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ROCKBANK NORTH MAJOR ACTIVITY CENTRE

ECONOMIC ASSESSMENT

FIRST URBAN & TRACT | FEBRUARY 2021



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CONTENTS

EXECUTIVE SUMMARY	1
1. INTRODUCTION	4
1.1. BACKGROUND	4
1.2. ENGAGEMENT	4
2. LAND USE CONTEXT	5
2.1. INTRODUCTION	5
2.2. SUBJECT SITE	5
2.3. PSP CONTEXT	6
2.4. GROWTH CORRIDOR LAND USE CONTEXT	7
2.5. LAND USE AND SITE CONTEXT SWOT	8
3. STRATEGIC CONTEXT	9
3.1. INTRODUCTION	9
3.2. WEST GROWTH CORRIDOR PLAN	9
3.3. ROCKBANK NORTH PRECINCT STRUCTURE PLAN	11
3.4. COUNCIL STRATEGIES	15
3.5. KEY POINTS	17
4. ECONOMIC CONTEXT	18
4.1. INTRODUCTION	18
4.2. POPULATION AND DEMOGRAPHICS	18
4.3. DWELLINGS	20
4.4. FORECASTS	22
4.5. LABOUR FORCE	23
4.6. EMPLOYMENT PROFILE	26
4.7. KEY FINDINGS	29
4.8. IMPLICATIONS	30
5. RETAIL ASSESSMENT	31
5.1. INTRODUCTION	31
5.2. RETAIL TRENDS	31
5.3. EXISTING AND PLANNED ACTIVITY CENTRES	32
5.4. RETAIL DEMAND	33
5.5. NON-RETAIL SHOPFRONT FLOORSPACE	37
5.6. TIMING AND STAGING	37
5.7. KEY FINDINGS	38
6. COMMERCIAL ASSESSMENT	39
6.1. INTRODUCTION	39
6.2. MELBOURNE'S OFFICE MARKET	39
6.3. PLANNED EMPLOYMENT AREAS	41
6.4. COMMERCIAL ROLE OF ROCKBANK NORTH	43
6.5. EMPLOYMENT TARGETS AND FLOORSPACE REQUIREMENTS	46
7. IMPLICATIONS FOR UDF	50

7.1. PLANNING FOR A STAGED DEVELOPMENT	50
7.2. LAND REQUIREMENTS	51
7.3. OTHER UDF IMPLICATIONS	51
APPENDIX A FORECAST ID CATCHMENT MAP	54
APPENDIX B STATISTICAL AREAS	55
APPENDIX C PROPOSED / PLANNED ACTIVITY CENTRES	56

FIGURES

F1. SUBJECT SITE	5
F2. PSP CONTEXT	6
F3. LAND USE CONTEXT MAP	7
F4. WGCP EMPLOYMENT PLAN	10
F5. ROCKBANK NORTH PSP – FUTURE URBAN STRUCTURE PLAN	11
F6. ROCKBANK NORTH MAC CONCEPT PLAN	13
F7. PROPOSED ACTIVITY CENTRE NETWORK	15
F8. EMPLOYMENT GROWTH FORECAST CITY OF MELTON	17
F9. POPULATION CITY OF MELTON 2001-2018	18
F10. AGE PROFILE	19
F11. HOUSEHOLD COMPOSITION	19
F12. MEDIAN WEEKLY INCOMES, 2016	20
F13. DWELLING APPROVALS CITY OF MELTON 2001 TO 2019	20
F14. PROPORTION OF MELBOURNE’S DWELLING APPROVALS IN MELTON	21
F15. MEDIAN HOUSE AND UNIT PRICE (CITY OF MELTON)	22
F16. FORECAST POPULATION, HOUSEHOLDS AND HOUSEHOLD SIZE	22
F17. SERVICE AGE GROUP CHANGE	23
F18. OCCUPATION, 2016	25
F19. PROJECTED EMPLOYMENT CHANGE	27
F20. ACTIVITY CENTRE HIERARCHY AND TRADE AREA	34
F21. CATCHMENT POPULATION FORECASTS	35
F22. SUPPORTABLE RETAIL FLOORSPACE AND INDICATIVE STAGING	38
F23. MELBOURNE CBD OFFICE VACANCY	39
F24. METROPOLITAN MELBOURNE OFFICE VACANCY	39
F25. PLANNED EMPLOYMENT AREAS	43
F26. CITY OF MELTON EMPLOYMENT SCENARIOS	46

F27. FORECAST ID AREAS	54
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TABLES

TABLE S1 PROPOSED FLOORSPACE MIX	3
TABLE S2 INDICATIVE DEVELOPMENT STAGES	3
T1. SWOT ANALYSIS OF MAC	8
T2. ROCKBANK NORTH MAC – PRELIMINARY LAND BUDGET	13
T3. ESTIMATED EMPLOYMENT CAPACITY BASED ON PRELIMINARY LAND USE BUDGET	14
T4. PROPOSED CHANGES TO FLOORSPACE CAPS, MELTON ACTIVITY CENTRE STRATEGY	16
T5. POPULATION GROWTH CITY OF MELTON 2001-2018	18
T6. PROPORTION OF RESIDENTS AUSTRALIAN BORN, 2011 AND 2016	19
T7. CITY OF MELTON DWELLINGS	20
T8. DWELLING STRUCTURE	21
T9. LABOUR FORCE CITY OF MELTON (2016)	23
T10. HIGHEST LEVEL OF EDUCATION ATTAINMENT	24
T11. INDUSTRY OF EMPLOYMENT	24
T12. RESIDENTS WORKING IN CITY OF MELTON	25
T13. JOBS GROWTH BY INDUSTRY SECTOR CITY OF MELTON	26
T14. ECONOMIC PROFILE SWOT	28
T15. EXPENDITURE PER PERSON	35
T16. ROCKBANK NORTH MAC CATCHMENT RETAIL SPENDING (\$2019)	36
T17. SUPPORTABLE RETAIL FLOORSPACE	36
T18. INDICATIVE FLOORSPACE DISTRIBUTION BY TYPE	36
T19. METROPOLITAN MELBOURNE OFFICE MARKET INDICATORS BY REGION (MARCH 2018)	40
T20. KEY EMPLOYMENT AREAS AND YIELDS IN WESTERN GROWTH CORRIDOR	42
T21. EMPLOYMENT AND POPULATION IN MELBOURNE'S GROWTH AREA MUNICIPALITIES	46
T22. CITY OF MELTON EMPLOYMENT SCENARIOS	47
T23. INDICATIVE DISTRIBUTION OF EMPLOYMENT BY INDUSTRY AND LOCATION	47
T24. ROCKBANK NORTH MAC EMPLOYMENT TARGETS	48
T25. ROCKBANK NORTH MAC EMPLOYMENT ESTIMATES	48
T26. INDICATIVE DEVELOPMENT STAGES	50
T27. MAC LAND REQUIREMENTS	51

ACRONYMS

UDF	Urban Design Framework
LGA	Local Government Area
MAC	Major Activity Centre
VPA	Victorian Planning Authority
PSP	Precinct Structure Plan
AAG	Average Annual Growth

RETAIL CATEGORY DEFINITIONS

Food, Liquor and Groceries	includes supermarket, deli, bakery, convenience store, bottle shop and shops selling food that is not ready-to-eat.
Food Catering	includes cafes, restaurants and takeaway food premises
Apparel, Homewares and Leisure	includes clothing stores, shoes stores, gift stores, pharmacies, optometrists, homewares stores, sports and fitness stores, and outdoor living and camping stores.
Bulky Goods	generally, includes furniture, electronics, hardware stores, and whitegoods.
Retail Services	generally, includes services such as beauty salons, hairdressers and dry cleaning stores.

COVID-19 PANDEMIC

Note: The analysis in this report was prepared in mid 2019, prior to the impacts of the COVID-19 pandemic. Minor additions were made in mid 2020 based on feedback, however the economic analysis was not fully updated in 2020 and therefore primarily relates to conditions prior to the onset of the pandemic.

EXECUTIVE SUMMARY

Urban Enterprise was engaged by First Urban and Tract to prepare economic analysis to inform the preparation of an Urban Design Framework for the Rockbank North Major Activity Centre (MAC).

The Rockbank North MAC is centrally located within a major urban growth area in the West Growth Corridor of Melbourne. The Rockbank North Precinct is expected to accommodate at least 20,000 residents, and when neighbouring Precincts are included, the catchment for the MAC is projected to approach 60,000 residents at full development.

DEMOGRAPHIC AND ECONOMIC CONTEXT

Key findings relating to policy, demographic and economic considerations in the catchment and the broader growth area are as follows:

- Growth corridor planning seeks to increase employment retention in Melbourne's growth areas, a need also acknowledged in Melton City Council's strategies which identify a relatively low-skilled labour force, the opportunity for jobs growth in retail, construction and professional services, and the need to promote business growth, innovation, technology and education.
- The City of Melton has experienced strong population growth over the past ten years and is forecast to grow to a population of over 485,000 residents by 2051. Forecasts suggest that this will include close to 70,000 residents classified as 'young workforce' (aged 25 to 34 years).
- There has been strong growth in medium density dwellings in Melton and as the development of the Western Growth corridor continues, the market for medium and higher density residential is expected to strengthen.
- Although a lower proportion of Melton residents have Bachelor's degree qualifications or higher than the Melbourne average, this proportion is increasing. Most residents travel outside Melton for work (78%).
- Employment in the municipality is growing strongly, with the highest growth rates in the retail, health, education, construction and professional services industries. Projections are for strong growth in health, professional services, construction, accommodation and food services across the region.
- Significant opportunities for the MAC will be created by population growth, particularly for retail, entertainment, health and education services with a focus on the family market and an average to low income demographic. Opportunities also relate to the considerable young workforce that is projected to live in the surrounding areas and state and local policy to reduce the number of residents who must travel to jobs outside the municipality.

RETAIL

At present, many traditional retail types are facing strong competitive pressures. Retail alone is no longer sufficient to drive the performance of a MAC.

Planning for the MAC should consider a broader mix of uses with a focus on dining, entertainment and lifestyle in addition to core retail uses, including the creation of a mixed-use environment where living is integrated with retail and lifestyle offers to support elements such as recreation, socialising, hospitality and places to do business.

The retail catchment of the MAC includes three major PSP areas which will approach full development in 2051 with a total of 60,000 residents.

It is estimated that the MAC could support approximately 49,500sqm of retail floorspace (including approximately 37,500sqm of shop floorspace and 12,000sqm of restricted retail). A further 12,000sqm should be planned for in non-retail shop floorspace within the core of the MAC.

In earlier stages of residential growth in the catchment, the retail role of the MAC is expected to primarily serve the convenience needs of the local (Rockbank North) community. The UDF should seek to provide an urban layout which enables higher density residential uses to be located in close proximity to these early stages to underpin demand in this section of the PSP area.

The main opportunity to support higher order retailers will occur once the Warrensbrook and Melton East PSP areas begin to accommodate substantial residential populations. Higher order retailers and bulky goods floorspace should be located in parts of the MAC that are accessible to the broader catchment, including by public transport.

EMPLOYMENT ROLE

There are a number of planned employment areas proximate to the Rockbank North PSP. The majority of these precincts are focused on providing industrial land and related office space. There will also be numerous opportunities for businesses to establish in larger format business parks and dedicated commercial areas in proximity to the Rockbank North area, particularly as part of the Toolern Employment and Mixed Use Precinct and also within other Major and Principal Activity Centres.

This warrants consideration of the points of difference that can be established and advantages that can be capitalised on at Rockbank North and reflected in the UDF. Traditional larger format employment areas will be available in many of the competing precincts in the western growth corridor, however higher density mixed use precincts may be limited to a relatively small number of activity centres.

Emerging industries, such as those associated with technology, environmental issues and creative industries are expected to be established where there are opportunities for collaboration and interaction within a fine grain and mixed use precinct such as that possible in the MAC, as distinct from a traditional business park. The current Vision for the MAC supports the attraction of a talented workforce and new business creation with a focus on technology, education, health and emerging industries.

Two main types of MAC commercial employment opportunities are identified in this report:

- The primary opportunity for commercial and employment uses to be accommodated in the MAC relate to population services for the surrounding residential catchment and the opportunity to provide spaces for the attraction and establishment of small businesses.
- In addition to the population led commercial opportunities, the UDF should protect the opportunity to attract strategic businesses and land uses that will serve a broader catchment and assist increasing the availability of employment in the growth area.

Employment projections and modelling estimates the need for approximately 55,000 – 69,000sqm of commercial office floorspace in the MAC at full development, supported by 15,000sqm of medical and entertainment space to complement the core retail and hospitality role of the MAC. This land use mix could ultimately accommodate up to 5,000 jobs in the MAC, plus any education, institutional and civic uses that are established.

AREAS AND STAGING

Table S1 summarises the proposed elements of the MAC in terms of floorspace at full development of the centre and once the surrounding residential catchment approaches full development.

TABLE S1 PROPOSED FLOORSPACE MIX

LAND USE	GROSS FLOORSPACE (SQM)
Core Retail and Food	37,500
Restricted retail	12,000
Sub-total Retail	49,500
Shopfront commercial	12,000
Office	43,000 – 57,000
Office / commercial sub-total	55,000 – 69,000
Entertainment	10,000
Medical	5,000
Sub-total Entertainment and medical	15,000
Total	120,000 – 134,000

Source: Urban Enterprise.

Development of the MAC will need to be staged to respond to the projected growth in the catchment population and to enable a maturation of the scale and role of the retail, employment and service land uses within the centre over time.

Table S2 provides an indicative overview of the proposed staging of the MAC based on the findings of this assessment. It is noted that this is based on current information, population projections and economic conditions which are all subject to change, meaning that developers and Council should maintain a high degree of flexibility when planning the centre to enable the MAC to respond to changing community and market needs and opportunities as they arise.

TABLE S2 INDICATIVE DEVELOPMENT STAGES

STAGE	1	2	3
Indicative timing	2026-2030	2035-2040	2040+
Approximate catchment pop.	15,000 – 20,000	25,000 – 30,000	Up to 60,000+
Retail anchors	Supermarket, possible individual bulky goods retail	Second supermarket Larger retail specialties Bulky goods	Supermarkets Larger specialty retailers Discount Department Store Full bulky goods offering
Role	Neighbourhood Centre Local business location Initial attraction of education and medical services. Residential development	Emerging Major Activity Centre Growing employment role with small and medium businesses Emerging hospitality and entertainment offering Strong retail role Local population catchment built out through housing within and adjacent to MAC.	Established Major Activity Centre Hospitality and entertainment. Established employment role (small, medium and large) Full range of institutions and services available Medium and high density housing and accommodation.

Source: Urban Enterprise.

1. INTRODUCTION

1.1. BACKGROUND

The Rockbank North Precinct Structure Plan (**PSP**) area is located within Melbourne's Western Growth Corridor in the City of Melton. A number of PSPs have been prepared within the Western Growth Corridor and land in these areas is either under development, subject to planning or designated for future planning.

The Rockbank North PSP sits at the centre of five PSP areas, including completed PSPs Kororoit (part 2 in planning), Plumpton and Taylors Hill West and designated but unplanned PSP areas Warrensbrook and Melton East.

The Rockbank North PSP was prepared in 2012 and residential development is currently taking place within the south of the PSP area. This report relates to the Rockbank North Major Activity Centre (**MAC**) and the preparation of economic analysis to underpin the preparation of a UDF for the site.

The MAC is the largest proposed activity centre within the PSP area and is currently the largest planned future Activity Centre north of the Western Freeway. The PSP envisages the MAC as "a focal point for higher order employment, retail, health and education within a principle catchment north of the Western Highway".¹

The economic analysis underpinning the proposed land use of the MAC within the PSP was prepared at least 8 years ago. Therefore, an up to date economic assessment of the future land uses and role of the MAC is required to ensure the UDF responds to specific considerations relevant to the site.

1.2. ENGAGEMENT

Urban Enterprise has been engaged by First Urban (**client**) and Tract (**lead consultant**) to prepare economic analysis to inform the preparation of an Urban Design Framework (**UDF**) for the Rockbank North MAC. The UDF will be prepared by Tract.

The scope of services relating to this engagement include:

- Assessment of the site, planning and land use context as it relates to the future role and function of the MAC;
- Analysis of the catchment for the MAC, demographics and competitive position;
- Analysis of economic trends and strategic considerations that may impact on the UDF;
- Recommendations in regard to the provision of retail floorspace, employment land use mix and staging and sequencing of employment uses.

¹ Growth Areas Authority, Rockbank North PSP, 2012 p. 5

2. LAND USE CONTEXT

2.1. INTRODUCTION

The following provides an overview of the future land use context of the corridor relating to Rockbank North and the Rockbank North MAC.

2.2. SUBJECT SITE

The subject site covers 24.6ha of land within the MAC, bordered by Leakes Road to the west and Beattys Road to the south. Kororoit Creek is to the north of the subject site. The remainder of the MAC land (to the south and east) is owned by another party.

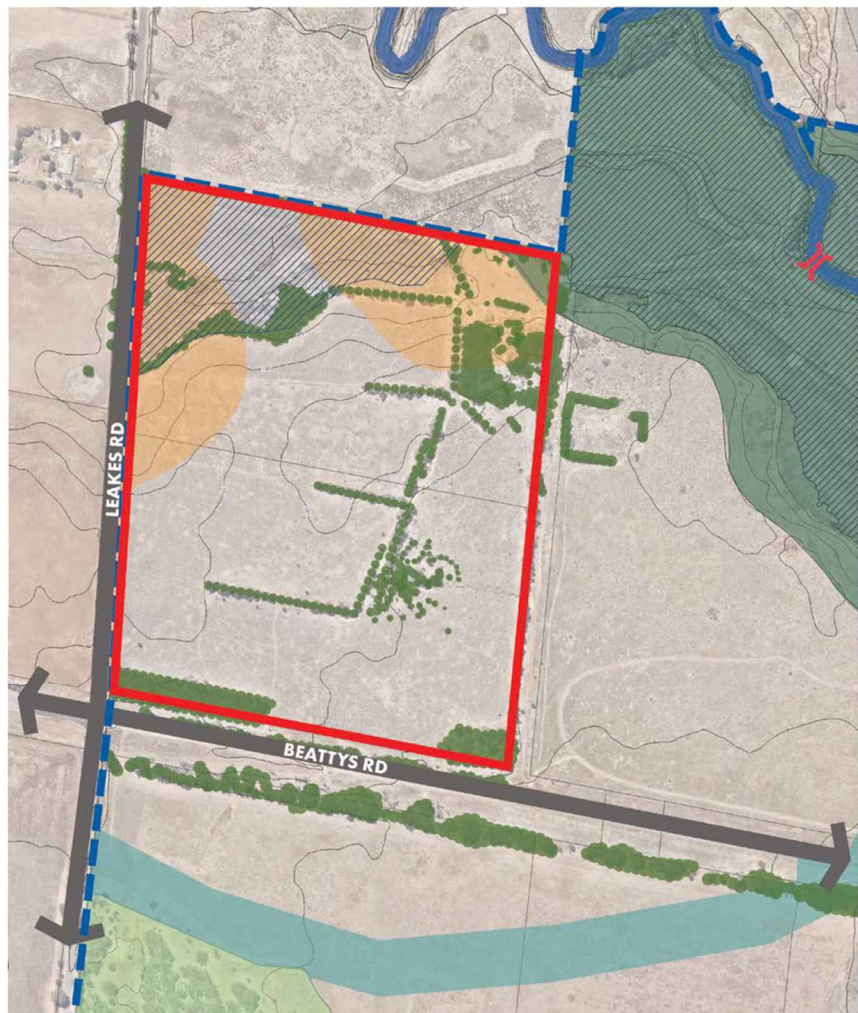
F1. SUBJECT SITE

LEGEND

- Site Boundary
- - - Precinct Boundary
- Cadastre
- ~ 1m Contours
- Existing Roads
- ~ Kororoit Creek
- Encumbered Waterway - Stormwater Wellands
- Encumbered Waterway - Drainage/Flooding
- Encumbered Conservation Area
- Growing Grass Frog Habitat - Requires Offset if Cleared
- Existing Trees
- ▨ Area subject to Detailed Flood Analysis
- ⌋ Future Pedestrian Bridge

Note

* Entire site has a medium contribution to species Golden Sun Moth habitat.



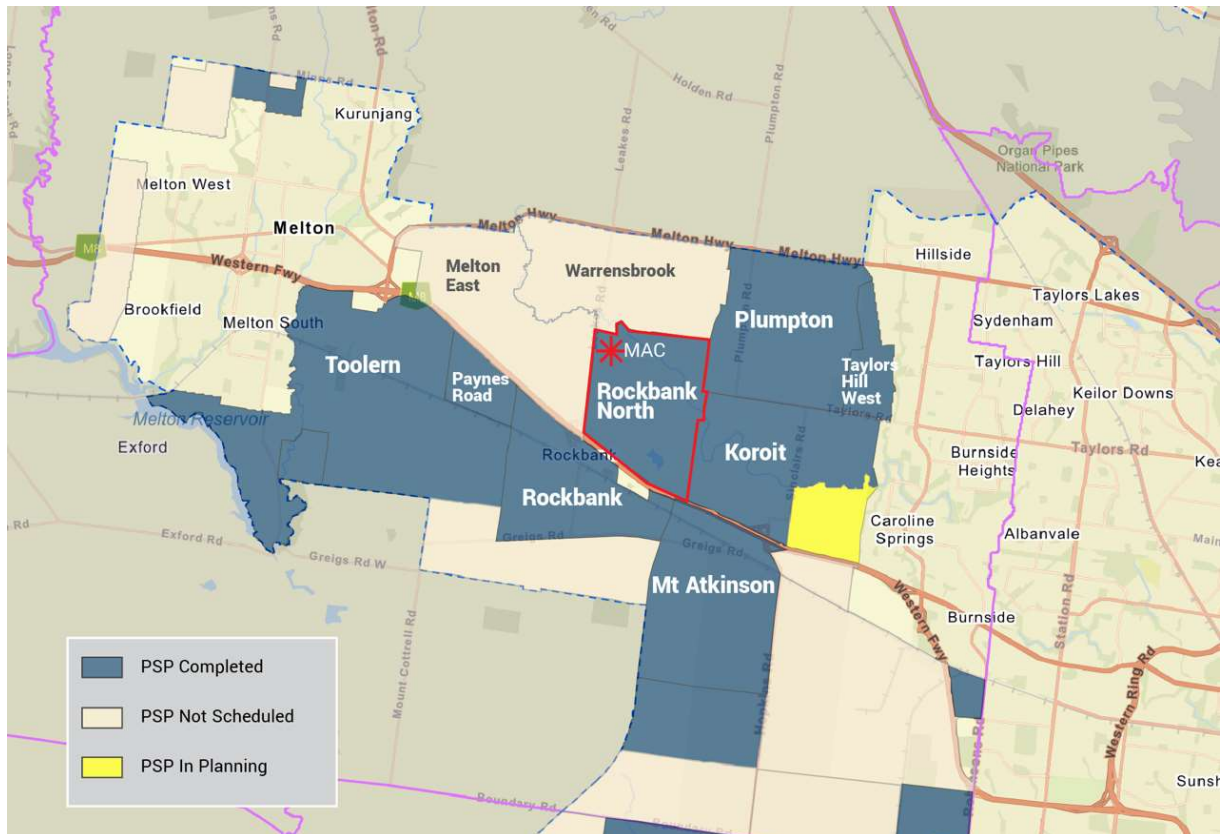
Source: Tract, 2019.

2.3. PSP CONTEXT

The PSP area is located in the Western Growth Corridor, between the Western Highway and Kororoit Creek. The MAC is planned to be located within the north-west corner of the PSP.

The PSP area is proximate to the Plumpton and Kororoit PSP areas to the east, the Rockbank and Mt Atkinson PSPs to the south and Toolern and Paynes Road to the west. The Warrensbrook and Melton East PSP areas are located to the west of Rockbank North, however planning for these areas is yet to commence.

F2. PSP CONTEXT



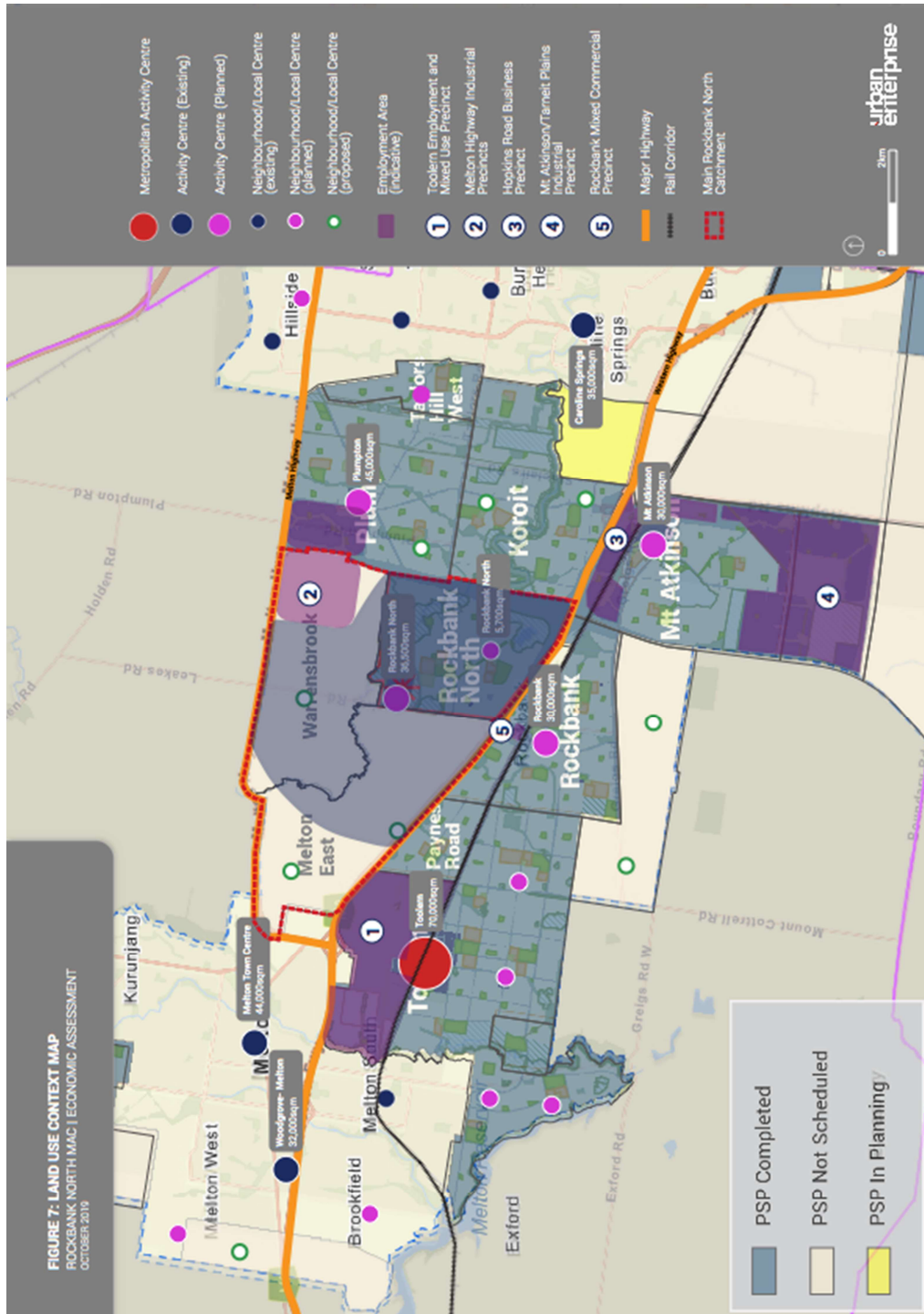
Source: VPA PSP map, annotated by Urban Enterprise, 2019/

2.4. GROWTH CORRIDOR LAND USE CONTEXT

A land use context map is provided in Figure 3, showing the broad urban structure of the Western Growth corridor, including each existing and proposed activity centre and employment precinct.

The MAC will be centrally located to the three PSP areas of Rockbank North, Warrensbrook and Melton East. These PSP areas have been adopted as the primary 'catchment area' for the economic analysis in this report.

F3. LAND USE CONTEXT MAP



Source: Urban Enterprise, based on VPA PSP Maps.

2.5. LAND USE AND SITE CONTEXT SWOT

An initial Strengths, Weaknesses, Opportunities and Threats (SWOT) assessment has been prepared for the Rockbank North MAC based on the site and land use context. This assessment identifies the factors that will influence the attractiveness of the MAC from an economic perspective and ultimately will influence the scale, role and timing of development in the centre.

T1. SWOT ANALYSIS OF MAC

<p>Strengths</p> <ul style="list-style-type: none"> • Central location to large population catchment, including 3 PSPs • The only planned MAC within the three PSPs • Proximity to Kororoit Creek, potential to leverage the natural asset to provide amenity and lifestyle benefits to residents and workers. • Planned metropolitan walking and cycling trail along Kororoit Creek corridor. • Proposed major bus interchange, linking to Rockbank MAC train station. • Close proximity of MAC to major community, education, civic, recreation and open space (including library, indoor sports centre, conservation area). • Direct road accessibility via Leakes Road, linking to the Melton Highway and Western Freeway and the future Outer Metropolitan Ring Road. • East west road accessibility via Beattys Road and Taylors Road. • Proximity to Melbourne Airport. • Proximity to Woodlands Conservation Area. • Proposed medium and higher density living within and adjoining the MAC. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • No train station / high capacity public transport within or adjacent to the site. • Not proximate to CBD. • Not proximate to major institutions (e.g., education, health) • Full build out of the residential catchment is a long term prospect with Warrensbrook and Melton East PSPs not yet scheduled for commencement. • MAC is physically separated from residential catchment by Creek (north), major road (west) and civic, education and other non-residential uses (south and east).
<p>Opportunities</p> <ul style="list-style-type: none"> • Service higher order retail and commercial / employment needs of the catchment, having regard to location of competing centres and employment land. • Establish well connected Activity Centre through capitalising on links to the train station, strong road network (including future OMR) and active transport. • Potential to leverage the Kororoit Creek corridor as an active transport link to the site, connecting residents to the north-west and east with the Rockbank MAC. • Region generally well catered for in terms of industrial employment land providing opportunity for Rockbank North to provide service and higher industry employment opportunities. 	<p>Threats</p> <ul style="list-style-type: none"> • Strong competition from nearby centres including Toolern (Cobblebank), Rockbank, Plumpton, Mt Atkinson and existing centres for investment and higher order employment. • Competition from existing and proposed Activity Centres outside of the region as a location for business, including centres with higher provision of public transport and more appropriately skilled labour force for office jobs. • Development timing – the full catchment requires progression and approval of other PSPs not yet commenced, and development in Rockbank North is already serviced by a supermarket-based centre.

Source: Urban Enterprise.

3. STRATEGIC CONTEXT

3.1. INTRODUCTION

The following provides overview of the planning context relevant to the economic assessment for the Rockbank North MAC, including the overall objectives and targets for the MAC.

3.2. WEST GROWTH CORRIDOR PLAN

The West Growth Corridor Plan (WGCP) was prepared in 2012 by the Growth Areas Authority (now Victorian Planning Authority) to guide the future land use and urban structure in the western growth corridor.

Relevant points in the plan include the following:

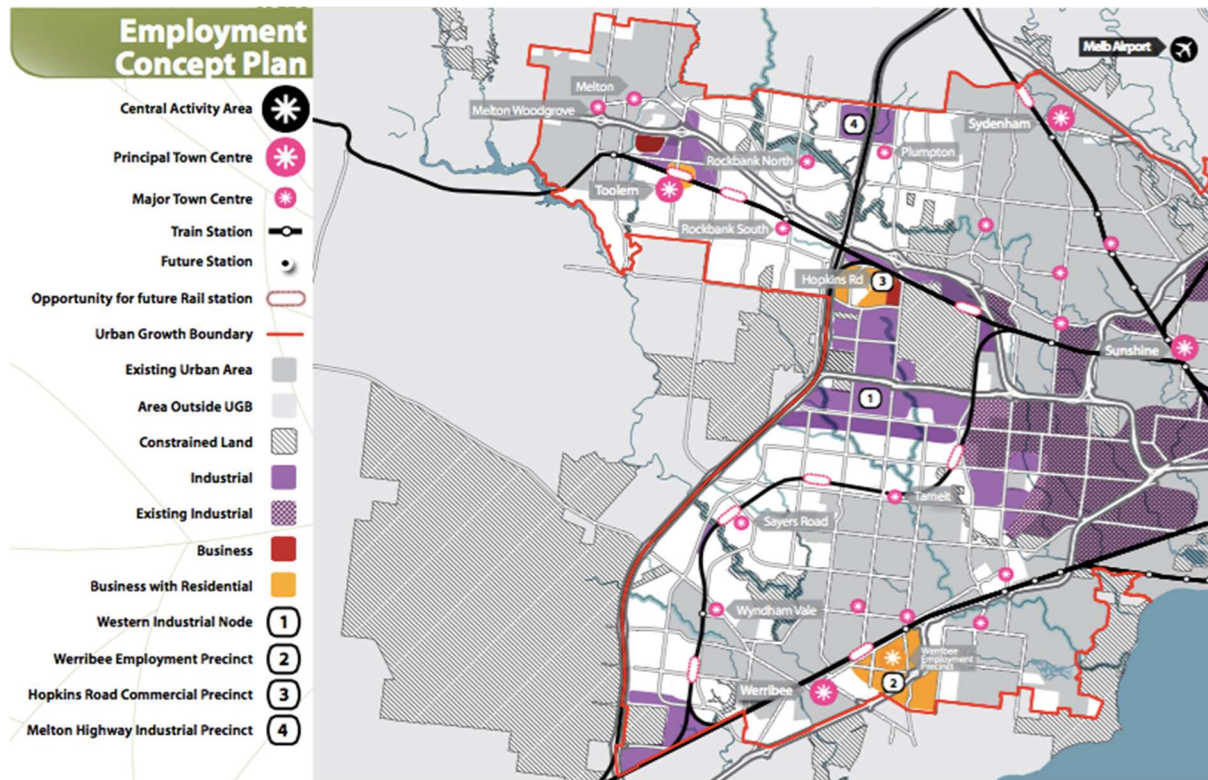
- The WGCP notes the western region as one of the fastest growing regions in Australia, with the corridor eventually expected to accommodate a population of 377,000+ people and 164,000 jobs.
- The WGCP notes the Regional Rail Link, proposed Outer Metropolitan Ring Road (OMR), Melton rail corridor and Western Interstate Freight Terminal at Truganina as significant transport projects that will shape the development of the corridor.
- The WGCP notes the creation of local self-containment, jobs and housing diversity and improved transport links as priorities for the plan.²
- The vision for the WGCP notes the “The West Growth Corridor will play a significant role in the diversification of the broader western region over time. The Hopkins Road Business Precinct, and the Werribee Employment Precinct, together with existing and planned Principal and Major Town Centres, will provide significant new opportunities for living, jobs, investment and services within the region”³
- The WGCP notes opportunities to enable Rockbank (including north and south areas within the WGCP) to be redeveloped to a more transit orientated form of development over time.
- In regard to employment, the WGCP notes that the corridor does not provide enough employment to meet the needs of the rapidly growing population and there is a reliance on the CBD for employment. However, overtime, it is envisaged that the corridor will achieve greater local job self-containment through town centres and employment precincts.
- The plan notes that Toolern will be the primary centre for the north west portion of the corridor and Werribee as the primary centre for the southern half of the corridor.

The employment concept plan from the WGCP is shown in Figure 4. The plan shows Rockbank North as the only MAC north of the Western Freeway.

² GAA, West Growth Corridor Plan, 2012, p.40

³ GAA, West Growth Corridor Plan, 2012, p.41

F4. WGCP EMPLOYMENT PLAN



Source: Growth Areas Authority, WGCP, 2012, p. 50

The Growth Corridor Plan builds on economic analysis prepared for the VPA in 2011 by Essential Economics which included the following targets and estimates for the distribution of employment in Melbourne’s growth areas:

- Growth area plans should seek to accommodate 1 job per household (which equates to 0.4 jobs per resident) over the long term;
- Town centres are expected to accommodate between 25%-30% of all jobs in growth areas; and
- Employment precincts are expected to accommodate 40%-45% of all jobs in growth areas.

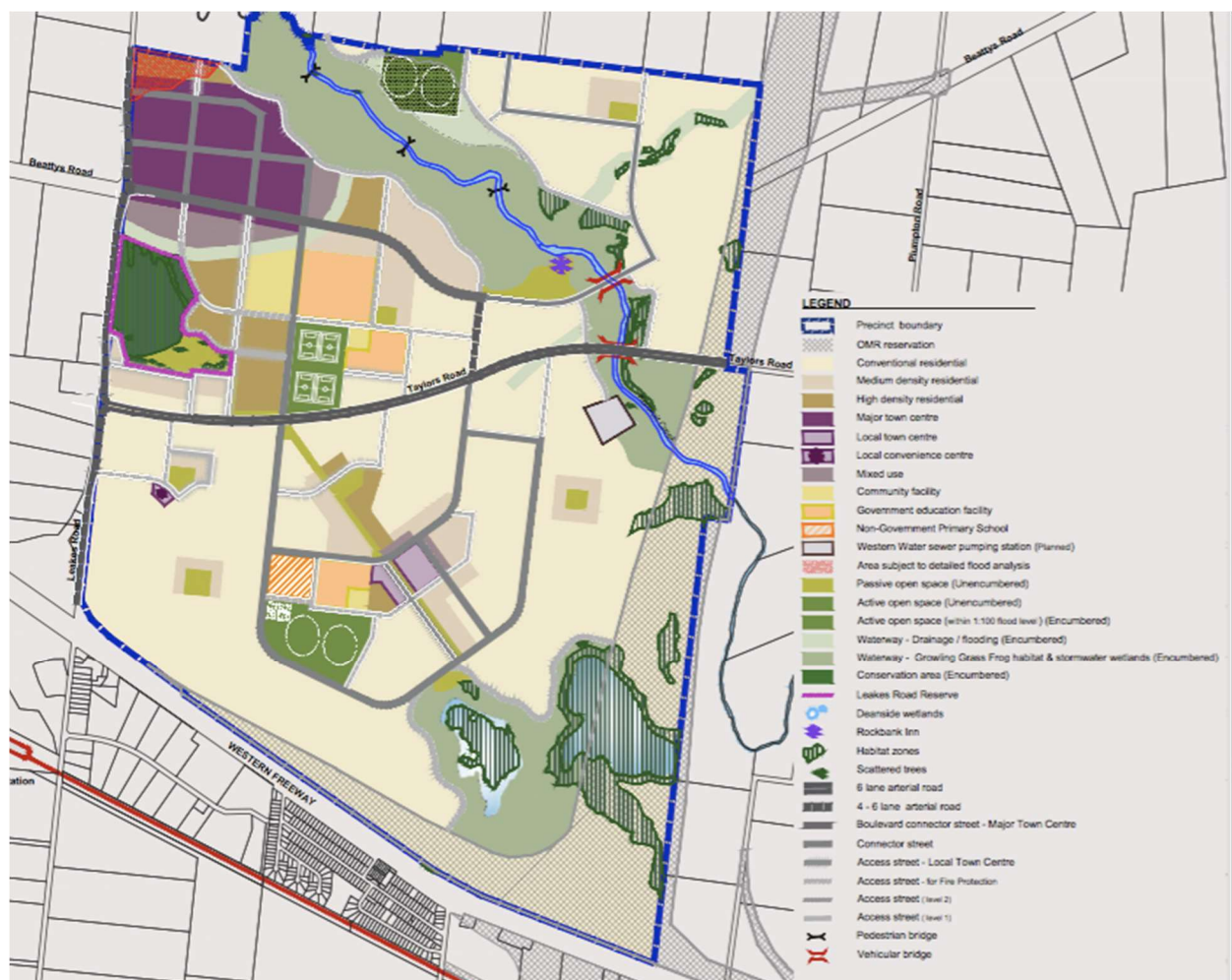
3.3. ROCKBANK NORTH PRECINCT STRUCTURE PLAN

The Rockbank North PSP (Growth Areas Authority, 2012) applies to 786 hectares of land bound by the proposed Outer Metropolitan Ring (OMR) to the east, the Western Freeway to the south, Leakes Road to the west and existing rural residential properties to the north (as shown in Figure 5).

The most relevant content of the PSP to this project is as follows:

- The PSP notes a residential yield of approximately 7,300 lots, with a resident population in the order of 20,400 people. The PSP plans for a Major Activity Centre (MAC) and Local Activity Centre (LAC).
- The vision for the PSP notes that the suburb will be an innovative new suburb, delivery a quality lifestyle, embracing natural qualities and conservation areas, provision of active and passive open space, a network of trails (including a Metropolitan Trail network along Kororoit Creek and a bicycle trail along Beattys Road).
- The LAC is noted for early delivery to service residents, including schools, open space, learning facilities, anchored by a supermarket and supported by speciality shops, cafes, commercial and residential uses.
- The PSP will also be home to local community and active sports facilities along the open space network and will support higher order civic facilities including a library, indoor sports centre and town square.
- High and medium density living will be encouraged within and adjoining the Major and Local Town Centres and in areas which have interface to natural and planned open space.

F5. ROCKBANK NORTH PSP – FUTURE URBAN STRUCTURE PLAN



Source: Growth Areas Authority, Rockbank North PSP, 2012, p. 4

ROCKBANK NORTH MAJOR ACTIVITY CENTRE

The PSP includes the following content and objectives relevant to the MAC:

- MAC is envisaged as a regional focal point for higher order employment, retail, health and education services with a principal catchment focused to the north of the Western Freeway. It will leverage its connection to Kororoit Creek and connectivity to Rockbank Train Station through provision of a key regional bus interchange.
- MAC is planned to service the north-west quadrant of the Melton-Caroline Springs Growth Corridor. It is located on Leakes and Beattys Roads with interface to the Kororoit Creek.
- Given its strategic location within the western growth corridor and its connectivity both locally and regionally, the Rockbank Major Town Centre will not only be a retail destination, but a regional destination for a number of activities including employment, education, recreation, entertainment, health, civic, dining and shopping.
- The Town Centre will be connected to the western growth area through a series of higher order roads including the Western Freeway, Leakes Road and Taylors Road.

The PSP indicates that the Rockbank North MAC shop floorspace must not exceed 36,500sqm without a permit – this is given statutory effect through a floorspace cap applied through the Urban Growth Zone Schedule 4.

The concept plan for the MAC is shown in Figure 6 and includes the following anticipated land uses (PSP, p.22):

- **Town Centre Core** - Supermarkets, discount department stores, mini major stores, showrooms, shops and stores, cafes, restaurants, bars and clubs, hotels, places of assembly, office, medium and high density residential, short stay accommodation and serviced apartments, car parking, bus interchange.
- **Commercial** - Offices, office/warehouses, service industry, child care, medical services, health and beauty services, higher order and long life learning services, community services.
- **Mixed-Use** - Ground floor office with upper floor residential, ground floor retail with upper floor residential or office, mix of retail, office and residential areas, medium and high density residential.
- **Civic Facilities** - Council facilities (library, indoor sports centre, community centre), emergency services, health facilities.
- **Education Facilities** - Primary education, secondary education, private and independent education facilities.
- **Residential** - Medium density residential, high density residential, mixed use residential, retirement living and aged care services, soho (small office home office) products, student accommodation.
- **Town Square/Public Space** - A number of public spaces in an urban setting such as town squares, plazas, malls and urban parks.

F6. ROCKBANK NORTH MAC CONCEPT PLAN



Source: Growth Areas Authority, Rockbank North PSP, 2012, p. 22.

A preliminary land budget prepared by Tract for the MAC is shown in Table 2. It is estimated that there is approximately 31.27ha of land available for development within the MAC area subject to the UDF, 17.11ha of which is located within the subject site.

The town centre core has an approximate land area of 9.24ha, all of which is within the subject site.

T2. ROCKBANK NORTH MAC – PRELIMINARY LAND BUDGET

Map Colour Code	Land Use	Subject Site Land Area (ha)	Woodlea Land Area (ha)	Total Area (ha)
	Town Centre Core	9.24	0.00	9.24
	Mixed Use	0.36	6.65	7.01
	Commercial	1.49	4.68	6.17
	High Density Residential	5.38	1.78	7.15
	Civic	0.00	1.03	1.03
	Passive Open Space	0.63	0.02	0.66
	Total	17.11	14.16	31.27

Source: Tract, 2019.

For the purposes of estimating the physical capacity of the MAC land, a potential employment yield analysis has been prepared as shown in Table 3. This has been prepared based on high level assumptions including:

- Site coverages of between 40% and 60%;
- Retail and commercial uses generally occupying 1-2 storeys, with residential above in some precincts;
- Employment densities consistent with middle and outer suburbs of Melbourne at present.

It is noted that these are relatively conservative assumptions which largely reflect current development conditions and outcomes, and that higher density development and employment results may be physically achieved over the long development period of this project. The estimates have been prepared for context only and should not be used as expected employment 'outcomes' or 'targets'.

T3. ESTIMATED EMPLOYMENT CAPACITY BASED ON PRELIMINARY LAND USE BUDGET

Land Use	Total Area (ha)	Site coverage (%)	Storeys (commercial)	Gross Floorspace (commercial)	Jobs Density (per sqm)	Jobs
Town Centre Core	9.24	40%	1	40,000	30	1,200 – 1,300
Mixed Use	7.01	60%	1	42,000	30-50	800 – 1,400
Commercial	6.17	60%	2	74,000	20-40	1,900 – 3,700
High Density Res.	7.15	N/A	N/A	N/A	N/A	-
Civic	1.03	60%	1	6,000	30-50	100 - 200
Passive Open Space	0.66	N/A	N/A	N/A	N/A	-
Total	31.27					4,000 – 6,600

Source: Urban Enterprise based on preliminary land use budget prepared by Tract, 2019. Results rounded.

3.4. COUNCIL STRATEGIES

Council strategies which have been reviewed and used to inform this assessment include:

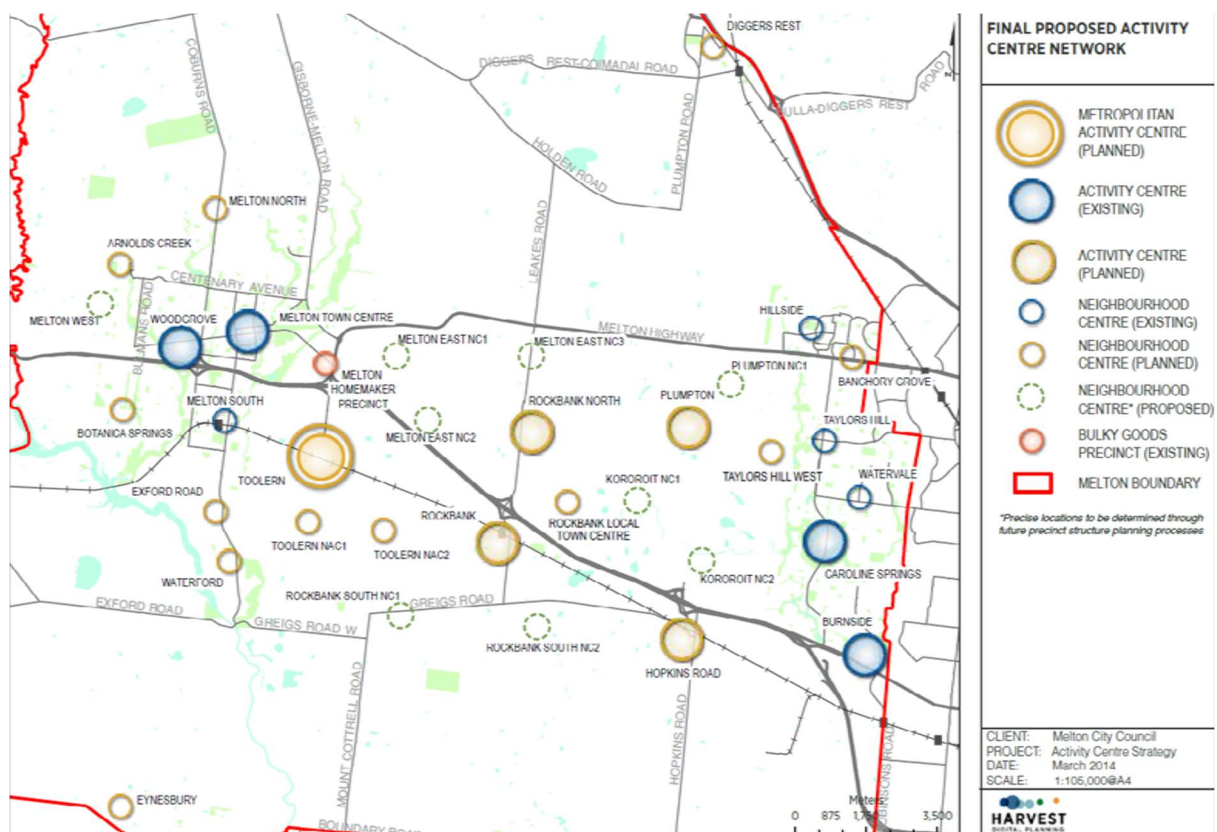
THE MELTON ACTIVITY CENTRES STRATEGY (2014)

The Melton Activity Centres Strategy was prepared in 2014 by Tim Nott with Harvest Digital Planning and Hansen Partnership. The strategy recognises Toolern as the Metropolitan Activity Centre (now known as Cobblebank), supported by the following Activity Centres:

- Burnside,
- Caroline Springs Town Centre;
- Hopkins Road;
- Melton Town Centre;
- Plumpton Town Centre;
- Rockbank Town Centre;
- Rockbank North Town Centre; and
- Woodgrove.

The Activity Centre network proposed in the strategy is shown in Figure 7.

F7. PROPOSED ACTIVITY CENTRE NETWORK



Source: Melton Retail and Activity Centres Strategy, 2014, p. 36

The Activity Centre Strategy utilises a catchment size of 50,000 people for sub-regional centre planning and suggests that a sub-regional Activity Centre should capture broadly 40% of the retail spending of the catchment. The strategy notes that for a catchment of 50,000 people, the supportable retail floorspace is likely to be

approximately 35,000 sqm of conventional retailing and up to 20,000 sqm of bulky good floorspace. The Strategy notes that it would be prudent to encourage the provision of at least 40% non-retail space in order to generate a breadth of employment choices.

The Strategy also made recommendations in regard to floorspace caps, which included recommending the removal of the current shop floorspace caps for Toolern and Rockbank North and increasing the caps for some smaller centres, noting: “the Strategy recommends that the relevant schedule to the UGZ be amended to reflect the ultimate floorspace caps identified by the Melton Retail and Activity Centre Strategy to provide flexibility to the market”⁴.

T4. PROPOSED CHANGES TO FLOORSPACE CAPS, MELTON ACTIVITY CENTRE STRATEGY

Proposed Centre	Current Identified Cap	Proposed New Cap
Toolern	30,000 sqm	No cap for centre overall – noting that retention of existing cap should remain
Rockbank North (MAC)	36,500 sqm	No cap for centre
Melton North	5,000 sqm	11,000 sqm
Exford Road	4,000 sqm	7,500 sqm
Waterford	4,000 sqm	4,000 sqm
Ferris Road	4,000 sqm	7,500 sqm
Rockbank North (LAC)	5,700 sqm	7,000 sqm
Diggers Rest	6,000 sqm	8,000 sqm

Source: Melton Retail and Activity Centres Strategy, 2014, p. 36

MELTON ECONOMIC DEVELOPMENT AND TOURISM PLAN 2014-2030

Review of the Melton City Council Economic Development and Tourism Plan 2014-2030 (EDTP) provides the following insights in regard to the economic context of the Western region and City of Melton:

Western Region:

- Expected to host 12-13% of metropolitan employment growth;
- Manufacturing is a key area of employment;
- Key exports are manufacturing and logistics;
- Higher than state average rate of residents with low qualifications;
- Key infrastructure projects including rail, road and freight.

Local Context:

- Anticipated increase in population of 120,000 residents by 2030;
- Limited employment role;
- Four main industrial areas (Toolern, Melton township, Melton East and Melton South);
- Funding for Western BACE (Business Accelerator and Centre for Excellence) – now constructed.

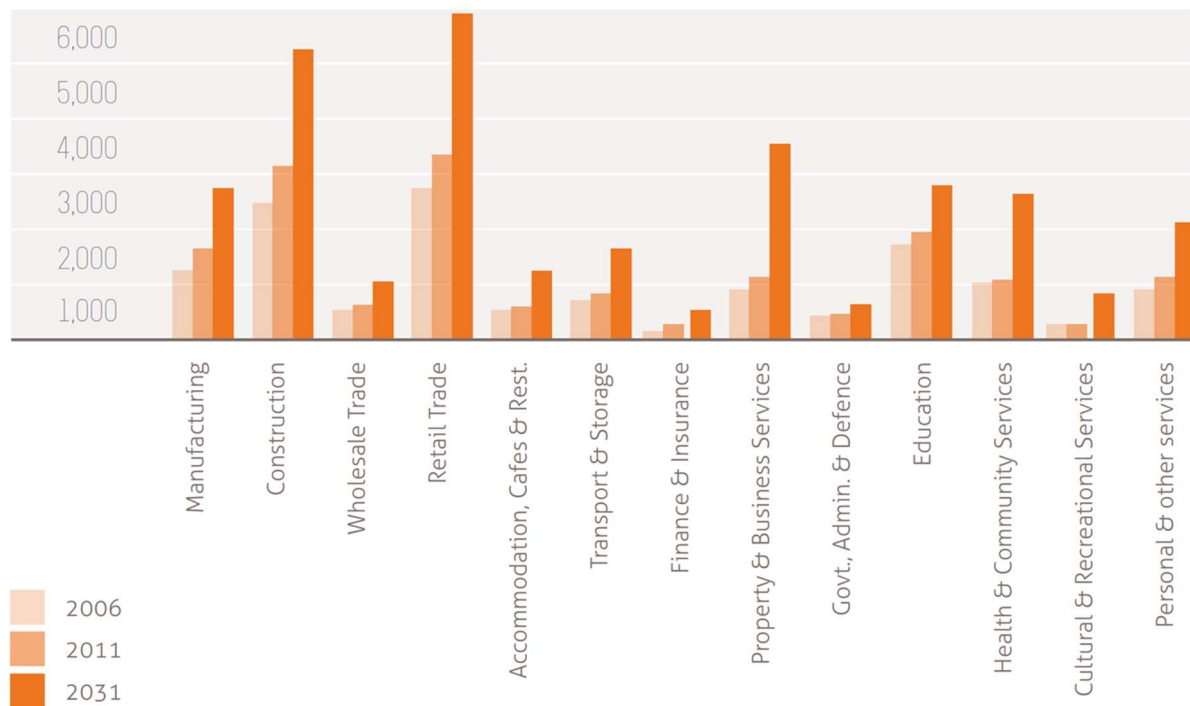
The EDTP includes an employment forecast to 2031 by activity which is reproduced in Figure 8. The forecast shows that the largest employment demand will be generated by retail trade and construction. The greatest increase is expected in ‘Property and Business Services’.

⁴ Melton Retail and Activity Centres Strategy, 2014, p. 21

The five themes of the strategy are:

1. Business Growth and Attraction;
2. City Promotion and Tourism;
3. Innovation and Technology;
4. Learning and Capacity Building;
5. Planning for Future Growth.

F8. EMPLOYMENT GROWTH FORECAST CITY OF MELTON



Source: Melton Economic Development and Tourism Strategy, data source: ABS – SGS Economics and Planning

3.5. KEY POINTS

- The Rockbank North MAC is centrally located within a major urban growth area, with the PSP expected to accommodate at least 20,000 residents.
- The MAC has a land area of approximately 31ha and has the capacity to accommodate in the order of 4,000 to 6,600 jobs at full development. Shop floorspace in the MAC is currently capped at 36,500 sqm without a permit.
- The MAC is planned to serve a sub-regional retail, commercial, entertainment, education, health and civic role, along with higher density residential land use. The MAC is expected to function within a broader network which includes a Principal Activity Centre at Toolern and a range of other sub-regional and neighbourhood activity centres and employment precincts in the Western growth corridor.
- Growth corridor planning seeks to increase employment retention in Melbourne’s growth areas, a need also acknowledged in Council’s strategies which identify a relatively low-skilled labour force, the opportunity for jobs growth in retail, construction and professional services, and the need to promote business growth, innovation and technology and education.

4. ECONOMIC CONTEXT

4.1. INTRODUCTION

This section provides economic and demographic analysis for the City of Melton and West Growth Corridor to inform the context for the MAC. A range of data areas and benchmark suburbs are analysed, the boundaries of which are shown in Appendix A. The socio-economic characteristics of these areas provide an indication of the potential profile of future residents of the catchment of the Rockbank North MAC.

4.2. POPULATION AND DEMOGRAPHICS

POPULATION

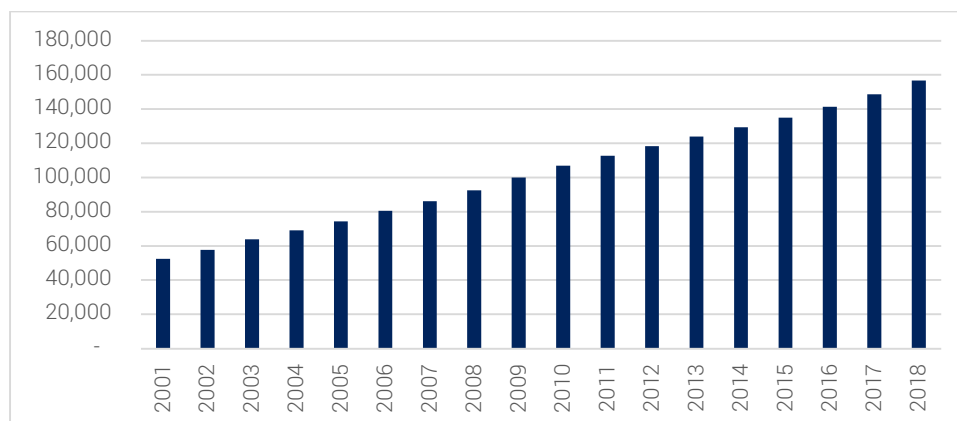
The resident population of the City of Melton has tripled since 2001, growing at an average rate of 6.6% between 2001 and 2018 and 4.8% per annum in the past 5 years from 2013 to 2018.

T5. POPULATION GROWTH CITY OF MELTON 2001-2018

Area	2001	2018	AAG 2001-2018	AAG 2013-2018
City of Melton	52,504	156,713	6.6%	4.8%

Source: ABS, Table Builder Pro, Melton LGA Place of Usual Residence, 2006, 2011 and 2016

F9. POPULATION CITY OF MELTON 2001-2018

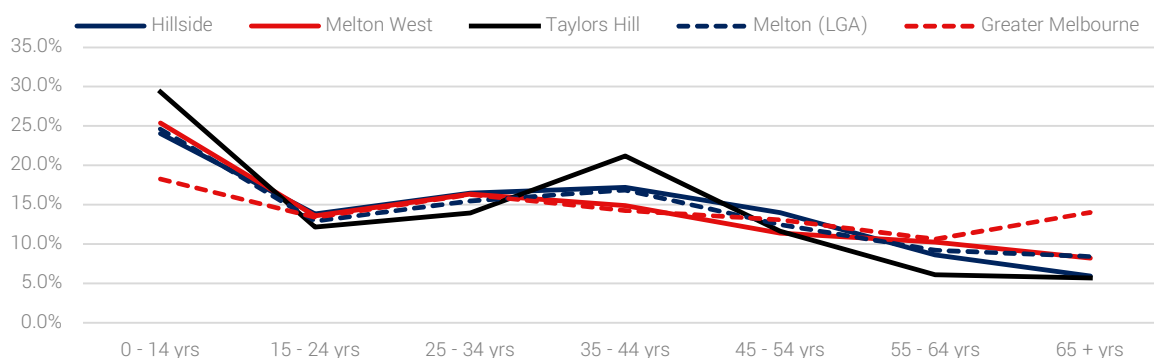


Source: ABS Regional Population Growth.

AGE PROFILE

The Western growth corridor has a higher proportion of young families (including those aged between 35-44 and 0-14 years) when compared to Greater Melbourne, and a lower proportion of older residents aged 65 years and over.

F10. AGE PROFILE



Source: ABS Census of Population and Housing 2016, Place of Usual Residence.

COUNTRY OF BIRTH

Across the City of Melton (and in particular in the western growth corridor areas of Melton West and Hillside), the proportion of Australian-born residents is decreasing as shown in Table 6, indicating that a significant proportion of new residents attracted to the western corridor's residential growth areas are migrants.

T6. PROPORTION OF RESIDENTS AUSTRALIAN BORN, 2011 AND 2016

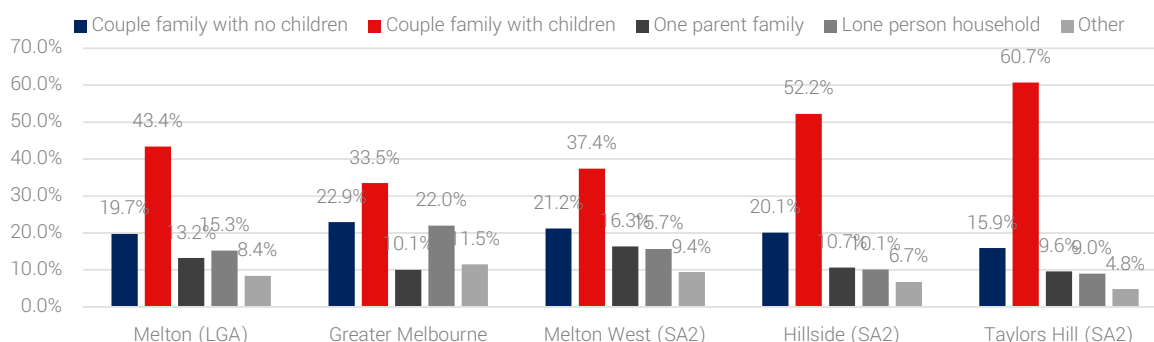
Area	2011	2016	Change
Melton (LGA)	67%	64%	-3%
Melton West (SA2)	75%	70%	-5%
Hillside (SA2)	69%	64%	-5%
Taylors Hill (SA2)	62%	61%	-1%
Greater Melbourne	63%	60%	-3%

Source: ABS Census of Population and Housing 2016, Place of Usual Residence.

HOUSEHOLD COMPOSITION

Household composition data confirms the higher proportion of family households in the western growth corridor when compared to Greater Melbourne. This is most pronounced for Taylors Hill and Hillside, which are located closest to metropolitan Melbourne's western growth front. There is also a higher proportion of one parent families in the western corridor and a lower proportion of lone person households.

F11. HOUSEHOLD COMPOSITION

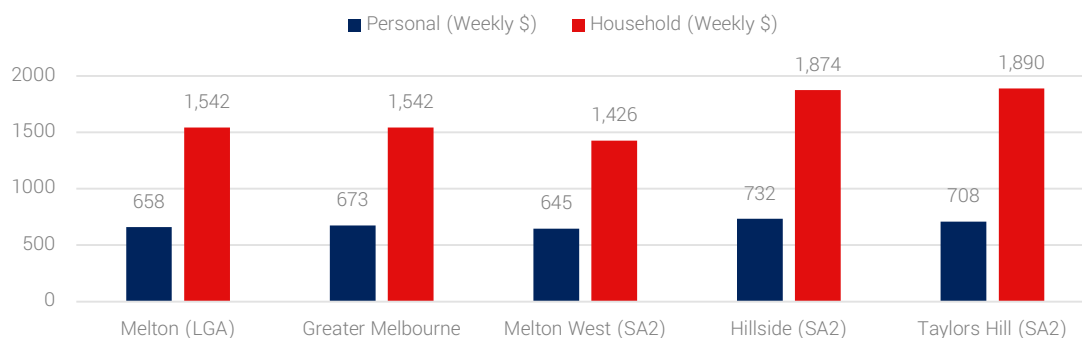


Source: ABS Census of Population and Housing 2016, Place of Usual Residence.

INCOME

Median household incomes in Melton are comparable with metropolitan Melbourne, however in the eastern part of the municipality incomes are considerably higher as shown in Figure 12. Taylors Hill (\$1,890) and Hillside (\$1,874) had the highest household incomes compared to Melton West (\$1,426), City of Melton (\$1,542) and Greater Melbourne (\$1,542). Incomes in Melton West are currently below the metropolitan and municipal medians.

F12. MEDIAN WEEKLY INCOMES, 2016



Source: ABS Census of Population and Housing 2016, Place of Usual Residence.

4.3. DWELLINGS

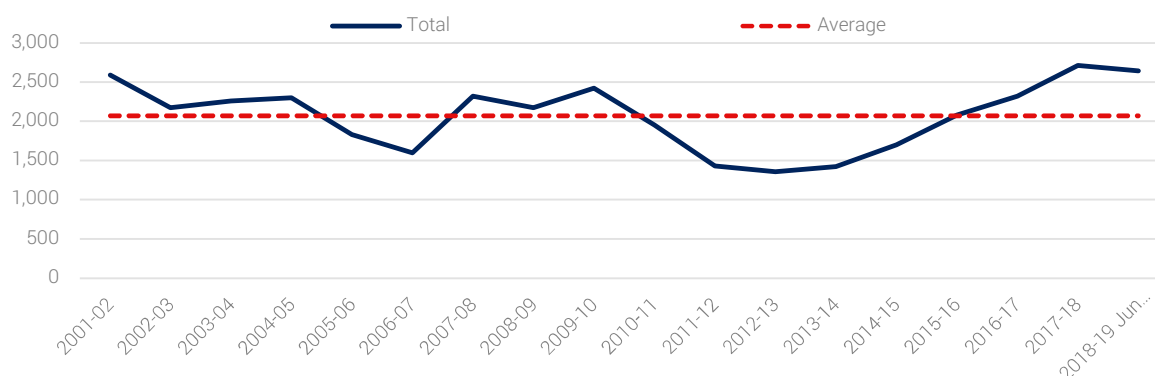
The number of dwellings in the City of Melton increased by 7,969 between 2011 and 2016, at a rate of 1,594 dwellings per annum.

T7. CITY OF MELTON DWELLINGS

	2011	2016	Change	Change p.a.
City of Melton	38,734	46,703	7,969	1,594

Since 2001, there have been an average of 2,071 dwellings approved for construction in the City each year. The number of approvals has significantly increased in the last 3 financial years, to an average annual approval of 2,560 dwellings per annum (2016-17 to 2018-19).

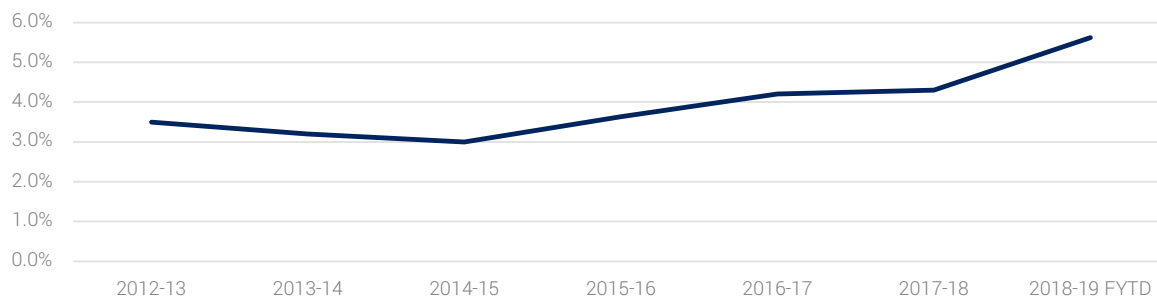
F13. DWELLING APPROVALS CITY OF MELTON 2001 TO 2019



Source: Australian Bureau of Statistics, Building Approvals, Australia, City of Melton

In 2018-19, dwelling approvals in Melton comprised 5.6% of Greater Melbourne’s approvals. This proportion has consistently increased since 2014, meaning that the western growth corridor is an increasingly significant component of Melbourne’s development industry and population growth.

F14. PROPORTION OF MELBOURNE’S DWELLING APPROVALS IN MELTON



Source: ABS Dwelling Approvals 2012-19

DWELLING TYPES AND VALUES

Although the vast majority of dwelling approvals in Melton have been separate dwellings, medium density and higher density development in the City of Melton has been increasing. The number of medium density dwellings increased at an average annual rate of 7.9% between 2011 and 2016.

T8. DWELLING STRUCTURE

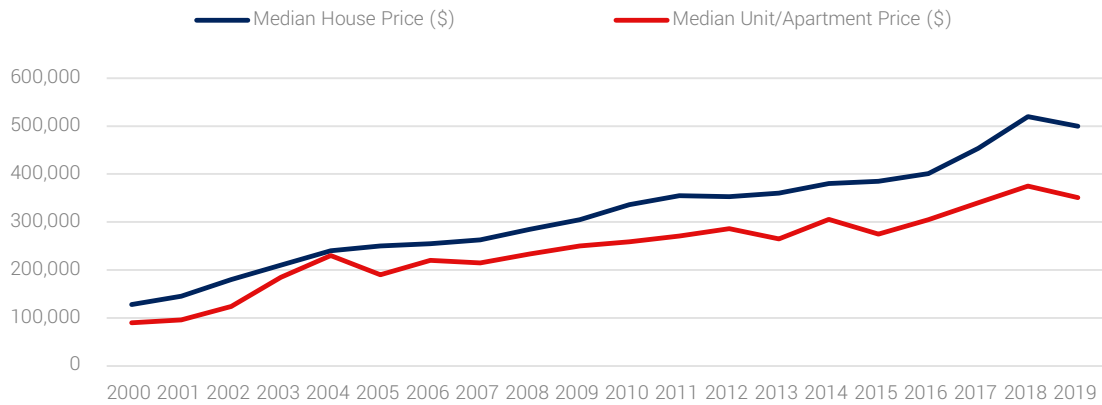
Dwelling type	2011	2016	AAG %	Proportion 2016	
	City of Melton			City of Melton	Greater Melbourne
Separate house	34,691	40,589	3.2%	87%	71%
Medium density	3,832	5,611	7.9%	12%	21%
High density	0	202	NA	0.4%	7%
Other	182	183	0.1%	0.4%	1%
Total	38,705	46,585		100%	100%

Source: id / ABS, 2011 and 2016.

Figure 15 shows the median house and unit price across the City of Melton between 2000 and 2019. House and unit prices have grown strongly over the period. Houses attracted a median price of \$520,000 in 2018, whilst units attracted a median sale price of \$375,000 in 2018.

The chart also shows that the gap between unit prices and house prices is increasing. In 2010, the average difference between the price of a house and unit was \$77,000, in 2019, this has increased to \$149,000. An alternative way to express this is the median unit price was 77% of the price of house in 2010 and 70% in 2019. As the relative levels of affordability for detached dwellings decrease, this will improve the attractiveness of medium and higher density development if a price advantage can be offered.

F15. MEDIAN HOUSE AND UNIT PRICE (CITY OF MELTON)



Source: DELWP. Valuer General Data, 2019.

4.4. FORECASTS

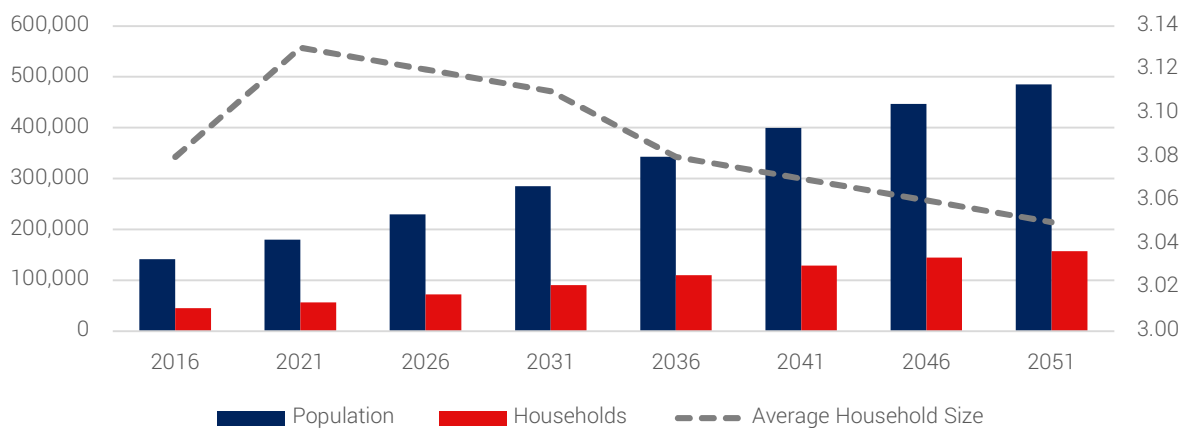
Given the likely long term nature of development of the corridor and development of the Rockbank North MAC, it is important to understand how the population is projected to change. Population and demographic forecasts prepared for Council are summarised below.

POPULATION, HOUSEHOLDS AND HOUSEHOLD SIZE

Id estimate the City of Melton population will increase to 485,061 by 2051. This equates to an average annual growth rate of 3.6% per annum between 2016 and 2051. Households are forecast to reach 157,409 by 2051, also equating to an annual average growth rate of 3.6% per annum.

There is expected to be limited change the average household size, ranging from between 3.05 and 3.12 over the forecast period as shown in Figure 16.

F16. FORECAST POPULATION, HOUSEHOLDS AND HOUSEHOLD SIZE

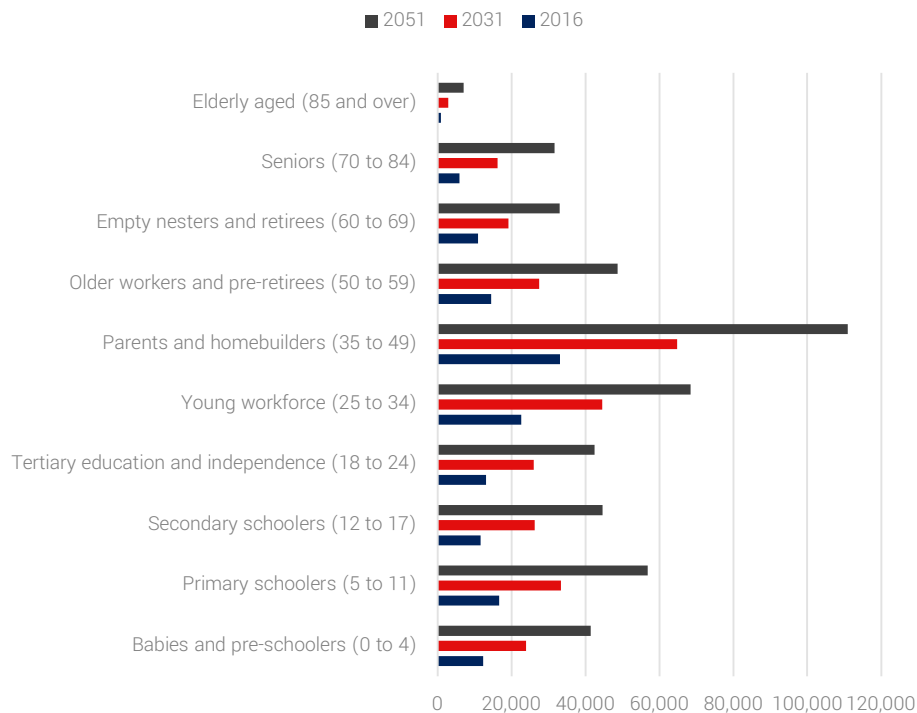


Source: Population and household forecasts, 2016 to 2051, prepared by .id, May 2019.

AGE GROUP [FORECAST]

Figure 17 shows the forecasts number of residents by age group. Growth is expected across all age groups, with 'Parents and Homebuilders' expected to contribute to a high proportion of the change (23% of population growth). There is also expected to be significant growth in the 'young workforce' age group (13% of population growth).

F17. SERVICE AGE GROUP CHANGE



Source: Population and household forecasts, 2016 to 2051, prepared by .id, May 2019.

4.5. LABOUR FORCE

The following provides an employment profile of residents in the City of Melton. Opportunities for business attraction will be influenced by the availability of labour in the local area and surrounds, in particular the skills and qualifications of the resident labour force.

LABOUR FORCE

In 2016, there were 64,970 people in the labour force in the City of Melton (48% of the population). Of these, 59% were employed full time, followed by 28% who worked part time.

T9. LABOUR FORCE CITY OF MELTON (2016)

Labour Force Status	Residents	%
Worked Full Time	38,562	59%
Worked Part Time	18,203	28%
Away from Work	3,262	5%
Unemployed	4,943	8%
Total Labour Force	64,970	100%

Source: ABS Census, 2016.

EDUCATION ATTAINMENT

Compared to Melbourne overall, the Melton labour force has a lower proportion of residents with higher education qualifications, with 18% of residents with Bachelor or higher education attainment compared with 30% across Melbourne.

T10. HIGHEST LEVEL OF EDUCATION ATTAINMENT

	Melton (C)	Greater Melbourne	Melton West (SA2)	Hillside (SA2)	Taylors Hill (SA2)
Postgraduate Degree Level	3%	7%	2%	3%	4%
Graduate Diploma and Graduate Certificate Level	2%	3%	1%	2%	2%
Bachelor Degree Level	13%	20%	9%	16%	17%
Advanced Diploma and Diploma Level	10%	10%	10%	11%	11%
Certificate III & IV Level	19%	14%	23%	19%	16%
Secondary Education - Years 10 and above	38%	32%	41%	37%	37%
Certificate I & II Level	0%	0%	0%	0%	0%
Secondary Education - Years 9 and below	10%	9%	10%	8%	8%
Supplementary Codes	4%	4%	4%	4%	4%

Source: ABS Census of Population and Housing 2016, Place of Usual Residence

INDUSTRY OF EMPLOYMENT

Based on 2016 data, Melton residents are more likely to work in construction, transport, public administration and manufacturing businesses than the Melbourne average. A much lower proportion of Melton and growth area residents (4-6%) were employed in professional services jobs than the Melbourne average (10%).

T11. INDUSTRY OF EMPLOYMENT

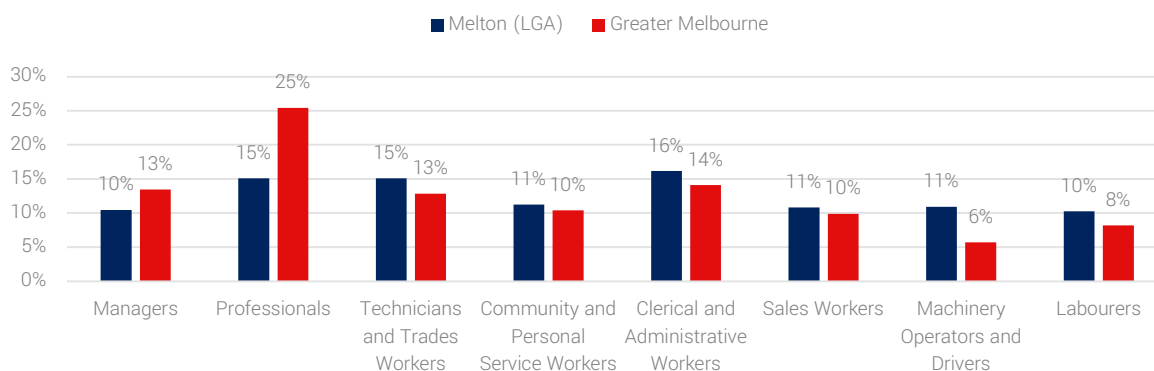
Industry	Melton (LGA)	Greater Melbourne	Melton West (SA2)	Hillside (SA2)	Taylors Hill (SA2)
Retail Trade	11%	11%	12%	12%	12%
Construction	11%	9%	11%	12%	11%
Health Care and Social Assistance	11%	13%	11%	11%	10%
Transport, Postal and Warehousing	11%	5%	11%	10%	10%
Manufacturing	9%	8%	9%	9%	9%
Education and Training	7%	9%	7%	8%	7%
Accommodation and Food Services	6%	7%	6%	6%	6%
Public Administration and Safety	6%	5%	6%	5%	5%
Professional, Scientific and Technical Services	5%	10%	4%	5%	6%
Financial and Insurance Services	4%	5%	3%	4%	6%
Other Services	4%	4%	4%	4%	4%
Administrative and Support Services	4%	4%	4%	3%	3%
Wholesale Trade	4%	4%	4%	3%	4%
Arts and Recreation Services	2%	2%	1%	2%	1%
Information Media and Telecommunications	2%	2%	1%	2%	2%
Rental, Hiring and Real Estate Services	1%	2%	2%	2%	2%
Electricity, Gas, Water and Waste Services	1%	1%	1%	1%	1%
Agriculture, Forestry and Fishing	0%	1%	1%	0%	0%
Mining	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%

Source: ABS, Place of Usual Residence, 2016.

OCCUPATION

The most common occupations for residents within the City of Melton include includes clerical and administrative workers, professionals and technicians and trade workers. When compared with Greater Melbourne, Melton has a significantly lower proportion of residents working as professionals as shown in Figure 18.

F18. OCCUPATION, 2016



Source: ABS Census of Population and Housing 2016, Place of Usual Residence.

LOCATION OF EMPLOYMENT

Across the City of Melton, 22% of residents worked within the LGA in 2016, with the remaining 78% working outside of the LGA in other municipalities. The most common employment destinations included Melbourne LGA (16%) and Brimbank LGA (16%).

The employment containment in Melton is particularly low when compared against other growth areas, a challenge identified in the Growth Corridor Plan and the Melton Economic Development Strategy.

T12. RESIDENTS WORKING IN CITY OF MELTON

	Melton (LGA)	Melton West (SA2)	Hillside (SA2)	Taylors Hill (SA2)
Melton (LGA)	22%	31%	15%	15%
Melbourne (LGA)	16%	13%	18%	20%
Brimbank (LGA)	16%	12%	20%	19%
Hume (LGA)	7%	6%	9%	8%
Wyndham (LGA)	7%	8%	4%	6%
Maribyrnong (C)	5%	4%	4%	5%
Hobsons Bay (C)	4%	4%	3%	4%
Moonee Valley (C)	3%	2%	5%	4%
Port Phillip (LGA)	2%	2%	3%	2%
Other	18%	19%	18%	17%
Total	100%	100%	100%	100%

Source: ABS Census of Population and Housing 2016, Place of Usual Residence.

4.6. EMPLOYMENT PROFILE

WORKERS INDUSTRY OF EMPLOYMENT

The most common industries of jobs located in the City of Melton are Retail Trade, Education and Training, Construction, Health Care and Social Assistance, Accommodation and Food Services and Public Administration and Training. These industries are primarily associated with servicing the population base of the area, as distinct from strategic businesses serving a broader metropolitan or regional catchment.

There was strong employment growth in the City of Melton between 2006 and 2016, with the highest growth occurring in Education and Training (+1,774 jobs), Health Care and Social Assistance (+1,697), Retail Trade (+1,679), Construction (+1,478 jobs) and Accommodation and Food Services (+1,202). Jobs growth in the City of Melton has been driven by population increase and institutional drivers in education and health.

Employment in Transport, Postal and Warehousing and Wholesale Trade also increased, particularly between 2011 and 2016, reflecting the new availability of industrial land and the access to transport infrastructure major roads and proximity to major industrial areas to the south east, the Port of Melbourne and Melbourne Airport.

Professional services jobs increased at an average of 10% per year over the period albeit from a low starting base.

Overall, employment increased at an average annual rate of 7% per annum between 2006 and 2016. This is a strong level of growth consistent with the rate of population growth over the period and is likely to reflect a period in which businesses were responding to the significant population growth across the municipality with expansion in retail, health, education and construction services, with some industrial and professional services growth also following.

T13. JOBS GROWTH BY INDUSTRY SECTOR CITY OF MELTON

Industry	2006	2011	2016	AAG 06-16	AAG 11-16	AAG 06-16
Retail Trade	1,737	2,509	3,416	8%	6%	7%
Education and Training	1,567	2,347	3,341	8%	7%	8%
Construction	1,325	1,803	2,803	6%	9%	8%
Health Care and Social Assistance	878	1,581	2,575	12%	10%	11%
Accommodation and Food Services	834	1,326	2,036	10%	9%	9%
Public Administration and Safety	950	1,336	1,889	7%	7%	7%
Transport, Postal and Warehousing	600	630	1,211	1%	14%	7%
Manufacturing	1,141	1,167	1,139	0%	0%	0%
Other Services	478	637	990	6%	9%	8%
Wholesale Trade	473	437	875	-2%	15%	6%
Professional, Scientific, Technical Services	314	554	807	12%	8%	10%
Administrative and Support Services	314	715	695	18%	-1%	8%
Arts and Recreation Services	172	284	397	11%	7%	9%
Financial and Insurance Services	163	169	359	1%	16%	8%
Rental, Hiring and Real Estate Services	167	256	349	9%	6%	8%
Agriculture, Forestry and Fishing	131	119	249	-2%	16%	7%
Information Media and Telecommunications	71	96	181	6%	14%	10%
Electricity, Gas, Water and Waste Services	48	93	115	14%	4%	9%
Mining	49	52	74	1%	7%	4%
Total	11,412	16,111	23,501	7%	8%	7%

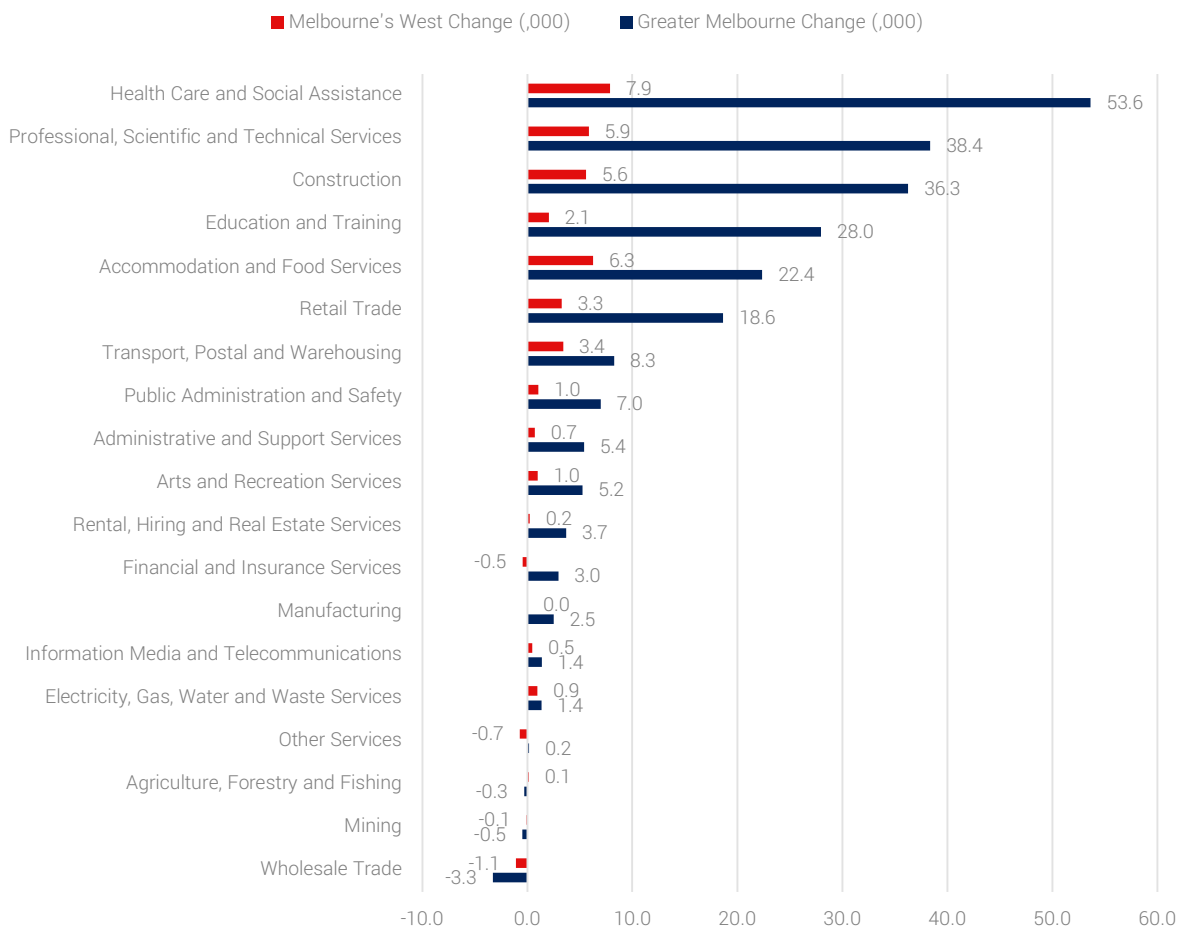
Source: ABS Census of Population and Housing 2016, Place of Usual Residence

FORECAST EMPLOYMENT PROFILE

Figure 19 shows the expected change in employment by industry across Greater Melbourne and Melbourne's West from 2018 to 2023 as published by the Department of Jobs and Small Business. Melbourne's West region includes the municipalities of Melton, Brimbank, Wyndham, Hobsons Bay and Maribyrnong, as well as Bacchus Marsh.

The industries forecast to experience the greatest increase in Melbourne's West are Health Care and Social Assistance, Accommodation and Food Services, Professional, Scientific and Technical Services, Construction, Transport and Retail Trade. These are primarily population services and institutional jobs, with transport and professional services the exceptions.

F19. PROJECTED EMPLOYMENT CHANGE



Source: Department of Jobs and Small Business, ABS, 2018.

4.6.1. ECONOMIC PROFILE SWOT

An SWOT analysis has been undertaken based on the key findings of the economic profile which will influence the role and function the Rockbank North MAC, in particular the extent to which the MAC could accommodate a greater service and employment role serving a broader catchment than the surrounding PSP residents.

T14. ECONOMIC PROFILE SWOT

<p>Strengths</p> <ul style="list-style-type: none"> • High historical and projected population growth. • Strong historical employment growth. • Increasing contribution to Melbourne’s population growth. • Strong retail employment base. • Higher than average household income for developed growth areas closer to metro Melbourne (i.e.. Hillside and Taylors Hill). 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Comparatively lower levels of bachelor degree (or higher) qualifications of residents. • A lower proportion of professionals within the City of Melton compared to Greater Melbourne. • A high proportion of the workforce currently employed in industry sectors not aligned to Activity Centre businesses including construction, transport, postal and warehousing and manufacturing. • Low level of job containment and a relatively low municipal employment level. • Lower levels of average household income for newly developed growth areas west of Melton (i.e.. Melton West).
<p>Opportunities</p> <ul style="list-style-type: none"> • Projected strong growth in professional services in Melbourne’s west • Up to 70,000 residents classified as ‘young workforce’ (aged 25 to 34 years) by 2051. • High proportion of family households, who may prefer to work locally to increase time with family. • Increases in proportion of residents with Advanced Diploma or Diplomas and Bachelor Degrees in recent years, potentially indicating a longer term trend toward a more skilled workforce. • Expected growth in professional services across the City of Melton. • Current low level of job containment, with opportunity to meet employment gaps and increase jobs containment. • Institutional investment and employment (i.e.. Health and education) as a driver for ancillary business development. 	<p>Threats</p> <ul style="list-style-type: none"> • Potential for primary workforce skills not to align with higher order activity centre jobs (i.e.. Office-based employment) and the potential impact of attracting new business investment.

Source: Urban Enterprise, 2019.

4.7. KEY FINDINGS

Population and Demographics

- The City of Melton has experienced strong population growth over the past ten years and is forecast to grow to a population of over 485,000 residents by 2051.
- City of Melton's contribution to Melbourne's dwelling growth has increased since 2014-15 as Melbourne's growth focus has shifted from the south-east to the north and west.
- Recent growth areas (Hillside and Taylors Hill) have a high proportion of family households with children.
- Forecasts suggest that there will be close to 70,000 residents classified as 'young workforce' (aged 25 to 34 years) by 2051.

Housing

- Housing profile is typical of growth area environments with majority of housing being detached larger dwellings. There has been strong growth in medium density dwellings (outpacing the growth rate of detached dwellings), and the price gap between houses and units is increasing which improves the conditions for medium density residential development.
- As the development of the Western Growth corridor continues, the market for medium and higher density residential will strengthen. In the short to medium term, accommodating medium density residential in a growth area environment will be driven by the value proposition of medium density living compared to detached dwellings including affordability, proximity to services and amenity (health, transport, retail, food and dining, open space).

Labour Force:

- Although a lower proportion of Melton residents have Bachelor's degree qualifications or higher than across Melbourne, this proportion is increasing.
- The current employment profile of residents is weighted towards retail, health, industrial (transport, postal and warehousing and manufacturing).
- There has been recent employment growth in the City of Melton including:
 - Population based employment (retail, accommodation and food services and health);
 - Institutional based employment (education, health, public administration and safety);
 - Industrial based employment (transport, postal and warehousing and construction).
- There is generally a lower proportion of residents employed in office-based employment in the City of Melton compared to Greater Melbourne including in professional services.
- There is generally a lower proportion of professionals within the City of Melton compared to Greater Melbourne.
- The majority of residents travel outside of Melton for work (78%), with Melbourne and Brimbank the main location of work outside the municipality.

Employment:

- A large proportion of employment in the City of Melton is in retail trade, education and training, construction, health care and social assistance.
- High level of jobs growth is likely a reflection of significant population growth across the municipality, driving the high rate of growth in retail, health, education, construction and professional services.
- Industrial based employment has also performed well including transport and warehousing and wholesale trade. Manufacturing employment has been stagnant.

- **Future change in employment is expected to be most significant in health, professional services, construction, accommodation and food services. Retail trade and transport and warehousing are also expected to drive a large proportion of employment growth in the west.**

4.8. IMPLICATIONS

The findings presented in this section provide important context for the type and scale of market demand for services and employment in the MAC. Although the demographic profile of the future PSPs will vary over time and may directly follow patterns of the municipality and its current growth area communities, the characteristics of the western growth area residents are important to consider as part of investment and the UDF.

MAC ROLE

The role and elements of the MAC will need to respond to the following:

- Significant strengths and opportunities created by population growth, particularly for retail, entertainment, health and education services with a focus on the family market and an average to low income level;
- A number of challenges to the attraction of traditional major business types, such as an existing labour force that is weighted towards population services and industrial sectors and a range of spatial weaknesses set out in the previous section, including alternative locations in nearby activity centres and employment precincts; and
- Opportunities presented by the considerable young workforce that is projected to live in the surrounding areas and policy support to reduce the number of residents who must travel to jobs outside the municipality.

With these considerations in mind, the following sections explore the optimum mix and scale of land uses and employment opportunities for the MAC.

5. RETAIL ASSESSMENT

5.1. INTRODUCTION

The provision of retail floorspace and associated business opportunities is the primary role of the Major Activity Centre, responding to the significant population growth projected for the catchment. This section provides an assessment of the type and scale of retail floorspace that should be planned for in the MAC.

5.2. RETAIL TRENDS

Retail conditions are changing, and in many cases new conditions present significant challenges to traditional forms of retailing. Relevant trends are summarised below:

- **The shopper experience** – There is an increasing trend toward making retail environments more vibrant, appealing and social experience for the shopper rather than offering a traditional transaction based experience. The ease of purchase through online retail has meant that retail environments are more curated and embrace mixed experience destinations, including dining, bars, entertainment, public spaces, events and other experiences. Individual retailers are experimenting with adding more to the retail experience, such as making spaces multi-purposes (art, events, classes, workshops) or as showrooms for consumers to interact with and experience products. There has also been a resurgence in traditional street based retail strips in some areas where a specialisation can be fostered and a high amenity experience offered.
- **Direct to consumer retail** – There is an increase in direct to consumer retailing, which has been made possible by the rise in online retailing as well as supported through advertising through non-traditional channels such as social media (e.g. Instagram). Direct to consumer retailers can have different bricks and mortar needs compared to traditional shopfront retail, including a rise in the need for spaces to act as distribution centres and a reduction in the need for wholesalers.
- **The rise in e-commerce** – e-commerce is prevalent Worldwide and Australia is no exception. Online spend in Australia reached 10% of total retail sales and more than 73% of Australian households having shopped online in 2018.⁵ Driven by an increase in online sales events, marketplaces (e.g. Amazon, Catch of the Day), mobile shopping, express delivery, click and collect and buy now pay later (BNPL).⁶ Areas where online retail is most prevalent includes fashion, variety stores/one stop shops, health and beauty, homewares and appliances, hobbies and recreational goods, media (e.g. books, prints, stationary) and speciality food and liquor (e.g. wine and non-perishable groceries).
- **Rise in ethically conscious consumers** – Research shows that in Australia 49% of online shoppers would choose to buy their products through businesses that are environmentally conscious, potentially leading to growth in retailers that adopt environmentally conscious practices.
- **The changing nature of department store retailing** – Department stores are struggling in the contemporary retail environment across the globe and Australia is no exception. Driven by a rise in online retail and a decline in the upper-middle and middle-income earners and low wages growth.⁷ Locally, Myer and David Jones are well known examples of this, with both major department stores in negotiations with landlords to reduce floorspace. Challenges are also faced by discount department stores such as Big-W, K-Mart and Target. A

⁵ Australia Post, Inside Australian Online Shopping, 2019 eCommerce Industry Report

⁶ Australia Post, Inside Australian Online Shopping, 2019 eCommerce Industry Report

⁷ The Conversation, 2019

recent example of this is the recent announcement from Big-W that it would be closing 30 outlets over the next three years.

- **Supermarket Retailing** – Supermarkets remain important anchors to activity centres. Woolworth and Coles continue to make up the majority of the grocery market in Australia, followed by Aldi and IGA. The rollout of 'Amazon Fresh' and the increase in the availability of consumer deliveries will further impact on the supermarket sector, creating strong price competition and warranting larger residential catchments and trading performance before major operators commit to new sites.

Overall there are headwinds being faced by bricks and mortar retailers, which are a result of increase in online retail and direct to consumer delivery, decline and repositioning of department store retail and increased competition within the supermarket sector.

Retail alone is no longer sufficient to drive the performance of the MAC. As a result, planning for the MAC needs to consider a broader retail environment with a focus on dining, entertainment and lifestyle. This includes the creation of a mixed use environment where living is integrated with retail and lifestyle to support elements such as recreation, socialising, hospitality and places to do business.

5.3. EXISTING AND PLANNED ACTIVITY CENTRES

The Rockbank Major Town Centre is part of a network of Town Centres within the Growth Corridor. Existing town centres in the corridor that may compete with Rockbank North MAC include:

- **Melton (Woodgrove)** located 8.7km west of Rockbank North MAC, this centre is identified as a future Regional Centre in the Melton Retail and Activity Centre Strategy.
- **Caroline Springs** located 8km east of Rockbank North MAC, is the nominated Activity Centre for East Melton.
- **Melton Activity Centre** located 7km west of Rockbank North MAC.

There are also a number of planned Activity Centres within the corridor that will compete with Rockbank North MAC, these include:

- **Toolern Metropolitan Activity Centre** (also known as **Cobblebank**), which is the largest Activity Centre proposed within the corridor on the Melton Train line, approximately 5km south-west of the Rockbank MAC. The Centre has a retail floorspace cap of 70,000 sqm. A Draft Urban Design Framework (2019) has been prepared for the Toolern⁹ Metropolitan Activity Centre, which proposes 591,000sqm including:
 - 70,000 sqm of retail floorspace;
 - 25,000 sqm of commercial floorspace;
 - 16,000 sqm of civic and community facilities;
 - 30,000 sqm of education facilities; and
 - 450,000 sqm of residential.⁹

The employment precinct to the north of the Toolern Metropolitan Activity Centre also includes provision for restricted retail.

- **Plumpton** - 4km east of Rockbank North MAC. Proposed retail floorspace of 45,000sqm¹⁰.

⁹ Toolern is designated as the Cobblebank Town Centre in the UDF

⁹ Source: Cobblebank Metropolitan Activity Centre (Toolern Town Centre) UDF, Draft, 2019

¹⁰ VPA, Plumpton Precinct Structure Plan, 2017

- **Rockbank** – 3km south of Rockbank North MAC. Proposed retail floorspace of 30,000sqm. In addition, 7,500sqm of office/commercial floorspace and 10,000sqm of large format retail is proposed.¹¹
- **Mt Atkinson** – 5.5km south-east of Rockbank North MAC. Proposed retail floorspace of 26,000sqm. A significant business/large format retail precinct (35,000-40,000 sqm) is also proposed adjacent to the MAC.¹²

There are also a number of neighbourhood centres either planned or proposed near the Rockbank North MAC, including a LAC 2.2km south-east of the MAC within Rockbank North. Three neighbourhood centres are proposed as part of future PSPs (Warrensbrook and Melton East). Importantly, Rockbank North is the largest Activity Centre proposed north of the Western Highway, servicing the PSP areas of Rockbank North, Warrensbrook PSP and Melton East PSP. A table summarising proposed and planned activity centres is provided in **Appendix A**.

5.4. RETAIL DEMAND

5.4.1. TRADE AREA

The trade area is the area for which the Rockbank North MAC will derive the majority of its retail trade. The following sets the retail trade area for the Rockbank North MAC having regard to the existing and planned Activity Centre hierarchy as well as physical considerations such as the Western Freeway.

The defining of the Rockbank North MAC trade area considers the following:

- The location and size of **competing Activity Centres** as discussed above, including Rockbank, Toolern (Cobblebank), Plumpton and Mt Atkinson.
- **Western Freeway** as a barrier to access, with main arterial road crossings proposed or planned for Leakes Road, Paynes Road, Mt Cottrell Road (subject to VicRoads investigation) and Ferres Road.
- Proposed **Outer Metropolitan Ring Road** to the east of the MAC. East-west access will be provided via Taylors Road.
- **Tarleton Road**, providing a main arterial connection between Warrensbrook PSP and Plumpton Activity Centre.
- The **Melton Highway** providing the northern most edge to the West Growth Area;
- **Kororoit Creek** to the north of the MAC and which is proposed to include a metropolitan cycling trail.
- Direct access to the MAC via Leakes Road and Beattys Road.
- The planned **major bus interchange** at Rockbank North MAC connecting the MAC to the Rockbank Train Station.

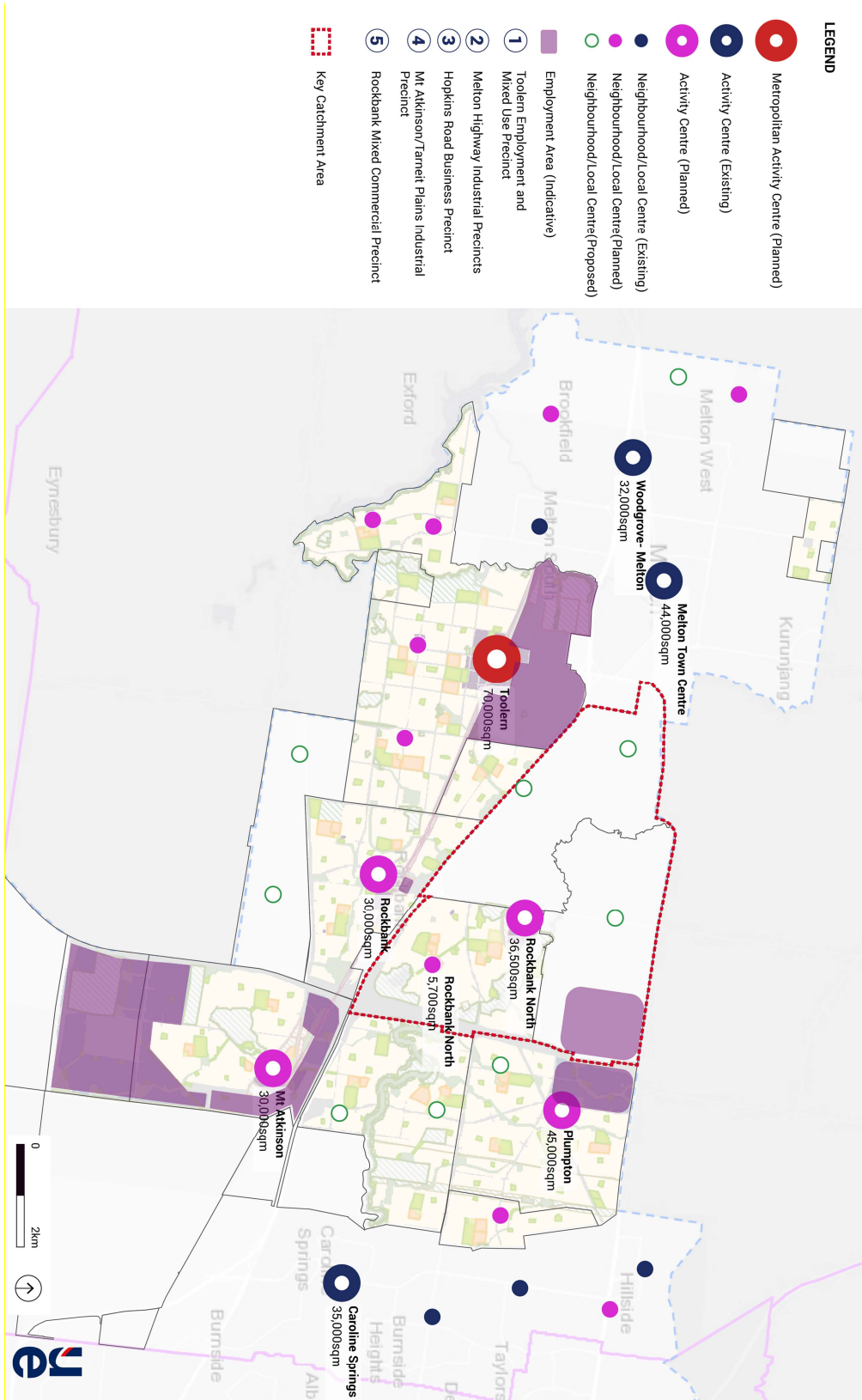
The Activity Centre Hierarchy and retail trade area for the Rockbank North MAC is shown in Figure 20. The primary trade area is considered to consist of the Rockbank North PSP area, the majority of the Warrensbrook PSP area and the majority of the Melton East PSP area. Some sections of Warrensbrook will be more proximate to the Plumpton Activity Centre and the Toolern MAC will be more accessible to some sections of the Melton East PSP than the Rockbank North MAC.

It is important to note that the primary trade area of the Rockbank North MAC is relatively well defined by the Western Freeway, separating the trade area from the primary catchments of the other larger centres proposed south of the highway at Toolern (Cobblebank) and Rockbank.

¹¹ Rockbank Major Town Centre Draft Urban Design Framework, 2018

¹² Mt Atkinson and Tarneit Plains Commercial and Industrial Land Review, JLL, 2015

F20. ACTIVITY CENTRE HIERARCHY AND TRADE AREA



Source: Urban Enterprise.

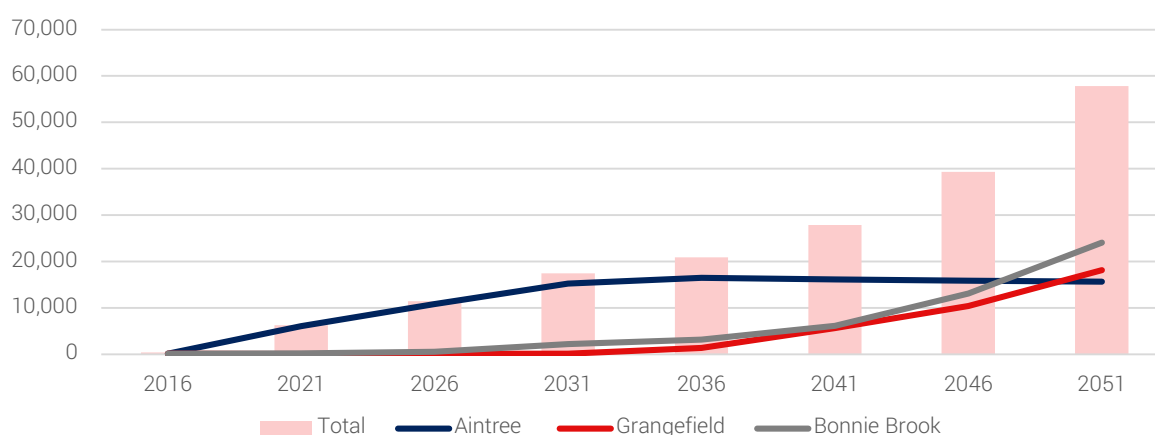
TRADE AREA POPULATION

Council's projections for the catchment area (ID Forecasts) estimate that the three PSP areas will approach full development at 2051 with a total approaching 60,000 residents.

Figure 21 shows the projected rate of growth. Rockbank North (comparable to the 'Aintree' data area) is expected to be the first catchment to reach resident capacity at around 2036. The Warrensbrook PSP ('Bonniebrook') is not expected to commence significant development until 2031, whilst Melton East ('Grangefields') is not expected to see noticeable residential population until 2036.

Full development of the catchment is therefore expected to be a long-term prospect, taking some 30+ years to develop. The catchment population is expected to change from a large PSP scale (approximately 20,000 residents) to a sub-regional scale (approaching 60,000 residents) between 2036 and 2051.

F21. CATCHMENT POPULATION FORECASTS



Source: Forecast .id

5.4.2. RETAIL EXPENDITURE

A retail expenditure model has been prepared to estimate the total available spending of residents of the MAC trade area at full development.

RESIDENT EXPENDITURE

The amount of retail expenditure per person in the trade area has been estimated by reference to Market Info data, the industry standard for retail modelling which is based on demographic characteristics of the 2016 Census matched with results of the ABS Household Expenditure Survey.

The expenditure per person of the catchment has been estimated by reference to the Caroline Springs SA2 and Taylors Hill SA2 as these areas present the closest developed areas to Rockbank North. Expenditure per person is estimated at \$12,565 (in 2019 dollars), as shown in Table 15.

T15. EXPENDITURE PER PERSON

	Food, Liquor and Groceries	Food Catering	Apparel, Homewares and Leisure	Bulky Goods	Retail Services	Total
2019	\$5,676	\$1,611	\$3,318	\$1,586	\$374	\$12,565

Source: Market Info, Urban Enterprise.

RETAIL EXPENDITURE AND SUPPORTABLE FLOORSPACE

The following provides an estimate of total retail spending in the trade area at full development in 2019 dollars.

It is estimated that retail spending of catchment area residents will increase from approximately \$58m in 2019 to \$850m at full development as shown in Table 16. This includes an allowance for real growth in per capita expenditure of 1% per annum between 2019 and 2031 and no growth thereafter.

T16. ROCKBANK NORTH MAC CATCHMENT RETAIL SPENDING (\$2019)

Retail Category	2019	2051
Food, Liquor and Groceries	\$26.2m	\$384.2m
Food Catering	\$7.4m	\$109.0m
Non-Food Retailing and Retail Services	\$24.3m	\$357.2m
Total	\$58.0m	\$850.5m

Source: Urban Enterprise, 2019

The locations at which this expenditure will occur and the proportion taking place in physical stores compared with direct to consumer alternatives will depend on a range of individual decisions and the availability of retail types and locations within and outside the catchment.

The most significant alternative locations for retail spending for catchment residents are expected to include higher order centres such as Toolern (Cobblebank), Melton, Watergardens, Highpoint and the Melbourne CBD. At the local level, a significant proportion of supermarket expenditure will also be attracted to neighbourhood shopping centres.

The amount of floorspace that resident expenditure will support within a MAC will ultimately depend on the attractiveness of the retailers and the retail environment, however sub-regional centres commonly achieve a market share in the order of 30-40% of spending in the primary catchment.

Using a market share of 40% for Rockbank North and 33% for other PSPs and allowance for 10% of trade to be derived from businesses, employees and other non-residents, **it is estimated that the MAC could support approximately 49,500sqm of retail floorspace at full development of the catchment as shown in Table 17.**

T17. SUPPORTABLE RETAIL FLOORSPACE

Item	2019	2051
Total Expenditure	\$58.0m	\$850.5m
MAC Sales Potential	\$25.8m	\$334.1m
Average Turnover Density (\$/sqm)	\$6,756	\$6,756
Supportable Floorspace (sqm)	3,800	49,500

Source: Urban Enterprise, 2019. Figures rounded.

Based on the above analysis, an indicative floorspace distribution has been provided as a guide for the UDF as shown in Table 18. This is based on an average market share across all retail types. In practice, the floorspace mix will vary based on decisions made by individual retailers and property managers.

T18. INDICATIVE FLOORSPACE DISTRIBUTION BY TYPE

Retail type	Floorspace (sqm)
Shop Sub-total	37,500
Restricted Retail (Bulky Goods)	12,000
Total	49,500

Source: Urban Enterprise.

5.5. NON-RETAIL SHOPFRONT FLOORSPACE

The MAC will have an important role in accommodating non-retail floorspace which is located amongst shops and retailers, including businesses such as real estate agents, medical clinics and allied health providers, legal, accounting and tax consultants and so on.

This type of floorspace is typically located on ground floors in shopfront premises, relying on the exposure and high foot traffic generated by retail anchors and other shops. Although some of the floorspace can be located on upper levels, this is generally not preferred due to the common business types and activities and reliance on foot traffic.

Non-retail shopfront floorspace typically occupies approximately 20-30% of floorspace in a sub-regional centre retail environment.

Accounting for 20% of all shopfront floorspace to be comprised of non-retail floorspace for planning purposes, approximately 12,400 sqm of non-retail shopfront floorspace would be required to be planned for within the UDF. This would bring the total of retail and non-retail shopfront floorspace to 50,000 sqm. Bulky goods floorspace is separate and additional to this amount.

5.6. TIMING AND STAGING

Demand for retail and other shopfront floorspace in the MAC will accumulate over a long period. In earlier stages of residential growth (i.e. build out of the Rockbank North PSP), it is not expected that any higher order retailers would be viable, however early stages of convenience focused floorspace (e.g. supermarket and other uses that would usually form part of a Neighbourhood Centre) could be supportable.

This will also depend on the location and timing of any residential development within the MAC itself and the ease of accessibility to the early stages of retail in the MAC from the balance of the Rockbank North PSP area. To this end, the UDF should seek to provide an urban layout which enables higher density residential uses to be located in close proximity to early retail stages so that a local catchment can be established (subject to development feasibility) and so that there is ready access to retail and other services for these future residents. This is important given the significant land use separation depicted on the PSP plans which would result in the retail area being physically separated from almost all residential areas in the catchment.

The main opportunity to support higher order retailers will occur once the Warrensbrook and Melton East PSP areas accommodate substantial residential populations. Higher order retailers and bulky goods floorspace should be located in parts of the MAC that are accessible to the broader catchment, including by public transport.

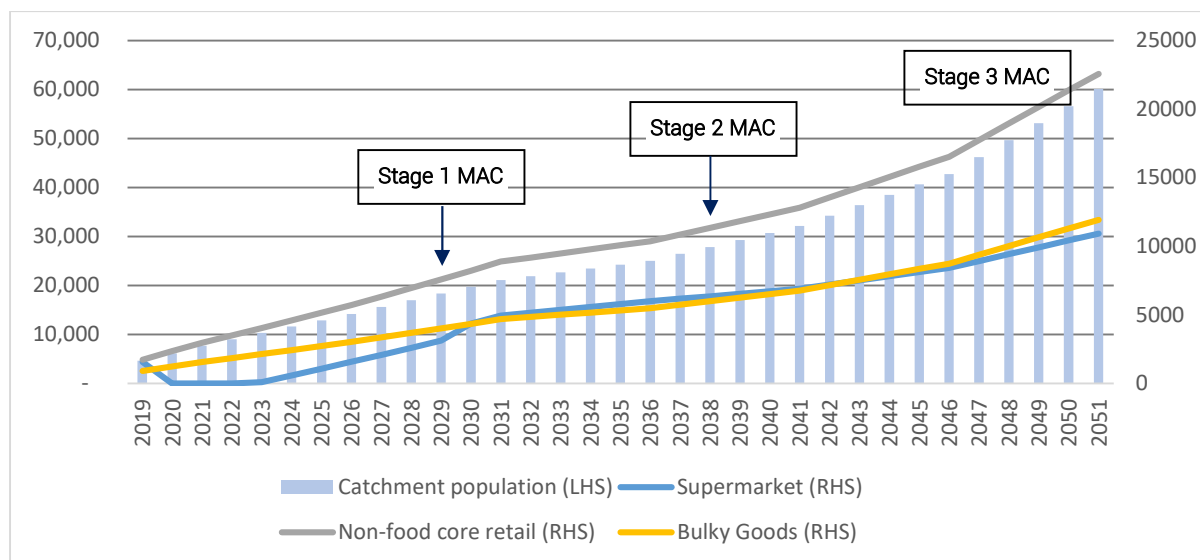
INDICATIVE STAGING

Figure 22 shows the projected supportable retail floorspace in the MAC over time, with annotations indicating the points at which logical stages of the retail offer could be added, including:

- Stage 1, when the demand for additional supermarket floorspace (over and above the Rockbank North NAC Coles) approaches 3,500sqm.
- Stage 2, when demand for a second MAC supermarket approaches 3,000sqm, bulky goods approaches 5,000sqm and non-supermarket core retail floorspace approaches 10,000sqm.
- Stage 3 would involve an expansion and maturation of the retail role to accommodate higher order retailers (such as comparison retailers and discount department stores) and a stronger hospitality role as the broader catchment fully develops and other land uses are well established, such as employment, entertainment, health, civic and education uses.

These stages are highly indicative, dependent on the population projections being achieved and should be treated as a general guide only given the very long term timeframe over which the catchment will develop and the prospect of many changes to economic and retail conditions over this period.

F22. SUPPORTABLE RETAIL FLOORSPACE AND INDICATIVE STAGING



Source: Urban Enterprise. Note: supportable floorspace quantum are indicative based on the findings of the retail model. In practice, floorspace provision will occur in stages and certain retail types (especially non-food) will become more supportable over time once supermarket and other anchors are established. The model is a simplified way to assess approximate staging of the retail offer.

5.7. KEY FINDINGS

- At present, many traditional retail types are facing strong competitive pressures. Retail alone is no longer sufficient to drive the performance of a MAC.
- Planning for the MAC should consider a broader mix of uses with a focus on dining, entertainment and lifestyle in addition to core retail uses, including the creation of a mixed-use environment where living is integrated with retail and lifestyle to support elements such as recreation, socialising, hospitality and places to do business.
- The retail catchment of the MAC includes three major PSP areas which will approach full development in 2051 with a total of 58,000 residents.
- It is estimated that the MAC could support approximately 49,500sqm of retail floorspace (including approximately 37,500sqm of shop floorspace and 12,000sqm of restricted retail). A further 12,000sqm should be planned for in non-retail shop floorspace within the core of the MAC.
- In earlier stages of residential growth in the catchment, the retail role of the MAC is expected to primarily serve the convenience needs of the local community. The UDF should seek to provide an urban layout which enables higher density residential uses to be located in close proximity to these early stages.
- The main opportunity to support higher order retailers will occur once the Warrensbrook and Melton East PSP areas accommodate substantial residential populations. Higher order retailers and bulky goods floorspace should be located in parts of the MAC that are accessible to the broader catchment, including by public transport.

6. COMMERCIAL ASSESSMENT

6.1. INTRODUCTION

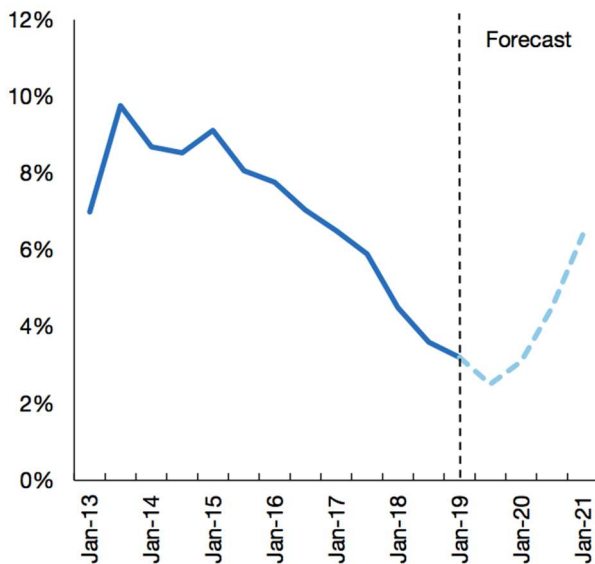
This section provides analysis of the potential economic and employment opportunities for commercial and other uses in the MAC in addition to those associated with retail activities. The primary land uses considered include office, commercial, entertainment, medical and education uses.

6.2. MELBOURNE'S OFFICE MARKET

Melbourne's office market has recently been experiencing historically low vacancy rates in recent years. In the CBD, vacancy rates are currently as low as 3% (see Figure 23).¹³ Historically low vacancies in the Melbourne CBD has led to increased demand for office space in the city fringe and inner areas and is expected to continue to spill over into demand into the suburban office market during the 'peak' period of this property market cycle.

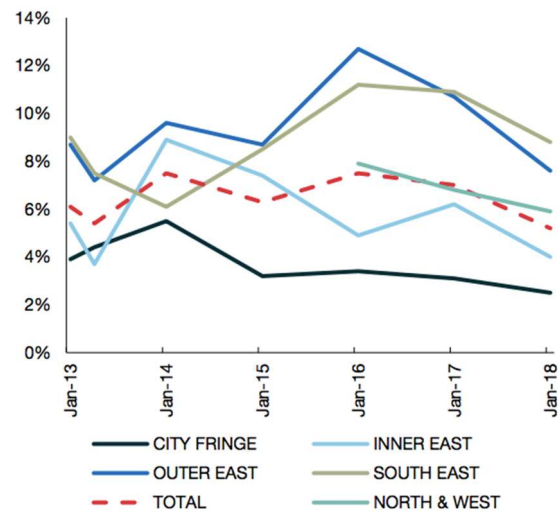
Vacancy rates in the suburban office market have also been trending down (see Figure 24) which has resulted in high rates of new office supply and consumption, particularly in Melbourne's east.

F23. MELBOURNE CBD OFFICE VACANCY



Source: Knight Frank Research, 2019

F24. METROPOLITAN MELBOURNE OFFICE VACANCY



Source: Knight Frank Research, 2019

Research by JLL into the Australian metropolitan office market provides the following insights:

- An increase in younger and highly educated workers in suburbs which have historically had lower levels of educational attainment due to the pressures of housing affordability resulting in a migration to more affordable suburbs and improvements to transportation and infrastructure. This has resulted in organisations

¹³ Knight Frank Research, Melbourne CBD Office Market Overview | March 2019

taking a more strategic approach to human resource planning, which has flowed through to decision making on locations.

- Ongoing transition of public sector jobs to metropolitan and regional locations.
- The rental value proposition of metropolitan office markets as a driver for relocation, with the pressure on CBD office rents expected to be greater than metropolitan office rents.
- An evolving investor composition of metropolitan office markets, with increased institutional investment.
- The expansion of small business in Melbourne has had a positive impact on Melbourne's metropolitan office markets, which has had a particularly strong impact on inner and fringe office markets, where businesses can access an educated labour force.

The North and West Melbourne metropolitan region is a relatively modest office market in terms of overall floorspace when compared to other suburban office markets such as the outer east (see Table 19), however, the region is increasing its office role through the emergence of Essendon Fields, Williams Landing and Bundoora as office locations. Although there are a number of examples of larger scale office developments emerging in previously uncommon areas such as middle-ring and outer suburbs, these are generally located in areas with particular advantages, such as proximate to a train station, university, freeway and/or central to a significant labour force.

Knight Frank has identified a strong recent increase in office floorspace demand in northern and western Melbourne, particularly in proximity to the residential growth areas in Melton and Wyndham, through the following commentary:

"The North & West region recorded 14,581 sqm of net absorption in 2018, more than five times the figure recorded in 2017. This surge in net absorption has been driven by an increase in business activity as businesses seek to capitalise on recent population growth in the North & West, particularly in the municipalities of Wyndham and Melton. Developers are taking note of the increase in tenant demand.

As an example, 20,000 sqm of office space will be developed in Essendon Fields over the next few years as developers attempt to entice corporates out of the CBD with the offer of being conveniently situated between the CBD and Melbourne's airports.

Some precincts in the North & West region are attracting specific types of tenants, such as University Hill in Bundoora whose close proximity to Austin Health and Northern Hospital is prompting the rise of commercial buildings focusing on the medical sector." (Knight Frank Melbourne Metropolitan Office April 2019, p.3)

T19. METROPOLITAN MELBOURNE OFFICE MARKET INDICATORS BY REGION (MARCH 2018)

Region	Total Stock (sqm)	Vacancy Rate (%)	Average Prime Net Face Rent (\$/sqm)	Average Secondary Net Face Rent (\$/sqm)
City Fringe	1,026,119	2.5%	450 - 500	350 - 400
Inner East	553,949	4.0%	380 - 410	300 - 330
Outer East	889,207	7.6%	290 - 340	220 - 270
South East	348,583	8.8%	250 - 280	185 - 220
North and West	238,189	5.9%	310 - 350	180 - 240
Total	3,056,047	5.2%	356	270

Source: Knight Frank Research, Melbourne Metropolitan Office Market Overview April 2018.

6.3. PLANNED EMPLOYMENT AREAS

The MAC is planned to form part of a network of activity centres and employment precincts which will present substantial competition from other areas for the attraction of businesses and employment. This includes:

- Areas proposed for industrial uses such as the Melton Highway Industrial precinct, parts of the Toolern Employment precinct and the Mt Atkinson and Tarneit Plains Industrial area; and
- Higher order activity and employment centres which could accommodate commercial uses (e.g. offices, research and development, etc) including Toolern (Cobblebank), Rockbank and the Hopkins Road Business Precinct, all of which benefit from their location on the Melton Rail line.

It is therefore important that planning for the MAC seeks to facilitate a centre which is differentiated from other employment areas while also seeking to address potential weaknesses such as access to a broader labour force through the provision of high capacity public transport to the MAC.

The West Growth Corridor Plan makes provision for:

- 3,960 gross hectares of industrial land;
- 1,410 gross hectares of business land; and
- 100 gross hectares of additional land which could also be provided for a range of local industrial and commercial activities across residential PSPs.

The West Growth Corridor Plan and PSPs identify the following employment precincts:

- **Mt Atkinson and Tarneit Plains PSP:**
 - **Industrial Precinct**– The West Growth Plan identifies a 1,510 ha (gross) extension to the Western Industrial Node, which extends into the Mt Atkinson and Tarneit Plains PSP area, south-east of Rockbank North. The Tarneit Plains employment precinct within the state significant Western Industrial Node and adjacent to the future Western Interstate Freight terminal make it a vital employment hub for the Western Growth Corridor. The existing Ravenhall industrial precinct is also located to the south-east of the Tarneit Plains and Mt Atkinson Business precinct, in the south-east corner of the City of Melton.
 - **Hopkins Road Business Precinct and other business areas in the PSP** - Approximately 81ha for a mix of business uses such as office park, research and development with potential to directly connect to the arterial road system, the future OMR, Western Highway Interchange and the designated principal public transport network.¹⁴
- **Toolern Employment and Mixed Use (TEMU) Precinct** – Approximately 390 ha of employment land is proposed as part of the Toolern Employment Precinct, which will be serviced by a high amenity mixed use precinct and Principal Town Centre. The area is proposed to include a mix of:
 - **Light industry** – 200ha including trade and service industries, warehousing and logistics, manufacturing and repairs, construction support and trade supplies and showrooms;
 - **Restricted retail/showrooms** – 35ha including a high proportion of showrooms such as automotive, trade supplies, building supplies and other products rather than household customers.
 - **Business Park** – 30ha of high amenity business park. The supporting economic analysis notes that in the longer term population growth in the surrounding region will generate more professional residents, new entrepreneurs and new start up business and that the TEMU may be attractive for larger regional

¹⁴ GAA, West Growth Corridor Plan, 2011

corporate offices and smaller scale strata office development, although noting this type of development may not eventuate for some years.

- **Specialised Uses** -50ha including potential to accommodate highly specialised research or education facilities, major specialised Government/public sector infrastructure, large scale recreational facilities, medical facility or hospital, major accommodation and conference facility.¹⁵
- **Melton Highway Industrial Precinct** (part Plumpton Business and Employment Precinct and part future Warrensbrook PSP) – The West Growth Corridor Plan plans for a new 325 ha (gross) industrial precinct along the northern part of the OMR. The precinct will have direct freight access to the metropolitan area, the Port of Melbourne and regional Victoria. The Plumpton PSP notes that the focus will be on local and sub regional businesses such as storage, printing, automotive and equipment repairs and supplies; ‘factoryettes’; distribution and postal services; workshops and studios for emerging local businesses; as well as other uses which need larger floor plates than typically available in town centres.¹⁶
- **Rockbank Mixed Commercial Precinct** – A mixed commercial precinct is proposed as part of the Rockbank PSP, to the north of the Rockbank Town Centre and adjacent to the Rockbank Train station to consolidate the role of the Rockbank Town Centre as a transit-orientated activity centre. The PSP proposes a mixed-use neighbourhood in the southern portion of the precinct, integrating medium and high density residential with retail and commercial activity. An assortment of commercial land uses are proposed further north, including offices, appropriate manufacturing and light industrial uses and limited retail uses.¹⁷

The Boral Quarry located to the east of Mt Atkinson /Tarneit Plains PSP is identified as future long term potential industrial land, which could generate in the order of 1,125 ha (gross) of industrial land.

The size and role of these employment areas are summarised in the Table 20 and spatially within the context of Rockbank North PSP (Figure 25).

T20. KEY EMPLOYMENT AREAS AND YIELDS IN WESTERN GROWTH CORRIDOR

Employment Area	Size	Employment Role	Jobs target
Mt Atkinson - Industrial	415ha	Industrial	6,225
Mt Atkinson - Hopkins Road Business Precinct	425,000sqm	Commercial / mixed use	8,680
Toolern Employment and Mixed Use Precinct	315ha	Business park Light industrial Restricted retail/ showrooms Specialised Uses	22,000
Melton Highway Industrial Precinct	325ha	Industrial	9,750 (estimated)
Rockbank Mixed Commercial Precinct	13ha*	Offices Manufacturing Light industrial	Not stated

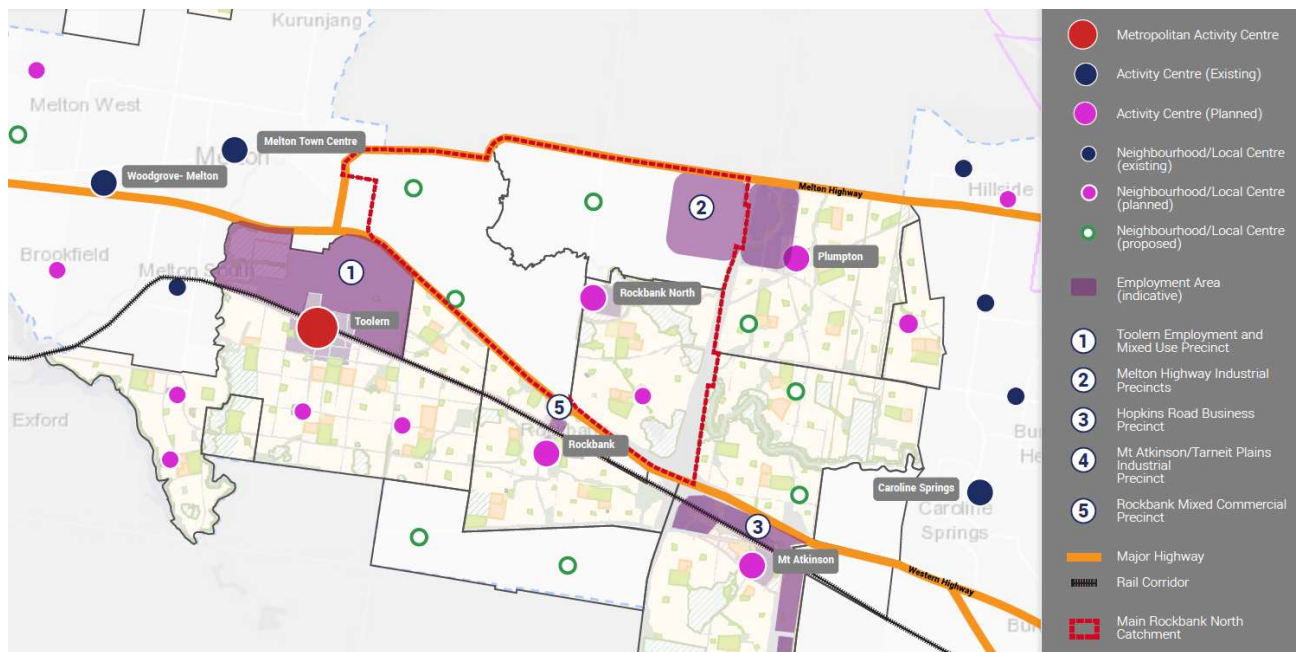
Source: various PSPs and Growth Corridor Framework, VPA.

¹⁵ Essential Economics, Draft Economic Input to the Toolern Employment and Mixed Use and Major Town Centre Urban Design Frameworks, 2017

¹⁶ VPA, Plumpton Precinct Structure Plan, 2017 p. 37.

¹⁷VPA, Rockbank Precinct Structure Plan, 2016, p.27

F25. PLANNED EMPLOYMENT AREAS



Source: Urban Enterprise.

6.4. COMMERCIAL ROLE OF ROCKBANK NORTH

There are a number of planned employment areas proximate to the Rockbank North PSP. The majority of these precincts are focused on providing industrial land and related office space.

There will also be numerous opportunities for businesses to establish in larger format business parks and dedicated commercial areas in proximity to the Rockbank North area, particularly as part of the Toolern Employment and Mixed Use Precinct and also within other Metropolitan and Major Activity Centres.

This warrants consideration of the points of difference that can be established and advantages that can be capitalised on at Rockbank North and reflected in the UDF. Traditional larger format employment areas will be available in many of the competing precincts in the western growth corridor, however higher density mixed use precincts may be limited to a relatively small number of activity centres. Emerging industries, such as those associated with technology, environmental issues and creative industries are expected to be established where these are opportunities for collaboration and interaction within a fine grain and mixed use precinct such as that possible in the MAC as distinct from a traditional business park.

This could position the Rockbank North MAC as a location for long term employment growth, business activity and business creation based on the following opportunities:

- The location central to a significant resident population and the opportunity to advance the concept of a 20-minute neighbourhood;
- Amenity benefits of proximity to the Kororoit Creek corridor and associated open space and proposed trail network;
- Proposed future infrastructure investment in the Outer Metropolitan Ring Road and the associated access to Melbourne Airport and the significant population base in the Wyndham area;
- The prospect of a future public transport interchange providing access to the rail network at Rockbank.

There are a number of potential barriers which would need to be overcome, including:

- Labour force with comparatively lower levels of bachelor degree (or higher) qualifications of residents.
- A lower proportion of professionals within the City of Melton compared to Greater Melbourne.
- Competition from other centres (planned and existing) as a location for business, including centres with higher provision of public transport (i.e.. on a train line/train station) and more appropriately skilled labour force for office jobs. This is particularly relevant to Cobblebank Metropolitan Activity Centre and to a lesser extent Rockbank MAC.
- Timing of infrastructure delivery of major projects including OMR, Kororoit Creek shared trail and public transport bus interchange.

In these circumstances, it is expected that the employment role and attractiveness of the Rockbank North MAC will comprise the following two elements:

- A local and sub-regional social, entertainment, services and small business employment role, primarily focused on supporting the catchment population; and
- A potential longer term office and commercial role supporting medium-sized businesses and new business creation, subject to the creation of a high quality urban environment, infrastructure investment and attraction of catalyst businesses and institutions.

It is understood that the vision for the MAC includes the attraction of investment across a range of institutions and land use types, including health, education, technology and business accelerators. These types of anchor organisations would be required to attract meaningful levels of employment from outside the local population catchment and population servicing roles.

POPULATION LED COMMERCIAL OPPORTUNITIES

The primary opportunity for commercial and employment uses to be accommodated in the MAC relate to population services for the surrounding residential catchment and the opportunity to provide spaces for the attraction and establishment of small businesses.

The following mix of uses should be planned within the MAC:

- **Health and Wellbeing** – medical practices, allied health services, fitness clubs, yoga and pilates studios, etc.
- **Entertainment** – bars, pubs, small cinema, live music venues, children’s indoor play venues, dance studios, function and event spaces.
- **Small Business** – small business establishment and growth, including potential graduation of home-based business into commercial floorspace, local direct to consumer businesses with distribution needs (i.e.. micro showroom, office and warehouse).
- **Satellite/Remote Working** – premises for businesses to set up satellite working environments for employees.
- **Civic** – Library/customer service centre, indoor sports centre, emergency services.
- **Other** – child care centres, accommodation, service station/car wash.

The small business role and the attraction of satellite or remote workers is considered particularly important in order to increase employment containment in the municipality and foster the 20 minute neighbourhood planning policy objective.

STRATEGIC BUSINESS OPPORTUNITIES

In addition to the population led commercial opportunities, the UDF should protect the opportunity to attract strategic businesses and land uses that will serve a broader catchment and assist increasing the availability of employment in the growth area.

The following circumstances and trends are expected to support the potential for a longer term office and commercial role in the MAC:

- Substantial population growth in the western growth corridor resulting in a large labour force with an increasing proportion of residents with professional qualifications;
- High office rents in established commercial precincts of Melbourne, encouraging businesses (especially new businesses) to consider suburban locations with lower rents; and
- The ongoing transition of the Melbourne economy towards knowledge-based professional services.

The attraction of office-based businesses which commonly rely primarily on the technical skills and knowledge of employees depends on the extent to which there is a competitive advantage of a particular location (such as high quality infrastructure or proximity to other similar businesses which enables economic agglomeration benefits to be obtained) and the extent to which staff can be attracted to work in a particular location due to its lifestyle and amenity attributes and accessibility to their place of residence.

In order to attract such businesses, the UDF should support a high amenity environment conducive to attracting professional businesses and employees, which includes access to public transport, high quality technology infrastructure, hospitality and open space uses, and opportunities for business agglomeration and interaction within the MAC.

Economic agglomeration builds on specialisation and anchor businesses and institutions which help to establish a competitive advantage of a particular location, such as proximity to a tertiary education provider, hospital or major specialised business. The UDF should make provision for land which may support larger format businesses or a tertiary education campus in the long term to enable this opportunity to be realised in the longer term.

Given the potential challenges in attracting businesses to locate to the location, a focus on smaller and start-up businesses in the short to medium term could also assist in creating the conditions that ultimately lead to the development of a substantial employment role at the MAC in the long term. This would be one way of differentiating the role of the MAC from other higher order activity centres which currently hold locational advantages, mainly in terms of public transport accessibility, such as Cobblebank and Rockbank.

Other catalysts for investment in the area are expected to include:

- Completion of the Taylors Road bridge crossing of Kororoit Creek in 2021, a key infrastructure connection between Rockbank North and the major residential areas of eastern Melton such as Caroline Springs and Taylors Hill. This road connection will provide direct access to a substantial labour force in Melbourne's west as well as improving the accessibility of Rockbank North residents to employment in western Melbourne and key nodes such as Melbourne Airport.
- The current developer-led proposal to establish trackless tram infrastructure between Rockbank Station and Rockbank North which forms part of the landowner's vision for the MAC. If delivered, this public transport connection would address one of the main competitive disadvantages of Rockbank North MAC compared with Rockbank and Cobblebank and would align with other elements of the vision such as the attraction of businesses and institutions with a focus on technology and innovation.

6.5. EMPLOYMENT TARGETS AND FLOORSPACE REQUIREMENTS

EMPLOYMENT TARGETS

Planning for Melbourne’s growth areas seeks to achieve an increase in the employment provision relative to population to address current challenges associated with the high proportion of residents commuting to central areas for employment.

The existing provision of jobs in Melbourne’s growth area municipalities relative to population varies widely, with three examples for Melton, Casey and Whittlesea shown in Table 21. A target often referred to in growth area planning is an objective to provide one job for every new household.

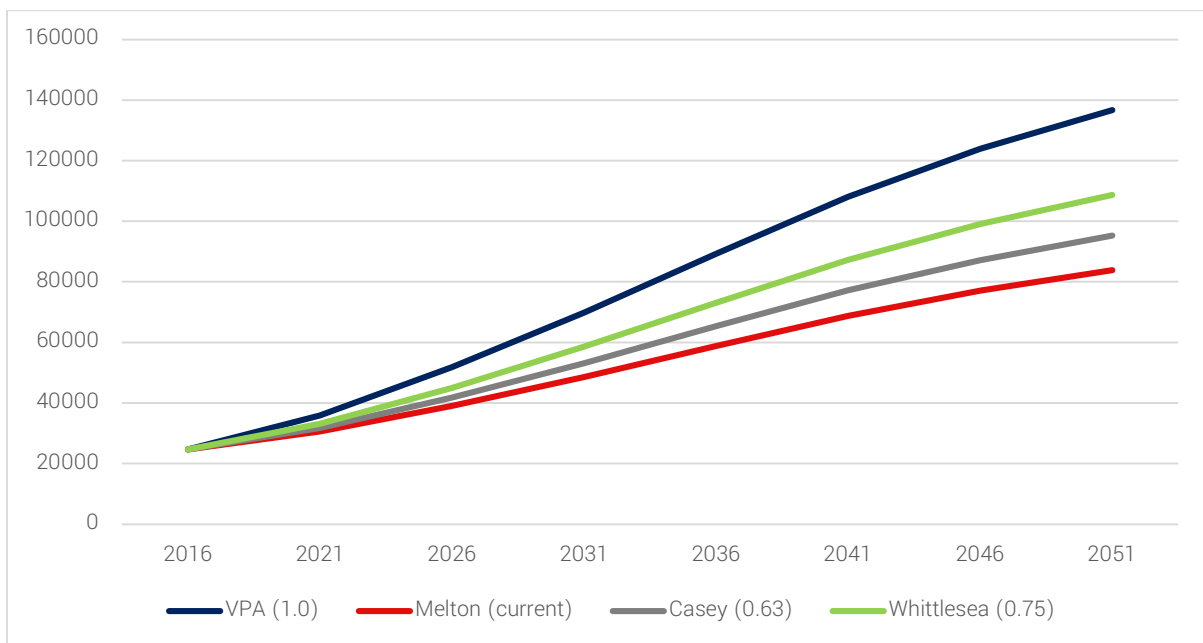
T21. EMPLOYMENT AND POPULATION IN MELBOURNE’S GROWTH AREA MUNICIPALITIES

AREA	JOBS PER HOUSEHOLD (2016)
City of Melton	0.53
City of Casey	0.63
City of Whittlesea	0.75
Growth Areas Target	1.00

Source: ABS Census, 2016.

An analysis of the potential employment growth across the City of Melton based on these potential outcomes is shown in Figure 26. This shows the number of jobs that could potentially be accommodated within the municipality over the period during which the catchment for the MAC is expected to develop.

F26. CITY OF MELTON EMPLOYMENT SCENARIOS



Source: .id, ABS, Urban Enterprise, 2019.

Table 22 shows a breakdown of the employment scenarios, indicating that the City could plan to accommodate between 59,000 and 112,000 additional jobs over the period 2016 to 2051.

Given the enduring challenges associated with attracting employment uses to urban growth areas, it is considered most realistic to plan for between 60,000 and 85,000 additional jobs in the municipality over the period. This would

equate to an average annual employment growth rate of between 3.5% and 4.3% per annum, the lower of which is comparable to the projected rate of population growth in the municipality to 2051.

T22. CITY OF MELTON EMPLOYMENT SCENARIOS

SCENARIO	JOBS PER HOUSEHOLD	2016	2021	2031	2041	2051	CHANGE 16-51
Melton	0.53	24,692	30,603	48,561	68,740	83,941	59,249
Casey	0.63		31,736	53,135	77,182	95,296	70,604
Whittlesea	0.75		33,078	58,553	87,180	108,745	84,053
VPA	1.0		35,873	69,840	108,009	136,762	112,070

Source: id, ABS, Urban Enterprise, 2019.

The locations and industries of these jobs will depend on a range of market factors that are not possible to predict, however broad estimates of the likely locations and industries can be made based on some high level assumptions.

Table 23 shows a potential distribution of these jobs by broad location, on the basis of the existing industry breakdown in Melton and allocating each industry to the location in which they would most commonly be located.

The results show that there would be a need for up to 17,000 town centre / office jobs across the municipality, in addition to retail and food employment. There would also be a proportion of the health sector employment that would be accommodated in town centres, including in medical clinics, allied health providers and so on.

T23. INDICATIVE DISTRIBUTION OF EMPLOYMENT BY INDUSTRY AND LOCATION

INDUSTRY GROUP / LOCATION	%	ADDITIONAL JOBS 2016 - 2051	
		Low	High
Retail, Food and Accommodation	23%	13,900	19,700
Town centre / office park	20%	11,900	16,900
Health and education	25%	15,100	21,400
Industrial and other	32%	19,000	27,000
Total	100%	60,000	85,000

Source: Urban Enterprise based on ABS Census.

Economic work which underpins growth corridor planning included an indicative distribution of 25-30% of all growth area jobs to be accommodated in Town Centres. This would result in a total of between 15,000 and 25,000 additional jobs being required in town centres across the City.

How these jobs are distributed across town centres as opposed to larger business parks will be a matter for individual business decisions, however it is important that a range of employment locations are available in existing areas and growth areas to provide alternatives to different business types.

ROCKBANK NORTH EMPLOYMENT

Tables 24 and 25 provide a high level analysis of the potential employment provision in the MAC based on the following assumptions and analysis outcomes:

- Retail, food and restricted retail as estimated in this report in terms of supportable floorspace with benchmark employment densities;
- An allowance for 10,000sqm of entertainment floorspace and 5,000sqm of medical floorspace in addition to shop retail;
- Other office and commercial uses which accommodate employment which would take the total activity centre employment up to the scale of 30% of all employment demand generated by the MAC catchment. The

resulting office-based employment would comprise between 10% and 17% of the projected growth in non-retail town centre / office jobs in the municipality (from Table 23).

It is recommended that the UDF should seek to accommodate approximately 120,000 - 134,000sqm of retail and commercial floorspace within the MAC with an aim to support up to 5,000 jobs.

T24. ROCKBANK NORTH MAC EMPLOYMENT TARGETS

ITEM	RESULT
Households in Catchment	24,000
Jobs per Household Target	0.75
Jobs	18,000
Activity Centre Jobs @ 30%	5,400
Neighbourhood Centre Jobs	600
Major Activity Centre Jobs	4,800
Population-led jobs (see Table 25)	2,050
Balance Target Jobs	2,750
Floorspace @ 20-25 sqm Per Job	55,000 – 69,000

Source: Urban Enterprise.

T25. ROCKBANK NORTH MAC EMPLOYMENT ESTIMATES

LAND USE	FLOORSPACE	EMPLOYMENT DENSITY (SQM PER JOB)	INDICATIVE EMPLOYMENT
Core Retail and Food	37,500	30	1,250
Restricted retail	12,000	40	300
Entertainment	10,000	40	250
Medical	5,000	20	250
Sub-total	64,500		2,050
Other office and commercial uses	55,000 - 69,000	20-25	1,300 – 2,900
Total	120,000 – 134,000		Up to 4,850

Source: Urban Enterprise.

It is noted that realisation of the 'other office and commercial' floorspace and employment would require successful business attraction, institutional and commercial investment and a conducive environment to business creation and employee attraction, especially given the strong competition from other proposed employment areas, activity centres and business parks in the growth corridor. It is possible that not all of this floorspace will be achieved, however given the long term nature of the opportunity, the strong trends towards professional jobs in the municipality and government policy support for greater employment in Melbourne's growth areas, it is recommended that the UDF plans to accommodate the upper end of this projection.

A component of the floorspace allocation of 55,000 – 69,000sqm of office and commercial space would be taken up in shopfront premises, estimated at 12,000sqm. The balance of the commercial floorspace would primarily be dedicated office space across a range of business types and sizes. The absorption of this scale of office floorspace would need to occur over a relatively long period of time given that the catchment population is currently very low and the office market in the west of Melbourne has only recently emerged as a genuine development opportunity.

The role and function of the MAC for business will change over time, with earlier opportunities likely to relate to small business development, which could include start-up businesses, graduation of home-based businesses to small commercial office spaces or smaller businesses seeking to relocate to a high activity environment (and perhaps attracted in earlier stages by lower rents). Co-working may also be an opportunity in earlier stages.

The attraction of medium to large businesses is likely to be a longer term prospect, with demand dependent on the following factors:

- Major infrastructure delivery facilitating movement of people and goods throughout a wide regional catchment (i.e., the OMR, bus interchange, regional shared trail, etc);
- When there is a significant local and regional skilled labour force available to businesses;
- If and when there is major institutional investment (i.e., in education, health, government offices/departments); and/or
- When an industry specialisation and agglomeration benefits can be established, for example through attraction of an anchor businesses or the availability of superior infrastructure offering a competitive advantage for a particular industry niche (e.g. technology, environmental, etc).

7. IMPLICATIONS FOR UDF

7.1. PLANNING FOR A STAGED DEVELOPMENT

As identified through this assessment, development of the MAC will need to be staged to respond to the projected growth in the catchment population and to enable a maturation of the scale and role of the retail, employment and service land uses within the centre over time.

Table 26 provides an indicative overview of the proposed staging of the MAC based on the findings of this assessment. It is noted that this is based on current information, population projections and economic conditions which are all subject to change, meaning that developers and Council should maintain a high degree of flexibility when planning the centre to enable the MAC to respond to changing community and market needs and opportunities as they arise.

T26. INDICATIVE DEVELOPMENT STAGES

STAGE	1	2	3
Indicative timing	2026-2030	2035-2040	2040+
Approximate catchment population	15,000 – 20,000	25,000 – 30,000	Up to 60,000+
Retail anchors	Supermarket, possible individual bulky goods retail	Second supermarket Larger retail specialties Bulky goods	Supermarkets Larger specialty retailers Discount Department Store Full bulky goods offering
Role	Neighbourhood Centre Local business location Initial attraction of education and medical services. Residential development	Emerging Major Activity Centre Growing employment role with small and medium businesses Emerging hospitality and entertainment offering Strong retail role Local population catchment built out through housing within and adjacent to MAC.	Established Major Activity Centre Strong focus on hospitality and entertainment. Established employment role across small, medium and larger businesses Full range of institutions and services available to service the catchment. Medium and high density housing and accommodation.

Source: Urban Enterprise.

7.2. LAND REQUIREMENTS

Table 27 provides an indication of land requirements to accommodate retail, non-retail shopfront and commercial uses within the Town Centre. These are by no means definitive and should be used as a guide based on the assumptions noted.

T27. MAC LAND REQUIREMENTS

Land Use	Floorspace	Indicative Storeys	Indicative Site Coverage	Indicative Net Land Area (ha)
Core retail, food, entertainment	47,500	1	50%	9.5
Medical and other non-retail shopfront uses	17,000	1	50%	3.4
Commercial office	Up to 57,000	3	50%	3.8
Restricted retail	12,000	1	30%	4.0
Sub-Total	Up to 133,500			20.7
Other Land Uses in Town Centre (as per PSP)				
Mixed Use				7.01
High Density Residential				7.15
Civic				1.03
Passive Open Space				0.66
Sub-Total				15.85
Total				36.55

Source: Urban Enterprise. Land areas are net of roads and assume each land use will be separate from the other.

The resulting land requirements (36.55ha under the development assumptions shown) exceed the MAC land allocation in the PSP of approximately 31ha. This does not include any strategic allowance or contingency amount to enable the attraction of a larger land user that would benefit the economic role of the MAC such as a satellite university campus.

In the possible absence of other opportunities to accommodate higher order employment and commercial uses in the sub-region across three PSPs, it is therefore considered important that the UDF seeks to facilitate development at medium and higher densities to maximise the economic potential of the MAC.

7.3. OTHER UDF IMPLICATIONS

The following economic issues and opportunities should be considered in the preparation of the UDF:

- **The need for genuine mixed use** – The importance of creating a mixed-use town centre environment should not be understated. Retail alone is not sufficient to drive a successful town centre nor is it adequate to create a vibrant destination for residents and workers. The UDF should encourage a genuine mix of land use types where feasible, including consideration of:
 - Retail shop-top development, providing opportunities for small offices, health, fitness classes, bars, entertainment uses and so on;
 - Consideration of ground floor commercial/retail tenancies in mixed use precincts;
 - Opportunities for residential development within close proximity to retail and entertainment precincts to support a vibrant and active town centre.
 - Avoiding large areas of segregated land uses, with the exception of a restricted retail precinct.

- **A strong focus on lifestyle, entertainment and recreation** – Population growth and the role of the MAC as the focal point for an otherwise relatively isolated community is the main driver for the types of uses that will be sought within the MAC. The UDF should seek to facilitate a strong lifestyle destination for residents of the sub-catchment, including a focus on food and dining, recreation and entertainment uses, public events, parks and gardens. The dedication of further land to passive and urban open spaces could be considered to assist.
- **The ‘heart’ of the town centre** – Retail is an important aspect of the Town Centre, with the attraction of anchor tenants such as supermarkets critical to the success of the Town Centre. However, it is recommended that consideration be given to staging the development of the Town Centre from the ‘outside in’, where core retail such as supermarkets and large format retail are located closer to the periphery. The heart of the town centre would then be developed as a lifestyle destination with a focus on dining (restaurants, cafes), entertainment (pubs, music venues), health (fitness studios), small offices, accommodation, civic uses (i.e.. library) and with strong links to a walkable residential catchment, open space and natural assets.
- **The importance of the public realm** – The MAC should provide a strong focus on creating a public realm that is conducive to people and activity. This includes using streets for outdoor dining and the use of public space for events, markets etc.
- **Leveraging natural assets** – A key advantage of the MAC is its proximity to the Kororoit Creek and Woodlands Conservation Area. These natural assets should be leveraged to increase the appeal of the Town Centre for residents, workers and visitors. The Town Centre should have a strong orientation to the creek to draw the amenity of the corridor into the Town Centre.
- **Differentiation** – the MAC will be seeking to attract businesses and investment to a corridor which has several other activity centres which are likely to be more accessible to regional residents by road and public transport, especially Cobblebank and Rockbank. It is therefore important that a differentiated vision is developed for Rockbank North which ensures (where possible) that a distinct economic role is evident and that businesses and investors can clearly differentiate between the various activity centre opportunities available. In Rockbank North, potential points of differentiation include the proposed focus on smaller and start-up businesses, entrepreneurialism, technology, knowledge and education, and seeking to capitalise on the location advantages of the natural assets of the Kororoit Creek.

For retail land uses, the catchment of Rockbank North is sufficient to sustain a substantial scale and mix of retailers without unreasonably competing with Rockbank and Cobblebank, and any timing and staging issues (for example, if a retail proposal in the MAC precedes the establishment of a sufficient local catchment and demand base) can be dealt with through the planning permit process.

- **The need for a strong transport network** – The economic role of the MAC would benefit from the creation of a strong transport network to linking to Rockbank Train station and the broader metropolitan network, especially to provide improved access to a regional labour force for businesses. One such proposal is the potential for trackless trams as a landowner-led initiative. The UDF should also seek to capitalise on the future Kororoit Creek shared path and linking this path to the Town Centre to encourage regular visits to retail, entertainment, employment and other functions from surrounding residential areas.
- **Enabling the evolution of business** – It is expected that the short-term opportunities for the Town Centre will be driven by population demand. In the short to medium term this will require a fine grain approach to the provision of commercial land, which supports the creation of mixed-use precincts and the creation of a high quality and active public realm to support local business investment.

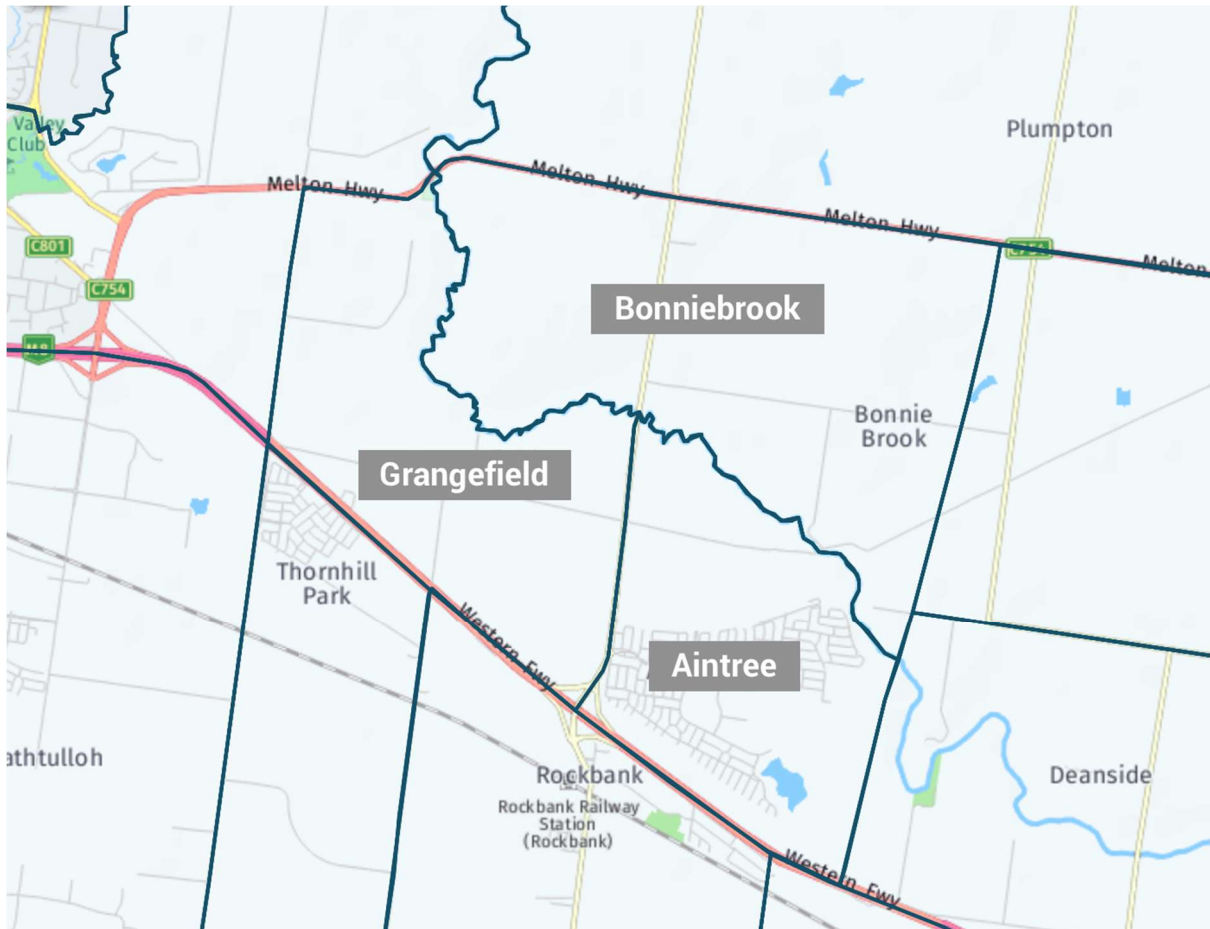
New businesses generally require low cost premises and can utilise a variety of premise types, including workshops, warehousing, shops, office space and even no premises at all by utilising hospitality premises and public infrastructure. Given the need to support business creation and a greater diversity of employment in the municipality, the UDF should seek to facilitate a variety of premise types, especially in earlier stages of the MAC development.

Business growth and development would also be supported by co-working or business incubator space to enable the graduation of home-based businesses to small businesses. These types of spaces could also be used as satellite working environments for existing offices located elsewhere in Melbourne. The office and employment role would be supported by the availability of high quality telecommunications infrastructure and opportunities for businesses and workers to collaborate within the MAC, as distinct from traditional segregated buildings in office parks.

- **Retaining market flexibility** – The UDF should enable short-term opportunities for retail and small businesses which will typically be developed at a lower density/scale but also support higher density and mixed-use development in the medium to long term.
- **Retain opportunity for the attraction of institutional investment** – Opportunities should be protected for the attraction of a major institution, such as a satellite campus for a tertiary education provider, a TAFE campus or health provider. This is particularly important as a major contributor to the potential differentiation of the MAC to focus on education, entrepreneurialism and innovation.
- **The benefit of integrating home, work and play** – The incorporation of medium density residential within the town centre will improve the vibrancy of the town centre, including through increased activation and support for small business. Medium and higher density development within the MAC should be located so that residents have good access to services but also so that businesses benefit from the integration of retail, employment and residential uses in appropriate areas encouraging interaction, sharing of ideas and opportunities for informal trade, collaboration and innovation.

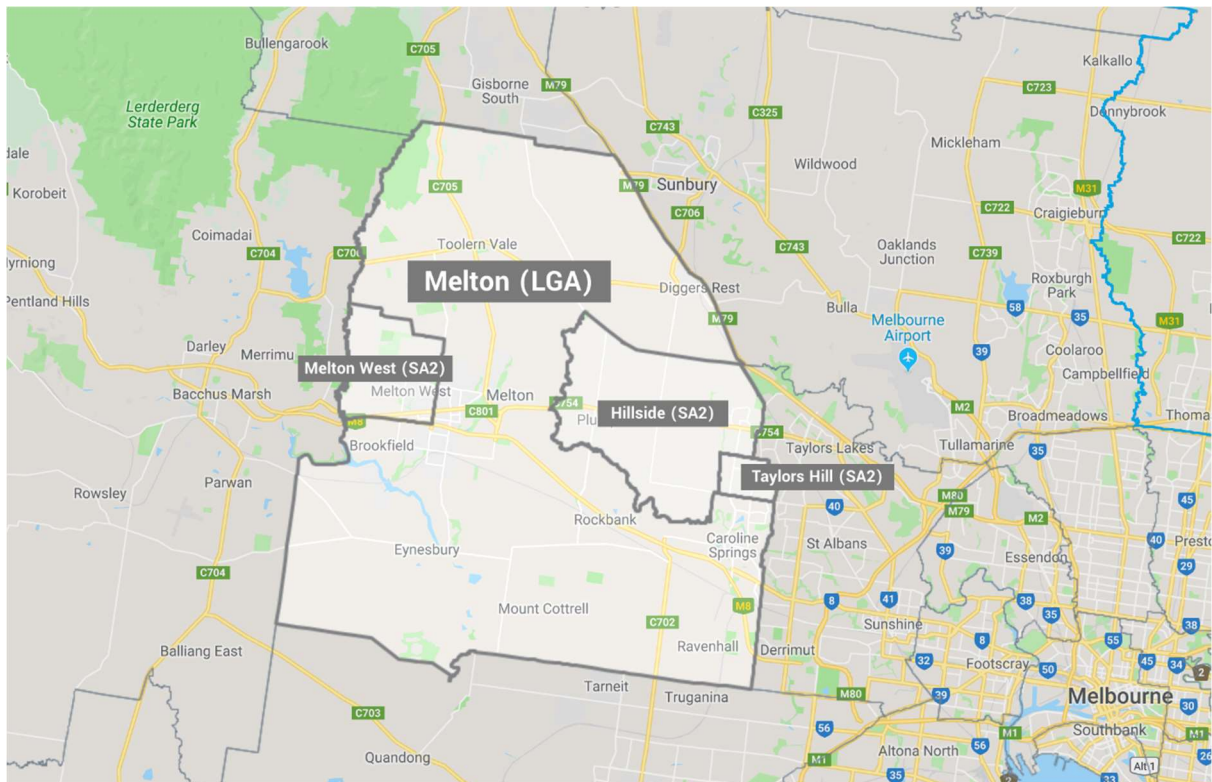
APPENDIX A FORECAST ID CATCHMENT MAP

F27. FORECAST ID AREAS



Source: Forecast .id.

APPENDIX B STATISTICAL AREAS



Source: Remplan Map Builder, annotated by Urban Enterprise, 2019

APPENDIX C PROPOSED / PLANNED ACTIVITY CENTRES

Activity Centre	Land Use Activities
<p>Rockbank North</p> <p>MAC</p> <p>36,500sqm (retail floorspace)</p>	<p>Town Centre Core (Supermarkets, discount department stores, mini major stores, showrooms, shops and stores, cafes, restaurants, bars and clubs, hotels, places of assembly, office, medium and high density residential , short stay accommodation and serviced apartments, car parking, bus interchange).</p> <p>Commercial (Offices, office/warehouses, service industry, child care, medical services, health and beauty services, higher order and long life learning services, community services).</p> <p>Mixed-Use (Ground floor office with upper floor residential, ground floor retail with upper floor residential or office, mix of retail, office and residential areas, medium and high density residential).</p> <p>Civic Facilities (Council facilities, library, indoor sports centre, community centre, emergency services, health facilities).</p> <p>Education Facilities (Primary education, secondary education, private and independent education facilities).</p> <p>Residential (Medium density residential, high density residential, mixed use residential, retirement living and aged care services, soho (small office home office) products, student accommodation).</p> <p>Town Square/Public Space (A number of public spaces in an urban settings such as town squares, plazas, malls and urban parks. A central destination node which acts as the central meeting space and the 'heart' of the Rockbank North community).</p>
<p>Toolern</p> <p>Metro AC</p> <p>70,000sqm (retail floorspace)</p>	<p>Retail (supermarkets, department stores, shops, cafes, restaurants, , speciality stores, showrooms, health and beauty, bars, large format, showrooms, manufacturing sales, landscape supplies)</p> <p>Commercial/office (offices, exhibition centre, child care, medical, entertainment, home based business)</p> <p>Residential (apartments, student accommodation, hotel, townhouses, aged care, retirement living).</p> <p>Community/Civic (Indoor sports stadium, performing Arts centre, Open sports ground, health facilities, police station, law courts, emergency services civic facilities)</p> <p>Education Facilities (Tertiary institution, private and independent education facilities)</p> <p>Public Space</p>
<p>Rockbank</p> <p>MAC</p> <p>30,000sqm (retail floorspace)</p>	<p>Retail (supermarkets, shops showrooms, DDS, cafes, restaurants, bars and clubs).</p> <p>Commercial (Offices, local service industry, child care, medical services, health and beauty, higher order and long life learning, community services).</p> <p>Mixed Use (Ground floor office, upper level residential, upper level office, ground floor retail, medium and high density residential)</p> <p>Civic/Health (emergency services, health facilities, places of assembly)</p> <p>Education (private education facilities)</p> <p>Residential (retirement living, small office, home office, student accommodation, serviced apartments, hotels)</p>
<p>Plumpton</p> <p>MAC</p> <p>45,000sqm (retail floorspace)</p>	<p>Retail (supermarkets, speciality retailers, DDS, mini majors, bulky goods retailing and display based retailing)</p> <p>Civic/Health/Education (education, health, aged care, civic services, higher order government, community, civic, education and health services)</p> <p>Social and entertainment services (cafes, restaurants, bars, taverns, hotels, performance venues and regional entertainment facilities, leisure, recreation and art and cultural uses).</p> <p>Residential (medium and high density housing, Serviced apartments, visitor accommodation).</p> <p>Commercial (office, warehouse, office/showroom).</p>

Activity Centre	Land Use Activities
Mt. Atkinson MAC 26,000sqm (retail floorspace) - (23,500sqm south of rail corridor and 2,500sqm north of rail corridor)	Full range of retail, commercial, mixed use and private community facilities including an education centre. High amenity food and beverage/entertainment area with higher density housing and waterway/wetlands connecting to the open space network.
Melton (Woodgrove) MAC 57,000sqm	Existing Centre
Caroline Springs MAC 35,000sqm	Existing Centre
Melton MAC	Existing Centre

Source: Data sourced from individual PSPs (VPA)

