based on the latest available information which shows a potential population capacity of approximately 138,000 persons. As a consequence,

HillPDA's estimate of demand for 48,000m<sup>2</sup> of bulky goods floorspace may be considered to be conservative.

- 7.7 My estimate takes into consideration the following information which has been updated since HillPDA prepared their assessment in 2014:
- Population estimates provided in the Sunbury South, Lancefield Road and Diggers Rest PSPs (source: VPA).
  - Population for the existing urban areas based on official ABS population data at a small area level (SA1).
  - Population forecasts for existing urban areas have been estimated using estimated supply of new residential lots identified in the Urban Development Program (DELWP, 2016) and applying an average household size of 2.8 persons.
  - Population capacity in Sunbury West and Sunbury North have been estimated using the areas of developable land identified in the HillPDA report, and applying an average dwelling density of 15 lots per hectare and an average household size of 2.8 persons. HillPDA's estimates were based on an average dwelling density of 13.5 lots per hectare and 2.5 persons per dwelling.

A comparison of HillPDA's estimate from 2014 and my estimate is shown in Table 1.

**Table 1: Population Capacity of Greater Sunbury**

Location	HillPDA Estimate (2014)	Essential Economics Estimate	Source of information used in Essential Economics Estimate
Sunbury South PSP	27,049	33,000	Sunbury South PSP (VPA)
Lancefield Road PSP	20,897	22,600	Lancefield Road PSP (VPA)
<u>Diggers Rest</u>	<u>14,035</u>	<u>13,770</u>	
Diggers Rest PSP	-	11,970	Diggers Rest PSP (VPA)
Existing Urban Area	-	1,800	ABS, Estimated Resident Population by SA1 (ABS)
Sunbury West	8,489	10,600	HillPDA; however, using assumptions of 15 lots per hectare and 2.8 persons per household (HillPDA, VPA)
Sunbury North	13,817	17,200	HillPDA; however, using assumptions of 15 lots per hectare and 2.8 persons per household (HillPDA, VPA)
Existing Township	36,664	40,700	ABS, Estimated Resident Population by SA1; DELWP, Urban Development Program, 2016 (ABS, DELWP)
<b>Greater Sunbury</b>	<b>120,951</b>	<b>137,870</b>	

Source: HillPDA; Essential Economics

## Forecast Demand for Bulky Goods Floorspace in Greater Sunbury

- 7.8 Based on the estimates of population capacity shown in Table 1 and industry benchmarks discussed below, demand for approximately 69,000m<sup>2</sup> to 79,000m<sup>2</sup> of retail floorspace in bulky goods centres/precinct in Greater Sunbury is forecast upon full-development of the Greater Sunbury area (figures rounded).
- 7.9 In addition, it is likely strong demand for non-retail uses that may be appropriate for bulky goods centres/precincts such as trade supplies will also eventuate having regard for the extent of construction activity anticipated over the coming decades.
- 7.10 This level of demand is sufficient to support bulky goods precincts at both the Vineyard Road employment area and the subject site.

Table 2 summarises the analysis of demand for bulky goods floorspace. The key assumptions used in the analysis are discussed below.

**Table 2: Demand for Bulky Goods Retail Floorspace in Sunbury, at Capacity**

Category	Based on HillPDA Population Estimate	Based on Essential Economics Population Estimate
Greater Sunbury Capacity Population	120,000	138,000
Estimated demand for bulky goods floorspace per capita	0.76m <sup>2</sup> per persons	0.76m <sup>2</sup> per persons
Demand for bulky goods floorspace by Greater Sunbury residents	91,200m <sup>2</sup>	104,900m <sup>2</sup>
Demand for bulky goods floorspace in bulky goods centres/precincts (assuming 80%)	73,000m <sup>2</sup>	83,900m <sup>2</sup>
Bulky goods floorspace demand in Sunbury bulky goods centres/precincts by Greater Sunbury residents (assuming a market share of 75%)	54,800m <sup>2</sup>	62,900m <sup>2</sup>
<b>Demand for bulky goods floorspace in Sunbury bulky goods centres/precinct (assuming 20% derived from beyond Greater Sunbury)</b>	<b>68,500m<sup>2</sup></b>	<b>78,600m<sup>2</sup></b>

Source: Large Format Retail Association; HillPDA; Essential Economics

- 7.11 The industry benchmarks used as a basis for this assessment rely on information prepared for the Large Format Retail Association (LFRA) by JBA and Deep End Services (*Large Format Retail in NSW*, 2015).
- 7.12 The LFRA is the peak national association for Australia's large format retail sector. Large format retailing comprises the following retail categories and according to the LFRA accounts for more than 30% of retail floorspace in Australia:
- Automotive parts & accessories (e.g. Autobarn, Burson, Repco, Supercheap Auto)

- Coverings including floor and curtain and blinds (e.g. Carpet Call, Choices, Kresta)
- Electrical (e.g. Bette Electrical, JB Hi-fi, Harvey Norman)
- Furniture (e.g. Fantastic Furniture, Forty Winks, Adairs)
- Hardware and Garden (e.g. Bunnings, Mitre 10)
- Homewares (e.g. Adairs, Beacon Lighting, Spotlight)
- Other large format retailers including those selling pet supplies, office supplies, sporting and outdoor goods (e.g. Amart Sports, Anaconda, BCF, Petbarn).

For the purpose of this assessment, bulky goods retailing refers to large format retailing as described above.

#### **Total Demand for Bulky Goods Floorspace by Greater Sunbury Residents**

- 7.13 According to the LFRA, a total 17.86 million square metres of occupied large format retail floorspace existed throughout Australia in 2013/14. This represented an average of 0.76m<sup>2</sup> per capita.
- 7.14 Applying this share to the estimated population capacities shown in Table 1 provides the following estimates of total demand for bulky goods retail floorspace by Greater Sunbury residents upon full-development:
- |                                  |                       |
|----------------------------------|-----------------------|
| - Population of 120,000 persons: | 91,200m <sup>2</sup>  |
| - Population of 138,000 persons: | 104,900m <sup>2</sup> |
- 7.15 This floorspace could be accommodated within Sunbury or other locations further afield. In addition, it may be accommodated within traditional activity centres or dedicated bulky goods centres or precincts.

#### **Demand for Bulky Goods Floorspace in Bulky Goods Centres/Precincts by Greater Sunbury Residents**

- 7.16 According to the LFRA, approximately 20% of large format retail occurs within shopping centres or as part of traditional activity centres and shopping strips. The balance is located in dedicated homemaker centres, homemaker precincts or in areas zoned for industrial purposes (similar to the existing bulky goods centre along Vineyard Road and which contains the Bunnings Warehouse).
- 7.17 Assuming 80% of demand for bulky goods floorspace is directed to bulky goods centres/precincts, this equates to demand by Greater Sunbury residents for approximately 73,000m<sup>2</sup> (based on HillPDA population estimate) to 84,000m<sup>2</sup> (Essential Economics population estimate) of retail floorspace in bulky goods centres/precincts. Once again, this could be accommodated in Sunbury and locations further afield.

### **Demand for Bulky Goods Floorspace in Bulky Goods Centres/Precincts in Sunbury by Greater Sunbury Residents**

- 7.18 A population in Greater Sunbury of 120,000 or more people is considered to be a population that would attract considerable interest from bulky goods retailers. Therefore, it is likely that Sunbury would be able to attract major tenants that would provide a level of destination appeal that enables retailers to capture a relatively high market share.
- 7.19 On this basis, it would be reasonable to expect that *at least* 75% of demand for bulky goods floorspace by Greater Sunbury residents could be retained in Sunbury, with the balance locating in centres further afield.
- 7.20 Based on a market share of 75%, estimated demand by Greater Sunbury residents exists for between 55,000m<sup>2</sup> (HillPDA population estimate) and 63,000m<sup>2</sup> (Essential Economics population estimate) of bulky goods floorspace in Sunbury.

### **Total Demand for Bulky Goods Floorspace in Bulky Goods Centres/Precincts in Sunbury**

- 7.21 In addition to demand from Greater Sunbury residents, bulky goods retailers would also expect to capture spending from residents located beyond Greater Sunbury including, in particular, residents to the north in the townships of Romsey, Lancefield, Woodend, Macedon and Gisborne where little or no bulky goods retailing is provided.
- 7.22 Combined, these areas (consisting of the SA2s of Woodend, Gisborne, Macedon, Riddells Creek and Romsey) and referred to as the 'northern catchment' (refer Figure 2) are forecast to accommodate a population of 46,200 persons by 2031, based on the latest official ABS estimated population (ABS, Regional Population Growth, Cat 3218.0) and Victoria in Future 2016 (DELWP).
- 7.23 The population of 46,200 persons in the northern catchment accounts for approximately 25-28% of the combined population of Greater Sunbury at capacity and the northern catchment, as shown in Table 3 below.

**Table 3: Greater Sunbury and Northern Catchment Population**

Category	HillPDA	Essential Economics
Greater Sunbury Population Capacity	120,000	138,000
Northern Catchment Forecast Population , 2031	46,200	46,200
<b>Total</b>	<b>166,200</b>	<b>184,200</b>
<i>Northern Catchment Share</i>	<i>28%</i>	<i>25%</i>

Source: HillPDA; Essential Economics; DELWP, Victoria in Future, 2016; ABS

- 7.24 On this basis, it is reasonable to assume that *at least* 20% of demand for bulky goods floorspace in Sunbury could be derived from beyond Greater Sunbury. Therefore, total estimated demand for bulky goods retailing within dedicated centres/precincts is estimated to be between approximately 69,000m<sup>2</sup> and 79,000m<sup>2</sup>. This is considered to

be an indicative estimate of demand for bulky goods floorspace in the Greater Sunbury Area.

#### **Potential Distribution of Bulky Goods Floorspace in Greater Sunbury**

- 7.25 Assuming the subject site is developed for 21,000m<sup>2</sup> of bulky goods floorspace, potential exists for other bulky goods centres/precincts in the Greater Sunbury area to accommodate between 48,000m<sup>2</sup> and 58,000m<sup>2</sup> of bulky goods floorspace. This is sufficient to support the existing bulky goods precinct along Vineyard Road and the planned restricted retailing area in the Vineyard Road employment area.

Table 4 summarises the potential distribution of bulky goods floorspace in the Greater Sunbury area.

**Table 4: Potential Distribution of Bulky Goods Floorspace in Greater Sunbury**

Category	Based on HillPDA Population Estimate	Based on Essential Economics Population Estimate
Forecast for bulky goods floorspace	69,000m <sup>2</sup>	79,000m <sup>2</sup>
Subject site capacity	21,000m <sup>2</sup>	21,000m <sup>2</sup>
Elsewhere (i.e. existing and Vineyard Road employment area)	48,000m <sup>2</sup>	58,000m <sup>2</sup>

Source: Essential Economics

Note: Figures are rounded

#### **Demand for Non-retail Uses in Bulky Goods Centres/Precincts**

- 7.26 In addition to bulky goods retailing, demand for trade supplies stores is also likely to eventuate, having regard for the extent of construction that is likely to occur over the coming decades. These businesses focus on trade or business customers, as opposed to retailers who tend to mainly serve residential customers.
- 7.27 Trade supplies can also co-locate within bulky goods centres/precincts and may include businesses in today's environment such as Reece Plumbing, Middy's Data and Electrical, Mitre 10 and Bunnings Trade Centres, Stratco, etc.
- 7.28 Based on my review of the HillPDA report, it is unclear how trade supplies is treated within their assessment.
- 7.29 The subject site, along with other potential bulky goods/restricted retail locations in the Greater Sunbury area are suitable to accommodate a share of the anticipated strong demand for trade supplies. This demand will be in addition to the demand for bulky goods floorspace as described above.



## 8 IMPLICATION OF COMMERCIAL USES AT 720 SUNBURY ROAD

- 8.1 Mr Turnbull's evidence suggests merit in including the southern proportion of land at 720 Sunbury Road as a commercial use contiguous with proposed uses at the subject site. This would contribute to improved access to the subject site as it would allow for entry to a bulky goods/restricted retail precinct via a signalised intersection.
- 8.2 It is understood, via correspondence received from the VPA on 10 August 2017, VPA support the location of a Local Convenience Centre towards the south of the property at 720 Sunbury Road.
- 8.3 The concept plan as identified by Mr Turnbull is shown below in Figure 6.

**Figure 6: Proposed Concept Plan for Site Access**



Source: Traffix Group

- 8.4 Based on the above concept plan and assuming the development of a Local Convenience Centre (LCC), including land at 720 Sunbury Road as part of a broader bulky goods/restricted retail area would add an estimated 2.5ha of land available for restricted retailing purposes.

This estimate is indicative as there are a number of factors that would contribute to the extent of land available for development including uses proposed in the LCC, the potential for other commercial uses to be developed (e.g. medical centre, petrol station, child care etc) and allowance for open space and drainage.

- 8.5 It is not known if all of this land would be developed for bulky goods/restricted retailing; however, assuming it was, it could potentially add a further 10,000m<sup>2</sup> of bulky goods floorspace to a centre/precinct in this location.
- 8.6 Including the southern proportion of 720 Sunbury Road within a broader bulky goods/restricted retail precinct at 700 Sunbury Road would strengthen the role of the centre/precinct. It would provide improved accessibility to the centre/precinct and allow for a greater range of tenants with the potential amount of bulky goods floorspace at the centre increasing to around 30,000m<sup>2</sup> (subject to demand).
- 8.7 This would allow for between 39,000m<sup>2</sup> and 49,000m<sup>2</sup> of bulky good floorspace to be distributed between the existing bulky goods area in Sunbury along Vineyard Road, and the planned Vineyard Road employment area. This is still sufficient to support these bulky good precincts; however, depending on the eventual level of demand and extent of development at the subject site (comprising 700 and 720 Sunbury Road), potential exists that the subject site (comprising 700 and 720 Sunbury Road) may become most prominent bulky goods precinct in the Greater Sunbury area.

## 9 CONSIDERATIONS FOR THE SUNBURY SOUTH PSP AND THE SUBJECT SITE

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### Potential Exists for an Additional Bulky Goods Precinct

- 9.1 As identified earlier, it is my view the demand for bulky goods floorspace provided in the HillPDA assessment is a conservatively low estimate. The forecast demand of 48,000m<sup>2</sup> in Greater Sunbury represents 0.41m<sup>2</sup> per capita (i.e. 48,000m<sup>2</sup> divided by 120,000 persons).
- 9.2 In comparison, my estimate of demand of approximately 79,000m<sup>2</sup> of bulky goods floorspace in bulky goods centres/precincts represents 0.57m<sup>2</sup> per capita. This estimate is more in-line with the industry benchmark of 0.6m<sup>2</sup> of bulky good floorspace in dedicated centres/precincts (i.e. 0.76m<sup>2</sup> of total bulky goods floorspace demand per person x 0.8% in bulky goods centres/precincts = 0.6m<sup>2</sup>).
- 9.3 Having regard for the analysis of demand for bulky goods retail floorspace presented in Section 7 and the opportunity for non-retail uses such as 'trade supplies', in my view potential exists for more than one bulky goods precinct in the Sunbury South PSP. The subject site provides an opportunity for a second bulky goods precinct in addition to the Vineyard Road employment area.

### Bulky Goods Retail at the Subject Site will Provide Access to Bulky Goods Retailing along both the Vineyards Road and Sunbury Road Corridors

- 9.4 HillPDA identified the opportunity for bulky goods retailing in both the Vineyard Road and Sunbury Road corridors. Enabling the subject site to accommodate bulky goods/restricted retailing will fill a gap that currently exists in the Sunbury South PSP.
- 9.5 Providing bulky goods retailing along both corridors will provide more convenient access to this type of retailing for all residents in the Sunbury South and Lancefield Road PSPs. In addition, it is my view that development of bulky goods retailing at the subject site is likely to commence earlier than the planned Vineyard Road employment area.
- 9.6 The Vineyard Road corridor is already serviced by a bulky goods precinct, including a major anchor tenant in Bunnings. Consequently, the Vineyard Road employment area is located in a more competitive environment than the subject site. It is my view that the subject site could attract a major tenant typically required to anchor a bulky goods centre in a more timely manner than the Vineyard Road employment area.
- 9.7 Bendigo provides a practical example of a region with a similar population to that envisaged for Greater Sunbury that supports multiple bulky goods precincts of different sizes along different transport corridors. Greater Bendigo has an estimated population of approximately 111,000 persons (2016 estimate) and supports four

different bulky goods/restricted retail locations (including two Bunnings Warehouses). These precincts include:

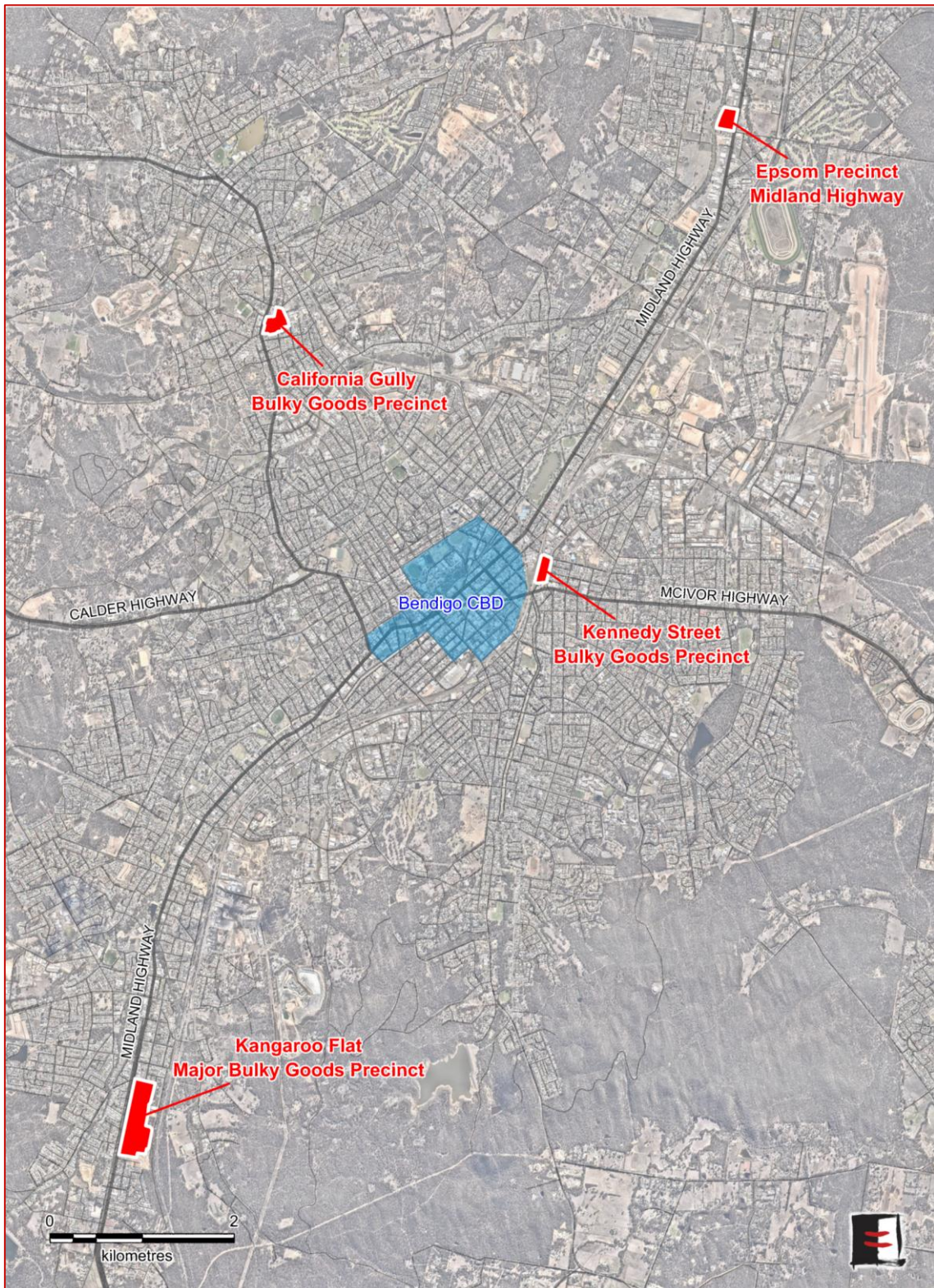
- the major bulky goods precinct in Kangaroo Flat to the south of the CBD
- three smaller precincts in Epsom, California Gully and one in close proximity to the CBD.

Figure 7 shows the distribution of bulky goods precincts in Bendigo, and shows the location of precincts on major arterial roads on the southern, northern and north-western entrances to the urban areas of Bendigo. This distribution provides residents and businesses with easy access to some form of bulky goods retailing.

- 9.8 Enabling a bulky goods precinct to locate at the subject site would provide Sunbury with a similar distribution of centres along the major entrances to the suburban Sunbury area (i.e. Sunbury Road and Vineyard Road).



**Figure 7: Distribution of Bulky Goods Precincts in Bendigo**



Produced by Essential Economics using MapInfo, StreetPro and BingMaps

### **Assist in Preserving ‘Industrial’ Areas for Industrial Purposes**

- 9.9 It is my reading of the Sunbury South PSP that the intention of the Sunbury Road employment area is to primarily provide for ‘industrial’ uses.
- 9.10 Without additional opportunities in the Sunbury South PSP for bulky goods retailing, it is anticipated that pressure will build for a part of the Sunbury Road employment area to be used for bulky goods retailing. Similar to the subject site, the Sunbury Road employment area also possess excellent characteristics to support bulky goods retailing.
- 9.11 Therefore, allowing bulky goods/restricted retailing to occur at the subject site would enable the preservation of land at the Sunbury Road employment area to be developed for its intended industrial use.

### **Complement the Town Centre Hierarchy**

- 9.12 The development of bulky goods at the subject site is intended to complement, rather than compete with, the town centre hierarchy identified in the Sunbury South and Lancefield Road PSPs, and the Sunbury Town Centre.
- 9.13 As described in Section 7, around 20% of demand for bulky goods type retailing is accommodated in traditional activity centres. My estimates of demand for bulky goods floorspace takes this into consideration, and still indicates significant demand for additional bulky goods retailing.
- 9.14 The subject site (and land at Vineyard Road) is intended to provide for retail and restricted retail uses that are not suited to a location in traditional activity centres. Bulky goods retailers require the following characteristics that are not always available within traditional activity centres:
- large floorspace requirements
  - affordable land and development costs
  - expansive areas for at-grade car parking
  - location on major road that provides high levels of exposure to passing traffic.

### **Opportunity to Support other Commercial Uses in the Locality**

- 9.15 Enabling bulky goods/restricted retailing at the subject would assist in the attracting patronage to the planned LCC on 720 Sunbury Road.

## 10 CONCLUSIONS

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- 10.1 I support the designation of land at 700 Sunbury Road, Sunbury, in the Sunbury South PSP to be changed from 'residential' to a land use category that would enable the future development of bulky goods, restricted retailing and ancillary uses to occur at the site for the following reasons:
- The site is well located with respect to features sought by bulky goods retailers.
  - Sufficient demand for bulky goods and restricted retail floorspace exists to support two bulky goods locations in the Sunbury South PSP, one located at Vineyard Road and one located at the subject site.
  - In light of a relatively low job to household ratio in the Sunbury area, the subject site should be considered as a strategic economic asset, having regard for its high level of exposure and accessibility to regional catchments which are features that have the potential to attract employment generating uses.
  - Bulky goods retailing at the subject site will not impact adversely the viability of the town centre hierarchy proposed in the Sunbury South and Lancefield Road PSPs.
- 10.2 Including the southern portion of 720 Sunbury Road within a bulky goods precinct at the subject site would further support the development of a viable centre at the subject site.

### **Declaration**

I have made all the inquiries that I believe are desirable and appropriate and no matters of significance that I regard as relevant have to my knowledge been withheld.



Nicholas Brisbane  
Director  
**Essential Economics Pty Ltd**

11 August 2017

## **ATTACHMENT: NICHOLAS BRISBANE CV**

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# Nick Brisbane

B. ECONOMICS

Director



Nick is an economist with wide-ranging experience in public and private sector work in both Australia and the UK. Nick's particular expertise is in undertaking market assessments of the demand for property development, and assessing the economic impact of development on the local, regional and wider economies.

## INTRODUCTION

Nick has a Bachelor degree in Economics, with a specialisation in Econometrics, and has 16 years' experience in undertaking economic research for a wide range of public and private sector clients.

At Essential Economics, Nick's role is primarily in undertaking market assessments of various forms of property development, preparing demand forecasts across a range of sectors, preparing economic and demographic profiles, and assessing economic impacts associated a wide range of project projects.

In particular, Nick has strong expertise in assessing the market potential for retail, residential, retirement and tourism project. He has experience in community and stakeholder consultation, and excellent report writing and presentation skills.

## ACADEMIC QUALIFICATIONS

*Bachelor of Economics, Monash University, Melbourne, 2001*

## PRESENT POSITION

Director, Essential Economics Pty Ltd,  
March 2012 -

## PAST POSITIONS

Associate, Essential Economics, March 2011 – March 2012

Senior Economist, Essential Economics,  
January 2007 - March 2011

Economist, Essential Economics, March 2004 – January 2007

Consultant, Colin Buchanan and Partners Pty Ltd, September 2003 – January 2004

Economist, Essential Economics, August 2001 – March 2003

## RELEVANT EXPERIENCE



## **Retail, Commercial and Industrial Assessments**

*Exford Road NAC, Melton South – Economic Assessment, for private client*

*Torquay ALDI – Economic Impact Assessment, for ALDI*

*Bunnings Swan Hill Economic Assessment, for Bunnings Group Limited*

*Proposed Gateway Neighbourhood Centre, New Norfolk (Tas) – Economic Impact Assessment, for North Hobart Developments Pty Ltd*

*Montague Street, South Melbourne - Retail Assessment, for Austpac*

*Shepparton Retail Overview, for Shepparton City Council*

*Bunnings Swan Hill Trade Area Profile, for Bunnings Group Pty Ltd*

*Bunnings Yarrawonga Trade Area Profile, for Bunnings Group Pty Ltd*

*Laurimar Town Centre Advice, for private client*

*Craigieburn R2 NAC Assessment, for Peet*

*Glebe Hill Estate Neighbourhood Activity Centre Assessment, for private client*

*Super Amart - Retail Economic Impact Assessment, for Super Amart*

*Application for Rezoning of Land at Harcourt Parade, Cremorne - Economic Analysis, for Caydon Property Pty Ltd*

*Sibelco Economic Benefit Assessment, for Sibelco*

*University Hill Retail Analysis, for MAB Corporation*

*Assessment of Industrial Land in the City of Monash, for private land owners*

*Economic Assessment of Preferred Future Land Uses, Oakleigh, for private land owners*

*Corio Norlane Urban Renewal Project - Retail and Activity Centre Assessment, for Major Projects Victoria*

*Costco Auburn Economic Impact Assessment, for Costco*

*Market Street, South Melbourne – Economic Advice, for Blueprint Australia*

*Inverloch Retail Assessment, for Coomes Consulting on behalf of Bass Coast Shire*

*Business and Industrial Zoned Land Requirements in Wallan, for Mitchell Shire Council*

*Diggers Rest – Employment Land Assessment, for Industrial Commercial Property Solutions Pty Ltd*

*Moorabbin Airport Masterplan Review, for Moorabbin Airport Corporation*

*Sale Industrial and Business Zoned Land Assessment, for Wellington Shire*

*Tooronga Homemaker Centre Economic Impact Assessment, for Leighton Properties Pty Ltd*

## **Strategic and Urban Planning**

*City of Swan Local Commercial and Activity Centres Strategy, for City of Swan*

*Alexandrina Economic Development Strategy, for Alexandrina Council*

*Shire of Mundaring Local Commercial and Activity Centres Strategy, for Shire of Mundaring*

*Colac Economic Development and Land Use Strategy, for Colac-Otway Shire*

*Beveridge North West PSP 1059 – Retail Needs Assessment, for Metropolitan Planning Authority*

*Donnybrook, Woodstock and English Street PSP – Activity Centre and Employment Land Analysis, for Metropolitan Planning Authority*

*Melton Housing Diversity Strategy, for City of Melton*

*Mildura Housing and Settlement Strategy, for Rural City of Mildura*

*North Park Reserve, Swan Hill – Economic Impact Review of Proposed Rezoning, for Swan Hill Rural City Council*

*Collins Street (St Albans) Redevelopment Feasibility Study – Economic Input, for Brimbank City Council*

*Quarry Hills PSP – Activity Centre and Employment Analysis, Growth Areas Authority*



*Wollert PSP – Activity Centre and Employment Analysis, Growth Areas Authority*

*Yarra Ranges Activity Centre Network Strategy, for Shire of Yarra Ranges*

*Horseshoe Bend Activity Centre Assessment, for private client*

*Assessment of Economic Impact Associated with Reducing Development Levies in Mooroonpa West, for Greater Shepparton Council*

*Twin Rivers Land Use Plan, for East Gippsland Shire*

*Hopkins Street Precinct, Footscray - Retail Economics Assessment, for Austpac Properties*

*Leakes Road Rockbank Masterplan - Economic Input, for Mirvac and Jayaland*

*Mount Penang Parklands - Economic Input to State Significant Site Study, for Central Coast Regional Development Corporation*

*Batesford South, Geelong - Assessment of Future Land Use and Employment, for private client*

*Assessment of Preferred Future Land Uses in Westminster Street Oakleigh, for private client*

*Clyde North Submission to GAFF, for private client*

*Retail Floorspace Forecasts for Regional Victoria, 2007-2030, for Department of Sustainability and Environment*

*Retail Floorspace Forecasts for Metropolitan Melbourne, 2006-2030, for Department of Sustainability and Environment*

*Moorabbin Airport Masterplan Review, for Moorabbin Airport Corporation*

*Input to Fyans Street / West Fyans Street Structure Plan, for City of Geelong*

*Input to Taylors Hill Structure Plan, for Shire of Melton*

*Input to Melton North Structure Plan, for Shire of Melton*

*Mooroolbark Urban Design Framework – Retail and Economic Considerations for the UDF, for Aspect*

*St Albans Activity Centre – Economic Input to the Urban Design Framework, with David Lock Associates*

## **Residential, Retirement and Aged Care Assessments**

*Ballarat Eco-Village – Economic Assessment, for private client*

*A Victorian Housing Solution – Market Analysis as Input Masterplan development & Urban Renewal of Fitzroy, Prahran and North Richmond Public Housing Estates, for Department of Human Services*

*Pallara Retirement Village Market Assessment, for Stockland*

*Farrington Grove Retirement Village Market Assessment, for Stockland*

*Boral Quarry Residential Land Assessment, for Boral*

*Selandra Rise Retirement Village Market Assessment, for Stockland*

*Hillside Retirement Village Market Assessment – Update, for Stockland*

*Woodend Davies Hill – Economic Analysis, for Villawood Properties*

*Cape Paterson Eco Village Market and Impact Assessment, for PlannedFX*

*Due Diligence for the Geelong TAFE Site, for VicUrban*

*Infill Development Opportunities for Ballarat, for City of Ballarat*

*Latrobe Residential and Rural Residential Land Assessment, for Latrobe City Council*

*Residential Mix Market Assessment, Cowes, for Kellehers*

*Ventnor Residential Land Assessment, for Tomkinson*

*Apollo Bay Residential Land Assessment, for J. Di Cecco & Associates Pty Ltd*

*Arcare Knox – Aged Care Market Assessment, for Arcare Pty Ltd*

*ARC/Stockland Victorian Retirement Village Research, for Stockland*

*Gowanbrae Retirement Village Assessment, for Stockland*



*South Morang Retirement Village Assessment, for Stockland*

*Kawana Retirement Village Assessment, for Stockland*

*Maitland Retirement Village Assessment, for Stockland*

*Pemulwuy Retirement Village Assessment, for Stockland*

*Campbelltown Retirement Village Assessment, for Stockland*

*Maitland Retirement Village Assessment, for Stockland*

*Rosebud West Retirement Village Assessment, for AMP Capital*

*Penrith Retirement Village Assessment, for Stockland*

*Craigieburn Retirement Village Assessment, for Stockland*

*Shellharbour Retirement Village Assessment, for Stockland*

*Baldivis Retirement Village Assessment, for Stockland*

*Vincentia Residential Land and Retirement Village Assessment, for Stockland*

*Cowes Retirement Village Market and Economic Impact Assessment, for AMP Capital*

*Point Lonsdale Retirement Village Assessment, for Stockland*

*Apollo Bay – Market Assessment for Potential Land Uses, for BCR*

*Lyndhurst Aged Care and Accommodation Proposal, for Southern Cross Care*

*Korumburra Assessment of Demand for Aged Care and Retirement Living, for Rossi Group Pty Ltd*

*Leongatha Assessment of Demand for Aged Care and Retirement Living, for Rossi Group Pty Ltd*

## **Economic Development Strategies and Town Centre Assessments**

*Echuca Commercial Strategy, for Campaspe Shire*

*Swan Hill Retail Strategy 2014 – Strengthening Swan Hill's Retail*

*Industry, for Swan Hill Rural City Council*

*Horsham CAD Strategy, Rural City of Horsham*

*Economic Impact of Crime in Frankston, for City of Frankston*

*Economic Assessment of Crop2 Project Sunshine, for Brimbank City Council*

*Coomera Town Centre Meeting Community Infrastructure Needs - Economic Assessment of Integrated Community Infrastructure, Sutera Architects*

*Assessment of Sunshine Station Development Opportunities, for City of Brimbank*

*Business and Industrial Zoned Land Requirements in Wallan, for Mitchell Shire Council*

*South Gippsland Township Study – Economic Assessment of Future Requirements for Residential, Industrial and Commercial Zoned Land, for South Gippsland Shire*

*Metropolitan Fringe Strategic Planning Partnership Project - Growth Strategies, for DSE, Mitchell Shire and Baw Baw Shire*

*Macedon Rural Land Study, Tourism and Urban Growth Assessment, for Macedon Ranges Shire, with RPD Group*

*Mitchell Shire Economic Development and Planning Strategy, for the Shire of Mitchell*

*Moorabool Shire Economic Profile, for the Shire of Moorabool*

## **Tourism Assessments**

*Kinglake Resort – Market and Economic Impacts Assessment, for private client*

*Korumburra Resort – Market and Economic Impacts Assessment, for private client*

*Lorne Strategy Plan (Tourism and Economic aspects), for Surf Coast Shire and Maunsell*

*Surfworld Museum – Tourism Benefit Assessment, for Surfworld Museum*