ESSENTIAL ECONOMICS

Toolern Employment & Mixed Use and Major Town Centre Urban Design Frameworks

Economic Input

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City of Melton

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EXECUTIVE SUMMARY

Melton City Council have commissioned a consultant team led by Tract to prepare Urban Design Frameworks (UDFs) for:

- The Toolern Town Centre (100ha), and
- The Toolern Employment and Mixed-Use Areas (390ha).

This report provides the economic input required to ensure the UDFs are based on a sound understanding of the prevailing economic and commercial opportunities. In particular, this report provides the following:

- Identification of land use and floorspace requirements in the Toolern Town Centre UDF
- An overview of the potential types of land uses and their area requirements in the Toolern Employment and Mixed-Use Area.

Context Analysis

Toolern is situated in the Western Growth Corridor which is experiencing rapid residential development driven by the release of significant areas of affordable greenfield residential land. Over the coming decades, the Western Growth Corridor is estimated to accommodate a population of 377,000-plus people.

The Toolern Town Centre will be the Metropolitan Activity Centre serving this region and as such, will be the main centre providing a range of retail, commercial, community, entertainment and civic uses. The centre will be developed around the future Toolern Train Station.

Approximately 390ha of land located to the immediate north of the Toolern Town Centre has been identified for employment and mixed uses. This area will benefit from being adjacent to range of uses in the Toolern Town Centre as well as having strong transport links. The extensive land area identified for employment uses provides an opportunity for a range of uses including traditional industry, showroom and higher amenity employment uses such as business parks.

Both the Toolern Town Centre and Toolern Employment and Mixed Use (TEMU) areas will be important in providing local employment opportunities for existing and future residents, noting that as of 2011 65% of City of Melton residents travelled beyond the municipality for work.

Potential Toolern Town Centre Outcomes

The Toolern Town Centre will serve a large regional catchment extending from Caroline Springs in the east to Bacchus Marsh in the west. At full development, it is estimated the catchment will accommodate more than 370,000 persons.

Retail and Commercial Vision

The following Vision for retail and commercial uses has been developed for the Toolern Town Centre:

> *Toolern Town Centre will serve the entire Melton urban growth corridor and Bacchus Marsh. The centre will have a strong range of convenience and comparison retailing, complemented by a vibrant dining and entertainment scene. A high-amenity street-based environment will be supported by protected areas offering shoppers and visitors a pleasant year-around environment.*
>
> *Key elements of the town centre will also include commercial uses, as well as important health and education providers. Access to both retail and non-retail elements of the town centre will be made safe and convenient by high-quality public transport links.*

Retail Tenancy Mix and Staging

Having regard to analysis of retail development potential, trends in retail development and retailing in general, and a review of similar sized centres throughout Australia, potential for 70,000m^2 of retail floorspace as identified in the Toolern Precinct Structure Plan is reasonable.

A potential staging program is shown in the Table below which would allow for various components in the centre to be developed over time as relevant demand thresholds are achieved.

Toolern Town Centre Supportable Retail Floorspace at Development Capacity

	Stage 1	Stage 2	Full Development (*)
Major Tenants			
Discount Department Store 1	-	7,000m^2	7,000m^2
Discount Department Store 2	-	-	7,000m^2
Supermarket 1	4,000m^2	4,000m^2	4,500m^2
Supermarket 2	-	4,000m^2	4,500m^2
Supermarket 3 (Discount Supermarket)	-	-	1,500m^2
Total Majors	**4,000m^2**	**15,000m^2**	**24,500m^2**
Mini Majors (@ 1,500m^2 each)	1,500m^2	4,500m^2	12,000m^2
Specialty Shops			
Café and Restaurant	500m^2	2,000m^2	6,000m^2
Other Food	1,000m^2	1,500m^2	2,500m^2
Non-Food	1,000m^2	7,000m^2	15,000m^2
Total Specialty Shops	**2,500m^2**	**10,500m^2**	**23,500m^2**
Total Shop Retail	**8,000m^2**	**30,000m^2**	**60,000m^2**
Restricted Retail	-	10,000m^2	10,000m^2
Total Retail	**8,000m^2**	**40,000m^2**	**70,000m^2**

Source: Essential Economics, published sources;

Non-Retail Uses

In total, potential exists for a further 120,000m^2 of non-retail uses in the Toolern Town Centre as shown in the Table below.

Toolern Town Centre Non-Retail Floorspace at Development Capacity

Land Use Type	Full Development
Commercial Office	30,000m^2
Entertainment	15,000m^2
Other Commercial	15,000m^2
Medical	10,000m^2
Administration/Community	10,000m^2
Tertiary Education	30,000m^2
Aquatic/Leisure Centre	10,000m^2
Total Commercial	**120,000m^2**

Source: Essential Economics

Toolern Employment and Mixed Use Outcomes

At least a 50-year supply of employment land exists in the Western Growth Corridor; however, the TEMU provides an opportunity for employment uses seeking affordable land in close proximity to a Metropolitan Activity Centre. This is likely to include a range of uses such as:

- Light industrial uses such as trade and service industries, warehousing and logistics, manufacturing and repairs, construction support, and trade supplies and showrooms.

- Restricted Retail/Showroom. Areas of the TEMU with good exposure and accessibility to key road transport connections can accommodate restricted retail and showroom uses.

- Business Park. The TEMU may be attractive for larger regional corporate offices that require access to an extensive labour force, or service-related business that serve the needs of other industrial and commercial businesses located nearby. Potential may also exist for smaller-scale strata-office development.

- Specialised Uses. The significant scale of the TEMU provides opportunities for other large-footprint and hard-to-locate land uses to operate in proximity to a metropolitan activity centre, and significant transport and other infrastructure. An existing example is the Victorian Harness Racing Sports Club facility (Tabcorp Park) which is located on the northern edge of the TEMU and occupies approximately 30ha. Other possible specialised uses attracted to the TEMU could include highly specialised research or education facilities (e.g. synchrotron equivalent), major specialised Government/public sector infrastructure (e.g. police training academy equivalent), large-scale recreational facilities (e.g. theme park), medical facility or hospital (major regional-level hospital, including research facilities), or major accommodation and conference facility.

On an overall basis, it is appropriate for the UDF to consider the potential to accommodate approximately 315ha of employment uses, as summarised in the Table below. Other non-employment uses will account for the balance of development, primarily in the mixed-use area.

TEMU Indicative Land Use Mix

Land Use	Area
Light Industry	200ha
Restricted Retail/Showroom	35ha
Business Park	30ha
Specialised Uses	50ha
Other (residential, public space etc)	75ha
Total TEMU	390ha

Source: Essential Economics

INTRODUCTION

Background

Melton City Council have commissioned a consultant team led by Tract to prepare Urban Design Frameworks (UDFs) for:

- The Toolern Town Centre (100ha), and
- The Toolern Employment and Mixed-Use Areas (390ha).

The UDF for the Toolern Town Centre is an update to the previous UDF prepared in 2012. In contrast, this is the first UDF process for the Employment and Mixed-Use Areas.

Economic input is required to ensure the UDFs are based on a sound understanding of the prevailing economic and commercial opportunities. In particular, the economic analysis will:

- Determine the types of land uses and their area requirements in the Toolern Employment and Mixed-Use Area; and
- Assess if the previously identified land use and floorspace requirements in the Toolern Town Centre UDF are appropriate or need to be adjusted.

The analysis builds on previous work undertaken for the Toolern Precinct Structure Plan (PSP) and surrounding Melton urban growth corridor, with new analysis taking into account the latest economic inputs and industry trends.

Project Objective

To undertake an economic -analysis which informs the development of UDFs for the Toolern Town Centre and Toolern Employment and Mixed-Use Areas. The analysis will include an assessment of the required mix and scale of relevant land uses, ensuring each UDF is appropriately informed by economic issues and trends.

1 PROJECT CONTEXT

This Chapter provides an overview of the context for the UDFs, including the location, an overview of the Toolern PSP and the planning context for the UDF projects.

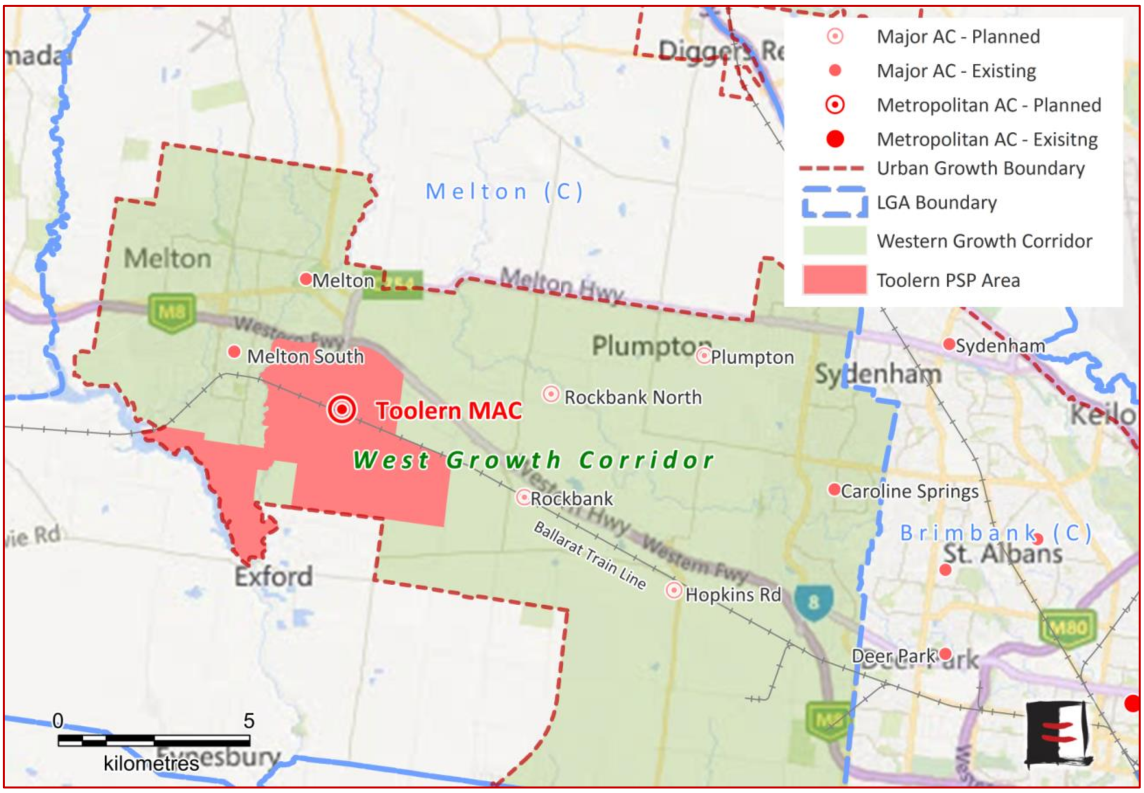
1.1 Location

The Toolern PSP is located in the City of Melton, approximately 44km west of the Melbourne CBD, and on the south-eastern edge of the existing Melton urban area.

The Toolern Precinct Structure Plan (PSP) area is located in the Western Growth Corridor of metropolitan Melbourne which includes the City of Melton and the City of Wyndham to the south, as shown in Figure 1.1. The Western Growth Corridor is one of four major growth corridors identified in Plan Melbourne. Detailed planning for future development of the Western Growth Corridor is currently being guided by the creation of PSPs for individual areas, including Toolern.

Urban development has already commenced in Toolern and several neighbouring PSP areas.

Figure 1.1: Toolern Regional Context



Source: Essential Economics using MapInfo and Bing Maps

The Toolern PSP area is located in the heart of the urban growth corridor between Caroline Springs in the east and Melton in the west. The Western Highway runs along the northern edge of the PSP area, while the Melbourne-Ballarat rail line runs through the middle of the precinct. Toolern Creek runs along the western edge of the PSP area, creating a natural barrier between Toolern and Melton South.

An area of the Toolern PSP is also located west of Toolern Creek, and is centred on Exford Road at the southern edge of Melton.

In total, the Toolern PSP covers 2,200ha of land. A more detailed description of land use planning for the Toolern PSP is described in the next Section.

The Toolern Town Centre is nominated as a future Metropolitan Activity Centre in Plan Melbourne and is centrally located within the Toolern PSP. The Toolern Mixed Use and Employment area is located to the immediate north of the planned Town Centre.

1.2 Current Planning Context for Toolern

Detailed planning for urban development in the Toolern PSP area is informed by a range of documents, as described below. Note that this commentary relates to elements associated primarily with economic development and employment, while a detailed town planning overview is provided in the Toolern Background Report by prepared Tract.

West Growth Corridor Plan

The West Growth Corridor Plan is a high-level land use framework prepared in 2012 by the Victorian Planning Authority (then the Growth Areas Authority). The plan aims to accommodate 400,000 additional residents in new urban areas at capacity, as well as provide a mix of other non-residential land uses to service the population.

The West Growth Corridor Plan also aims to deliver at least 164,000 additional jobs by building on the region’s already strong transport and logistics industries.

A number of major employment precincts are identified in the West Growth Corridor Plan, including the Toolern Employment and Mixed-Use precinct. Toolern’s access to the Western Freeway and the Melbourne-Ballarat rail line, as well as location adjacent to the Toolern Town Centre, makes this an excellent location for a major employment precinct.

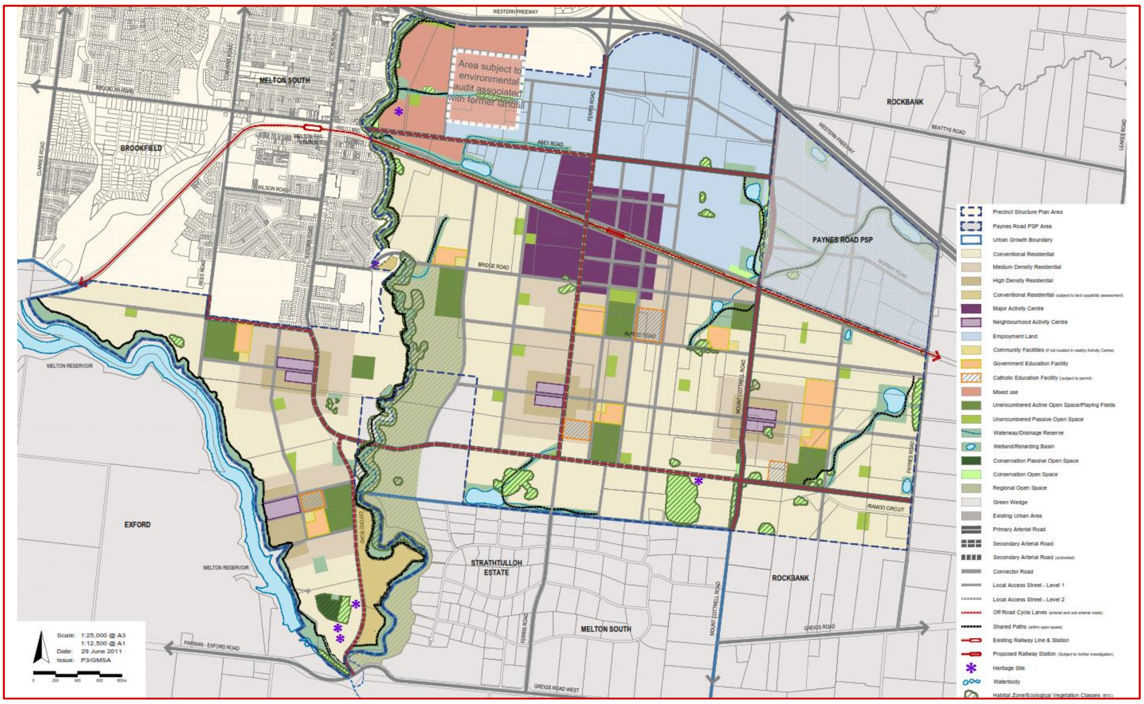
Several neighbouring PSPs have dedicated employment areas outlined in the West Growth Corridor Plan, including the Hopkins Road Business Precinct, the Melton Highway Industrial Precincts, the South-West Quarries Industrial Node, and the Western Industrial Node. Employment will also be generated in activity centres and mixed-use areas.

Toolern Precinct Structure Plan (Updated)

The Toolern PSP was implemented into the *Melton Planning Scheme* by Amendment C84 (Part 1) and adopted and gazetted in October 2010. Further updates to the PSP were made through subsequent amendments Melton C84 (Part 2), approved and gazetted in November 2011 and Melton C161, approved and gazetted on 17 March 2016.

The Toolern PSP includes plans for one Metropolitan Activity Centre comprising 70,000m^2 of retail floorspace which will, at capacity, make it the largest centre in the corridor. A total of 100ha has been identified for the town centre. An overview of the PSP is shown in Figure 1.2.

Figure 1.2: Toolern PSP Area, including Activity Centres and Employment Land



Source: Toolern Precinct Structure Plan, VPA 2015

Four smaller Neighbourhood Activity Centres are also identified elsewhere in the PSP area.

The Toolern Town Centre is located in close proximity to the Western Freeway and the Melbourne-Ballarat rail line, making the centre easily accessible for both consumers and workers throughout the corridor, which extends from Caroline Springs in the east to Bacchus Marsh in the west.

Approximately 300ha of land located immediately north of the Town Centre has been reserved for employment uses.

A mixed-use area is also planned for approximately 130ha of land located to the west of the Toolern Employment precinct. Approximately 40ha of the mixed-use precinct is subject to an environmental audit associated with a former land fill site.

A second EAO covers two properties at 133-199 Ferris Road (within the Toolern Town Centre area) and 2-82 Shogaki Drive (within the TEMU). These areas covered by the EAO may reduce the developable employment area of the PSP.

The Toolern PSP sets a target of 25,000 jobs covering a range of employment types. This is equivalent to more than 1 job per household in the PSP (22,000 households).

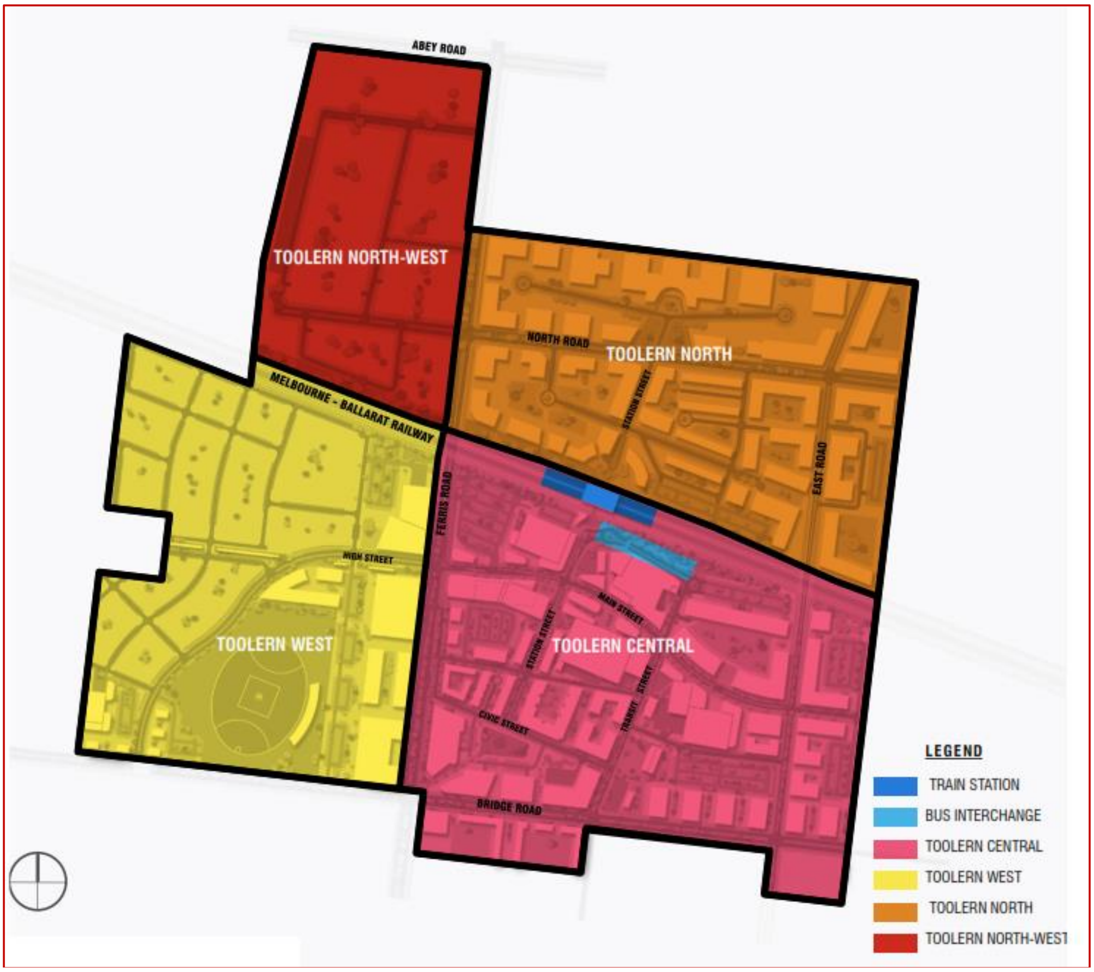
Land within the Toolern PSP area is zoned Urban Growth Zone 3 (UGZ3), which seeks to guide the development of the area in-line with the recommendations of the Toolern Structure Plan.

Toolern Town Centre Urban Design Framework

A more specific vision for the Toolern Town Centre is provided in a UDF prepared in 2012. It is understood the UDF was based on the provision for 30,000m^2 of retail floorspace rather than the 70,000m^2 identified in the PSP based on advice provided by Charter Keck Cramer as input to the UDF. *Plan Melbourne* identifies Toolern as a Metropolitan Activity Centre.

The 2012 Toolern Town Centre UDF outlines a preliminary urban form for the Town Centre which straddles the Melbourne-Ballarat train line, as shown in Figure 1.3.

Figure 1.3: Toolern Masterplan Quadrants



Source: Toolern UDF 2012

The UDF identifies four precincts with the following specified purposes:

- **Toolern North West**: Includes opportunities for large-format retail and light industrial uses.
- **Toolern North**: Includes an intensive mixed-use development framework, including health and education opportunities.
- **Toolern Central**: Is the primary retail and commercial 'heart' of the town centre.
- **Toolern West**: This precinct is a high-density residential precinct with a civic and recreation focus.

The above framework is subject to change as part of the UDF review, of which this economic report is a technical input.

Toolern Employment and Mixed Use UDF

In conjunction with developing a revised UDF for the Toolern Town Centre, a UDF is also being prepared for the Toolern Employment and Mixed-Use (TEMU) area of approximately 390ha. As identified in the Toolern PSP, this area is a dedicated employment and mixed-use area serving the entire surrounding growth corridor.

Despite the significant scale of the TEMU, guidance on the scale and nature of development is currently generalised in nature. For this reason, the current UDF process represents an important opportunity to develop a more targeted policy framework which ensures that development of the TEMU achieves the ambitious employment targets established by the Toolern PSP.

1.3 Other Relevant Policy Background

Plan Melbourne

Plan Melbourne identifies Toolern as a future 'Metropolitan Activity Centre', the purpose of which is:

> *'To provide a diverse range of jobs, activities and housing for regional catchments that are well served by public transport.*
>
> *These centres will play a major service delivery role, including government, health, justice and education services, as well as retail and commercial opportunities.'*

Another key feature of Plan Melbourne relevant to Toolern is the location of the planned Interstate Freight Terminal approximately 10km to the south-east. This terminal is expected to be a focus for significant employment and investment associated with high-quality access to transport and logistics infrastructure.

City of Melton Retail & Activity Centres Strategy

The City of Melton Activity Retail and Activity Centres Strategy was prepared by Tim Nott in conjunction with Harvest Digital Planning and Hansen Partnership in 2014. The main strategic guidance for the Toolern PSP that arises from the document is as follows:

- Identification of Toolern as the Metropolitan Centre for the City of Melton
- Recognition that the Toolern Town Centre will provide higher-order goods and services, as well as the goods and services that would be found in other lower-order centres
- Recognition that Toolern Town Centre will be strongly connected to the wider metropolitan area by public transport, and in particular via the rail line
- Identification of Toolern as a 'job-rich' service area that will generate income for the region.

Higher order activities identified as potentially included in the Toolern Town Centre in the strategy include:

- Major health services
- Further and higher educational institutions
- Recreation and entertainment venues
- Hotels
- Dining options
- Corporate and government regional headquarters
- Major retailers
- Discount department stores
- Supermarkets
- Specialty stores

For the balance of the Toolern PSP, total retail floorspace in the Neighbourhood Centres is estimated at between 7,500m^2 and 12,000m^2.

The Strategy notes the basis of 30,000m^2 of retail floorspace for the Toolern Town Centre identified in the UDF and notes that this level of retail floorspace is likely to be insufficient. The Strategy recommends the removal of floorspace caps at the Toolern Metropolitan Activity Centre.

Employment Land Supply Review

The Employment Land Supply Review Report by SGS Economics and Planning was completed in 2013. The report, which is a municipal-wide assessment of the supply of employment land in the City of Melton, identifies strategic directions to guide council decisions regarding future employment land.

The report identifies where key employment sectors will be distributed throughout the local government area.

Toolern is identified as a location for bulky goods retail and an office cluster, as well as local service industry. Land uses such as transport and warehousing and other heavy industrial uses are more appropriately located in the major industrial areas of State significance to the east.

Toolern Major Activity Centre Review

The Toolern Major Activity Centre Review was completed in 2011 by Charter Keck Cramer (CKC) for the Growth Areas Authority. The report estimates demand for approximately 30,000m^2 of retail floorspace in the Toolern Town Centre and this is the basis of the 30,000m^2 of retail floorspace as identified in the Toolern Town Centre UDF (2012).

However, the CKC report does note there maybe "*opportunity for the centre to support some additional floorspace over the longer-term in the event the competitive advantage offered by its accessibility via fixed rail enables it to extend its trade area and /or market share beyond that that typically characterises similar retail centres*".

The retail analysis presented later in this report (refer Chapter 3) is undertaken on the basis of population capacity and is therefore taking a longer-term view of the retail opportunities for the Toolern Town Centre.

In addition to retail floorspace, the CKC report identifies potential for 36,250m^2 of office floorspace by 2031.

Economic Development and Tourism Plan

The Economic Development and Tourism Plan was prepared by the City of Melton in 2014. The Plan is a high-level long-term vision that focuses on economic growth in the City of Melton through the generation of local employment opportunities for residents.

The Plan identifies retail trade, construction, and property & business services as the top three growth industries for the municipality. The Western Interstate Freight Terminal is also identified as a particularly important area supporting future employment.

2 CITY OF MELTON ECONOMIC CONTEXT

This Chapter provides an overview of key economic and demographic indicators for the City of Melton in which the Toolern PSP area is located. These indicators provide the context for the assessment of land uses at the Toolern Town Centre and TEMU area.

2.1 Population Trends

The City of Melton has a population of approximately 141,750 persons in 2016, according to the latest ABS estimates of resident population.

Over the past 10-years the population of the City of Melton increased by a total of +61,160 persons at an average annual rate of +6,120 persons or +5.8% per annum. This compares to an average growth rate of +2.1% per annum for metropolitan Melbourne over the same period.

Table 2.1: City of Melton Population Trends, 2006 to 2016

	2006	2011	2016
Population			
City of Melton	80,590	112,640	141,750
Greater Melbourne	3,647,020	3,999,980	4,485,210
Average Annual Growth (No.)			
City of Melton		+6,410	+5,820
Greater Melbourne		+70,590	+97,050
Average Annual Growth (%)			
City of Melton		+6.9%	+4.7%
Greater Melbourne		+1.9%	+2.3%

Source: Profile id., ABS Greater Melbourne TSP
Note: Rounded figures

The City of Melton has experienced the fifth largest population increase of any municipality in Victoria over the period 2006 to 2016. This includes higher population growth than the other outer metropolitan growth area municipalities of Hume and Cardinia.

As a result of rapid population growth, the share of the Melbourne's population living in the City of Melton has increased from 2.2% in 2006 to 3.2% in 2016.

2.2 Population Forecasts

In the City of Melton, population growth is being driven by factors that include affordable housing options and the increased popularity of the western growth corridor as a place to live.

Strong population growth is forecast to occur in the City of Melton for the foreseeable future, with significant areas of land planned for urban development between Caroline Springs and

Melton, as well as in areas located on the northern, southern and western edges of the existing Melton urban area.

By 2041, the City of Melton's population is forecast to more than double to 374,000 persons according to projections prepared for Council by id Consulting.

Strong population growth is anticipated to continue beyond 2041 until the overall urban growth area reaches population capacity. The precise timing of population capacity for the municipality is unknown at this stage, with timing influenced by overall population growth and other market considerations, noting detailed planning for a number of PSP areas is still being undertaken.

A summary of forecast population in the City of Melton is provided in Table 2.2 below. The Toolern Town Centre will serve a catchment area which extends beyond the City of Melton, and analysis of this area is undertaken in Chapter 3.

Table 2.2: City of Melton Population Forecasts, 2016 to 2041

	2016	2021	2026	2031	2036	2041
Population (No.)	141,750	174,770	219,440	271,710	327,250	381,990
Average Annual Growth (No.)		+6,600	+8,930	+10,450	+11,110	+10,950
Average Annual Growth		+4.3%	+4.7%	+4.4%	+3.8%	+3.1%

Source: Forecast id., City of Melton

2.3 Demographic Trends

An analysis of demographic trends in the City of Melton has been undertaken to identify the current demographics of residents from the 2016 ABS Census of Population and Housing, and to compare these with 2006 Census results.

The main findings of the analysis are shown in Table 2.3 and summarised as follows:

- Although the population of the City of Melton continues to have a younger age profile than metropolitan Melbourne (36 years), the average age of residents in the City is getting older with the median age increasing from 31 years in 2006 to 33 years in 2016.

- The proportion of people in the City of Melton aged over 65-years has increased rapidly from 5.4% in 2006 to 7.9% in 2016. This trend indicates an expanding demand for infrastructure, services and housing formats catering to an ageing population.

- Mortgage repayments in the City of Melton have increased in line with rising house prices. Home ownership with a mortgage in 2016 (53.9%) is significantly higher than the greater Melbourne average (36.9%).

- The popularity of Melton for young families is illustrated by 43.4% of household being 'families with children' which is significantly higher than the average for Greater Melbourne of 33.5%.

Table 2.3: City of Melton Demographic Profile, 2006 and 2016

	City of Melton			*Greater Melbourne*
	2006	**2016**	**Change**	***2016***
Age Structure				
0 to 4	8.9%	8.5%	-0.4%	*6.4%*
5 to 19	12.0%	11.9%	-0.2%	*9.2%*
20 to 34	15.0%	12.9%	-2.1%	*13.5%*
35 to 64	26.0%	26.2%	+0.2%	*25.0%*
65 to 84	4.8%	7.2%	+2.3%	*10.6%*
85 and over	0.6%	0.7%	+0.1%	*1.9%*
Median Age (years)	31	33		*36*
Place of Birth				
Born in Australia	74.1%	67.9%	-6.2%	*63.8%*
Born Elsewhere	25.9%	32.1%	+6.2%	*36.2%*
Housing Costs				
Median total household income ($/weekly)	$1,136	$1,539	+$403	*$1,539*
Variation from Greater Melbourne	*4.2%*	*0.0%*	*na*	*na*
Median mortgage repayment ($/monthly)	$1,300	$1,704	+$404	*$1,800*
Variation from Greater Melbourne	*0.0%*	*-5.3%*	*na*	*na*
Median rent ($/weekly)	$186	$300	+$114	*$350*
Variation from Greater Melbourne	*-7.0%*	*-14.3%*	*na*	*na*
Average Household Size	3.0	3.0	-	*2.7*
Home ownership				
Owned Outright	23.2%	23.2%	0.0%	*31.2%*
Owned with a Mortgage	60.0%	53.9%	-6.1%	*36.9%*
Rented	16.2%	22.1%	+5.9%	*31.0%*
Other tenure type	0.6%	0.7%	+0.1%	*0.9%*
Household type				
Couple family with no children	21.5%	19.7%	-1.8%	*22.9%*
Couple family with children	44.2%	43.4%	-0.8%	*33.5%*
One parent family	12.7%	13.2%	0.4%	*10.1%*
Other family	0.9%	1.1%	0.2%	*1.4%*
Lone person household	14.9%	15.3%	0.3%	*22.0%*
Group household	1.9%	2.2%	0.2%	*4.7%*
Other household	3.7%	5.2%	1.5%	*5.4%*

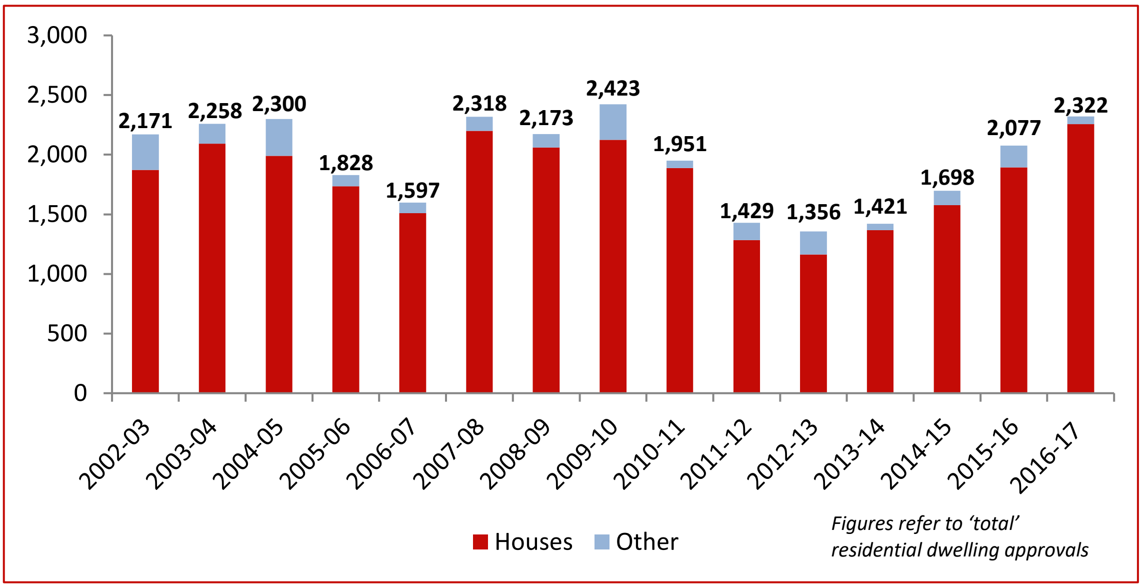
Source: ABS Census of Population and Housing, 2006 and 2016

2.4 Residential Building Approvals Trends

City of Melton has experienced strong growth in the number of residential dwelling approvals in recent years increasing from 1,360 in 2012-13 to 2,320 in 2016-17. The release of new greenfield residential estates and relative affordability of land compared to other areas of Melbourne has driven this growth.

As shown in Figure 2.1, the majority of new residential dwelling approvals are for separate houses. 'Other' dwellings, which includes town house and apartment dwellings accounted for only 2.8% of dwelling approvals in 2016-17.

Figure 2.1 City of Melton Residential Dwelling Approvals, 2002-03 to 2016-17



Source: ABS, Building Approval, Cat No. 8731.0

2.5 Non-Residential Building Approvals

A comparison of non-residential building approvals in the Melton-Bacchus Marsh Statistical Area 3 (SA3) with other SA3s in Melbourne's growth areas is provided in Table 2.4.

Between July 2011 and June 2017, the Melton-Bacchus Marsh SA3 attracted $1,833m in non-residential building approvals. A relatively large proportion (30%) of this investment was in industrial buildings which attracted $552m in building approvals, including $486m in the 'warehouses' illustrating the area's strength as a transport & logistics location.

Compared to other growth area locations, the Melton-Bacchus Marsh SA3 has attracted relatively less investment in office, education and health, and entertainment and recreation buildings. However, it is expected that the demand for and level of investment in these types of uses will increase as the Western Growth Corridor continues to development over the coming decades as populations reach threshold that would support major investment in these sectors. The Toolern Town Centre and MUEA will be a key driver and facilitator of investment in these sectors.

Table 2.4: Value of Non-Residential Building Approvals Melton-Bacchus Marsh SA3 and Selected SA3s in Melbourne Growth Areas, July 2011 to June 2017

Building Types	Melton-Bacchus Marsh SA3	Cardinia SA3	Tullamarine - Broadmeadows SA3	Whittlesea - Wallan SA3
Commercial Buildings				
Retail and wholesale trade buildings	$244m	$139m	$353m	$309m
Offices	$27m	$46m	$183m	$67m
Other commercial	$24m	$5m	$619m	$35m
Total commercial buildings	**$295m**	**$190m**	**$1,155m**	**$411m**
Industrial Buildings				
Factories and other secondary production buildings	$22m	$28m	$167m	$30m
Warehouses	$486m	$90m	$529m	$313m
Other Industrial Buildings	$45m	$18m	$58m	$14m
Total industrial buildings	**$552m**	**$135m**	**$754m**	**$357m**
Other Non-residential Buildings				
Education buildings	$60m	$159m	$192m	$317m
Health buildings	$24m	$5m	$43m	$108m
Entertainment and recreation buildings	$60m	$69m	$143m	$66m
Short term accommodation buildings	$6m	$0m	$18m	$40m
Other non-residential buildings	$837m	$43m	$302m	$145m
Total other non-residential buildings	**$986m**	**$277m**	**$698m**	**$675m**
Total Non-Residential	**$1,833m**	**$603m**	**$2,607m**	**$1,443m**

Source: ABStat

2.6 Employment Trends

Employment trends in the City of Melton have been analysed for the period 2006 to 2011, noting that data from the 2016 ABS Census is not yet available. Based on this analysis, growth in local employment has occurred in most industries, with the highest growth over the five-year period taking place in Education and Training, Retail Trade, and Healthcare and Social Assistance – all sectors driven by strong local population growth.

Two industries – Agriculture, Forestry and Fishing, and Wholesale Trade industries – have declined in employment terms over the same five-year period.

Table 2.5: Employment Trends in the City of Melton, 2006-2011

Industry	2006			2011			Change
	Number	%	Greater Melbourne %	Number	%	Greater Melbourne %	2006 to 2011
Growth Industries							
Education and Training	1,551	13.5	8.1	2,348	14.4	8.4	+797
Retail Trade	1,742	15.1	11.8	2,498	15.3	10.9	+756
Health Care and Social Assistance	888	7.7	10.4	1,579	9.7	11.5	+691
Accommodation and Food Services	838	7.3	5.7	1,342	8.2	5.9	+504
Construction	1,327	11.5	5.4	1,791	11.0	6.2	+464
Administrative and Support Services	312	2.7	3.2	706	4.3	3.2	+394
Public Administration and Safety	956	8.3	5.3	1,336	8.2	5.4	+380
Professional, Scientific and Technical Services	323	2.8	8.8	544	3.3	9.5	+221
Other Services	480	4.2	3.7	655	4.0	3.7	+175
Arts and Recreation Services	177	1.5	1.7	288	1.8	1.9	+111
Rental, Hiring and Real Estate Services	163	1.4	1.5	257	1.6	1.6	+94
Stagnated Industries							
Manufacturing	1,115	9.7	13.5	1,179	7.2	11.3	+64
Electricity, Gas, Water and Waste Services	51	0.4	0.8	100	0.6	1.0	+49
Industry not classified	109	0.9	1.2	156	1.0	1.2	+47
Transport, Postal and Warehousing	602	5.2	4.7	633	3.9	4.8	+31
Information Media and Telecommunications	71	0.6	2.6	90	0.6	2.4	+19
Mining	49	0.4	0.2	53	0.3	0.2	+4
Financial and Insurance Services	174	1.5	5.1	178	1.1	5.2	+4
Declining Industries							
Agriculture, Forestry and Fishing	128	1.1	0.6	117	0.7	0.5	-11
Wholesale Trade	466	4.0	5.8	443	2.7	5.3	-23
Total	**11,522**	**100.0**	**100**	**16,293**	**100.0**	**100**	**4,771**

Source: Economy id. For the City of Melton

2.7 Labour Force Trends

In 2011, approximately 65% of City of Melton residents travel outside the municipality for work, according to ABS data. This situation is likely to continue into the near future given the strong rates of population and household growth, and the relatively limited investment in employment generating uses.

The Toolern Town Centre and MUEA, along with other planned employment areas in the Western Growth Corridor, will be important in terms of generating local employment opportunities and reducing the need to travel elsewhere for work.

An overview of the industries in which the City of Melton residents' work in 2011 is provided in Table 2.6. Compared to Greater Melbourne, the City of Melton has a high representation of labour force in the manufacturing, construction and transport/logistics industries.

Despite education and health being growth industries in terms of jobs (refer Section 2.6) in recent years, the City of Melton is under-represented in these sectors compared to Greater Melbourne. The City of Melton labour force is also under-represented in the 'professional, scientific and technical services' sector.

Table 2.6: City of Melton Labour Force by Industry, 2011

Industry	City of Melton	Greater Melbourne	City of Melton %-point Difference
Agriculture, forestry and fishing	0.3%	0.5%	-0.2%
Mining	0.2%	0.2%	0.0%
Manufacturing	12.7%	10.8%	1.9%
Electricity, gas, water and waste services	1.0%	1.0%	0.1%
Construction	10.5%	8.1%	2.4%
Wholesale trade	4.7%	5.0%	-0.3%
Retail trade	11.2%	10.6%	0.6%
Accommodation and food services	5.4%	5.9%	-0.5%
Transport, postal and warehousing	10.1%	4.8%	5.3%
Information media and telecommunications	1.6%	2.3%	-0.7%
Financial and insurance services	4.1%	4.8%	-0.8%
Rental, hiring and real estate services	1.3%	1.5%	-0.2%
Professional, scientific and technical services	4.7%	8.9%	-4.1%
Administrative and support services	3.6%	3.5%	0.1%
Public administration and safety	5.2%	5.1%	0.1%
Education and training	6.1%	7.9%	-1.9%
Health care and social assistance	9.3%	11.1%	-1.7%
Arts and recreation services	1.5%	1.8%	-0.3%
Other services	3.8%	3.6%	0.2%

Source: ABS, Census of Population and Housing, 2011 (2016 employment data unavailable at the time of preparing this report)

3 TOOLERN TOWN CENTRE MARKET ASSESSMENT

This Chapter provides a market assessment of the Toolern Town Centre, including consideration of the scale and mix of uses appropriate for consideration in the Toolern Town Centre UDF revision.

3.1 Retail and Commercial Industry Trends

The following trends in retail and commercial activity are relevant to future planning for the Toolern Town Centre.

Importance of Major Retail Chains

The retail 'giants' continue to dominate many retail categories, and these 'giants' include major supermarket chains, chain and franchise stores, big-box retailing in homemaker merchandise, and the like. It remains critically important for centres to attract major retail anchor tenants, such as supermarkets, to drive visitation and sales. Very few centres in Australia are successful without the presence of major chain retail stores which can attract consistent patronage from residents living across a broad geographic area.

Supermarkets sell approximately 70% of all household purchases of fresh food, take-home liquor and groceries. The four largest supermarket chains account for 90% of total supermarket sales.

(various published sources)

Resurgence of Traditional Street-Based Centres

Signs exist that traditional strip-based activity centres are recapturing market share through re-focused and improved marketing, as well as an increasing preference by consumers for a 'main street' style experience.

In response, many shopping centre developments are looking to replicate the look and feel of traditional street-based activities in their design. In recent times, developments such as Rouse Hill Town Centre in Sydney and Springfield Orion in Brisbane have aimed to develop a hybrid design that incorporates elements of both shopping centres and street-based shopping.

'Foodie Culture'

Food retailing – including fresh food and groceries, cafes and restaurants and takeaway food – is the strongest-performing component of the business mix in activity centres at the present time.

Fresh food and groceries have traditionally been regarded as a relatively stable component of household spending, and this has proven to be the case since the Global Financial Crisis of

2008. For this reason, food-based major retailers such as supermarkets and large fresh food stores continue to be important components of the tenant mix in most centres.

Per capita spending at cafes and restaurants in the past five years has experienced real growth of 0.7% per annum, above that for the wider retail sector (0.5% per annum). A mix of economic, cultural and social changes mean that consumers now spend more time and money interacting with friends and family at cafes and restaurants. These sectors are also less likely to be negatively impacted by online retailing.

Shifts in Community Needs and Behaviour

The wider community is continually redefining their demands in terms of lifestyle choices, housing needs, leisure activities, and the types of goods and services they require. The manner by which these demands are met is also changing, particular with the increasing influence of technology, particularly online technology.

Today, competition for the retail dollar is reflected in the promotion of many options that extend well beyond the regular view of 'household goods and services'. These competing options include travel, entertainment, dining-out and gambling, DIY home-improvements, mobile phones, internet and a whole range of other activities.

Centres as a Social and Cultural Focus

For many people, visiting an activity centre is closely related to the desire for entertainment and social interaction. This has given rise to the concept of 'recreational shopping', which places centres at the heart of a social and cultural experience. Activity centres must now provide a high degree of amenity in terms of seating, natural sunlight, children's play areas, and prominent café and dining areas. These changes are designed to encourage social interaction, as well as maximising the time people spend in the centre.

In particular, traditional street-based centres have benefited from this trend due to the increased opportunities for retail and commercial activities to integrate with public infrastructure such as parks, libraries, galleries, and administrative functions associated with Council and Government offices.

Demographic Shifts

An important factor in explaining the behavioural trends of shoppers is the changing socio-economic and demographic profile experienced throughout Australia (and in many countries overseas). Briefly, these changes include:

- An ageing population as the 'baby-boomers' approach retirement age. Approximately 8.0% of the City of Melton's population is now aged over 65 years, and this proportion is forecast to increase to 11.8% in 2031 (Victoria in Future 2016)

City of Melton Population Aged 65-plus years	
2011:	7,310
2016:	13,890
2021:	20,120
2026:	23,380
2031:	31,310

Source: Victoria in Future 2016

- Increased labour force participation by women, with the result that many more families are 'time-poor', and therefore have greater demand for convenience shopping, extended shopping hours, and accessible centres where shopping can be undertaken in conjunction with other activities

- Smaller household units and a higher proportion of households with double income and no kids, the so-called 'DINKS'

- Historically-high levels of household debt, coupled with high rates of home ownership, with the result that households need to devote a greater proportion of their disposable income paying-off the mortgage, and with an increased level of sensitivity to interest rate movements.

Internet and Technology

Ongoing advances in information technology have impacted on the way in which people work, shop and live. For the Toolern Town Centre, future technological changes will include the increasing use of the Internet as a purchasing medium, as well as other changes which affect how town centres operate such as:

- Traditional retailers have lost market share as households undertake a greater proportion of their shopping through the Internet and other media. The extent to which Internet sales are likely to affect the existing retail industry remains uncertain. Nonetheless, the Internet continues to account for just 7% of overall retail sales in Australia.
- In many respects, the Internet is used in conjunction with traditional retail outlets. Consumers are increasingly using the Internet to research prices and products before going to 'bricks and mortar' stores to purchase items.
- The Internet presents opportunities for people to work at home or remotely, thereby creating opportunities for people to undertake work while involved in other activities, such as dining at a café. Similarly, many workers and businesses may seek temporary or casual office space as required, rather than a permanent office tenancy.

New forms of retailing and market entrants

New forms of retailing and market entrants continue to enter the Australian market that change how Australians shop and influence the development of centres. Over the past two to three decades Australia has seen the introduction many new formats of retailing including big box hardwares stores, dedicated homemaker centres, large format liquor, new supermarket entrants (e.g. ALDI), etc.

In addition, international retailers are continually eyeing off the Australian market. In recent years this has included a focus on apparel retailers (e.g. Zara, H&M and Uniqlo), while Costco has also influenced the retail development industry recently. Furthermore, Amazon is also planning to launch in Australia which will be another shock to the retail industry influencing consumer shopping patterns.

3.2 Existing and Planned Activity Centres

The existing and planned activity centre hierarchy for the City of Melton is shown in Figure 3.1 and is based on the hierarchy of activity centres as described in the *City of Melton Retail and Activity Centre Strategy* (2014). The Strategy is currently subject to planning scheme amendment C171 to the Melton Planning Scheme. A Panel Hearing was convened and the activity centre hierarchy shown in Figure 3.1 and described below is based on Council's final version of Clause 21.05 provided at the panel hearing and shown in Appendix C of the *Melton Planning Scheme Amendment C171 – Panel Report (3 May 2017)*. Note, the activity centre hierarchy is awaiting ministerial approval.

Characteristics of activity centres at each level of the hierarchy are described below.

Metropolitan Activity Centres

These centres act as hubs for employment, transportation and service delivery, and they offer a broad range of goods and services including major retailers, major health services, further and higher education institutions, entertainment venues, and corporate and government regional headquarters

Toolern will be the Metropolitan Activity Centre serving the western region of Melbourne.

Activity Centres

These are higher-order activity centres that provide access to a wide range of goods, services, employment and housing, while performing various roles across their catchments. These centres should be well-serviced by public transport and act as a connecting node for the local region. Activity Centres are intended to provide a broad mix of integrated sub regional land uses such as retail (discount department store as well as supermarkets and specialty stores), office, business, community (e.g. education, health and recreation), entertainment and residential in order to generate a breadth of employment choices for the municipality.

The main Activity Centres that may compete with Toolern include:

- Melton Town Centre
- Woodgrove Shopping Centre
- Caroline Springs, Burnside and Watergardens (in Sydenham) are all existing Activity Centres located to the east of Toolern Town Centre in established residential areas.
- Activity Centres are planned for the Rockbank and Rockbank North PSPs located to the east of the Toolern Town Centre. The PSPs refer to these centres as Major Town Centres.

Neighbourhood Centres

Neighbourhood centres play a supporting role in the activity centre hierarchy and are well-connected to residential catchments. These centres typically contain a full-line supermarket, food catering and specialty retail, as well as other elements specifically designed to enable the centre to perform its role in the surrounding catchment.

Local Activity Centres

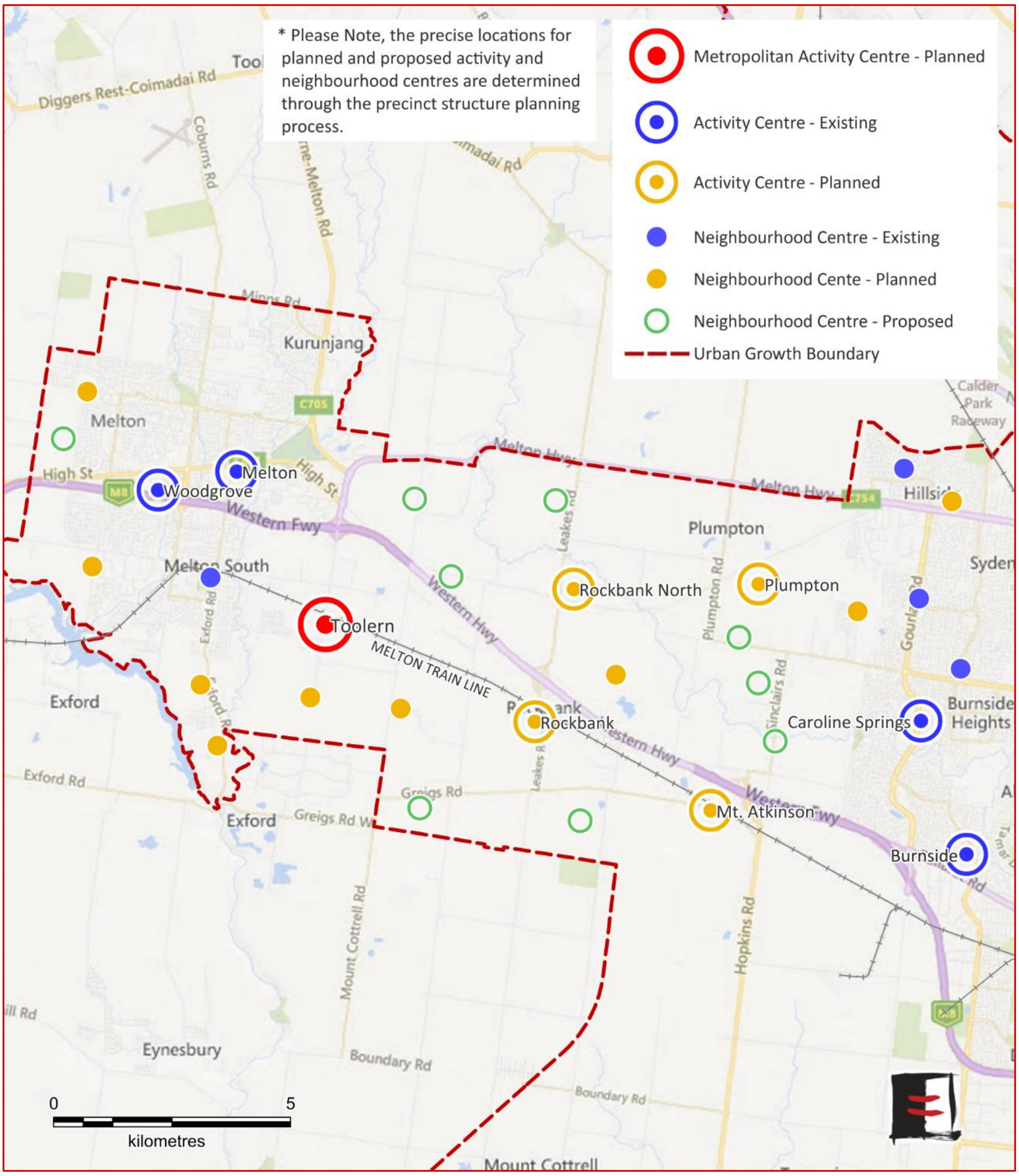
Local Convenience Centres typically consist of a relatively small area of retail floorspace (less than 1,000m^2) and play a supporting role in the activity centres hierarchy.

Restricted Retail Precincts

In addition, the centre hierarchy described above, Restricted Retail Precincts, or homemaker centres/precincts, also perform a significant role. In this context, approval has been granted for a 50,000m^2 homemaker centre in Melton approximately 3km to the north of the Toolern Town Centre, while the Mount Atkinson PSP also identifies opportunities for homemaker retailing within the Hopkins Road Business Precinct.

The hierarchy of activity centres in the surrounding region is shown in Figure 3.1.

Figure 3.1: Activity Centre Hierarchy



Source: Essential Economics using MapInfo, Bing Maps and information contained in Melton Planning Scheme Amendment C171 – Panel Report (3 May 2017)

In addition to the above activity centre hierarchy, Table 3.1 summarises the status of planned activity centres in nearby PSPs. Note, Table 3.1 refers to the centre hierarchy used by VPA which includes Major Town Centres (higher order centres such as Metropolitan and Activity Centres described above), Local Town Centre (similar to Neighbourhood Activity Centre described above) and Local Convenience Centres (similar to Local Activity Centres described above).

Table 3.1: Summary of Planned and Proposed Activity Centres in Precinct Structure Plans

PSP Name	Activity Centres	Large Format Retail Provision
Mt Atkinson & Tarneit Plains	• Specialised Town Centre: 26,000m^2 'shop' floorspace without a permit • 3 Local Convenience Centres	Yes – 40,000m^2
Rockbank North	• 1 Major Town Centre: Retail floorspace cap of 36,500m^2 • 1 Local Town Centre: Retail floorspace cap of 5,700m^2 • 1 Local Convenience Centre	No
Rockbank	• Major Town Centre: 30,000m^2 'shop' floorspace without a permit • 2 Local Convenience Centres	Limited in MTC
Toolern	• Major Town Centre: 'Shop' floorspace cap of 70,000m^2 • 4 Neighbourhood Activity Centres containing 1-2 Supermarkets • Local Convenience Centres: capped 250m2 of floorspace	Yes – Limited bulky goods in MAC of 10,000m^2
Toolern Park		No
Paynes Road	• 1 Local Convenience Centre	No
Taylors Hill West	• 1 Local Convenience Centre	No
Melton North	• 1 Neighbourhood Activity Centre: approx. 5,000m^2 of retail floorspace, including one full line supermarket	No
Plumpton (Proposed)	• 1 Major Town Centre: 45,000m^2 of retail floorspace 'shop', 58,000m^2 of Commercial floorspace • 1 Local Town Centre: 7,200m^2 of retail floorspace, 5,400m^2 of Commercial floorspace • 1 Local Convenience Centre: 500m^2 retail floorspace, 500m^2 commercial floorspace	Yes – approx. 20,000m^2
Kororoit (Proposed)	• 2 Local Town Centres • 2 Local Convenience Centre	No

Source: VPA, Precinct Structure Plans (various)

3.3 Catchment Definition

As a Metropolitan Activity Centre, the Toolern Town Centre will attract sales and visitation from a large geographic area. A catchment for the Toolern Town Centre has been identified and includes two sectors:

- **Melton Corridor Catchment**, which includes the established areas of Melton and the surrounding urban growth areas extending to the border of Caroline Springs and Deer Park in the east.

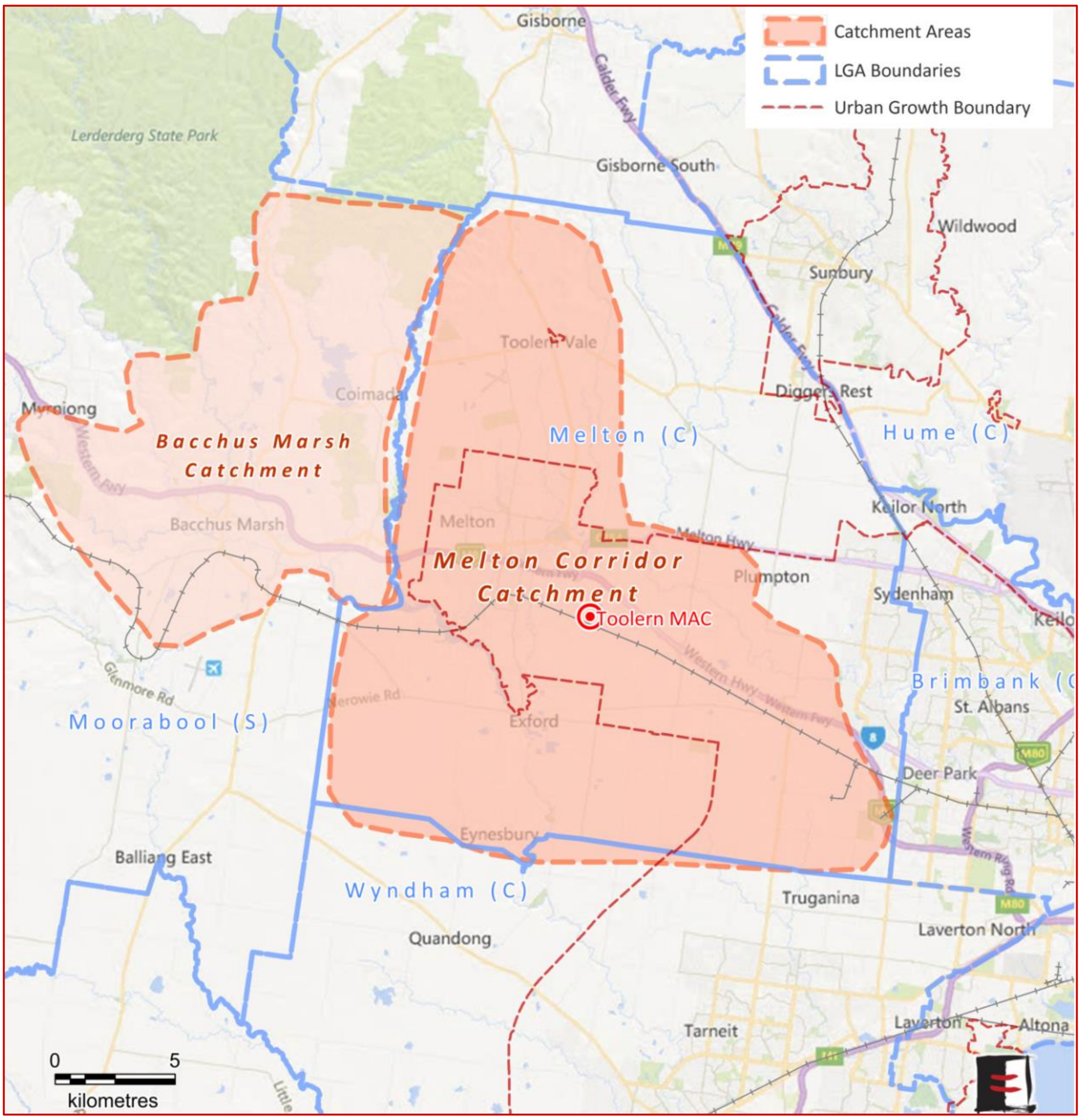
- **Bacchus Marsh Catchment**, which includes areas to the west in the Shire of Moorabool surrounding the Bacchus Marsh urban area.

The Melton Corridor Catchment will comprise the highest share of visitation and sales to the Toolern Town Centre. Residents of this catchment will be located relatively close and accessible to the town centre. The Melton Corridor Catchment includes most of the City of Melton excluding Caroline Springs, Taylors Hill and areas in proximity to Diggers Rest.

The Bacchus Marsh Catchment includes the township of Bacchus Marsh and rural surrounds. Although residents in this catchment can be expected to visit the Toolern Town Centre on a reasonably regular basis (attracted by the size and range of facilities and services in Toolern Town Centre), their visits will be less frequent than for residents of the Melton Corridor Catchment in which Toolern is located.

The catchment for the Toolern Town Centre is shown in Figure 3.2 below.

Figure 3.2: Toolern Town Centre Catchment



Source: Essential Economics, Using Mapinfo and Bing Maps

3.4 Catchment Population Analysis

Population Trends and Forecasts

Population of the catchment served by the Toolern Town Centre in 2016 is estimated at 86,290 persons. This includes 65,300 persons in the Melton Corridor Catchment and 20,990 persons in the Bacchus Marsh Catchment.

Since 2001, population in the catchment has increased by +30,310 persons, including +24,910 persons in the Melton Corridor Catchment and +5,400 persons in the Bacchus Marsh Catchment.

Continued strong population growth is forecast for the catchment over the next 15-plus years, with resident population numbers expected to increase to 177,820 persons by 2031, representing a net increase of +91,530 persons at an average rate of +6,100 persons or +4.9% per annum over the period.

Most of this population growth (88%) is expected to take place in the Melton Corridor Catchment (+5,340 persons per annum). However, the Bacchus Marsh Catchment (+760 persons per annum) will continue to be an expanding source of demand for the range of uses locating at the Toolern Town Centre.

Table 3.2 summarises the forecast catchment population to 2031 based on analysis of ABS estimated resident population data and forecasts prepared by DEWLP in *Victoria in Future 2016*.

Table 3.2 Toolern Town Centre Catchment Area Population Trends, 2006 to 2031

	2006	2016	2021	2031
Population (No.)				
Melton Corridor Catchment	40,390	65,300	84,100	145,370
Bacchus Marsh Catchment	15,600	20,990	23,830	32,450
Total Catchment Area	**55,990**	**86,290**	**107,930**	**177,820**
Average Annual Growth (No.)				
Melton Corridor Catchment		+2,490	+3,760	+6,130
Bacchus Marsh Catchment		+540	+570	+860
Total Catchment Area		**+3,030**	**+4,330**	**+6,990**
Average Annual Growth (%)				
Melton Corridor Catchment		+4.9%	+5.2%	+5.6%
Bacchus Marsh Catchment		+3.0%	+2.6%	+3.1%
Total Catchment Area		**+4.4%**	**+4.6%**	**+5.1%**

Source: Essential Economics; ABS; DEWLP, Victoria in Future, 2016

Population Capacity

In view of the long-term nature of urban development in the Toolern PSP and the surrounding urban growth areas, the population capacity of the Toolern Town Centre Catchment Area is the most important factor affecting demand for town centre services for the purpose of preparing the UDF.

At full-development, the total Toolern Town Centre Catchment Area is estimated to accommodate more than 373,000 residents. This estimate takes into consideration the following:

- Potential dwelling and population outcomes identified in completed PSPs.
- Estimates of dwelling and population outcomes in yet-to-be-completed PSPs based on the following:
  - Net developable area of PSPs accounts for 60% of gross area
  - Average dwelling density of 17.5 dwellings per hectare of net developable area
  - Conservative estimate of 2.8 persons per household
  - PSPs identified for employment areas in the West Growth Corridor Plan (Growth Areas Authority, 2012) have been excluded.
- Estimate of future lot supply not included within PSPs are based on Urban Development Program data (2016).
- The *Bacchus Marsh Urban Growth Framework* which is currently being prepared by Moorabool Shire and the VPA, and which anticipates Bacchus Marsh's population to reach approximately 40,000 persons by 2041. For the purpose of this assessment, it is assumed 40,000 persons is the population capacity of the Bacchus Marsh Catchment
- Existing (2016) population in established residential areas in catchment. No allowance for infill development of existing urban areas has been made, and therefore the total population capacity should be considered to lie at the lower end of reasonable expectations.

The estimated population capacity is shown in Table 3.3.

Table 3.3: Toolern Town Centre Catchment – Population Capacity

Location	No. Persons
Melton Corridor Catchment	
Precinct Structure Plans	252,800
Existing broad hectare residential areas beyond PSP boundaries	15,100
Existing Population (2016)	65,300
Sub-total: Melton Corridor Catchment	**333,200**
Bacchus Marsh Catchment (*based on Bacchus Marsh Urban Growth Framework*)	**40,000**
Total Catchment Population	**373,200**

Source: Various published sources, Essential Economics

3.5 Retail Spending Analysis

Estimates of total retail spending in the catchment provide a broad estimate the total retail development potential in the Toolern Town Centre.

Estimates of retail expenditure for the catchment are derived from MarketInfo, which is a micro-simulation model that combines data from the ABS Household Expenditure Survey, ABS Population and Housing Census, ABS National Accounts and other official sources, to generate estimates of retail expenditure for small areas. MarketInfo is widely used in the retail economic, property and planning sectors.

Retail spending estimates for the following retail categories have been prepared:

- Food, liquor, groceries (FLG): this is the most relevant component in terms of assessing future supermarket opportunities
- Food catering: cafés, restaurants and take away food
- Non-food merchandise and services.

For the purpose of analysing long-term spending capacity, estimates of retail spending are provided for the population at full-development, as estimated in Table 3.3. These retail spending estimates are based on estimates of existing (2017) average retail spending per capita with reference to MarketInfo.

The actual timing of full-development of the catchment is unknown, although it is expected to be post-2050.

Estimates of retail spending of the catchment population at full-development are presented in Table 3.4 and expressed in constant 2017 dollars (ie, excluding price inflation). In total, retail spending of $5,063 million is estimated for the Toolern Town Centre catchment at full-development.

Table 3.4: Toolern Town Centre Catchment Retail Spending at Capacity ($2017)

Retail Category	Melton Corridor Catchment	Bacchus Marsh Catchment	Total Catchment
Food, liquor & groceries	$1,784.5m	$232.4m	$2,017.0m
Food catering	$531.3m	$42.4m	$573.8m
Non-food and service	$2,172.7m	$299.9m	$2,472.6m
Total retail	**$4,488.6m**	**$574.8m**	**$5,063.4m**

Source: MarketInfo; Essential Economics

3.6 Review of Total Supportable Retail Floorspace

The Toolern Town Centre is currently planned to accommodate 70,000m^2 of retail floorspace, according to the Toolern PSP (2015).

With total retail spending of $5,063m by catchment residents at population capacity (see Table 3.4), the Toolern Town Centre is forecast to achieve an indicative market share of 7.5% of this available spending. This estimate is based on the observation that large centres serving a regional catchment typically capture market shares of between 5% and 10% of retail spending (source: Essential Economics market analysis).

Table 3.5 shows that by allowing for an additional 15% of retail sales to be drawn from beyond the catchment, the Toolern Town Centre would achieve retail sales in the order of $447m (in constant 2017 dollars). Assuming an average turnover of $6,500/m^2, the Toolern Town Centre would support a total of approximately 70,000m^2 of retail floorspace.

As a means of comparison, Watergardens in Sydenham has total floorspace of approximately 63,910m^2 and achieved turnover of $399m, according to the *Shopping Centre News Big Guns Survey 2017*. This reflects an average trading level of approximately $6,600/m^2.

Having regard for the revised analysis described above and in Table 3.5, it is a reasonable expectation to plan for approximately 70,000m^2 of retail floorspace at the Toolern Town Centre.

Table 3.5: Toolern Town Centre Supportable Retail Floorspace at Development Capacity

Category	Value
Forecast Retail Spending	$5,063.4m
Assumed market share	7.5%
Retail turnover from catchment	$379.8m
Total retail turnover (assuming 15% from beyond)	$446.8m
Average turnover	$6,500/m^2
Supportable retail floorspace (calculated)	69,000m^2
Supportable retail floorspace (rounded)	**70,000m^2**

Source: Essential Economics

3.7 Indicative Retail Development Outcomes

Staging and Tenant Mix

Identifying the specific tenant mix for the Toolern Town Centre at full development capacity can only be undertaken on an indicative basis, as full development is not expected to be achieved for over thirty years.

Nonetheless, it is reasonable to expect that planning for the town centre can be informed by contemporary development expectations, as long as a realistic expectation is made in detailed centre planning for some evolution in household expenditure patterns and tenancy mix over time.

An indicative retail floorspace mix for the Toolern Town Centre at full development is shown in Table 3.6. This retail mix is based on a comparison with centres across Australia of approximately 60,000m^2 to 80,000m^2 in retail floorspace, as well as general expectations for development based on the analysis in this Chapter.

A potential staging program is also indicated which would allow for various components in the centre to be developed over time as relevant demand thresholds are achieved.

Table 3.6: Toolern Town Centre Supportable Retail Floorspace at Development Capacity

	Stage 1	Stage 2	Full Development (*)
Major Tenants			
Discount Department Store 1	-	7,000m^2	7,000m^2
Discount Department Store 2	-	-	7,000m^2
Supermarket 1	4,000m^2	4,000m^2	4,500m^2
Supermarket 2	-	4,000m^2	4,500m^2
Supermarket 3 (Discount Supermarket)	-	-	1,500m^2
Total Majors	**4,000m^2**	**15,000m^2**	**24,500m^2**
Mini Majors (@ 1,500m^2 each)	1,500m^2	4,500m^2	12,000m^2
Specialty Shops			
Café and Restaurant	500m^2	2,000m^2	6,000m^2
Other Food	1,000m^2	1,500m^2	2,500m^2
Non-Food	1,000m^2	7,000m^2	15,000m^2
Total Specialty Shops	**2,500m^2**	**10,500m^2**	**23,500m^2**
Total Shop Retail	**8,000m^2**	**30,000m^2**	**60,000m^2**
Restricted Retail	-	10,000m^2	10,000m^2
Total Retail	**8,000m^2**	**40,000m^2**	**70,000m^2**

Source: Essential Economics, published sources
Note: (*) includes incremental additions to floorspace post-Stage 2

Total retail floorspace at full development is estimated at **70,000m^2**, including 60,000m^2 of shop retail and 10,000m^2 of restricted retail.

Major Tenants

The major tenants at the Toolern Town Centre will be critically important in attracting consistent sales and visitation from across the catchment.

Department Store

In past years, a department store (typically Myer or David Jones) would be an important consideration for a centre of the scale and role of the Toolern Town Centre. However, recent and current shifts in the retail sector – particularly the introduction of new retail formats such as Costco and ALD, a trend to large format retailing of household and other merchandise, and internet-based retailing – are creating challenges for the traditional department store model. Furthermore, a catchment population at capacity of 373,000 persons (see Table 3.3) is generally below the threshold of 500,000-plus persons typically required to attract a department store operator.

For the above reasons, the indicative development scheme in Table 3.6 does not specifically include a department store. Nonetheless, the ability to attract a department store to the Toolern Town Centre should remain broadly supported by centre policy, subject to any future operator interest.

Discount Department Stores

Two discount department stores are expected to be operating from the Toolern Town Centre, recognising that the long-term nature of full-development means that these stores may be better referred to as 'non-food anchor tenants' in site planning. This approach reflects ongoing changes in the retail sector, with the discount department store model also likely to undergo significant change over coming years.

Supermarkets

Supermarkets remain a key component of the retail sector, particularly in providing the basic food and groceries required to support day-to-day household needs. The indicative development scheme for Toolern Town Centre allows for two full-line supermarkets and a smaller discount supermarket operator. A full-line supermarket can be expected to be the anchor tenant for any first stage of development at the town centre.

Mini-Majors

Mini-major tenants are large specialised retailers, typically having retail floorspace of between 1,000m^2 and 2,500m^2. These retailers are an increasingly important part of the retail mix in centres, nationally. In some centres, a strong mix of three or four mini-majors are effectively operating in combination as a major tenant, attracting high levels of patronage from across a wide geographic area.

Current examples of mini-major tenants include Dan Murphy's (take home liquor), Reject Shop (discount variety), Best & Less (apparel), JB Hi Fi (entertainment), and Rebel Sports (sporting goods).

Specialty Shops

At full development, an indicative allowance for specialty shop floorspace of 23,500m^2 has been provided, as shown in Table 3.6. With an average store size of 120m^2, this floorspace provision represents total of approximately 200 specialty shops.

The mix of specialty shops will be closely associated with the operation of the major tenants, such as fresh food shops (eg, bakery, butcher) and other convenience retailing (eg, chemist, newsagent) located adjacent to supermarkets, as well as represented in street-based specialty retail precincts.

An increasingly important component of the specialty shop mix in most centres, nationally, involves cafes and restaurants. Although these tenancies will be distributed throughout the centre, it can also be expected that a dedicated cafe, dining and entertainment precinct would be provided in the Toolern Town Centre, in addition to the conventional 'food court' with 'quick service' food outlets that characterise large centres .

Restricted Retail

A modest indicative allowance for approximately **10,000m^2** of restricted retail (such as furniture and hardware) has been provided for the Toolern Town Centre. This provision acknowledges the potential for some larger-format bulky goods type uses in the Centre, while also reflecting on the presence of the significant adjacent employment precinct to the north and the desire to retain the town centre for more intensive retail activities.

3.8 Indicative Commercial Development Outcomes

Commercial Office

The extent of non-retail development at higher-order activity centres varies considerably, making it difficult to predict with certainty the extent of non-retail floorspace.

Within most activity centres, commercial office uses can be divided between:

- **Shopfront office uses**: a wide range of non-retail commercial uses such as banks, real estate agents, travel agents, insurance agents, medical consulting suites and the like will typically locate in a shopfront tenancy. These office uses integrate closely with the retail components of activity centres and they usually depend on passing shopper traffic in supporting their business activities (such as properties listed for sale in real estate windows and medical suites conveniently located to town centre parking areas). These uses typically occupy up to 20% to 30% of the total floorspace in a street-based activity centre environment (although the share is normally lower in enclosed shopping centres).

- **Non-Shopfront**: these are tenancies which are typically used for dedicated office space and which do not require the street-front location and exposure provided by shopfront tenancies. In general, dedicated office space is occupied by a range of professional, personal and community services which do not require high levels of exposure to passing customers. Dedicated non-shopfront office space is typically found in larger centres which accommodate higher-order office users that require purpose-built office facilities.

The demand for office space in the Toolern Town Centre is generally dominated by the **'resident'** demand created by the personal and professional needs of the surrounding population and business sector. It can be expected that major regional and large-scale office users are more likely to locate in a business park in the adjacent Toolern employment area (see Chapter 4).

For the Toolern Town Centre, which is expected to serve a trade area population of approximately 373,000 persons at full capacity, this resident demand is likely to be in the order of:

- 15,000m^2 of shopfront non-retail uses, which represents 25% of a combined 65,000m^2 of retail/non-retail shopfront floorspace
- 15,000m^2 of non-shopfront office space, which is representative of the commercial office space in centres serving a similar-sized function and trade area around Victoria.

Overall, the available resident demand has the potential to generate approximately **30,000m^2** of office development in the Toolern Town Centre.

Entertainment

The precise mix of entertainment uses in the Toolern Town Centre is difficult to identify in advance, but is expected to include uses such as:

- Cinemas
- Gymnasia and fitness centres (including children's indoor play, rock climbing and other activities)
- Bowling alley or similar family entertainment provider
- Pubs/bars/live music venues
- Dance/yoga/studios.

The largest single entertainment use in the Toolern Town Centre is likely to be a cinema complex. Nationally, one major cinema screen is provided for approximately every 12,000 persons. On this basis, at full development the catchment population is likely to support approximately 30 cinema screens.

It is reasonable to consider potential for a 10-screen cinema complex occupying approximately 3,500m^2 of floorspace in the Toolern Town Centre, with other cinema screens or complexes located elsewhere in the catchment.

Other entertainment land uses, as identified above, generally require a relatively large floorspace component. For example, many large gym complexes are in the order of 1,000m^2 in size or even larger.

Having regard for the above locational and other considerations, a total entertainment floorspace component at the Toolern Town Centre of approximately **15,000m^2** has been identified.

Other Commercial

Consideration is given to the potential opportunities for a range of other commercial uses in the Toolern Town Centre. Specific opportunities are identified for the following:

- **Commercial accommodation**: Potential for a 100-room four-star hotel targeted at a mixed resident/business market. This is likely to incorporate conference and event hosting capability. Provision for ground floor floorspace of 2,000m^2, assuming a four-storey development footprint. An opportunity for a basic 3-star hotel/motel is also appropriate to consider for the town centre.
- **Registered club**: The Toolern Town Centre could potentially accommodate a member-based licenced club such as an RSL or other similar venue. This is potentially associated with the recreation uses also proposed for the town centre.
- **Market retailing**: The ongoing growth and popularity of market-based retailing would support a farmers market or other regular event in the Toolern Town Centre. This should be reflected in the design of public space within the centre.
- **Other**: various uses including service stations, car wash facility and so on.

A total of approximately **15,000m^2** of floorspace can be allocated to these other commercial uses.

Medical

Given the higher-order role of the Toolern Town Centre and convenient access to high-capacity public transport, the provision of medical and para-medical facilities serving the catchment should be a high priority. These facilities would include the following:

- Day surgery facility for minor medical procedures
- GP super clinic and other medical consulting services
- Rehabilitation services
- Para-medical facilities

- Medical training and education.

An allocation for **10,000m^2** of floorspace is made for these medical uses, reflecting the relative importance from a service provision perspective for residents of an outer-urban area, and consistency with the objectives for the future role and function of the town centre.

Some flexibility is also advocated for the possible inclusion of a more substantial medical facility in the Toolern Town Centre, such as a public or private hospital facility.

Administration/Community

Community Services

The Toolern Town Centre will also operate as a major focus for the delivery of a range of community services including:

- Emergency services
- Justice system
- Municipal and State Government service delivery.

A number of these services are appropriately located on the fringe of the town centre (such as emergency services), while others will be closely integrated with the retail and commercial elements in the higher-activity areas of the town centre (such as government agencies that deal with customers).

An indicative floorspace allocation of approximately **10,000m^2** is made for community services.

Tertiary Education

It is reasonable to expect that future population growth in the surrounding region will generate demand for tertiary education providers serving local and regional residents. As a nominated metropolitan activity centre, the Toolern Town Centre should plan for a relatively significant education provider requiring **30,000m^2-plus** of floorspace.

This could include a TAFE or even a campus for a University (subject to provider interest). In general terms, the land requirements for a significant facility are:

- TAFE campus: 5ha to 10ha
- Satellite campus for major University: 10ha+.

Aquatic/Leisure Centre

Current trends for aquatic and leisure centres emphasise a range of activities and facilities, including:

- Swimming pools, including main lap pool, diving pool, children's pools, dedicated recreational pool including slides etc

- Supporting facilities, including spas, saunas
- Consulting rooms and studios
- Indoor sports courts

Total floorspace for modern facilities is often up to **10,000m^2** in size, although this will vary based on the actual uses which are incorporated into individual sites.

Typically, an indoor/outdoor facility will occupy a much larger area of land than a dedicated indoor facility.

On an indicative basis, **2ha** of land would be required for a regional-level indoor/outdoor aquatic/leisure centre.

Total Commercial

Based on the above consideration of commercial development outcomes, Table 3.7 summarises the total floorspace allocations and this is estimated at 120,000m^2.

Table 3.7: Toolern Town Centre Non-Retail Floorspace at Development Capacity

Land Use Type	Full Development
Commercial Office	30,000m^2
Entertainment	15,000m^2
Other Commercial	15,000m^2
Medical	10,000m^2
Administration/Community	10,000m^2
Tertiary Education	30,000m^2
Aquatic/Leisure Centre	10,000m^2
Total Commercial	**120,000m^2**

Source: Essential Economics

3.9 Toolern Town Centre Outcomes and Recommendations

On an overall basis, it is appropriate for the UDF to consider the potential to accommodate approximately 190,000m^2 of retail and commercial floorspace, as summarised in Table 3.8.

Table 3.8: Toolern Town Centre Indicative Schedule of Uses at Capacity

Land Use	Floorspace
Shop	60,000m^2
Restricted Retail	10,000m^2
Total Retail	**70,000m^2**
Shopfront Office	15,000m^2
Non-Shopfront Office	15,000m^2
Total Office	**30,000m^2**
Other Commercial	**90,000m^2**
Total Retail and Commercial	**190,000m^2**

Source: Essential Economics

Retail and Commercial Vision

Toolern Town Centre will serve the entire Melton urban growth corridor and Bacchus Marsh. The centre will have a strong range of convenience and comparison retailing, complemented by a vibrant dining and entertainment scene. A high-amenity street-based environment will be supported by protected areas offering shoppers and visitors a pleasant year-around environment.

Key elements of the town centre will also include commercial uses, as well as important health and education providers. Access to both retail and non-retail elements of the town centre will be made safe and convenient by high-quality public transport links.

Land Requirements

Estimates of the land area required to accommodate the identified retail and commercial uses are summarised in Table 3.9, using industry expectations of site coverage for relevant uses.

The total land requirement for the identified land uses is estimated at 482,500m^2 or 50ha (rounded).

Table 3.9: Toolern Town Centre Indicative Land Budget

Land Use	Floorspace	Land Coverage Ratio	Land Requirement
Retail	70,000m^2	35%	200,000m^2
Shopfront Office	15,000m^2	30%	50,000m^2
Non-Shopfront Office	15,000m^2	200%	7,500m^2
Other Commercial	90,000m^2	40%	225,000m^2
Total	190,000m^2	39%	482,500m^2

Source: Essential Economics

4 TOOLERN EMPLOYMENT AND MIXED-USE ASSESSMENT

This Chapter considers the future development outcomes for the TEMU area located in the north of the Toolern PSP.

4.1 Existing and Planned Major Employment Locations

A total supply of approximately 4,255ha of land will be available for industrial and employment areas in the Melton growth corridor in the future. This estimate takes into consideration existing vacant land zoned for industrial purposes and land identified for employment in relevant PSPs.

The West Corridor Plan identifies significant new employment land to serve the future needs of residents in outer western Melbourne, and to safeguard future supplies of industrial land for economic uses. Major new areas of industrial land or other dedicated employment precincts (labelled *industrial*, *commercial*, and *mixed use/employment*) are identified in PSPs at Mt Atkinson, Toolern, Plumpton, Robinsons Road South and Robinsons Road North.

A summary of the key precincts is as follows:

- Toolern (TEMU): Includes approximately 300ha of land identified in the Toolern PSP which will be for employment uses consistent with the Commercial 2 Zone. At present, the precinct includes a number of larger industrial uses that will transition to other more intensive uses over time. In addition, the Toolern PSP identifies approximately 130ha for mixed-use development in the north-west, including approximately 40ha which is only developable subject to the result of a future environmental audit.

- Melton East Gateway: A total of approximately 190ha (gross) of industrial land is identified at the eastern edge of the existing Melton urban area, and this land currently includes a mix of light industry, showrooms and restricted retail.

- Mt Atkinson and Tarneit Plains: This PSP area comprises both light and heavy industrial coupled with residential land and activity centres. The two main components of industrial land in the PSP area are the Western Industrial Node and Western Interstate Freight Terminal, both of which are expected to be major employment hubs. Anticipated employment in the PSP area is in the order of 19,000 jobs.

- Deer Park/Hopkins Road: Approximately 415ha (gross) of industrial land is currently located on the eastern edge of the City of Melton in the Robinsons Road Precinct and along the Western Freeway at Deer Park. The UDP also identifies 195ha (gross) of future industrial land to the west of the Deer Park bypass and south of the Western Freeway in the vicinity of Hopkins Road. Hopkins Road also includes a mixed-use area of approximately 20ha adjacent to the proposed Mt Atkinson Major Town Centre

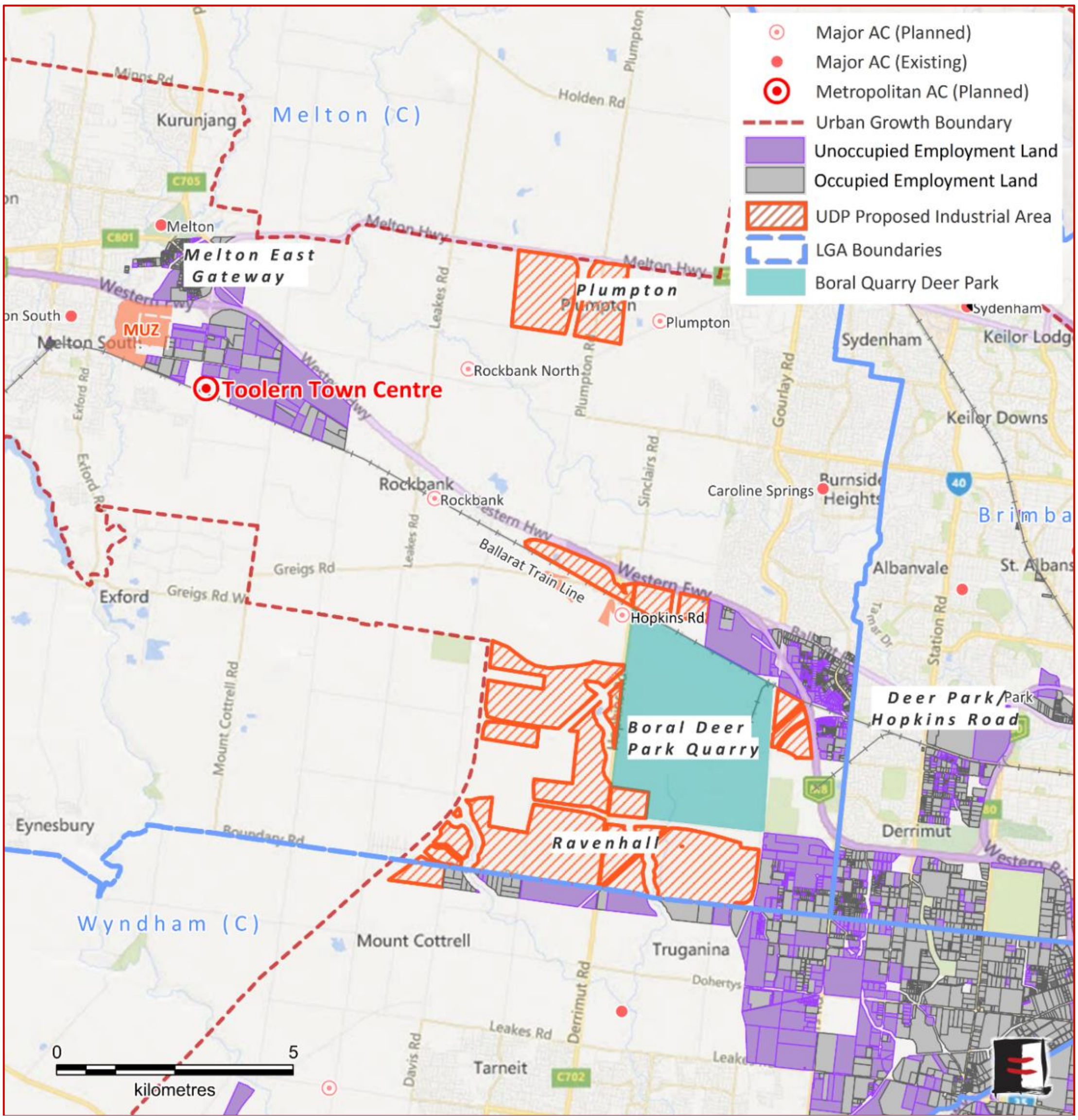
- Plumpton: Two proposed industrial areas are located on the northern edge of the Melton growth corridor at Plumpton, with a total area of 335ha (gross) that the UDP has identified in the Plumpton PSP and in the future Warrensbrook PSP.

- Ravenhall: An existing area of industrial land comprising approximately 250ha (gross) is located at the south-eastern edge of the City of Melton and this is included in the Robinsons Road South PSP; the PSP forms the edge of the Derrimut industrial area that also extends further south into the adjacent City of Wyndham. Located to the west are the proposed Western Interstate Freight Terminal and other adjacent land identified for a future industrial use (1,250ha gross in total in the City of Melton).

- Boral Deer Park Quarry: The Boral Deer Park quarry is identified as future industrial land of State significance and has also been identified as a future PSP site. While the timing and precise nature of future development on this site remains uncertain, theoretically, the locality could generate additional industrial land supply of approximately 1,125ha gross.

The summary of employment land shown in Figure 4.1 indicates that extensive areas of current and future employment land supply are available in the Melton growth corridor.

Figure 4.1: Employment Land Current and Proposed in Melton Growth Corridor



Source: Urban Development Program, various PSPs, West Corridor Plan

A review of historical UDP data for western Melbourne and other growth area corridors in Melbourne indicates an average long-term annual rate of employment land consumption in the order of 60ha to 70ha per year can be expected in the Melton growth corridor.

The Melton growth corridor has at least a 50-year supply of employment land, taking into consideration the currently-identified future supply of approximately 4,255ha.

The potential for additional employment land supply in PSPs yet to be prepared in the Melton growth corridor means that further additional employment land supply may be created in addition to the land supply identified in the above analysis.

4.2 Drivers of Employment Land Use Development in Toolern

The following key drivers are relevant in considering the demand for employment land in the TEMU:

- **Resident Population.** An expanding population in the surrounding growth areas will drive demand for a range of service industries, as well as personal and professional services. The TEMU will be the appropriate location for uses seeking low development costs and a larger site size than is available in the Toolern Town Centre.
- **Land Affordability.** The outer western industrial market is characterised by relatively competitive land costs relative to other parts of metropolitan Melbourne. The TEMU has the potential to be an attractive location for businesses for which cost competitiveness is an important locational consideration.
- **Transport Connectivity.** The TEMU has excellent transport connectivity through direct access and exposure to the Western Highway, proximity to a future Toolern railway station, and proximity to the future Outer Metropolitan Ring Road and Western Interstate Freight Terminal.
- **Labour Force Availability and Skills.** For many corporate and larger-scale businesses, access to an appropriately qualified and experienced labour force is an important locational consideration. As the population of the Melton growth corridor expands in size over coming decades, the willingness of key businesses to locate at the TEMU may be enhanced by a ‘deeper’ local labour force pool where appropriate skills and experience can be tapped.
- **Wider Economic Linkages.** It would be of benefit for the TEMU to accommodate higher-order businesses with export linkages across the state, national and international economies. This potential is enhanced by the presence of infrastructure capable of attracting national and international businesses.
- **Diversity of Users.** The significant scale of the TEMU (390ha) means that the land use mix should be relatively diverse, and that a precinct-based approach to future development would be beneficial. Despite relatively consistent planning controls across the TEMU, in reality a clustering of business and land use types can be expected to occur.
- **Timing and Staging.** Full development of the TEMU is likely to occur over a period of at least 30 years.

4.3 Indicative Development Outcomes

Light Industry

Light industry typically involves relatively low cost development of lots that range between 500m^2 and 4,000m^2 in area. Light industrial areas can be located away from major roads and prominent locations, as many businesses will not have a reliance on exposure to passing trade.

Many uses which contribute significantly to economic activity, employment and the level of services available to the community do not fit neatly within the traditional category of ' light industrial'. Increasingly, as technology and the economy evolve, many businesses in light industrial areas operate across or outside the traditional definition of that land use category. Examples include gymnasia, micro-breweries, dance studios, factory and warehouse sales, etc.

Optimising economic and employment potential for the TEMU means providing scope for a diverse range of activities in areas developed primarily for light industrial uses.

In general, the light industrial areas of the TEMU will primarily accommodate local enterprises meeting the needs of the local business and the household sector. This includes primarily small scale activities such as:

- Trade and service industries
- Warehousing and logistics
- Manufacturing and repairs
- Construction support
- Trade supplies and showrooms.

In a metropolitan Melbourne context, light industrial areas of 100ha-plus are often strategically located, with access to cost-effective land and high-quality transport links.

On an indicative basis, an allowance for up to **200ha** of light industrial activity in the TEMU is appropriate in view of the significant availability of land and the locational attributes of the site.

Restricted Retail/Showroom

Areas of the TEMU with good exposure and accessibility to key road transport connections can accommodate restricted retail and showroom uses.

In view of the considerable provision of restricted retail planned in Melton (including approval for a 50,000m^2 homemaker centre) and other PSPs in the corridor (in particular Mt Atkinson PSP), the TEMU is expected to have a high share of showrooms rather than primarily restricted retail type tenants. These showroom uses stock and sell a wide range of automotive, marine, trade supplies, building supplies and other products often targeted at businesses rather than household customers.

A total of 120,000m^2 of restricted retail/showroom floorspace would require approximately **35ha** (350,000m^2) of land once carparking, landscaping and other requirements are taken into account.

Business Park

The TEMU may be attractive for larger regional corporate offices that require access to an extensive labour force, or service-related business that serve the needs of other industrial and commercial businesses located nearby.

Potential may also exist for smaller-scale strata-office development. In the longer-term, population growth in the surrounding region will generate more professional residents, new entrepreneurs and new start-up businesses seeking commercial office accommodation.

On this basis, the TEMU presents as a future strategic opportunity for a high-amenity business park development.

Although demand for this type of development may not eventuate for some years and pressure for alternative uses may eventuate, it is important in a land use planning sense to safeguard these opportunities for a business park.

Business parks throughout metropolitan Melbourne vary in size, ranging from small sites with only a handful of corporate office buildings, to larger business parks in the order of 20ha-plus. Two of the larger business parks in Melbourne are Tally Ho Business Park in Burwood East and University Hill Business Park in Bundoora. These business parks cover areas of 21ha and 16 ha respectively. Each of these developments is serviced by public transport networks and adjoin residential areas.

On this basis, an allowance for a business park of approximately **30ha** is recommended for the TEMU. Ideally, this land would be located edge-of-centre to the Toolern Town Centre in order to benefit from locational synergies with the adjacent intensive land uses and infrastructure.

Specialised Uses

The significant scale of the TEMU provides opportunities for other large-footprint and hard-to-locate land uses to operate in proximity to a metropolitan activity centre and significant transport and other infrastructure.

An existing example is the Victorian Harness Racing Sports Club facility (Tabcorp Park) which is located on the northern edge of the TEMU and occupies approximately 30ha. Other possible specialised uses attracted to the TEMU could include:

- Highly specialised research or education facilities (e.g. synchrotron equivalent)
- Major specialised Government/public sector infrastructure (e.g. police training academy equivalent)
- Large-scale recreational facilities (e.g. theme park)
- Medical facility or hospital (major regional-level hospital, including research facilities)
- Major accommodation and conference facility.

Supporting the potential for specialised uses to locate in the TEMU will require reserving approximately **50ha** of land until such time as the potential or otherwise to attract specialised uses is identified. Subsequently, any surplus land can be developed for a light industrial, residential (if in the mixed use zone), restricted retail/showroom or business park use, as determined by demand at that time.

4.4 Toolern Employment and Mixed Use Area Outcomes and Recommendations

On an overall basis, it is appropriate for the UDF to consider the potential to accommodate approximately 315ha of employment uses, as summarised in Table 4.1. Other non-employment uses will account for the balance of development, primarily in the mixed-use area.

Table 4.1: TEMU Indicative Land Use Mix

Land Use	Area
Light Industry	200ha
Restricted Retail/Showroom	35ha
Business Park	30ha
Specialised Uses	50ha
Other (residential, public space etc)	75ha
Total TEMU	**390ha**

Source: Essential Economics