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1 Introduction

1.1 Background

Melbourne 2030 envisages the metropolitan area as a ‘city of cities’. A largely homogeneous and low density pattern of urban growth dominated by car travel is expected to give way to a richly textured metropolitan environment characterised by a network of ‘activity centres’ each displaying a clear urbanity, but each reflecting environmental and cultural characteristics which set the region in question apart.

In Transit Cities, Principal Activity Centres and Major Activity Centres, a full range of retail, commercial, recreational, civic and ceremonial activities, in addition to housing, are expected to form the nodal points in a greatly improved public transport system. Ultimately, people will be able to satisfy a much greater proportion of life’s daily requirements within walking distance or convenient public transport ride of their homes, thereby rendering the pattern of urban development more sustainable.

The same aspirations of self-containment at the local level are evident in Melbourne 2030 with respect to Neighbourhood Activity Centres. These too are expected to feature relatively dense concentrations of retailing, service, commercial, housing, leisure and cultural uses, linked wherever possible by high quality public transport.

In addition, Specialised Activity Centres are identified. These play unique roles such as technology hubs or transport nodes. Melbourne Airport in Hume is a Specialised Activity Centre.

It is important to remember that activity centre characteristics are also evident in other employment nodes, such as bulky goods strips and business parks. Consideration is also given to these areas in defining an Activity Centre Hierarchy.

The Melbourne 2030 hierarchy was defined by the State Government. The task for Hume is to review and apply this hierarchy to the local context, and develop more detailed long-term strategies for activity centre development and change. This is the subject of this report.
1.2 Purpose

The purpose of this report as defined in the study brief\(^1\) is summarised as:

- To confirm the activity centre hierarchy in Hume so as to provide a clear decision-making framework for Hume’s activity centre network development over a 20-year period;
- To identify issues and opportunities relating to activity centres in the municipality to help guide future development of centres; and
- To identify strategies to address the issues and opportunities identified in the study, including recommendations for implementation.

This report focuses on the activity centre network in Hume, giving consideration to the regional context. The higher order centres in Hume are Broadmeadows Transit City and the major centres of Sunbury, Roxburgh Park, Gladstone Park, the future Craigieburn Town Centre and Melbourne Airport. Smaller centres in Hume are Campbellfield Plaza, Craigieburn East Shopping Centre, Meadow Heights Shopping Centre, Greenvale Shopping Centre, Westmeadows Village Shopping Centre, Dallas Shopping Centre, Tullamarine Shopping Centre, Olsen Place Shopping Centre, Gap Road Shopping Centre, Homestead Centre and Upfield Shopping Centre.

The report also considers activity centre planning within growth areas, paying particular attention to the role of the future Craigieburn Town Centre and the possible need for new neighbourhood centres. Consideration is also given to other employment nodes such as bulky goods retail / showroom strips and business parks.

1.3 Structure

This report is structured as follows:
- Section 2 – Policy and Strategy Review;
- Section 3 – Retail and Activity Centre Trends;
- Section 4 - Regional Activity Centre Network;
- Section 5 - Activity Centre Profiles;
- Section 6 – Expenditure Patterns and Growth Expectations; and
- Section 7 – Findings and Recommendations.

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\(^{1}\) Hume City Council, Hume Activity Centre Hierarchy Study, April 2004.
2 Policy and Strategy Review

2.1 State Planning Policy Framework

The purpose of the SPPF\textsuperscript{2} is to ensure land use and development is undertaken in a sustainable economic, social and environmental manner.

Relevant clauses regarding the role of activity centres are as follows.

<table>
<thead>
<tr>
<th>State Planning Policy Framework Extract for Activity Centres and Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.01 Activity centres – To encourage the concentration of major retail, commercial, administrative, entertainment and cultural developments into activity centres (including strip shopping centres) which provide a variety of land uses and are highly accessible to the community.</td>
</tr>
</tbody>
</table>

Clause 17.01-2 'Activity Centres' indicates that planning for Activity Centres should incorporate and integrate a variety of land uses and maximise opportunities for co-location, multiple use and sharing of facilities; provide good accessibility by all available modes of transport (particularly public transport); minimise the effects of commercial development on the amenity of residential areas; and provide attractive environments for community activities.

17.02 Business - To encourage developments which meet the community’s needs for retail, entertainment, office and other commercial services and provide net community benefit in relation to accessibility, efficient infrastructure use and the aggregation and sustainability of commercial facilities.

Clause 17.02-2 'Business' directs commercial facilities to existing or planned Activity Centres. However, new freestanding commercial developments may occur in new residential areas, which have extensive potential for population growth or will accommodate facilities that improve the overall level of accessibility for the community, particularly by public transport.

To summarise, the main points in the State Framework relevant to this study are:

- Activity centres are to accommodate a variety of mixed land uses.
- Activity centres are to be accessible to the community.
- New activity centres can be established where there is a demonstrated need, especially in growth areas.

\textsuperscript{2} Government of Victoria (24 July 2003).
2.2 Melbourne 2030

Melbourne 2030 is the State Government’s Metropolitan Strategy for Melbourne. It was released in October 2002. Melbourne 2030 defines at a broad level the activity centre hierarchy for the metropolitan area, leaving refinement and detailed development and implementation to municipalities in partnership with the State and other stakeholders.

Melbourne 2030 outlines how growth and change should be managed across metropolitan Melbourne and the surrounding region over the long term. The main thrust of Melbourne 2030 is to establish a more compact city, which is defined by a series of high density and multi-purpose activity centres (within Melbourne and regional Victoria) that are ‘tied together’ by an effective public transport network.

Managing structural development of Melbourne is a key component of Melbourne 2030. Direction 1 ‘A More Compact City’ and Direction 2 ‘Better Management of Metropolitan Growth’ and Direction 8 ‘Better Transport Links’ are directly relevant to urban form and activity centre development by:

- Establishing an Urban Growth Boundary so that Melbourne develops in a more ‘compact’ way, and that the ‘roll out’ of urban areas is more predictable, better co-ordinated and serviced;
- Establishing a network of activity centres which are expected to take a larger share of development – including high density housing - that would otherwise have developed as low density fringe or ‘sprawl’ development; and
- Establishing a Principal Public Transport Network that links key activity centres to each other.

Around the key themes of a more compact city defined by high-density activity centres, tied together by effective public transport, Melbourne 2030 identifies a range of land use, infrastructure, economic, cultural, social, environmental, and urban management directions that seek to promote a more ‘sustainable’ urban outcome.

The figure below identifies the Urban Growth Boundary, Network of Activity Centres and Principal Public Transport Network in the central part of Melbourne. Broadmeadows, Roxburgh Park and Sunbury are on the Principal Public Transport Network.
Figure 1 - Melbourne 2030 Context Map

Source: Melbourne 2030, Department of Sustainability & Environment

The network of centres in Hume, and in the wider region, according to Melbourne 2030 is as follows.

<table>
<thead>
<tr>
<th>Hume</th>
<th>Whittlesea</th>
<th>Melton</th>
<th>Brimbank</th>
<th>Moreland</th>
<th>Moonee Valley</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Principal Activity</strong></td>
<td><strong>Activity</strong></td>
<td><strong>Centre</strong></td>
<td><strong>Centre</strong></td>
<td><strong>Centre</strong></td>
<td><strong>Centre</strong></td>
</tr>
<tr>
<td>Broadmeadows*</td>
<td>Epping*</td>
<td>-</td>
<td>Sunshine</td>
<td>Coburg</td>
<td>Airport West</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sydenham*</td>
<td></td>
<td>Moonee Ponds</td>
</tr>
<tr>
<td><strong>Major Activity</strong></td>
<td><strong>Centre</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gladstone Park</td>
<td>South Morang</td>
<td>Melton</td>
<td>Deer Park Central</td>
<td>Brunswick</td>
<td>Ascot Vale-Union</td>
</tr>
<tr>
<td>Shopping Centre</td>
<td></td>
<td>-</td>
<td>Deer Park-Brimbank</td>
<td></td>
<td>Road</td>
</tr>
<tr>
<td>Roxburgh Park</td>
<td></td>
<td></td>
<td>Central St Albans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping Centre</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sunbury Town</td>
<td>South Morang</td>
<td>Melton</td>
<td>Deer Park-Brimbank</td>
<td>Brunswick</td>
<td>Ascot Vale-Union</td>
</tr>
<tr>
<td>Centre</td>
<td></td>
<td>Woodgrove and</td>
<td>Central St Albans</td>
<td></td>
<td>Road</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Coburns Road</td>
<td></td>
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</tbody>
</table>

*Indicates primary activity centres.
*Transit Cities - The Transit City program aims to restructure major centres for ‘transit’ (ie. rail station or transport interchange) oriented mixed-use development. This includes high-density housing, retail, commercial and other uses around public transport nodes. These centres are targeted for government investment and development facilitation. Thirteen transit cities have been nominated by the State Government, three of which are in the outer north and west region of Melbourne as indicated above.

Melbourne 2030 does not nominate Neighbourhood Activity Centres for municipalities.

A summary of Melbourne 2030’s activity centre classification follows. Note that Melbourne 2030’s activity centre classification differs from traditional activity centre classifications. Refer to Section 4.1 of this report for more detail on the use of a traditional retail hierarchy classification, and how this relates to Melbourne 2030. The traditional model is based on centre size and range of shops provided.

Hume City Council uses a traditional retail centre classification system in its Municipal Strategic Statement. Hume’s Municipal Strategic Statement uses the following classification:

- Regional-Order Activity Centre – Broadmeadows District Centre;
- Sub-Regional-Order Activity Centre - Sunbury Town Centre, Roxburgh Park Shopping Centre, Campbellfield Plaza and a future Craigieburn Town Centre; and
- Neighbourhood-Order Centres – This includes other centres that serve a neighbourhood catchment for local level services.

<table>
<thead>
<tr>
<th>Activity Centre Classification</th>
<th>Key Characteristics</th>
<th>Future Strategic Development Objectives</th>
</tr>
</thead>
</table>
| Central Activities District   | Melbourne’s largest, most diverse and intense centre  
|                               | Provides commercial, retail, specialised personal, education, government and tourism services | Preferred location of activities of State or national significance  
|                               |                                                                  | Location for activities that have significant trip generation and benefit from a central position in the Principal Public Transport Network  
|                               |                                                                  | To be the main retail, office and destination node in Melbourne |
| Principal Activity Centre     | A mix of developments including business, retail, services and entertainment  
|                               | Well serviced by multiple public transport routes (being on the Principal Public Transport Network or capable of being linked to it)  
|                               | A large catchment covering several | Reinforce the network of centres by connecting all Principal Activity Centres to the Principal Public Transport Network  
|                               |                                                                  | Encourage more mixed use development  
<p>|                               |                                                                  | Focus for a range of government and community services and facilities |</p>
<table>
<thead>
<tr>
<th><em>Suburbia</em> Activity Centre Hierarchy Study</th>
</tr>
</thead>
<tbody>
<tr>
<td>suburbs, and attracting activities that meet metropolitan needs</td>
</tr>
<tr>
<td>• Potential to grow and support intensive housing</td>
</tr>
<tr>
<td>• Encourage a wider range of arts, cultural and entertainment facilities</td>
</tr>
<tr>
<td>• Location for higher density housing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Major Activity Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Serves a smaller catchment than a Principal Activity Centre</td>
</tr>
<tr>
<td>• Supplements the network of Principal Activity Centres</td>
</tr>
<tr>
<td>• Provides additional scope to accommodate ongoing investment and change in retail, office, service and residential markets</td>
</tr>
<tr>
<td>• Encourage mixed use development</td>
</tr>
<tr>
<td>• Continue broadening the range of uses</td>
</tr>
<tr>
<td>• Encourage a wider range of arts, cultural and entertainment facilities</td>
</tr>
<tr>
<td>• Location for higher density housing</td>
</tr>
<tr>
<td>• Upgrade public transport services</td>
</tr>
<tr>
<td>• Connect to the Principal Public Transport Network</td>
</tr>
<tr>
<td>• Not to grow substantially if lacks public transport and there are better options to serve the same catchment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Specialised Activity Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Important economic precincts in Melbourne</td>
</tr>
<tr>
<td>• Provides a mix of activities that generate jobs and visitor trips</td>
</tr>
<tr>
<td>• Support specialised role and primary function</td>
</tr>
<tr>
<td>• Should not compete directly with Principal and Major Activity Centres</td>
</tr>
<tr>
<td>• Must be located on the Principal Public Transport Network</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Neighbourhood Activity Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Generally, a limited mix of uses meeting local convenience needs</td>
</tr>
<tr>
<td>• Usually less that 10,000 sqm of retail floorspace</td>
</tr>
<tr>
<td>• Accessible to local community via walking and/or cycling</td>
</tr>
<tr>
<td>• Accessible by local bus services and public transport links to one or more Principal or Major Activity Centres</td>
</tr>
<tr>
<td>• Important community focal point, ideally close to schools, libraries, child care, health services, police stations and other facilities that benefit from good public transport</td>
</tr>
<tr>
<td>• Encourage walking, cycling and local public transport use</td>
</tr>
<tr>
<td>• Development of new growth areas should provide viable locations for Neighbourhood Activity Centres in areas where their distribution is inadequate</td>
</tr>
<tr>
<td>• Location should be planned in conjunction with the design of local public transport services</td>
</tr>
<tr>
<td>• Encourage higher density housing of varied type and style in and around Neighbourhood Activity Centres</td>
</tr>
</tbody>
</table>

Within activity centres and urban areas more generally, Melbourne 2030 envisages high quality urban design that facilitates pedestrian access and mobility and enhanced attractiveness and liveability. This includes:
- Encouraging pedestrian and bicycle oriented movement systems and safety;
- Protecting cultural identity, neighbourhood character and sense of place;
- Improving safety; and
- Protect heritage and values.
To summarise, the main points in Melbourne 2030 relevant to this study are:

- Melbourne is envisaged to develop in a more compact way, with higher density development expected to take place in activity centres that are inter-connected by public transport services.
- The Urban Growth Boundary is defined to support co-ordinated fringe development and encourage consolidation.
- Melbourne 2030 classifies Hume’s centres differently to Hume City Council as follows:
  - Principal Activity Centre – Broadmeadows Transit City;
  - Major Activity Centre - Gladstone Park Shopping Centre, Roxburgh Park Shopping Centre and Sunbury Town Centre; and
  - Specialised Activity Centre - Melbourne Airport.
- The future Craigieburn Town Centre, which is notionally a Major Activity Centre (or perhaps even a Principal Activity Centre), is not identified by Melbourne 2030.
- Neighbourhood Activity Centres are not identified by Melbourne 2030, with this role being deferred to local authorities.
- Some of the main growth and development directions in Melbourne 2030 in relation to activity centres are:
  - To develop a broad mix of retail, business, and community uses;
  - To accommodate higher density housing;
  - To be tied into the public transport network;
  - Centres are not to grow substantially if they lack public transport services and there are better options to serve the same catchment;
  - Specialised Activity Centres are to remain specialised and not compete (and indeed take a lower priority) to generic activity centres; and
  - Development of new growth areas should provide viable locations for Neighbourhood Activity Centres in areas where their distribution is inadequate.

2.3 Hume City Council Response to Melbourne 2030

In response to the release of Melbourne 2030, each Council was required to prepare a submission following a detailed review of the document. Hume City Council issued its response (Melbourne 2030 Hume City Council Submission) in February 2003.

The main points in Hume’s submission relevant to this study are:

- That the Urban Growth Boundary in the Craigieburn corridor be increased to be bounded by Mickleham Road to the West, the Mount Ridley Inter Urban Break to the north, Hume Highway to the east, and land bordering the Greenvale Reservoir and Somerton Road to the south in accordance with the Hume MSS;
- Activity centres planned in growth areas should be recognised – particularly the future Craigieburn Town Centre - which should be identified as a Major Activity Centre;
- Subject to review, the Campbellfield (Mahoney’s Road) centre should be identified as a Major Activity Centre, particularly given its proximity to the Upfield railway line;
- There is difficulty in accommodating larger scale bulky goods retailing within activity centres due to insufficient site availability;
Structure plan guidelines should be provided for new activity centre development (to be developed by the State Government); and
Structure plans should guide the extent of development in activity centres, and the appropriateness of bulky goods retailing in or around activity centres.

2.4 Hume’s Municipal Strategic Statement

The Hume Municipal Strategic Statement (MSS) (April 2004) provides strategic directions for the municipality’s physical, social, economic and environmental development. Key content of the MSS is summarised below.

Hume is located about 20 kilometres north-west of Melbourne, with major transport routes being the Hume Highway, Western Ring Road, Calder Freeway and Tullamarine Freeway. Two rail lines pass through the City: the Melbourne-Sydney line through the eastern part of the City and the Melbourne-Bendigo line through the western part of the City and Sunbury. Melbourne Airport is located within Hume’s boundaries.

Metropolitan train services end at Broadmeadows, the only stop in Hume. The metropolitan service is proposed to be electrified to Roxburgh Park and Craigieburn, although this is a country rail service at this time.

Two major north-south road links are proposed to be constructed in Hume: the F2 Freeway known as the Craigieburn by-pass and the E14 arterial through Craigieburn.

Hume is experiencing rapid development and growth mainly in the form of residential development and industrial development. The figures below show the broad strategic framework for Hume.
Figure 2 – Hume’s Strategic Framework Plan

Source: Hume City Council Municipal Strategic Statement
In terms of activity centres, the Municipal Strategic Statement encourages the development of a rational hierarchy of attractive and accessible activity centres that maximise resident spending within the City, whilst providing for a range of retail, community and entertainment services and facilities.

As noted above, Hume’s classification of centres follows a traditional retail / activity centre classification system as follows:

- Regional-Order Activity Centre – Broadmeadows District Centre;
- Sub-Regional-Order Activity Centre - Sunbury Town Centre, Roxburgh Park Shopping Centre, Campbellfield Plaza and a future Craigieburn Town Centre; and
- Neighbourhood-Order Centres – This includes other centres that serve a neighbourhood catchment for local level services.

Section 21.02-5 states that the hierarchy of activity centres within Hume should support the continued growth of Broadmeadows district centre as a regional-order activity centre, whilst Sunbury Town Centre, Campbellfield Plaza and the proposed Craigieburn Town Centre should develop to sub-regional level. The framework also directs that new activity centres servicing the needs of existing and future residents within the growth areas of Craigieburn and Roxburgh Park should be encouraged.

Other relevant aspects of the framework relate to transport, community development and design as follows:

- Provide safe, efficient, affordable and accessible transportation infrastructure for the movement of people, goods and services within, into and out of the municipality;
- Provide access to community services and facilities that meet the growing and changing needs of the community; and
- Provide enhanced amenity and appearance of the City’s employment and residential areas, activity centres, open spaces, gateways and approach roads.

Activity centre specific directions are summarised below.

**Activity Centre Extracts from the MSS**

**Broadmeadows**

The Broadmeadows District Centre, which contains the most extensively developed retail, office, leisure, entertainment, medical and civic facilities in the municipality, is highly valued by the local and broader community.

Notable features of the Centre include the presence of a major shopping centre, Kangan Batman Tafe, the City's municipal headquarters, Broadmeadows Leisure Centre, Town Park and several large parcels of undeveloped land. These features provide a strong basis for attracting new uses to the Centre that will consolidate its role as a regional centre in the City's activity centre hierarchy.

The objective of the MSS is to "establish Broadmeadows District Centre as a vibrant, attractive and safe regional activity centre that provides the full range of community, cultural, educational, retail and commercial services appropriate to the needs of the local community and the region".
Opportunities and constraints:

- The centre provides the opportunity to encourage higher-density housing to be developed in close proximity to the Broadmeadows railway station, Broadmeadows District Centre and the Broadmeadows Valley Park.
- The appearance of development within the District Centre strongly influences people’s perceptions of the Centre and the attraction of new investment. Attention to urban design and developments displaying a high quality architectural standard are, therefore, seen as critical to the Centre’s success.
- A ‘sense of place’ can be developed within the Centre through urban design and environmental improvements, landscaping and shade, seating and provision of pedestrian paths.
- The lack of an electrified rail service beyond the Broadmeadows railway station has contributed to difficulties in the local community accessing job and education opportunities.
- There are limited venues for learning and artistic and cultural expression in the Centre.
- The decline in population in the Broadmeadows area has contributed to the decline in the range of local shopping and community facilities.
- There is a lack of diversity in the range of housing options in the area.

Melbourne Airport

The Hume Planning Scheme does not cover the Melbourne Airport, but it is recognised as the most significant transport feature in the area. It provides passenger and freight services and significant employment and flow-on economic activity in accommodation, storage and transport industries.

The curfew-free status of the Airport is recognised as a key strength of the facility and its continued competitiveness, and that of supporting industries.

Sunbury Town Centre

The MSS notes that “Sunbury has the most extensively developed retail, commercial and community facilities in the western half of the municipality and the City encourages the development of the Sunbury Town Centre as a sub-regional activity centre. Any new development should reflect and enhance the historic and ‘rural town’ character and ambience of the Centre”.

The MSS seeks to retain and enhance the precinct of office, institutional, civic and community-related activities along Macedon Street to reflect its role as an eastern approach road and promote the concept of neighbourhoods as the basis for residential planning and the delivery of community services at the local level.

The establishment of neighbourhood and local shopping facilities within or adjacent to the activity centre in accessible locations around the town is encouraged, although retail development outside the Sunbury Town Centre needs to be limited.

Higher density housing is also encouraged in areas in close proximity to shopping, public transport, educational facilities and open space, especially the Sunbury railway station. Council recognises the need to work with the State Government and the Directorate of Public Transport to develop a strategy for the establishment and expansion of public transport facilities in Sunbury as it grows and develops.
Past planning policies have consistently recommended that the Centre should be the major activity centre in the town with a heavy bias toward comparison goods shopping supported by substantial civic, cultural and business uses. Presently, it is a sub-regional order activity centre in the City’s activity centre hierarchy.

Opportunities and constraints:
- The Sunbury Town Centre is an attractive self-contained centre that would benefit substantially from additional higher order retail, entertainment facilities and provision of a greater range of comparison and convenience shopping facilities and recreation services and facilities to consolidate the Centre’s role as a sub-regional activity centre.
- Sunbury has a unique country town character that is highly valued by its residents.
- Sunbury has experienced steady population growth in the past and will continue to grow for at least the next 20 years. However, the growth potential of the town is limited by topographical and environmental features that will eventually contain the amount of development that occurs.
- Retail developments that have large floor area requirements and are dependent on high exposure and vehicular access should be located outside of the retail ‘core’, but within the Centre.
- The dissection of the town by a railway line hinders access to the Town Centre and the principal employment and residential areas and reinforces the need for a ‘ring road’ in the western half of Sunbury, improved rail crossings and off-road cycling paths.

Gladstone Park Shopping Centre

Council encourages the continued development of the Gladstone Park Shopping Centre as a neighbourhood-order activity centre.

Opportunities and constraints:
- The Tullamarine Freeway is a major visual and physical barrier separating the communities of Gladstone Park and Tullamarine.
- Access to regular and convenient public transport services is inadequate.

Roxburgh Park Shopping Centre

The Roxburgh Park Shopping Centre is classified as a sub-regional facility that is continuing to be developed as a focus of retail and community activity. Priority has been given to the development of conventional retailing activities within the sub-regional shopping centre.

Any development within the Business 4 Zoned land located on the southern side of Somerton Road must complement conventional retailing located in the sub-regional shopping centre, presenting the opportunity to expand the activity centre by adding complementary services.

Opportunities and constraints:
- The proposed railway station at Roxburgh Park offers opportunities to provide a public transport node and create a major focal point for Roxburgh Park Shopping Centre through integration into a wider centre.
- Roxburgh Park Shopping Centre has the opportunity to promote development and integrate it into a well-planned activity centre covering land on the north as well as the south side of Somerton Road.
- The land at the south-east corner of Somerton Road and Pascoe Vale Road, Coolaroo, is well-
positioned to provide for a range of uses and development opportunities including restricted retailing, smaller scale office type uses and light industry incorporating service components. The site’s proximity to the Roxburgh Park Shopping Centre requires future use and development of the site to complement the core retail role of the Shopping Centre.

- Vast tracks of undeveloped land provide an opportunity to give the neighbourhood a sense of identity and individuality.
- Substantial new physical and community infrastructure is required to service the needs of existing and future residence.

**Future Craigieburn Town Centre**

This Centre is yet to be developed and it seems that retail, commercial and community facilities have not kept pace with the needs and expectations of residents.

The Centre is expected to “provide the residential development with a vibrant and accessible activity centre in the Craigieburn neighbourhood that offers a wide range of retail, commercial, community and cultural facilities and services to complement a comprehensive transport network, attractive open spaces and access to a range of employment opportunities”.

Opportunities and constraints:

- The lack of an electrified rail service and Craigieburn’s distance from the metropolitan area, have contributed to the physical isolation experienced by some residents.
- Substantial new physical and community infrastructure is required to service the needs of existing and future residents.
- Vast tracks of undeveloped land provide an opportunity to give the neighbourhood a sense of identity and individuality.
- Substantial new physical and community infrastructure is required to service the needs of existing and future residence.

**Campbellfield Plaza**

Campbellfield Plaza is a sub-regional order activity centre.

Opportunities and constraints:

- The Hume Highway is a major physical barrier that effectively separates established residential and industrial areas of Campbellfield (on the east side of the Highway) from Dallas and Coolaroo (on the west side).
- Public transport in the area is poor and Council suggests the construction of a new railway station in the vicinity of Camp Road, Campbellfield, is desirable.
- Northcorp Industry Park is identified as a preferred site for large-scale employment generating activities.
- Vehicular gateways to the city are poorly defined, generally unattractive and do not display a unique or cohesive landscaping theme.
- There is a lack in the range of housing options in the area.
### Craigieburn East Shopping Centre

This is a neighbourhood centre.

Opportunities and constraints:
- The centre needs to foster a ‘sense of arrival’ on approaches to the Centre and ‘sense of place’ and cohesiveness within it.
- The neighbourhood has excellent vehicular access to the metropolitan and national freeway network.
- Hume Highway is a major physical barrier which impacts upon the appearance of Craigieburn from the east.
- The electrification of the railway line to Craigieburn and the construction of two additional railway stations in the vicinity of Roxburgh Park would ease the feeling of isolation felt by some residence.

### Meadow Heights Shopping Centre

Neighbourhood centres serve an important retail, community and commercial function and, if well designed and appropriately located, have the potential to significantly enhance the character and amenity of a neighbourhood.

Opportunities and constraints:
- Meadow Heights has well-developed physical infrastructure, however community infrastructure (open space facilities, community centres) is lacking.
- The Meadow Heights Learning Shop is an example of community services that improve the education and skills of people living in the local area.

### Greenvale Shopping Centre

Greenvale Shopping Centre is neighbourhood-order activity centre.

Opportunities and constraints:
- The capacity for the neighbourhood to yield only small populations means that only neighbourhood and lower-order activity centres will be sustained in the long term.
- Well-developed neighbourhood-order retail facilities exist in the area. However, the location of the Greenvale Shopping Centre in the north-west corner of Greenvale, and difficulties in accessing the Fawkner Street centre from residential areas west of Mickleham Road, necessitates the provision of local shopping facilities.
- Access to regular and convenient public transport services is inadequate.
- Where possible and appropriate, cluster activity centres with community facilities, open space and education facilities to maximise community access to those facilities and to achieve cost efficiencies in the provision, management and operation of services.

### Westmeadows Village Shopping Centre

Council encourages the development of this Shopping Centre as a neighbourhood-order activity centre. Development within the Westmeadows Village area should maintain and enhance the character and heritage values of the area.
Opportunities and constraints:

- The capacity for the neighbourhood to yield only small populations means that only neighbourhood and lower-order activity centres will be sustained in the long term.
- Residential environments in the neighbourhood are of a high quality and offer diversity in lot size. The choice in housing size and tenure, and the availability of alternative housing types however is poor.
- Access to convenient and regular public transport services is inadequate.
- A lack of employment opportunities means that many of the neighbourhood’s workers must travel outside the immediate area to work.

### Dallas Shopping Centre

This is a local centre.

Opportunities and constraints:

- The neighbourhood is culturally diverse, unemployment is high, the number of residents with qualifications is low, and a high percentage of residents rent, rather than own, their home. Consequently the community is particularly vulnerable to economic downturns and requires access to specialist community services and facilities.
- The Centre suffers from poor urban and streetscape design, a high turnover of businesses and the lack of an attractive and vibrant shopping atmosphere.
- Council encourages existing neighbourhood-order activity centres to become vibrant and active centres through improved business mix, streetscape and urban design improvements, and marketing and promotion.
- Improve facilities at the Linda Blundell Community Centre in Dallas and continue to implement the recommendations of the Olsen Place and Dallas Shopping Centre business plans.
- Higher density housing is also encouraged in close proximity to the Broadmeadows railway station and Dallas Shopping Centre (excluding areas which are or will be subject to high levels of aircraft noise exposure).
- Housing in parts of Dallas is of poor appearance and construction and in need of redevelopment.
- The neighbourhood has a number of cultural heritage sites that are of local or greater significance.

### Tullamarine Shopping Centre

Council supports the continued development of Tullamarine Shopping Centre as a community activity centre.

Opportunities and constraints:

- The capacity for the neighbourhood to yield only small populations means that only neighbourhood-order activity will be sustained in the long term.
- The Tullamarine Freeway is a major visual and physical barrier separating the communities of Gladstone Park and Tullamarine.
- Access to regular and convenient public transport services in the area is inadequate.
### Olsen Place Shopping Centre

Council supports the continued implementation of the recommendations of the Olsen Place and Dallas Shopping Centre business plans.

**Opportunities and constraints:**
- The centre suffers from poor urban and streetscape design, a high turnover of businesses and the lack of an attractive and vibrant shopping atmosphere.
- There is a lack of diversity in the range of housing options in the area.

### Gap Road Shopping Centre

Council encourages the establishment of neighbourhood and local shopping facilities within or adjacent to activity centres in accessible locations around Sunbury.

Development of a neighbourhood-order centre on land located on the northeast corner of Elizabeth Drive and Gap Road is supported to promote the concept of the neighbourhood as the basis for residential planning and the delivery of community services at the local level.

### Homestead Centre

The MSS makes no reference to this centre.

### Upfield Shopping Centre

This is a local centre.

**Opportunities and constraints:**
- The centre suffers from poor urban and streetscape design, a high turnover of businesses and the lack of an attractive and vibrant shopping atmosphere.
- Many major industries are located in the neighbourhood.
- The Hume Highway is a major physical barrier.

The main points in the MSS relevant to this study are:
- Hume is experiencing rapid development and growth which will generate demand for activity centre development.
- New transport links, especially the electrification of the Craigieburn rail line and the two major north-south road links (the F2 Freeway known as the Craigieburn by-pass and the E14 arterial through Craigieburn) will have an impact on the nature and distribution of development, and activity centre development.
- Activity centre policy seeks to maximise resident spending within the City, whilst providing for a range of retail, community and entertainment services and facilities.
- Broadmeadows is nominated as the highest order centre in the City, followed by Sunbury Town Centre, Campbellfield Plaza and the future Craigieburn Town Centre.
- New activity centres within growth areas of Craigieburn and Roxburgh Park should be encouraged.
Transport, land use mix and design are important ingredients to urban development generally and activity centre development.

Centre specific themes include improving land use mix, improving transport provision especially public transport, addressing physical barriers, encouraging co-location of retail, commercial, civic, entertainment and recreational activities, and improving urban design and sense of place.

### 2.5 Craigieburn Strategy Plan – Towards 2011

This Strategy Plan was prepared in June 1993 by the then Shire of Bulla. It is an adopted planning strategy document.

The Strategy documents future directions for Craigieburn having regard to environmental features, urban form and character, population, housing, human services, activity centres, employment, open space, pedestrians and cyclists, transport, physical infrastructure and funding of development infrastructure, services and facilities.

The Strategy Plan provides a framework for planning the growth area generally between Somerton Road, Mt Ridley Road, Mickleham Road and Hume Highway. Part of this area is outside the Urban Growth Boundary established by Melbourne 2030.

Ultimately, the wider Craigieburn planning area is expected to accommodate:

- New housing estates with about 100,000 people;
- A major town centre to service the area, with significant retail, community service and commercial space; and
- Significant urban and environmental design features.

In terms of activity centres, the Strategy provides a general hierarchy of centres to guide planning including:

- **Town Centre (or Regional Activity Centre)** – This would service the whole of Craigieburn, which is expected to have a population of around 90,000 to 100,000. It is envisaged that the Town Centre will have more than 50,000 sqm of shopping floorspace at full development. In addition, it would contain commercial office space and a number of higher order community services such as further education and health facilities.

- **Community (or Sub-Regional) Activity Centres** – These are likely to serve populations of at least 35,000 people and have a secondary school. Retail floorspace in the order of 12,000-20,000 sqm is envisaged.

- **Neighbourhood Activity Centres**: These centres would form the basic unit of the activity centre network by serving a population of up to 6,500 and include a primary school. Retail floorspace around 1,500-3,500 sqm is envisaged.

- **Local Shops** - Provision of local shops would ensure that every household is within walking distance of a shop for basic groceries. Local shops serve a catchment of around 1,500 residents.
2.6 Craigieburn Strategic Framework and Local Structure Plans

This document provides strategic and structure plans for Craigieburn. The report was prepared in November 1999 by Hume City Council, and has been adopted in its strategic and statutory planning framework. The framework has a notional time horizon of 20 years.

The area that is investigated in this document forms one part of Craigieburn, and is within the boundaries of the 1993 Strategy Plan. Again, this area extends beyond the Urban Growth Boundary that was identified by the State Government in Melbourne 2030, and aligns with Hume’s submission on this topic in its response to Melbourne 2030.

The area subject to the plan has potential for over 36,000 people at full development. The features of the plan are:

- Identification of the future Craigieburn Town Centre, which is earmarked for 55,000 sqm of retail space notionally comprising a department store, discount department store, supermarkets and speciality shops;
- 20,000 sqm of office including a mix of local and regional offices;
- Significant community space for civic, ceremonial, entertainment, recreation and leisure activities;
- A research and development technology node;
- About seven new neighbourhood (commercial / retail) nodes integrated with community facilities in new growth areas; and
- A major new road that will dissect the new growth area (ie. the E14 arterial).

The report notes that the staging and timely provision of community facilities and services is a critical issue in the development of a sense of community and an identifiable neighbourhood character. The presence of accessible and affordable services that reflect the population mix are crucial to the well-being of a healthy community.

Emphasis is placed on the provision of multi-functional spaces and the co-location of facilities and services within neighbourhood activity centres. This will encourage community development by providing residents with a visual and functional focus. Moreover, it will minimise total travel time and promote single destination multi-purpose trips.

The report notes that the existing public transport system is not meeting local needs in the existing Craigieburn area. The area is not well catered for by mainstream transport services.

The main points in the Report relevant to this study are:

- Identification of the future Craigieburn Town Centre, which could be a future competitor to the Broadmeadows Transit City and other larger centres in the region.
- About seven new neighbourhood (commercial / retail) nodes integrated with community facilities are identified in new growth areas, although a part of this need is due to development which is outside the Urban Growth Area. (Preliminary assessment of the local
level centres suggests that the demand for new neighbourhood centres within the Urban Growth Boundary could be four new retail nodes (ie. local shops) with one being a small supermarket based centre).

- Transport and in particular public transport is poor in the new growth areas and poses challenges in the future. To this end strategy should seek to ensure bus services can be linked into existing and future centres in the area.

### 2.7 Broadmeadows Transit City Land Use Mix Study

In the context of Melbourne 2030 and the Transit Cities Program, Broadmeadows is earmarked for more intensive development with a range of activity centre uses, including housing. Three studies were commissioned to add detail to this direction: a land use mix study, a transport study and an urban design study. The Land Use Mix Study: Broadmeadows Transit City was prepared in October 2003.

The report highlights that Broadmeadows is the main activity centre in Hume and has been designated a Principal Activity Centre and Transit City and provides major retail, civic, education, community services, entertainment and recreational opportunities for the regional population. However, the ‘offer’ of Broadmeadows is limited. The Transit City lacks a critical mass of activity in a number of land uses that contribute to vibrancy and diversity. This includes high order retail, business services, street based café culture and leisure retail (pubs and clubs), accommodation, high-density housing and a host of related uses.

The recommended strategic directions for the Broadmeadows Transit City are to establish: high and medium density residential development in and around the Transit City; office / commercial development in the Transit City, making provision for approximately 44,000 sqm (with this target reviewed and if required amended over time); retail development in the Transit City, making provision for approximately 33,000 sqm over 20 years; and ‘other uses’ (ie. entertainment, community services, business services and transport development uses) in the Transit City.

The reports suggest there is demand for additional retail space development, as noted in the following extract.

<table>
<thead>
<tr>
<th>Retail Analysis Extract from Land Use Mix Study</th>
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| Broadmeadows is a sub-regional shopping centre (anchored by discount department stores, supermarkets and a cinema complex). At this point in time Broadmeadows has developed a conventional chain retail offer, some bulky goods but little restaurant / café retail (for the regional population and executive labour).

The Transit City is surrounded by competing centres, which frame the opportunities that are available to it. For the retail role it does perform, major centres of influence are:
- Central City - Melbourne’s Central Activities District for metropolitan-wide retail services.
- Regional Centres - Highpoint (Maribyrnong) and Northland (Preston) provide regional retail services (anchored by department stores, discount department stores, supermarkets and entertainment). |
• Sub-Regional Centres – Broadmeadows’ sphere of influence is limited by nearby sub-regional centres like Airport West Shoppingtown and Campbellfield (anchored by discount department stores and supermarkets).
• Neighbourhood Centres – There are a range of smaller, supermarket-based centres which serve a lower order role but also have an influence on retail patterns. This includes the developing Roxburgh Park Centre, Gladstone Park, Glenroy and others.

Broadmeadows’ future retail growth potential will be heavily influenced by development of new retail centres in the northern region, especially in the Craigieburn and Roxburgh Park growth areas. These growth areas will generate significant retail expenditure over time, and most of the ‘new’ retail expenditure in the wider region over a two-decade period. The extent to which Broadmeadows can capture this retail expenditure will depend on the quantum of new competing retail space provided in these growth areas, and in surrounding areas.

A significant amount of retail space is planned for both Craigieburn and Roxburgh Park. A department store has been identified in planning strategies for the Craigieburn centre.

Broadmeadows has attracted some bulky goods (hardware, auto parts, etc.) in a purpose-built homemaker centre in the northern precinct of the Transit City. However, the primary arterial roads in the region have had most success in attracting bulky goods retail to this point in time. Sydney Road / Hume Highway has been historically the strongest regional attractor of this activity. This relates to the fact that a main road location and relatively low cost land are important locational decision criteria for bulky good businesses. This form of shopping is mainly undertaken by car visits (due to the nature of goods purchased) and hence a main road location for ease of access and exposure to passing trade is paramount in the location decision-making of business operators. Furthermore, these uses have significant floorspace and parking requirements and hence low cost land (eg. on the fringe of centres or on industrial main road locations) is another site selection consideration.

Possible retail development strategies for the Transit City are to:
• Enable growth in the main shopping centre as it is demanded, within the confines of the existing street pattern to ensure the area does not become dominated by this single use;
• Provide outdoor convenience retail area(s) (foods and personal goods) in pursuit of boosting the ‘CBD’ style retail offer of the Transit City; and
• Provide outdoor entertainment and retail (cafes / restaurants and pubs / clubs) in pursuit of boosting 24-hour activity in a Transit City environment.

Based on this indicative analysis, the wider regions under investigation may be able to support a department store over a 20-year period (a department store is typically sized around 20,000 sqm). If this is the case, a department store facility should be located in Broadmeadows to confirm its role as the principal activity centre in Hume and in the region. Taking this policy position will mean that Broadmeadows is allowed to grow at the expense of the Craigieburn centre.

The bulky goods retail precinct should be encouraged to grow over time within the existing street pattern, but this precinct should be considered for conversion into more intensive uses (eg. high density housing, commercial development, conventional retailing) in the longer-term should the demand arise and other sites be developed.
The main points in the Land Use Mix Report relevant to this study are:

- Broadmeadows is classified as a Principal Activity Centre and Transit City, but its retail role is ‘sub-regional’ at this point in time. It is framed by other similar scaled centres such as Airport West Shoppingtown and Campbellfield, and ‘larger’ centres like Highpoint and Northland.
- Most retail expenditure growth in Hume will be concentrated in the new growth areas in and around Craigieburn, which is part of the Broadmeadows catchment.
- There is a policy tension between the roles of the future Craigieburn Town Centre and the Broadmeadows Transit City, with either centre being capable of diminishing opportunities for the other.
- The Land Use Mix Report takes the view that Broadmeadows should be confirmed as the highest order centre in the region, with the future Craigieburn Town Centre playing a lower order role. This is particularly relevant for a future department store location, which could be warranted in the region within 20 years. The Report states that Broadmeadows be identified as the preferred location for such a facility.
- The bulky goods precinct in Broadmeadows Transit City is growing and should be able to continue to grow but in the long term this area may be more suited to more intensive activity centre uses.

2.8 Hume Activity Centres Hierarchy Study Brief

The Hume Activity Centre Hierarchy Study was commissioned by Hume City Council in April 2004. It highlights some of the main issues affecting the activity centre network in the municipality as a starting point for investigation.

The following extract is from the study brief.

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Activity Centre Hierarchy Study

Hume City is a large, populous municipality on Melbourne’s north-western fringe. It covers the established residential suburbs of Broadmeadows, Gladstone Park, Greenvale and Meadow Heights, the growing urban township of Sunbury, the industrial suburbs of Campbellfield and Somerton, the Melbourne International Airport at Tullamarine, and the new growth areas of Roxburgh Park and Craigieburn. It is also home to a large rural population, and approximately 72% of the municipality is zoned for rural purposes.

Hume boasts a number of significant activity centres, with a strong retailing and public sector presence. Melbourne 2030 has identified one Principal Activity Centre at Broadmeadows, one Specialised Activity Centre at the Melbourne Airport as well as three Major Activity Centres at Sunbury, Roxburgh Park and Gladstone Park. In addition, the Draft Implementation Plan 2: Growth Areas identifies a potential public transport oriented centre in the Craigieburn area. Broadmeadows has a strong retail, public sector office, tertiary education and transport interchange focus, however lacks a private sector office, residential and entertainment presence. As part of the Transit City project, a draft master plan is being developed to address many of these issues. This plan is currently on exhibition. The remaining centres are dominated by retail uses, however Sunbury boasts a mix of retail uses, private and public sector offices and community services.
Particular areas within Hume are coming under increasing pressure to accommodate new forms of retail use. Mickleham Road and the Hume Highway in particular are being targeted for large format and bulky goods retailing. If not appropriately planned, this has the potential to undermine the City’s existing activity centre hierarchy. Population growth and demographic change including the development of new housing estates and infill development will require better planned and more accessible places to live, shop, work and conduct business. The changing nature of retail centres as influenced by M2030 has broadened the base of activity in activity centres and will enable a concentration of mixed uses and a wider range of services.

Activity Centre Classification (Interim)

1. Principal Activity Centre:
   - Broadmeadows Transit City – Pascoe Vale Rd, Broadmeadows

2. Specialised Activity Centre:
   - Melbourne Airport

3. Major Activity Centres:
   - Sunbury Town Centre – Evans, O’Shannassy, Brook and Horne St, Sunbury
   - Gladstone Park Shopping Centre – Mickleham Road, Gladstone Park
   - Roxburgh Park Shopping Centre – Somerton and Pascoe Vale Road/David Munroe Drive, Roxburgh Park/Meadow Heights
   - Future Craigieburn Town Centre – Craigieburn Road West and E14 Arterial

4. Neighbourhood Activity Centres:
   - Campbellfield Plaza – Camp/Mahoneys Road and Hume Hwy, Campbellfield
   - Craigieburn East Shopping Centre – Craigieburn Road West and Hanson Road, Craigieburn
   - Meadow Heights Shopping Centre – Hudson Circuit, Meadow Heights
   - Greenvale Shopping Centre – Greenvale Drive and Mickleham Road, Greenvale
   - Westmeadows Village Shopping Centre – Fawknner St, Westmeadows
   - Dallas Shopping Centre – Blair St, Dallas
   - Tullamarine Shopping Centre – Melrose Drive, Tullamarine
   - Olsen Place Shopping Centre – Olsen Place, Broadmeadows
   - Gap Road Shopping Centre – Gap Road, Sunbury
   - Homestead Centre – Roxburgh Park Drive, Roxburgh Park
   - Upfield Shopping Centre – Barry Road, Campbellfield/Dallas

To summarise, the main points in the study brief relevant to this study are:
   - Hume has a mix of urban environments and significant rural land. The urban environments include: established areas, developing fringe areas, township of Sunbury, industrial areas and Melbourne Airport;
   - There is potential for a new Transit City in the Craigieburn corridor, in addition to the existing Centre at Broadmeadows;
Many of the centres in Hume have a focus on retailing and lack land use diversity, although Sunbury has a mix of uses and Broadmeadows has public sector activities and some entertainment; and

There is continuing pressure for large format bulky goods development along Mickleham Road and Hume Highway, which has the potential to undermine the activity centre hierarchy.

### 2.9 Synthesis

The various policy and strategy documents that address the activity centre network in Hume at State and Local Government levels have a number of consistencies, differences and inconsistencies.

The major consistencies are as follows.

- There is a need to establish an orderly and vibrant network of activity centres that are economically strong, have a wide mix of retail, commercial, entertainment and community uses and are accessible to the community with a range of transport and movement options.

- Expansion of centres and the network of centres is supported where there is a demonstrated need and where a range of transport options (especially public transport) is provided.

- Hume City Council drafted a revised activity centre classification (to update the MSS definitions) using the Melbourne 2030 model, and this generally accords with Melbourne 2030’s position. The hierarchy is focused on Broadmeadows as the primary centre in Hume. Melbourne Airport is a specialised centre that plays an important transport role and complimentary economic role in the economic of Hume. Major Activity Centres are Sunbury, Gladstone Park and Roxburgh Park. See below for a discussion on the future Craigieburn Town Centre. A host of Neighbourhood Activity Centres are identified.

A point of difference in policy occurs where one agency has a direction for a topic that the other agency has not fully addressed. Such distinctions are evident in the following areas.

- Higher density housing in activity centres is a direction in Melbourne 2030 and is generally supported by Hume although previous activity centre related policies and strategies have not addressed this direction to a significant extent, apart from the Broadmeadows Transit City Study which recommended inclusion of higher-density housing in the Transit City. Hume has no blanket policy acceptance of higher density housing in all activity centres.

- The location and role of a future Craigieburn Town Centre is clearly specified in Hume’s planning framework. The Centre is expected to become a Major Activity Centre or Principal Activity Centre (using Melbourne 2030 classification system) at the north-east junction of Craigieburn West Road and the proposed E14 transport corridor. This is the adopted
position of Hume City Council. However, Melbourne 2030 does not recognise this Centre in its activity centre network and considers the scale and location of a future major centre in Craigieburn to be subject to review, which may or may not support the location currently specified by Hume City Council.

The major inconsistency in the two positions is as follows.

- The location for future urban growth differs between Hume’s formal position and the State Government’s position with respect to the Hume / Craigieburn growth area. Hume’s growth area planning boundary is based on Mickleham Road being the western boundary and the northern line of the inter-urban break being the northern boundary (which is about 1.5 kilometres north of Mt Ridley Road). The State’s Urban Growth Boundary takes in a smaller area, which is located some 1.5 kilometres to the east of Mickleham Road and along Mt Ridley Road in the north. This has implications for the location and catchments of future activity centres in the growth area.
3 Retail and Activity Centre Trends

3.1 Understanding the Role of Activity Centres in an Economic System

It is important to have a conceptual appreciation of where an activity centre fits into an economic system. The following diagram provides a simplified conceptual understanding of an economy. It shows that there are a number of components, which can be summarised as the 'local demand economy' and 'export economy'.

The key message from this diagram is that an activity centre, especially in a suburban setting, will be mainly occupied by local demand based businesses that primarily serve the local area, and the success or otherwise of local demand based businesses will largely depend on the size and composition of the local population base (in relation to the supply of competing business outlets).

Figure 3 - The Role of An Activity Centre

Understanding an Economic System

Strategic Direction 1. Boost Export Income

Export Economy
- Driven by Export Businesses
- Important for Capturing Wealth and Boosting the Size of the Economy
- Examples include Manufacturing, Advanced Business Services, Agriculture, Tourism

Local Demand Economy
- Driven by Size of Local Population and Business Base
- Important for Retaining and Circulating Wealth, and Creating Jobs
- Examples include Retailing, Personal Services, Construction

Strategic Direction 2. Minimise Escape Expenditure
In this context, an activity centre’s success is driven in part by demand side factors such as:

- The size and composition of the local population base (in the catchment);
- Plus export earnings through ‘tourism’ expenditure; and
- In larger centres, the presence of advanced business services that derive export earnings that flow through to local suppliers in outsourcing arrangements.

Smaller suburban centres mainly rely on the first demand driver (ie. the local population) and to a lesser extent tourism, and only in some cases advanced business services.

The other side of the equation is the supply side. All things being equal, the consumer and business operator will be attracted to a centre that has a superior supply of facilities and environments. The supply side factors will include quality of:

- Street level amenity and architecture;
- Transport networks and facilities (public transport, car parking); and
- Image as a desirable and safe place.

The point here is that a suburban activity centre is provided with an opportunity to service its local population base, and thus has the potential to be sized and composed in such a way to reflect the purchasing profile of its local population base. However, the extent to which this happens depends on the capacity of the centre to meet this local need in the context of a competitive, evolving and expanding network of centres in the metropolitan area.

### 3.2 Retail Activity

#### 3.2.1 Types of Shopping Trips

Shopping for retail goods consumes a significant proportion of household expenditure and the activity of shopping accounts for significant resource consumption, particularly the consumption of time and energy resources utilised in transportation.

Retail plays a major and arguably the core role in an activity centre. As shops provide the goods such as food and clothing necessary for people to manage their daily lives, retailing is the cause of the majority of the trips from home to the activity centre. However, the purposes driving shopping trips vary and can be classified into five main categories as follows:

- **Convenience Shopping** is undertaken to ‘top up’ common household consumer items (such as milk and bread), and occasionally applies to emergency situations such as when unexpected guests drop in.

- **Household Shopping** is often perceived to be a ‘chore’, and is usually referred to as ‘doing the shopping’. This generally involves the major weekly shopping trip, is often planned in advance, and usually occurs at the local supermarket.
• **Comparison Shopping** largely represents a pleasant trip to the local shopping centre, is often referred to as 'going shopping' and relates to purchase items including clothes, music and books. It can also comprise a social event and incorporate activities such as meeting a friend for lunch.

• **Special Purpose Shopping** involves the purchase of white goods, furniture and other household durables. Such goods maintain a longer lifespan compared to goods purchased during household and comparison shopping trips, making special purpose trips infrequent. In recent times, special purpose shopping trips have become the domain of ‘category killer’ shopping centres, for example large homemaker centres.

• **Recreational Shopping** is synonymous with a leisure pursuit where shopping is perceived as a day event in which consumers seek to be entertained through shopping. Examples include a trip to the market or to ‘the City’.

More recently however, the boundaries between the various classifications of shopping trips have become significantly blurred. Convenience retailers are progressively carrying a larger selection of goods, and now cater for what could be considered minor household shopping. Likewise supermarkets have experimented with the development of express aisles and ‘megamarts’ in order to capture convenience shoppers and stock household items normally purchased in discount department stores.

One particular and increasingly prevalent crossover in shopping trips involves the distinction between recreational shopping and comparison shopping. There is an increasing demand by consumers for a shift from traditional retailing, which usually involves mass sales of low-margin goods, to a new service based approach.

These changes are driven in part by consumer shifts. As consumers become more educated with a greater variety of choice, they are demanding quality products, real service, a positive experience, service excellence, convenience and flexibility of choice and a special environment in which to shop, spend time, relax, whilst also being part of an authentic community. This scenario puts increasing demands on retailers, retailer associations, building owners and Councils to provide for customers needs and wants.

Some key factors driving diversification in retail markets are noted below. These factors have led to a shift in who shops, when, for how long and why:

• Diversification in work patterns;
• Growth in female employment;
• Increase in non-family households;
• Unemployment for some;
• Increased leisure, entertainment and recreation orientation overall;
• Delayed childbearing;
• Ageing population;
• Smaller households;
• Increased consumption of fast food and restaurant services;
• Convenience shopping; and
• Growth of e-commerce.
3.2.2 Implications for Activity Centre Planning

The implications of this structure of shopping trips for activity centre planning includes the need to provide a network of activity centres that respond to the pattern and frequency of trips, generally on the following basis:

- Local shops for Convenience Shopping;
- Neighbourhood Centres for Convenience Shopping and Household Shopping and some Comparison Shopping;
- Major and Principal Centres – for all types of shopping, and including Comparison Shopping, Special Purpose Shopping and Recreational Shopping; and
- Special purpose centres for specific or unique shopping trips.

The challenge is to create an activity centre network that allows new retail technologies to evolve from within. In many cases this involves pro-active measures in established centres to overcome inherent difficulties, especially with regard to site consolidation and redevelopment facilitation.

3.2.3 Market Forces Hindering and Assisting Planning

Some trends hinder and others assist planners in developing an activity centre network. The main trends are noted below.

**The Trend Towards Freestanding Centres** - In response to growing and changing consumer demands for retail services, the retail industry responds with new space, location and car parking requirements. Ownership tends to be concentrated and when these factors are combined, there is constant pressure for establishment of freestanding locations for new retail facilities. The difficulties of expanding and redeveloping within established centres where land values are high and land parcels are fragmented creates a ‘push’ factor.

The lack of available sites for development is a key constraint to strip or village centre development and redevelopment. Major retail operators prefer to obtain a consolidated site, which they can ‘control’ and have few external stakeholder interests influencing decision making.

The desire to locate at out of centre sites is strongest for ‘large’ retail operators that can establish a market catchment independent of other operators - such as large bulky goods retail stores and supermarkets.

Internally, freestanding centres tend to provide a climate-controlled environment with easy access to parking. The outcome of this trend towards freestanding locations, if unchecked, is that cars become the dominant transport mode and synergies with other retail activities will become eroded.

**Design of Modern Corporate Centres** - There is a tension between public objectives for activity centres and the objectives of many large retail operators who will desire to establish enclosed or detached facilities in any location, whether it be inside an activity centre or in a freestanding
location. The aim of the operator is to maximise private benefit from visitors. As a result, enclosed or internalised shopping centres with blank external walls are typical across urban areas.

There is some evidence that consumers are rejecting this design model and that a more open street-based retail environment is favoured.

**A Return to ‘Village Shopping’** - A global trend in western nations, particularly in USA and Europe, has been the return to community and particularly village shopping. As society and the pace of change quicken there is a growing trend back to a manageable pace of life that is more connected to a sense of place.

Key implications for village retailing include:

- Increased demand for flexible trading hours (especially late evenings and Sunday trading);
- Incorporating more leisure and recreation facilities such as cafes and bookstores;
- Demand for relaxed, unique and inspiring environments with all the comforts and conveniences;
- Seeking niche destination retailers;
- Greener (eco-friendly) shopping environments;
- Demand for quality;
- Pursuit of value for money and a high degree of cost convenience; and
- Awareness and understanding of your target market and their spending capacity (needs and wants).

**E-Commerce** - A survey carried out in Melbourne[^3] explored the impact of e-commerce on local shopping centres. It was observed that certain products and services such as books, CDs, computer equipment, travel and hotel reservations – activities that do not require a ‘tactile’ experience - are amenable to on-line purchasing. It was also found that there is a potential for e-commerce to make inroads into areas such as groceries when the issue of distribution is resolved.

The evidence confirms a potential for e-commerce to influence shopping patterns. However, for local centres it is arguable that the product lines likely to be most severely affected have already been taken away. Local centres tend to cater for the more tactile experiences, the experience of the centre itself, and the local convenience function. It is perhaps the larger centres, supermarkets and category killers that might lose market share to on-line trading. Furthermore, there may even be opportunities for smaller centres to act as agents in on-line trading. This could be in the area of net access and as local distribution nodes.

[^3]: SGS Economics & Planning, 2000
3.2.4 Retail Planning Strategies

The above information suggests that planning strategies should:

- Understand the different levels of shopper behaviour and how this is changing to establish a network of activity centres that performs a variety of distinct and specific roles;
- Understand land stock needs to accommodate the various retail forms and evolving retail forms, and 'pre-plan' for these principally by allocating land stock for future development and change; and
- Allow for and promote flexibility and change.

A hierarchical structure in the activity centre network can reasonably align with consumer preferences and behaviour patterns. The dynamics of the retail industry have created a situation whereby freestanding centres have taken the lion’s share of suburban retail spending. This does not in any way suggest that strip centres have no role because there will be a need to distinguish individual centres in the system. The future of some traditional centres lies in doing what the big box may not do as well, perhaps:

- Convenience retailing – the weekly food shopping trip and top-up shopping;
- Niche retailing – the special and unusual;
- Alternative entertainment experiences;
- Alternative, more challenging and interesting environment;
- Interesting and diverse cultural experiences;
- Access to community facilities;
- Lower-rent retailing;
- Services to people – eg. health and beauty;
- Services to households – eg. professional services;
- Business services – eg. consultants;
- Service industries – eg. car repairs;
- Clusters of new and emerging business activities; and
- Providing for a lifestyle whereby people desire to live, work and play in an interesting and exciting local environment where they feel they belong.

The challenge, therefore, is to build on the competitive strengths of centres to exploit the markets available to them.

3.3 Commercial Office Activities

Activity centres range in size, scope of activity, catchment and development potential. They may host a range of activities in addition to retail and personal services including:

- Offices and commercial activity;
- Community services;
- Recreation and leisure opportunities;
- Hospitality and tourism attractions;
- Transportation nodes; and
• Associated residential and even industrial activity.

While the role of an activity centre at any given time is typically influenced by its size, mix of activities hosted and catchment, its ultimate development potential will be determined by other factors such as:
- The structure, size and growth trends in the regional economy;
- Geographic barriers influencing catchments;
- Relationship to major transport infrastructure; and
- Relationship to competing activity centres and the broader flow of movement, typically in and out of the CBD but also more localised commuter activity.

The office market has a number of segments, which can be defined by business / organisational groups as follows.

• Local offices - This segment comprises local business services that primarily serve the regional population, for example government services, tax agents, solicitors, real estate agents and related businesses that have a local orientation. The size of this sector is a function of the size of the regional population or catchment, much like the retail sector.

• Back offices of large firms - Call centres and data processing centres that serve a wide market favour locations that have a relatively skilled but stable workforce with few alternative employment opportunities. Low property costs are also desired by these operations because they generally occupy 'large' horizontal floorplates. This sector is more 'footloose' but is a candidate in suburban locations that offer the attributes demanded by these organisations.

• Advanced business services - This segment comprises businesses that offer highly specialised services potentially serving local, national and international clients. Key locational criteria for this segment are access to the highest quality skills and business networks (i.e. being 'close' to partner firms and clients). 'Lifestyle' is important to this group, because of the need to attract and retain skilled workers.

• Corporate headquarters - This encompasses 'large' firms that provide all kinds of services and are located in major office facilities. Access to skills, proximity to business services and a prestigious address are key decision criteria. Firms in this category tend to demand a CBD address or a high profile suburban site with good access to managerial and executive labour.

• Offices attaching to industry and institutions – A significant stock of office activity will attach to industry, research facilities and institutions such as universities and hospitals. These activities can be dispersed across the urban landscape which may or may not include activity centres.

Furthermore, the office market can be segmented on a locational preference basis, where some firms tend to prefer a CBD / activity centre location and others campus style locations.
CBD / activity centre environments – Many firms will seek out a CBD or activity centre setting for their office premises. Such locations offer benefits in terms of: co-location with other firms / organisations (providing agglomeration benefits) and activities that offer a wide range of services (including lifestyle services); the opportunity for face-to-face business contact; quality information and communication infrastructure; and good accessibility by multi-modal transport systems (including road and radial public transport services). These attributes are highest in the CBD and tend to fall away as suburban activity centres get smaller.

Campus environment – Some firms will eschew a CBD / activity centre location in favour of predominantly car-based locations that offer campus style accommodation, ‘large’ sites, high quality ‘detached’ buildings with large floorplates and superior landscaping (perhaps in conjunction with recreation facilities and cafes). High profile street frontages are desired for the corporate address. Note that this segment of the commercial office market differs from the CBD / activity centre office market. Because sites and facilities of this nature are difficult to find in traditional activity centres, organisations that favour this type of accommodation will tend to look for out-of-centre sites, much like the freestanding shopping centre. This style of facility is consistent with State Government activity centre policy if located in an activity centre, but not if located in an out-of-centre location.

Again, the implication for activity centre planning is a need for pre-planning for specific office development types. It is not sufficient to simply say ‘office’ is desired in all activity centres and expect the development to occur. Strategies must identify the type of office business being targeted, and the type of office facilities required. Furthermore, strategies must demonstrate how the office segment or segments are to be ‘fitted’ in the activity centre system, and how necessary infrastructure (hard and soft) will be provided to support for the targeted activity.

3.4 Higher-Density Residential Activities

A key approach to make an activity centre more successful as a retail and entertainment location (eg. filling vacancies and / or expanding floorspace) is to, firstly, boost the demand drivers by growing the population base (and where possible tourist dollars) and , secondly, making the supply side more attractive by improving urban design, infrastructure and marketing. Most planning strategies tend to focus on supply-side factors, which is important, but this can have little overall impact if the end market is not there or is being served to its maximum potential.

This is why a big impact strategy can be to boost the local catchment via residential intensification. Apart from the economic benefits, boosting the number of residents within a catchment can have social benefits by:

- Building a ‘café culture’ and extending hours of activity;
- Increasing informal surveillance, and making a place look and be safer;
- Encouraging a more pedestrian and public transport oriented lifestyle; and
- Generally adding to a sense of vibrancy.
If stakeholders resolve to introduce high density housing in an activity centre for economic and social reasons, they will be confronted with a number of challenges, which may include:

- The absence of a ‘market’ for high density living in the centre or the wider area;
- Technical difficulties with implementation, including site assembly and parking / traffic constraints; and
- Political resistance to changing the urban form.

The absence of a ‘market’ for high density living in a centre or the wider area is a major barrier, because without the prospect of high-density development other issues are irrelevant. However, research\(^4\) suggests that the market for higher-density living in suburban activity centres is likely to be ‘out there’, but the level of ‘market depth’ will vary greatly from region to region.

The fundamentals for apartment style living are growing strongly, based on growth in smaller household sizes. This includes ‘empty nesters’ (some of which are retirees), young adults that have moved out of the family home (which includes people in the workforce and students) and working couples that have delayed having children due to career priorities.

The mix and ‘depth’ of likely apartment dwellers varies from region to region. The inner city has a strong professional (singles and couples) and tertiary student focus, by virtue of the region’s large number of jobs, university places and vibrant lifestyle. The inner city apartment market draws in people from the whole metropolitan area and beyond.

Suburban apartment markets are likely to be more regionally focused, primarily drawing in people already living in the region. This is because of the lower scale and ‘pull’ of suburban centres compared to the inner city. On this basis, demand for suburban apartments is likely to come from people that want a new, low maintenance home close to services in an area that they know and have strong connections in (including work, family, friend and lifestyle connections). Therefore, suburban apartment markets are more likely to have a mix of dwellers, including retirees and empty nesters (in addition to younger white collar workers and students).

The point here is that each suburban region is likely to have a pool of households that will consider living in an apartment in an activity centre. This can, in many cases, represent a significant number of household and apartment units, which could be applied to boosting the performance of suburban activity centres.

A major issue in terms of housing development in activity centres is site or property availability for development. In many centres, especially in smaller ones, sites may not be available to enable housing development. On this basis some centres may be more conducive for development than others.

Also, political resistance has proven to be a major issue with respect to activity centre housing development in recent years. In theory, this can be managed by quality design and a sound consultation and communication strategy.

\(^4\) Surveys by SGS Economics & Planning, 2002-2003
However, it should not be assumed that housing in activity centres delivery only benefits. There are costs / negatives with this form of development in such locations, and these include:

- Land use incompatibility and conflict issues; and
- Possibly constraining future retail evolution.

Residents will generally demand a ‘quiet’ environment but this is often not available in activity centres due to factors like night-time entertainment (eg. live music), odour from restaurants, and possibly significant transport volumes and conflicts.

Furthermore, introducing housing generally involves creation of separate land titles and strata titles (plus attaching planning controls). Such legal factors can constraint major commercial and retail redevelopment possibilities due to a host of stakeholder needing to be involved in a proposal. This can be an issue where there is a need for redevelopment in order for a centre to meet changing market needs.

In summary, the implication for activity centre planning is that each centre must be assessed on a case–by-case basis as to whether there is physical scope for housing development. Where there is scope for development, it is prudent to stage housing release in a co-ordinated fashion in order to manage supply to avoid a situation of over-supply for a ‘new’ product. This is particularly relevant in suburban settings where the market for this style of living is not well developed.

### 3.5 Synthesis

A summary of important issues and trends that are relevant to activity centre hierarchy planning are as follows.

- Activity centre strategies must be tailored to meet the specific and unique characteristics of each centre’s catchment and desired future role. Retail activity is the anchor of most activity centres and the size and mix of the retail component will be largely influenced by the catchment of the centre. The local population base, supported by tourism and the business base, will determine the expenditure available to support retailing, and therefore activity centre structure to a large extent. Commercial office development will also be driven by these factors and the structure of the wider regional economy. Higher-density housing development is also an option for some suburban centres. Any special or unique population (eg. ethnic mix) and economic characteristics must be understood and included in activity centre specific strategy and design.

- It is important to set the ‘supply conditions’ in activity centres with a view to achieve strategy objectives. This involves ensuring supply of land, provision of infrastructure, quality of urban design, and other supporting features within activity centres are tailored to meet the specific needs of organisations / customers / residents that are targeted for each centre.

- There will be constant pressure for large retail operators (that can establish a market catchment independent of other operators such as large bulky goods retail stores and
supermarkets) to seek out stand-alone sites or out of centre sites. This can be addressed by estimating future land and infrastructure needs and 'pre-planning' for the future demand in desired locations. In other words, having sites ready for development in desired locations.

- In terms of design, planning strategies should seek to ensure activity centres develop in an integrated way with surrounding areas and internally, and have active and attractive street levels. Construction of separation walls and blank walls and divisions between private properties should be avoided. This approach must acknowledge the tension between public objectives for activity centres and the objectives of large retail operators in particular who will seek to establish enclosed or detached facilities within activity centres in order to maximise private benefit from visitors.

- Allowing higher density housing in activity centres is a concept that should be supported but its application must be tailored to each centre on a case-by-case basis. Activity centres have different attributes and structures and these must be considered before plans to enable higher density housing are supported.
4  Regional Activity Centre Network

4.1  Regional Network

The following table and graphic provides information on the overall activity centre network in the region.

The table lists all major centres in Hume and in surrounding areas. Estimated retail floorspace figures and major tenancies are provided to illustrate relative scale (but note that these figures are indicative and should not be used for other purposes without verification).

The centres in the table have been ranked in terms of traditional retail centre classifications, as follows:

- Regional centre – a major retail centre that serves a wide catchment and is anchored by a department store, discount department store, supermarket and specialty stores;
- Sub-regional centre - a major retail centre that serves a wide catchment (but smaller than a regional centre) and is anchored by a discount department store, supermarket and specialty stores;
- Neighbourhood centre - a retail centre that serves a neighbourhood catchment (smaller than a sub-regional centre) and is anchored by a supermarket and specialty stores; and
- Local shops – a collection of small shops that serve a community with convenience retail needs.

The regional network of centres are categorised according to this typology in the table. Also noted in the table is the Melbourne 2030 classification that applies to each centre (as defined by the Department of Sustainability and Environment for Principal, Specialised and Major Centres and Hume City Council for Neighbourhood Centres).

The Melbourne 2030 classification has regard to the traditional retail classification system but also ranks centres against sustainability measures, based mainly on the extent to which public transport serves or can serve a centre.

There is general consistency between the retail classification method and Melbourne 2030 classification method apart from the following instances.

- Future Craigieburn Town Centre – The site for this Centre has been formally adopted by Hume City Council in its planning policies and in the Planning Scheme through the Comprehensive Development Zone and a Local Structure Plan. The Centre is planned to become a sub-regional or regional retail centre and is therefore notionally a future Major Activity Centre or perhaps even a Principal Activity Centre. It is not located on a rail line although the future E14 transport corridor could provide public transport services of some sort. However, Melbourne 2030 does not identify this Centre and hence its location under this framework is open for review. Despite this, it is necessary to maintain consistency.
with long-term planning for the area in the absence of an alternative position that is accepted by stakeholders.

- **Campbellfield** – This is classified as a Neighbourhood Activity Centre by Melbourne 2030 (by virtue of it not being a Major Activity Centre or higher) but could be a Major Activity Centre based on its retail role. This centre is likely to serve a wide regional catchment because of its discount department store and supermarket offer. However, the Centre’s growth prospects are generally limited due to it being largely ‘land locked’ (although potential additional development along Hume Highway is a possibility). The Centre is remote from rail services and is heavily dependant of car-based trade. On balance, these factors work against further growth here, and on that basis a Neighbourhood Activity Centre rating can be applied.

- **Roxburgh Park** – This is classified as a Major Activity Centre by Melbourne 2030 based on growth potential and future rail services provision, but its current retail role is relatively small. However, the Centre is likely to grow into a Major Activity Centre role over time and thus this classification is reasonable.

- **Sunbury** – This is classified as a Major Activity Centre but could be classified as a Principal Activity Centre based on its attributes. However, Sunbury is a satellite township and its growth prospects are perhaps more subdued than suburban areas, and electrified rail services are not available at present. On this basis a Major Activity Centre classification appears reasonable.

All other centres in Hume are generally consistent with Melbourne 2030. More detail on the centre and the niche roles they do and can perform within the Melbourne 2030 framework is explained in Section 5.
Table 1 – Inventory of Activity Centres

<table>
<thead>
<tr>
<th>Centre</th>
<th>LGA</th>
<th>Approximate Retail GLA</th>
<th>M2030 Activity Centre Classification</th>
<th>Major Retail Store(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highpoint</td>
<td>Maribyrnong</td>
<td>91,100</td>
<td>Principal</td>
<td>Myer, Target, Target Home, Big W, Harris Scarfe, Toy’s R Us, Best &amp; Less, Rebel Sport, Lincraft, Safeway</td>
</tr>
<tr>
<td>Northland</td>
<td>Darebin</td>
<td>85,800</td>
<td>Principal</td>
<td>Myer, K-mart, Toys R Us, Rebel Sport, Baby Target, Best &amp; Less, Coles, Safeway</td>
</tr>
<tr>
<td>Broadmeadows</td>
<td>Hume</td>
<td>51,700</td>
<td>Principal</td>
<td>Target, Big W, Safeway, Bi-Lo</td>
</tr>
<tr>
<td>Airport West</td>
<td>Moonee Valley</td>
<td>50,900</td>
<td>Principal</td>
<td>K-mart, Target, Coles, Franklins, Bi-Lo</td>
</tr>
<tr>
<td>Epping Plaza</td>
<td>Whittlesea</td>
<td>34,100</td>
<td>Principal</td>
<td>Target, Harris Scarfe, Safeway, Coles</td>
</tr>
<tr>
<td>Sunbury</td>
<td>Hume</td>
<td>28,800</td>
<td>Major</td>
<td>Big W, Coles, Safeway, Bi-Lo, Target Country</td>
</tr>
<tr>
<td>Watergardens</td>
<td>Brimbank</td>
<td>26,200</td>
<td>Principal</td>
<td>Target, Safeway, Bi-Lo</td>
</tr>
<tr>
<td>Glenroy</td>
<td>Moreland</td>
<td>22,800</td>
<td>Major</td>
<td>Coles</td>
</tr>
<tr>
<td>Gladstone Park</td>
<td>Hume</td>
<td>15,800</td>
<td>Major</td>
<td>Dimmeys, Safeway, Food Rite</td>
</tr>
<tr>
<td>Campbellfield</td>
<td>Hume</td>
<td>11,100</td>
<td>Neighbourhood</td>
<td>K-mart, Coles</td>
</tr>
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<td>Craigieburn East</td>
<td>Hume</td>
<td>9,700</td>
<td>Neighbourhood</td>
<td>Target Country, Safeway</td>
</tr>
<tr>
<td>Roxburgh Park</td>
<td>Hume</td>
<td>9,400</td>
<td>Major</td>
<td>Safeway, The Warehouse, Fresh Plus</td>
</tr>
<tr>
<td>Dallas</td>
<td>Hume</td>
<td>4,000</td>
<td>Neighbourhood</td>
<td>Bi-Lo, Food Rite</td>
</tr>
<tr>
<td>Meadow Heights</td>
<td>Hume</td>
<td>3,200</td>
<td>Neighbourhood</td>
<td>IGA Supermarket</td>
</tr>
<tr>
<td>Greenvale Village</td>
<td>Hume</td>
<td>2,000</td>
<td>Neighbourhood</td>
<td>Bi-Lo</td>
</tr>
<tr>
<td>Westmeadows</td>
<td>Hume</td>
<td>na</td>
<td>Neighbourhood</td>
<td>IGA Supermarket</td>
</tr>
<tr>
<td>Dandenong Place</td>
<td>Hume</td>
<td>na</td>
<td>Neighbourhood</td>
<td>IGA Supermarket</td>
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<tr>
<td>Gap Road Sunbury</td>
<td>Hume</td>
<td>na</td>
<td>Neighbourhood</td>
<td>Aldi Supermarket</td>
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<tr>
<td>Homestead</td>
<td>Hume</td>
<td>na</td>
<td>Neighbourhood</td>
<td>Food Rite</td>
</tr>
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<td>Local Shops</td>
<td>Hume</td>
<td>na</td>
<td>Neighbourhood</td>
<td>Local shops</td>
</tr>
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<td>Tullamarine</td>
<td>Hume</td>
<td>na</td>
<td>Neighbourhood</td>
<td>Local shops</td>
</tr>
<tr>
<td>Upfield</td>
<td>Hume</td>
<td>na</td>
<td>Neighbourhood</td>
<td>Local shops</td>
</tr>
<tr>
<td>Specialised Centre</td>
<td>Hume</td>
<td>na</td>
<td>Specialised</td>
<td>Airport Terminal Retail Stores, Hilton Hotel, Formule 1 Motel</td>
</tr>
<tr>
<td>Future Centres</td>
<td>Hume</td>
<td>55,000</td>
<td>Not identified in M2030</td>
<td>Department store, 3 discount department stores, home and garden centre, 3-4 Supermarkets</td>
</tr>
<tr>
<td>Future Craigieburn Town Centre</td>
<td>Hume</td>
<td>55,000</td>
<td>Not identified in M2030</td>
<td>Department store, 3 discount department stores, home and garden centre, 3-4 Supermarkets</td>
</tr>
<tr>
<td>New Neighbourhood Centres in Growth Areas</td>
<td>Hume</td>
<td>To be determined</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Not Including Homemaker Centres
Sources: DSE, PCA, SGS
Figure 4 - Regional Activity Centre Network
4.2 Notional Catchments

The following three graphics plot notional catchments over existing centres in the activity centre network (using Melbourne 2030 classifications).

These catchments are generalised, and have not been ‘scientifically’ derived. Their purpose is to provide an overview of density of centre provision to highlight areas that may be well served by centres in each level of the hierarchy and areas that may not be well served by the existing network.

Neighbourhood Activity Centre Catchments - This information suggests that most residential areas in Hume are well served by Neighbourhood Activity Centre except perhaps:

- The fringe areas of Craigieburn, especially the northern and western fringes;
- The area between Craigieburn and Roxburgh Park;
- The fringe areas of Sunbury; and
- The residential pocket in Gladstone Park (although Gladstone Park has a Major Activity Centre).

It can be argued that lack of easy access to a Neighbourhood Activity Centre facilitates car based shopping trips from these areas.

Major Activity Centre Catchments – Some of the apparent deficiencies in the Neighbourhood Activity Centre network are to some extent addressed by the network of Major Activity Centres. The only obvious area where coverage is lacking is the fringe areas of Craigieburn, especially the northern and western fringes.

Principal Activity Centre Catchments – The municipality has good coverage at the higher end of the scale. Although Sunbury is shown to have no service it in fact would be served by Broadmeadows, Sydenham and Airport West.

The main conclusion of this overview of notional catchments is that the fringe areas around Craigieburn and Sunbury may need additional activity centre provision as they develop.
Figure 5 - Neighbourhood Activity Centre Catchments
Figure 6 - Major Activity Centre Catchments
Figure 7 - Principal Activity Centre Catchments
4.3 Synthesis

Hume’s existing activity centre hierarchy was reviewed against the Melbourne 2030 framework and an appropriate classification is as follows:

- Principal Activity Centre - Broadmeadows Transit City;
- Specialised Activity Centre - Melbourne Airport;
- Major Activity Centre - Sunbury Town Centre, Gladstone Park Shopping Centre and Roxburgh Park Shopping Centre;
- Neighbourhood Activity Centre - Campbellfield Plaza, Craigieburn East Shopping Centre, Meadow Heights Shopping Centre, Greenvale Shopping Centre, Westmeadows Village Shopping Centre, Dallas Shopping Centre, Tullamarine Shopping Centre, Olsen Place Shopping Centre, Gap Road Shopping Centre, Homestead Centre and Upfield Shopping Centre.

Hume’s activity centre hierarchy will require expansion in the future due to growth in population and activity centre needs. The future network is to be determined but is likely to include:

- A new Major or Principal Activity Centre – The future Craigieburn Town Centre has been established to meet higher order activity centre need in the growth area; and
- New Neighbourhood Activity Centres – The patterns of ‘new’ Neighbourhood Activity Centres is yet to be determined, but new centre may be needed in fringe areas of Craigieburn and Sunbury.

Melbourne 2030 does not support establishment or expansion of a Major or Principal Activity Centre if the centre in question lacks public transport and there are better options to serve the same catchment. On this basis, the future Craigieburn Town Centre will need public transport provision to conform to the Melbourne 2030 framework.
5 Activity Centre Profiles

A profile is provided for each activity centre in Hume that is classified a Neighbourhood Activity Centre or higher.

Each profile provides a context map, location reference and description of ‘style’ of centre (eg. CBD style, enclosed / box style). The profile then addresses:

- Classification – This states this report’s recommended centre classification using the Melbourne 2030 framework.
- Zones and Overlays – A brief description of the main planning controls that apply to the centre.
- Major Retail Tenants – An example list of the bigger tenants than perform the role of retail ‘anchor’ for the centre.
- Other Tenants – An example list of other tenants in the centre such as commercial, government or community tenants.
- Vacancy – An estimate of the vacancy rate in the centre to provide an indicator of centre ‘health’.
- Transport Networks – A list of major transport systems that serve the centre.
- Strengths – A list of attributes internal to the centre that are deemed a positive for future development / performance.
- Weaknesses – A list of attributes internal to the centre that are deemed a negative for future development / performance.
- Opportunities – A list of external factors that the centre could harness for future development / performance.
- Threats – A list of external factors that could adversely impact on the centre’s future development / performance.
- Housing Development Potential Based on Land Availability and Public Transport Provision - This provides a preliminary ranking regarding centres that should be the target for higher density housing investigation. See below for more information.
- Suggested Actions – A list of recommended planning actions to promote positive outcomes in the centre.

The housing development screening process is based on two questions:
1. Do there appear to be development sites in the centre that could be used for housing development? and
2. Are public transport services provided to service the centre?

A simple rating system was used as follows:

Land Availability -
- Greenfield sites appear to be available – 3 points
- Only infill sites appear to be available – 2 points
- Redevelopment appears to be necessary – 1 point
Public Transport -
- Suburban rail is provided or is committed - 3 points
- Other public transport is provided or committed – 2 points
- There appears to be limited scope for public transport – 1 point

The rating is summarised as:
- Very High ranking for higher-density housing investigation – 6 points;
- High ranking for higher-density housing investigation – 5 points;
- Medium ranking for higher-density housing investigation – 4 points; and
- Low ranking for higher-density housing investigation – 3 points or less.

This rating gives an indicative score that is used to rank centres in order of highest to lowest in terms of higher-density housing development potential.

This rating does not take into account whether a market for higher-density housing is currently available or whether land is zoned appropriately at the current time. The purpose of this initial screening is to obtain a list of centres that should be the focus for more detailed higher-density housing assessment.
5.1 Broadmeadows Transit City

**Figure 8 – Broadmeadows Context Map**

<table>
<thead>
<tr>
<th>BROADMEADOWS TRANSIT CITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pascoe Vale Road, Broadmeadows</td>
</tr>
<tr>
<td>This is a CBD-style multi-purpose activity centre, and is the principal centre in Hume</td>
</tr>
</tbody>
</table>

**Classification:**
- Principal Activity Centre and Transit City

**Zones and Overlays:**
- Much of the Centre is Business 1 Zone, allowing for a range of activity centre uses
- Much of the area to the east of the railway line is Business 3 Zone, allowing for a mix of industrial and commercial uses
- A Special Building Overlay follows a creek / drainage corridor through the Centre, to allow for waterway access and flood management
- An Environmental Significance Overlay applies to the southern park site, to ensure development recognises environmental qualities of the site and that the site was a landfill

**Major Retail Tenants:**
- Target, Big W, Safeway, Bi-Lo
<table>
<thead>
<tr>
<th>Other Tenants:</th>
<th>143 retail establishments, 27 office establishments, 7 education establishments, 6 community / health establishments, 4 entertainment establishments (Broadmeadows Transit City Land Use Mix Study)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacancy:</td>
<td>Low (2.5%, Broadmeadows Transit City Land Use Mix Study)</td>
</tr>
<tr>
<td>Transport Networks:</td>
<td>Train, bus, car, pedestrian / bike</td>
</tr>
</tbody>
</table>
| Strengths:           | Broadmeadows has the biggest and widest retail and service offer in Hume  
|                      | Significant undeveloped land and green spaces in the Centre provide development opportunities  
|                      | Provision of multiple transport options including suburban rail services and bus services  
|                      | Co-located with community facilities thus encouraging multi-purpose trips  
|                      | The population has an ethnic structure that contributes to diversity and opportunity  
|                      | The skills profile in the region is growing off a low base mainly due to growth in new residential estates  
|                      | Broadmeadows has relatively large land holdings and hence initiatives to facilitate development will require cooperation by a relatively small group of stakeholders |
| Weaknesses:          | The Centre provides a relatively limited ‘offer’ when compared to other major regional centres in Melbourne, mainly focused on conventional retailing, some bulky goods and government offices  
|                      | Major regional services are located outside Hume, contributing to significant importing of services and higher order retail (ie. escape expenditure)  
|                      | The population in the immediate vicinity of the Centre has a relatively low income profile  
|                      | The population in the immediate vicinity of the Centre is stagnant / in decline  
|                      | Demand for higher order activity centre development has been low and slow  
|                      | Tightly held land holdings constrain land development |
**Opportunities:**

- Development in accordance with the Broadmeadows Transit City Plan (refer to that Plan for details)
- Significant economic and population growth in the wider region will generate demand for retailing, personal and business services
- Retail forecasts suggest (see Section 6.1) that the Broadmeadows / Craigieburn corridor might be able to support up to 125,000 sqm of additional retail space to 2021 (from a 2001 base)
- High and medium density housing development (based on regional demand)
- Office / commercial development (based on regional demand)
- Retail / hospitality development, mainly drawing on new expenditure in the Craigieburn growth corridor, including conventional retail, outdoor retail and entertainment, bulky goods and in the long term possibly a department store
- Regional government and community services development
- Higher education expansion associated with Kangan Batman Tafe

**Threats:**

- Diffusion of retail / hospitality demand across the region that might otherwise be located in Broadmeadows, such as in the Craigieburn corridor and along main roads such as Hume Highway
- Diffusion of hotel, reception and related commercial activities across the region that might otherwise be located in Broadmeadows, such as along Hume Highway and at Melbourne Airport
- Government facility decisions that favour out of centre sites
- Competition from other regions to accommodate office / commercial development (especially inner city areas)

**Housing Development Potential Based on Land Availability and Public Transport Provision:**

- Very High (6 points)
- Land availability – 3 - Significant undeveloped land and green spaces in the Centre provide housing development opportunities
- Public transport – 3 - Rail and bus public transport is provided in the Centre

**Suggested Actions:**

- In accordance with Broadmeadows Transit City Plan when adopted (refer to that Plan for details)
- This includes development of retail, hospitality, entertainment, commercial, institutional and residential uses in the Transit City
5.2 Melbourne Airport

Figure 9 – Melbourne Airport Context Map

**MELBOURNE AIRPORT**

- Tullamarine Freeway, Tullamarine
- This is a modern international airport facility

<table>
<thead>
<tr>
<th><strong>Classification:</strong></th>
<th>Specialised Activity Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Zones and Overlays:</strong></td>
<td>Commonwealth Land, not controlled by Planning Scheme</td>
</tr>
<tr>
<td><strong>Major Tenants:</strong></td>
<td>Airport services and airlines</td>
</tr>
<tr>
<td></td>
<td>Downtown Duty Free, Hilton Hotel, Formule 1 Motel</td>
</tr>
<tr>
<td><strong>Other Tenants:</strong></td>
<td>Over 20 specialty stores (books, clothing, souvenir) and a variety of cafes and bars</td>
</tr>
<tr>
<td></td>
<td>Fast food restaurants, petrol filling, car hire and related car base retail on the outskirts of the Airport</td>
</tr>
<tr>
<td></td>
<td>Industrial and freight operators</td>
</tr>
<tr>
<td><strong>Vacancy:</strong></td>
<td>Low</td>
</tr>
<tr>
<td><strong>Transport Networks:</strong></td>
<td>Bus, car</td>
</tr>
</tbody>
</table>
| Strengths:                                | • Main international, national and domestic airport in Victoria  
|                                        | • 24 hour curfew free status  
|                                        | • Significant and growing through traffic generates passenger and freight related activity, including industrial, storage, distribution, transport, retail, accommodation and service activity  
|                                        | • Excellent road and freeway access to the site  
|                                        | • Provision of multiple transport options including bus services  |
| Weaknesses:                             | • Lack of rail services to the site  |
| Opportunities:                          | • Growth in tourist and visitor numbers, freight movements and aviation activities can generate demand for a variety of land uses including aviation related uses and population-driven activities like accommodation, retail / hospitality, commercial / office and entertainment such as cinemas  |
| Threats:                                | • Residential and urban encroachment as a threat to 24 hour curfew free status  |
| Housing Development Potential Based on Land Availability and Public Transport Provision: | • Not applicable  
|                                        | • Housing is incompatible with aviation related uses and the objectives of this Specialised Activity Centre  |
| Suggested Actions:                     | • Addressed by Melbourne Airport Master Plan by Australia Pacific Airports (Melbourne) Pty Ltd  
|                                        | • Hume City Council should oppose this Centre from developing a 'general' retail, commercial and entertainment offer that is geared to serve the non-air travel population  
|                                        | • Retail, commercial and entertainment activity that specifically serves air travellers should be supported  |
5.3 Future Craigieburn Town Centre

Figure 10 – Craigieburn West Context Map

<table>
<thead>
<tr>
<th>FUTURE CRAIGIEBURN TOWN CENTRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Craigieburn Road West and E14 Arterial, Craigieburn</td>
</tr>
</tbody>
</table>

**Classification:**
- Future Major or Principal Activity Centre

**Zones and Overlays:**
- All of the land earmarked for the Town Centre is Zoned Comprehensive Development
- The development must reflect the requirements for a Local Structure Plan in the schedule to the Comprehensive Development Plan
- The planning objectives for this Town Centre include development of a major retail, commercial and community centre

**Major Retail Tenants:**
- NA

**Other Tenants:**
- NA
- A health Super Clinic has been announced for development on the adjacent site to the east

**Vacancy:**
- NA

**Transport Networks:**
- NA
### Strengths:
- Unconstrained greenfield location
- Located to serve a wide regional housing catchment at the junction of two major roads (includes proposed E14 arterial / transport corridor)
- Significant land stock set aside for development
- Located adjacent to the future Craigieburn Super Clinic

### Weaknesses:
- Not located on a rail corridor

### Opportunities:
- Significant economic and population growth in the wider region will generate demand for retailing, personal and business services
- Retail forecasts suggest (see Section 6.1) that the Broadmeadows / Craigieburn corridor might be able to support up to 125,000 sqm of additional retail space to 2021 (from a 2001 base)
- High and medium density housing development (based on regional demand)
- Office / commercial development (based on regional demand)
- Retail / hospitality development, mainly drawing on new expenditure in the Craigieburn growth corridor, including conventional retail, outdoor retail and entertainment and bulky goods
- Regional government and community services development
- Education development

### Threats:
- Urban Growth Boundary is not moved to grow the future market / catchment area
- Diffusion of retail / hospitality demand across the region that might otherwise be located in the Town Centre, such as along main roads such as Hume Highway
- Diffusion of hotel, reception and related commercial activities across the region that might otherwise be located in the Town Centre, such as along Hume Highway
- Government facility decisions that favour out of centre sites
- Competition from other regions to accommodate office / commercial development (especially inner city areas)

### Housing Development Potential Based on Land Availability and Public Transport Provision:
- High (5 points)
- Land availability – 3 - Significant undeveloped land provides housing development opportunities
- Public transport – 2 - Bus services can be expected when the Centre is established, but rail is not committed
<table>
<thead>
<tr>
<th><strong>Suggested Actions:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ensure this Centre develops in accordance with Melbourne 2030 Principal Activity Centres objectives, incorporating mixed land use integration, public transport and walking / cycling facilities</td>
</tr>
<tr>
<td>• Ensure the Centre caters for bulky goods retail development to absorb the sub-regional demand for this form of retailing</td>
</tr>
<tr>
<td>• Ensure the Centre is designed to integrate with other land uses as opposed to the traditional ‘barrier wall’ model adopted in stand alone shopping centres</td>
</tr>
<tr>
<td>• Ensure this Centre has an adequate catchment to realise planning objectives</td>
</tr>
<tr>
<td>• Ensure public transport services are provided</td>
</tr>
</tbody>
</table>
5.4 Sunbury Town Centre

**Figure 11 – Sunbury Context Map**

<table>
<thead>
<tr>
<th>SUNBURY TOWN CENTRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evans, O’Shannassy, Brook and Horne Streets, Sunbury</td>
</tr>
<tr>
<td>This is a CBD-style multi-purpose activity centre</td>
</tr>
</tbody>
</table>

**Classification:**
- Major Activity Centre

**Zones and Overlays:**
- Much of the Centre is Business 1 Zone, allowing for a range of activity centre uses
- Areas to the north and south of the Sunbury Station have been zoned Business 4, allowing for the development of bulky goods retail and industrial uses
- A number of Public Use 6 Zones are located within the Centre, allowing for Local Government activities
- Areas zoned Industrial 3 are located to the south of the Centre, allowing for industries and associated uses compatible with the nearby community
- Mixed Use Zone and Public Park and Recreation Zone also apply
- Overlays apply to parts of the Centre (Development Plan Overlay, Environmental Audit Overlay, Environmental Significance Overlay and Heritage Overlay)
Major Retail Tenants: ▪ Coles, Safeway, Bi-Lo, Big W, Target Country

Other Tenants: ▪ Retail such as food, clothing, personal goods, household goods
▪ Bulky goods retail such as hardware, furniture
▪ Business services such as post office, solicitors, accountants, designers
▪ Entertainment such as cinemas, internet cafes, bars, pubs
▪ Tourist oriented uses such as cafes, restaurants, historic sites
▪ Health services such as medical centres, pharmacy, dentist
▪ Community services such as library, youth services, veterans services, employment services

Vacancy: ▪ Low

Transport Networks: ▪ Bus, car, pedestrian / bike
▪ Rail (country rail services only)

Strengths: ▪ A wide ranging retail and service offer – significant self-containment
▪ Co-located with community facilities thus encouraging multi-purpose trips
▪ Provision of multiple transport options including bus services and country rail services
▪ Entrances to major supermarkets front both the train station and bus interchange (on both sides) which promotes the use of public transport for weekly shopping trips
▪ Reasonably contained town centre divided into three precincts – town centre precinct, civic precinct and new format retail precinct (west of rail line)
▪ Pedestrians have been considered in design of laneways, bridges, crossings and paths
▪ Significant investment in the Centre in recent years

Weaknesses: ▪ Relatively low land stock for major future development, although some land is available on the southern edge of the Centre
▪ Shortage of parking spaces results in car parking demand conflicts between town centre users and public transport (mainly rail) commuters
▪ Poor integration between new retail development west of the rail line and the town centre on the east
▪ There are facilities for bicycles within the Centre but few paths have been integrated into the design of the road and path system
## Opportunities:
- Population growth in the region to boost market size
- Retail forecasts suggest (see Section 6.1) that the Sunbury corridor might be able to support up to 36,000 sqm of additional retail space to 2021 (from a 2001 base)
- Expansion of the Centre on vacant land
- Application of Mixed Use Zone on the west side of Horne Street for activities like medical suites and other commercial operations integrated with housing
- Redevelopment and intensification of existing sites within the town centre
- Better integration between precincts, especially the town centre precinct and new format retail precinct (west of rail line)

## Threats:
- New retail precinct west of the rail line could adversely affect the retail performance of the town centre proper resulting in long term retail activity decline in that part of the Centre
- Diffusion of retail / hospitality demand across the region that might otherwise be located in the town centre (eg. more Gap Road style developments)
- Diffusion of bulky goods retail development in locations not planned to accommodate bulky goods development (primarily due to lack of appropriate sites in the Centre)
- Government facility decisions that favour out of centre sites

## Housing Development Potential Based on Land Availability and Public Transport Provision:
- Medium (4 points)
  - Land availability – 2 - The internal part of the Centre is substantially developed but some infill sites may provide opportunities for housing development
  - Public transport – 2 - Country rail and bus services are provided
  - This Centre is a candidate for 'shop top' and apartment style housing in part based on a relatively pleasant town centre environment

## Suggested Actions:
- Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage
- Monitor the retail performance of the town centre precinct on the east side of the rail line in the context of retail / shopping centre expansion on the west side of the rail line
- Review land stock needs for all types of development possibilities exploring opportunities to facilitate redevelopment for retail, housing and community uses
- Identify sites capable of accommodating large format bulky goods retailing in and around the Centre in order to direct the future location of this form of retail development
5.5 Gladstone Park Shopping Centre

Figure 12 - Gladstone Park Context Map

GLADSTONE PARK SHOPPING CENTRE
Mickleham Road, Gladstone Park
This is a 'box' centre in a residential estate

Classification:
- Major Activity Centre

Zones and Overlays:
- The Centre is zoned Business 1, allowing for a range of activity centre uses
- Located opposite the Centre is a substantial area zoned Business 3, permitting offices and industrial uses
- The Gladstone Park Primary and Secondary Schools are located adjacent to the centre on land zoned Public Use – Education
- An Airport Environs 2 Overlay applies to the site

Major Retail Tenants:
- Safeway

Other Tenants:
- Retail such as food, clothing, household goods, fast food
- Business services such as accountants, home loans, real estate, post office
- Entertainment such as gambling
- Health services such as medical centre, pharmacy
- Bulky goods retailing such as furniture, car sales
<table>
<thead>
<tr>
<th>Vacancy:</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Transport Networks:</strong></td>
<td>Bus, car, pedestrian / bike</td>
</tr>
<tr>
<td><strong>Strengths:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>A strong daily and weekly convenience retail offer</td>
</tr>
<tr>
<td></td>
<td>Co-located with bulky goods retailing and community facilities, thus encouraging multi-purpose trips (although Mickleham Road is a barrier)</td>
</tr>
<tr>
<td></td>
<td>Car access and parking</td>
</tr>
<tr>
<td></td>
<td>Provision of multiple transport options including bus services</td>
</tr>
<tr>
<td><strong>Weaknesses:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Car based Centre - poor pedestrian integration between some precincts within the Centre and surrounding residential areas</td>
</tr>
<tr>
<td></td>
<td>The main shopping centre site has multiple property titles and a fragmented ownership structure</td>
</tr>
<tr>
<td></td>
<td>Low land availability for bulky goods which has diffused along the western side of Mickleham Road</td>
</tr>
<tr>
<td></td>
<td>Pedestrian and bicycle amenity is of a low standard</td>
</tr>
<tr>
<td></td>
<td>Poor interfaces / blank walls in some parts</td>
</tr>
<tr>
<td></td>
<td>Located on edge of residential catchment</td>
</tr>
<tr>
<td></td>
<td>Building is ageing and design is generally poor and dated</td>
</tr>
<tr>
<td><strong>Opportunities:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Better precinct integration and urban design</td>
</tr>
<tr>
<td></td>
<td>Reinvestment in building stock</td>
</tr>
<tr>
<td></td>
<td>Providing an outlet for bulky goods retailing</td>
</tr>
<tr>
<td></td>
<td>Potential extension of the Airport West Tram to this Centre</td>
</tr>
<tr>
<td><strong>Threats:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Stagnant / declining population and income levels in the surrounding residential areas</td>
</tr>
<tr>
<td></td>
<td>Market rejection of an ageing car based shopping centre</td>
</tr>
<tr>
<td><strong>Housing Development Potential Based on Land Availability and Public Transport Provision:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Low (3 points)</td>
</tr>
<tr>
<td></td>
<td>Land availability – 1 – The main shopping centre site appears to be highly constrained for further development</td>
</tr>
<tr>
<td></td>
<td>Public transport – 2 – Bus services are provided and a tram line may be provided but is not committed</td>
</tr>
<tr>
<td><strong>Suggested Actions:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage</td>
</tr>
<tr>
<td></td>
<td>Integrate the bulky goods strip on Mickleham Road with the Centre to encourage multi-purpose trips</td>
</tr>
<tr>
<td></td>
<td>Encourage reinvestment in the building stock and public realm</td>
</tr>
</tbody>
</table>
5.6 Roxburgh Park Shopping Centre

Figure 13 - Roxburgh Park Context Map

ROXBURGH PARK SHOPPING CENTRE
Somerton Road, Pascoe Vale Road, David Munro Drive, Roxburgh Park
This is a modern convenience centre in a new residential estate

<table>
<thead>
<tr>
<th>Classification:</th>
<th>Major Activity Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zones and Overlays:</td>
<td>The northern part of the Centre is Business 1 Zone, allowing for a range of activity centre uses</td>
</tr>
<tr>
<td></td>
<td>The opposite side of Somerton Road is Business 4 Zone, allowing the development of a mix of bulky goods retailing and manufacturing industry and their associated business services</td>
</tr>
<tr>
<td></td>
<td>Development Plan Overlay (Urban Development Area: Residential Area) applies to the site</td>
</tr>
<tr>
<td></td>
<td>An industrial area is located to the east</td>
</tr>
<tr>
<td>Major Retail Tenants:</td>
<td>Safeway, The Warehouse, Fresh Plus Supermarket</td>
</tr>
<tr>
<td>Other Tenants:</td>
<td>Retail such as food, household goods, fast food</td>
</tr>
<tr>
<td></td>
<td>Business services such as accountants, home loans, real estate</td>
</tr>
<tr>
<td></td>
<td>Personal services such as video hire</td>
</tr>
<tr>
<td></td>
<td>Health services such as medical centre</td>
</tr>
<tr>
<td></td>
<td>Bulky goods retailing such as furniture, car sales</td>
</tr>
<tr>
<td>Vacancy:</td>
<td>0%</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>
| Transport Networks: | - Bus, car, pedestrian / bike  
- Rail is located on the eastern boundary of the site (country rail services only but suburban rail services are committed) |
| Strengths: | - A strong daily and weekly convenience retail offer  
- Co-located with bulky goods retailing and community facilities, thus encouraging multi-purpose trips  
- Car access and parking  
- Adjacent to rail line - future suburban services  
- Vacant land for new development  
- Provision of multiple transport options including bus services |
| Weaknesses: | - Car based Centre - poor pedestrian integration between some precincts within the Centre and surrounding residential areas  
- The design and placement of the Centre encourages car-based travel  
- Pedestrian and bicycle amenity is of a low standard  
- Low / inefficient land utilisation rate  
- Poor interfaces / blank walls in some parts  
- Located on edge of residential catchment  
- Located adjacent to an industrial area which has some off-site noise impacts on the Centre |
| Opportunities: | - Population growth in the region to boost market size  
- Retail forecasts suggest (see Section 6.1) that the Broadmeadows / Craigieburn corridor might be able to support up to 125,000 sqm of additional retail space to 2021 (from a 2001 base)  
- Expansion of the Centre on vacant land  
- Growth in visitation to the area following establishment of suburban train services at Roxburgh Park station  
- Can accommodate a significant stock of bulky goods retail demand in the Centre  
- There are future plans to further develop the Centre |
| Threats: | - Market rejection of car based shopping centres (although this is unlikely in the foreseeable future)  
- Diffusion of bulky goods retail development on main roads in the region  
- Establishment of industrial uses to the east that have amenity impacts on the Centre |
| Housing Development Potential Based on Land Availability and Public Transport Provision: | - Very High (6 points) although the adjacent industrial area may limit this potential due to noise amenity impacts  
- Land availability – 3 – Undeveloped land and green spaces in the Centre provide housing development opportunities  
- Public transport – 3 – Bus services are provided and suburban rail services are committed |
**Suggested Actions:**

- Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage
- Review land stock needs exploring opportunities to convert vacant land and car parks for other uses including housing, open space, community facilities
- Ensure industrial development adjacent to the Centre is compatible with activity centre uses
5.7 Campbellfield Plaza

**Figure 14 - Campbellfield Context Map**

<table>
<thead>
<tr>
<th>CAMPBELLFIELD PLAZA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mahoneys Road and Hume Highway, Campbellfield</td>
</tr>
<tr>
<td>This is a modern convenience centre on a main road location, which adjoins a small strip centre</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Classification:</strong></th>
<th>Neighbourhood Activity Centre</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Zones and Overlays:</strong></th>
<th>The Centre is Business 1 Zone, allowing for a range of activity centre uses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Much of the area to the west of the Centre is Business 3 Zone, enabling the integration of offices and industrial uses</td>
</tr>
<tr>
<td></td>
<td>Much of the area to the north of the Centre is Industrial 1 and Industrial 3 Zones</td>
</tr>
<tr>
<td></td>
<td>Development Plan Overlay 5 (Campbellfield Plaza Development Plan) applies to the site</td>
</tr>
</tbody>
</table>

| **Major Retail Tenants:** | Coles (including a Liquor Land), Kmart (including Garden Super Centre and Kmart Tyre and Auto) |
### Other Tenants:
- Retail such as fast food, bakery, newsagent
- Business services such as post office, real estate
- Health services such as pharmacy, dental clinic, physiotherapist
- Bulky goods and highway retail uses such as hotels, fast food and showrooms are located on opposite side of Hume Highway and Mahoneys Road

### Vacancy:
- 0% (Plaza), 5% approximately (Strip)

### Transport Networks:
- Bus, car, pedestrian / bike

### Strengths:
- A strong daily and weekly convenience retail offer
- Car access and parking
- New facilities

### Weaknesses:
- Car based and highly segregated centre
- Poor pedestrian integration between some precincts within the centre and surrounding residential areas
- Poor integration between the Plaza and Strip
- Lack of rail services to the site
- Limited walking catchment to west and south due to main road barriers
- Limited land availability for further development (although expanding into the carpark is an option)
- Poor interfaces / blank walls in some parts

### Opportunities:
- Better integration with surrounding precincts and residential areas

### Threats:
- Stagnant / declining population and income levels in the surrounding residential areas
- Market rejection of car based shopping centres (although this is unlikely in the foreseeable future)

### Housing Development Potential Based on Land Availability and Public Transport Provision:
- Low (3 points)
  - Land availability – 1 – The site appears highly constrained for further development
  - Public transport – 2 – Bus services are provided in the vicinity

### Suggested Actions:
- Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage
5.8 Craigieburn East Shopping Centre

Figure 15 - Craigieburn East Context Map

<table>
<thead>
<tr>
<th>CRAIGIEBURN EAST SHOPPING CENTRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Craigieburn Road West and Hanson Road, Craigieburn</td>
</tr>
<tr>
<td>This is a modern convenience centre in a residential estate, which adjoins an older style strip centre / service industry area</td>
</tr>
</tbody>
</table>

| Classification: | Neighbourhood Activity Centre |
| Zones and Overlays: | The Centre is Business 1 Zone, allowing for a range of activity centre uses |
| | Adjacent residential and industrial areas to the east accommodate a mix of commercial and light industrial uses |

| Major Retail Tenants: | Safeway, Target Country |
| Other Tenants: | Retail such as food and household goods |
| | Business services such as banks |
| | Personal services such as video hire |
| | Community services such as community / religious centre |
| | Health services such as pharmacy, optometrist |

| Vacancy: | 0% |
**Transport Networks:**
- Bus, car, pedestrian / bike
- Rail is located nearby (country rail services only but suburban services are committed)

**Strengths:**
- A strong daily and weekly convenience retail offer
- Co-located with community facilities thus encouraging multi-purpose trips
- Car access and parking
- Provision of multiple transport options including bus services
- The train station is located within walking distance from the Centre – this offers country rail services at the current time but suburban rail services are committed

**Weaknesses:**
- Car based centre - poor pedestrian integration between some precincts within the centre and surrounding residential areas
- Poor interfaces / blank walls in some parts
- Poor urban design in the adjacent older strip centre / service industry area
- Poor integration between shopping centre and the adjacent older strip centre / service industry area
- Lack of rail services to the site, although rail is available in the vicinity
- Land is limited within the centre for development - any new development would need to utilise car parking space
- Land ownership is fragmented constraining comprehensive Centre renewal

**Opportunities:**
- Population growth in the region to boost market size
- Growth in visitation to the area following establishment of suburban train services at Craigieburn station
- Integration of the Centre with the rail station and other nodes

**Threats:**
- Emergence of new centres in the area to provide competition – especially as the Craigieburn Town Centre develops
- Market rejection of car based shopping centres (although this is unlikely in the foreseeable future)

**Housing Development Potential Based on Land Availability and Public Transport Provision:**
- Medium (4 points)
- Land availability – 1 – The site appears highly constrained for further development
- Public transport – 3 – Bus services are provided and suburban rail services are committed for the adjacent Craigieburn station

**Suggested Actions:**
- Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage
- Monitor the retail performance of the Centre as the Craigieburn Town Centre develops
- Review land stock needs exploring opportunities to redevelop areas towards the rail station, including the older service industry area
5.9 Meadow Heights Shopping Centre

Figure 16 - Meadows Heights Context Map

---

MEADOW HEIGHTS SHOPPING CENTRE

Hudson Circuit, Meadow Heights
This is a modern convenience centre in a residential estate

**Classification:**
- Neighbourhood Activity Centre

**Zones and Overlays:**
- Much of the Centre is Business 1 Zone, allowing for a range of activity centre uses
- A small section of the centre is Public Park and Recreation Zone, recognising areas for public recreation and open space
- A Public Use 7 Zone (Other) is located adjacent to the Centre for religious facilities
- A Public Use Zone 2 (Education) is located adjacent to the site for Meadow Heights Primary School

**Major Retail Tenants:**
- Supa IGA Supermarket
| **Other Tenants:** | Business services such as post office  
|                 | Personal services such as video hire  
|                 | Entertainment such as gambling  
|                 | Community services such as community / religious centre, family centre, learning centre  
|                 | Health services such as medical centre, pharmacy |
| **Vacancy:** | 0% |
| **Transport Networks:** | Bus, car, pedestrian / bike |
| **Strengths:** | A strong daily and weekly convenience retail offer  
|               | Performs a strong multicultural and multi-faith role  
|               | Co-located with community facilities thus encouraging multi-purpose trips  
|               | Car access and parking  
|               | Vacant land for new development  
|               | Provision of multiple transport options including bus services |
| **Weaknesses:** | Car based centre - poor pedestrian integration between some precincts within the centre and surrounding residential areas  
|               | Lack of rail services to the site  
|               | Low / inefficient land utilisation rate  
|               | Poor interfaces / blank walls in some parts |
| **Opportunities:** | Expansion of the Centre on vacant land  
|               | Build on the strong multicultural role of the area |
| **Threats:** | Stagnant / declining population and income levels in the region  
|               | Market rejection of car based shopping centres (although this is unlikely in the foreseeable future) |
| **Housing Development Potential Based on Land Availability and Public Transport Provision:** | High (5 points)  
|               | Land availability – 3 – Undeveloped land and green spaces in the Centre provide housing development opportunities  
|               | Public transport – 2 – Bus services are provided |
| **Suggested Actions:** | Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage  
|               | Review land stock needs exploring opportunities to convert vacant land and car parks for other uses including housing, open space, community facilities |
5.10  Greenvale Shopping Centre

Figure 17 - Greenvale Context Map

---

**GREENVALE SHOPPING CENTRE**

Greenvale Drive and Mickleham Road, Greenvale
This is a modern convenience centre in a residential estate

**Classification:** Neighbourhood Activity Centre

**Zones and Overlays:**
- The Centre is zoned Business 1, allowing for a range of activity centre uses

**Major Retail Tenants:**
- Bi-Lo Supermarket

**Other Tenants:**
- Retail such as bakery
- Business services such as post office
- Personal services such as dry cleaners
- Community services such as community / religious centre
- Health services such as medical centre, pharmacy

**Vacancy:** 0%

**Transport Networks:**
- Bus, car, pedestrian / bike
### Strengths:
- A strong daily and weekly convenience retail offer
- Car access and parking
- Provision of multiple transport options including bus services
- New facilities
- Vacant land to the east of the existing Centre for new development

### Weaknesses:
- Located on the edge of the Urban Growth Boundary (thus has a limited future catchment to the west)
- Lack of rail services to the site
- Car based centre - poor pedestrian integration between some precincts within the centre and surrounding residential areas
- The Centre lacks a social atmosphere with limited food, retail and entertainment tenants and inadequate use of urban design (eg. seating)

### Opportunities:
- Population growth in the region to boost market size, although there may be little new expenditure available to this particular Centre
- Expansion of the Centre to the east on vacant land - although this land may not be suited to further retail development because of a local residential street frontage, and demand for more space may be low because of market constraints placed by the Urban Growth Boundary
- Activity centre housing development on vacant land

### Threats:
- Market rejection of car based shopping centres (although this is unlikely in the foreseeable future)

### Housing Development Potential Based on Land Availability and Public Transport Provision:
- High (5 points)
- Land availability – 3 – Undeveloped land and green spaces in the Centre provide housing development opportunities
- Public transport – 2 – Bus services are provided

### Suggested Actions:
- Consolidate the neighbourhood role of this Centre and establish a high standard interface with residential activity
- Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage
- Review possibility of releasing vacant land for housing development
5.11 Westmeadows Village Shopping Centre

Figure 18 - Westmeadows Context Map

<table>
<thead>
<tr>
<th>WESTMEADOWS VILLAGE SHOPPING CENTRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fawkner Street, Westmeadows</td>
</tr>
<tr>
<td>This is a strip-style centre that straddles an attractive creek corridor</td>
</tr>
</tbody>
</table>

**Classification:**
- Neighbourhood Activity Centre

**Zones and Overlays:**
- Much of the Centre is Business 1 Zone, allowing for a range of activity centre uses
- A Public Park and Recreation Zone and an Environmental Significance Overlay apply to the Moonee Ponds Creek, to ensure development responds to the environmental qualities of the site
- Heritage Overlay 6 (Blue Stone Road Bridge) and Heritage Overlay 7 (Former Foresters Hall) apply to significant structures in the Centre

**Major Retail Tenants:**
- IGA Supermarket

**Other Tenants:**
- Retail such as cake shop, café, liquor
- Entertainment and social activity such as tavern
- Health and community such as pharmacy, community centre

**Vacancy:**
- 0%

**Transport Networks:**
- Bus, car, pedestrian / bike
### Strengths:
- A mix of local convenience retail and community services with cafes, the Tavern, the creek and associated leisure activities
- Located within a very attractive gully setting
- Has a number of heritage buildings and bridge
- Provision of multiple transport options including bus services (undercover bus bay)
- Pedestrian friendly in parts (pedestrian and bicycle tracks run the course of the Creek and offer access to the Centre from surrounding residential areas)

### Weaknesses:
- The site is small and built out, and has little room for expansion
- Lack of rail services to the site
- Poor interface with residential area, especially at rear of supermarket
- Traffic management issues and parking constraints on Fawkner Street
- Activity centre does not directly address / take advantage of the Moonee Ponds Creek corridor

### Opportunities:
- Restructure to take advantage of the Creek corridor, heritage features
- Develop a greater leisure retail focus
- Improve traffic and parking systems

### Threats:
- Stagnant / declining population and income levels in the surrounding residential areas

### Housing Development Potential Based on Land Availability and Public Transport Provision:
- Low (3 points)
- Land availability – 1 – The area appears to be substantially developed and constrained for further development
- Public transport – 2 – Bus services are provided in the vicinity

### Suggested Actions:
- Restructure to take advantage of unique heritage features in and around the Centre and the Creek corridor, and develop a greater leisure retail focus
- Undertake a traffic, parking and pedestrian / cycling management strategy
5.12  Dallas Shopping Centre

**Figure 19- Dallas Context Map**

<table>
<thead>
<tr>
<th><strong>DALLAS SHOPPING CENTRE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Blair Street, Dallas</td>
</tr>
<tr>
<td>This is an older style 'town square' style centre</td>
</tr>
</tbody>
</table>

**Classification:**  Neighbourhood Activity Centre

**Zones and Overlays:**
- The Centre is zoned Business 1 Zone, allowing for a range of activity centre uses
- A small area opposite the Centre is Industrial 3 Zone, which allows for a Water Depot
- Also opposite the Centre is a Public Use 1 Zone, which allows for Melbourne Water
- An Airport Environ Overlay 1 applies to the area

**Major Retail Tenants:**  Bi-Lo Supermarket

**Other Tenants:**
- Retail such as general store
- Business services such as printers, bank
- Health and community services such as pharmacy
- Entertainment such as billiards / snooker

**Vacancy:**  0%

**Transport Networks:**  Bus, car, pedestrian / bike
### Strengths:
- A mix of local convenience retail and services
- Town square layout
- Provision of multiple transport options including bus services
- Good road access and parking
- Pedestrian friendly in the Centre proper
- Significant vacant / undeveloped land stock (activity centre uses take up a low proportion of the overall site)
- Internal mall with community meeting facilities (benches and tables with overhead sun shades) have helped create a social atmosphere

### Weaknesses:
- Poor urban design, building layout and amenity
- Private building stock is generally dated
- Not very well connected to its surrounding catchment with clear pedestrian and bike routes
- Low / inefficient land utilisation rate
- Lack of rail services to the site

### Opportunities:
- Rationalise land stock exploring opportunities to convert vacant land and car parks for other uses including housing, open space, community facilities
- Further urban design improvements, focusing on improving backs of buildings that face streets
- Investment in building stock
- Integrate surrounding residential areas to the site better with pedestrian and bike links
- Build on achievements of the Broadmeadows / Dallas Urban Renewal Project

### Threats:
- Declining population and income levels in the surrounding residential areas
- Lack of investment in building stock

### Housing Development Potential Based on Land Availability and Public Transport Provision:
- High (5 points)
- Land availability – 3 – Undeveloped land (car parks and green spaces) in the Centre provide housing development opportunities
- Public transport – 2 – Bus services are provided in the vicinity

### Suggested Actions:
- Continue structure planning for the Centre to reflect the Broadmeadows / Dallas Urban Renewal Project
- Facilitate investment in building stock
- Rationalise land stock exploring opportunities to convert vacant land and car parks for other uses including housing, open space, community facilities
- Integrate surrounding residential areas to the site better with pedestrian and bike links
5.13 Tullamarine Shopping Centre

Figure 20 - Tullamarine Context Map

<table>
<thead>
<tr>
<th>TULLAMARINE SHOPPING CENTRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melrose Drive, Tullamarine</td>
</tr>
<tr>
<td>This is an older style strip centre on the south side of Melrose Drive, fronting a service lane</td>
</tr>
</tbody>
</table>

**Classification:** Neighbourhood Activity Centre

**Zones and Overlays:**
- Much of the Centre is Business 1 Zone, allowing for a range of activity centre uses
- Surrounding areas accommodate residential and industrial uses
- A Special Building Overlay follows a drainage corridor through the area, to allow for waterway access and flood management

**Major Retail Tenants:** None

**Other Tenants:**
- Retail such as food outlets, fast food, milk bar, newsagents, florist
- Business services such as travel agent, real estate, shipping company
- Personal services such as hairdresser
- Health services such as pharmacy

**Vacancy:** 0% (apart from one rear premises)

**Transport Networks:** Bus, car, pedestrian / bike
| **Strengths:** | - A mix of retail and services, mainly serving as a takeaway service centre  
- A service lane provides good access to, and movement within, the Centre  
- Parking within the area appears adequate with angle parking on both sides of the service lane  
- Provision of multiple transport options including bus services  
- Positioned to service the local community, passing trade and workers at the adjacent industrial estate |
| **Weaknesses:** | - The site is small and built out, and has little room for expansion  
- The rear part of the Centre has a direct interface with housing  
- Bus services do not stop within the centre itself  
- Pedestrian access across Melrose Drive is difficult  
- Lack of rail services to the site |
| **Opportunities:** | - Integrate the Centre better with surrounding residential and industrial area with walking / cycling facilities  
- Continue to take advantage of passing trade  
- Potential extension of the Airport West Tram to this Centre |
| **Threats:** | - Declining population and income levels in the surrounding residential areas  
- Increasing pedestrian barriers due to traffic on Mickleham Road and Melrose Drive |
| **Housing Development Potential Based on Land Availability and Public Transport Provision:** | - Low (3 points)  
- Land availability – 1 – The area appears to be substantially developed and constrained for further development  
- Public transport – 2 – Bus services are provided in the vicinity |
| **Suggested Actions:** | - Manage the residential – activity centre interface  
- Integrate the Centre better with surrounding residential and industrial uses with walking / cycling facilities |
5.14 Olsen Place Shopping Centre

**Figure 21 - Olsen Place Context Map**

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**OLSEN PLACE SHOPPING CENTRE**

Olsen Place, Broadmeadows
This is an older style 'town square' style centre

<table>
<thead>
<tr>
<th>Classification:</th>
<th>Neighbourhood Activity Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zones and Overlays:</td>
<td>The Centre is zoned Business 1, allowing for a range of activity centre uses</td>
</tr>
<tr>
<td></td>
<td>It is surrounded by residential areas</td>
</tr>
<tr>
<td>Major Retail Tenants:</td>
<td>IGA Supermarket (small version)</td>
</tr>
<tr>
<td>Other Tenants:</td>
<td>Retail such as café, liquor, petrol filling, newsagent</td>
</tr>
<tr>
<td></td>
<td>Business services such as post office</td>
</tr>
<tr>
<td></td>
<td>Health and community services such as chemist, medical centre, Community Resource Centre</td>
</tr>
<tr>
<td>Vacancy:</td>
<td>5% approximately</td>
</tr>
<tr>
<td>Transport Networks:</td>
<td>Car, pedestrian / bike</td>
</tr>
</tbody>
</table>

---
**Strengths:**
- A wide mix of local convenience retail and services
- Excellent town square layout with mall
- Well integrated with a surrounding residential catchment (represents a good activity centre model that encourages walking)
- Good road access and parking
- The amenity of the centre is good, with the recent investments in urban design (seating, improved paving surfaces and landscaping) creating a pleasant environment
- Acts as a community focal point and not just a retail centre

**Weaknesses:**
- Poor public realm in some parts and private building stock is generally dated
- No bus services run directly past the Centre but routes do pass through neighbouring streets
- The site is small and built out
- Lack of rail services to the site

**Opportunities:**
- Further urban design improvements to ‘fine tune’ an otherwise good activity centre model
- Investment in building stock
- Integrate bus services to the site

**Threats:**
- Declining population and income levels in the surrounding residential areas
- Lack of investment in building stock

**Housing Development Potential Based on Land Availability and Public Transport Provision:**
- Low (2 points)
- Land availability – 1 – The area appears to be substantially developed and constrained for further development
- Public transport – 1 – Bus services are provided in adjacent streets but not at this Centre

**Suggested Actions:**
- Undertake further urban design improvements to ‘fine tune’ an otherwise good activity centre model
- Seek to integrate bus services to the site
- Encourage refurbishment of building stock
5.15 Gap Road Shopping Centre

Figure 22 - Gap Road Context Map

 GAP ROAD SHOPPING CENTRE
Gap Road, Sunbury
This is a modern convenience centre in a residential estate

Classification:  • Neighbourhood Activity Centre

Zones and Overlays:  • The Centre is Business 1 Zone, allowing for a range of activity centre uses
    • The adjacent land, Public Use 6 Zone (Local Government), is occupied by the CFA

Major Retail Tenants:  • Aldi Supermarket

Other Tenants:  • Retail such as general store
    • Emergency services such as CFA
    • Community services such as Sunbury Leisure Centre

Vacancy:  • 0%

Transport Networks:  • Car, pedestrian / bike
    • Bus has not been directly integrated although a service is available on Gap Road
### Strengths:
- A strong daily and weekly convenience retail offer
- Car access and parking
- New facilities
- Significant vacant land for new development
- Operates approximately 1 kilometre from Sunbury Town Centre and therefore is well-positioned to capture significant daily and weekly shopping trips from the western part of Sunbury (at the expense of Sunbury Town Centre) – this Centre is a threat to Sunbury Town Centre

### Weaknesses:
- Poor design integration with surrounding land parcels – highly segregated Centre
- Poor integration with bus services
- Poor pedestrian integration between precincts within the Centre (including the supermarket and convenience store) and surrounding residential areas
- Lack of rail services to the site

### Opportunities:
- Population growth in the region to boost market size
- Expansion of the Centre to the north and east on vacant land

### Threats:
- Market rejection of car based shopping centres (although this is unlikely in the foreseeable future)

### Housing Development Potential Based on Land Availability and Public Transport Provision:
- High (5 points)
- Land availability – 3 – Undeveloped land and green spaces in the Centre provide housing development opportunities
- Public transport – 2 – Bus services are provided in the vicinity

### Suggested Actions:
- Do not support expansion of this Centre beyond a neighbourhood role so its complements, but does not directly compete with, Sunbury Town Centre
- Structure plan to establish a local community focused shopping centre that has integrated precincts, high quality design that encourage pedestrian, cycling and public transport usage
5.16 Homestead Centre

Figure 23 - Homestead Context Map

<table>
<thead>
<tr>
<th>Classification:</th>
<th>Neighbourhood Activity Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zones and Overlays:</td>
<td>The centre area is Business 1 Zone, allowing for a range of activity centre uses</td>
</tr>
<tr>
<td></td>
<td>Adjacent to the site is a mixed-use zone incorporating the Homestead Community Centre and Roxburgh Park Primary School</td>
</tr>
<tr>
<td></td>
<td>A Development Plan Overlay (Urban Development Area: Residential Area) applies to the area</td>
</tr>
<tr>
<td>Major Retail Tenants:</td>
<td>Food Rite &amp; Liquor</td>
</tr>
<tr>
<td>Other Tenants:</td>
<td>Retail such as bakery, fast food, deli</td>
</tr>
<tr>
<td></td>
<td>Business services such as real estate</td>
</tr>
<tr>
<td></td>
<td>Health services such as medical centre, family services</td>
</tr>
<tr>
<td></td>
<td>Community services such as Community Centre (adjacent site) and Roxburgh Park Primary School (adjacent site)</td>
</tr>
<tr>
<td>Vacancy:</td>
<td>0%</td>
</tr>
<tr>
<td>Transport Networks:</td>
<td>Bus, car, pedestrian / bike</td>
</tr>
</tbody>
</table>
**Strengths:**
- A good mix of local convenience retail and services
- Provision of multiple transport options including bus services and walking and cycling paths
- The Centre is co-located with community facilities and a school, thus encouraging multi-purpose trips

**Weaknesses:**
- Many visitors to the Centre arrive by car, creating parking congestion and traffic conflict
- The site is small and built out
- Lack of rail services to the site

**Opportunities:**
- Population growth in the region to boost performance

**Threats:**
- New centres in vicinity will erode market share

**Housing Development Potential Based on Land Availability and Public Transport Provision:**
- Low (3 points)
  - Land availability – 1 – The area appears to be substantially developed and constrained for further development
  - Public transport – 2 – Bus services are provided in the vicinity

**Suggested Actions:**
- Maintain a neighbourhood role for this Centre
- Review traffic and parking issues
5.17 Upfield Shopping Centre

Figure 24 - Upfield Context Map

<table>
<thead>
<tr>
<th>UPFIELD SHOPPING CENTRE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barry Road, Campbellfield</td>
</tr>
<tr>
<td>This is an older style strip centre on the south side of Barry Road</td>
</tr>
</tbody>
</table>

**Classification:**
- Neighbourhood Activity Centre

**Zones and Overlays:**
- The Centre is Business 1 Zone, allowing for a range of activity centre uses
- Much of the area to the north of Barry Road is Industrial 1 Zone, allowing for a variety of industrial uses (includes the Ford Plant)
- The Public Use 4 Zone (Transport) runs adjacent to the Centre accommodating the Upfield train line and station
- An Airport Environments Overlay 1 applies to the area

**Major Retail Tenants:**
- None

**Other Tenants:**
- Retail such as cafes, fast food, post office, newsagents
- Business services such as solicitors, financial services, bank, real estate, recruitment services
- Health services such as medical and dental surgery, pharmacy, optometrist

**Vacancy:**
- 10% approximately
### Transport Networks:
- Train, bus, car, pedestrian / bike

### Strengths:
- A wide mix of local convenience retail and services
- Provision of multiple transport options including suburban rail services and bus services
- Positioned to service the local community and workers at the adjacent Ford Plant
- Pedestrian access to and from the Ford Plant is made safer via the pedestrian traffic crossing and boom gates located at the train line

### Weaknesses:
- The site is small and built out
- The layout of the Centre creates congestion problems - significant car and pedestrian congestion and conflict at peak times
- Parking at the Centre is limited, creating over-spill parking in nearby streets and on the rail reserve to the west

### Opportunities:
- Utilisation of rail land along Dunstan Parade for formalised car parking
- Greater development in surrounding industrial and residential areas to boost market size

### Threats:
- Declining population and income levels in the surrounding residential areas
- Closure of the Ford Plant and surrounding industrial activity
- Worsening traffic conditions detracting from the functionality of the Centre

### Housing Development Potential Based on Land Availability and Public Transport Provision:
- Medium (4 points)
  - Land availability – 1 – The area appears to be substantially developed and constrained for further development
  - Public transport – 3 – Suburban rail and bus services are provided

### Suggested Actions:
- Undertake a traffic, pedestrian and parking management strategy
- Undertake a structure plan to determine possibility of using rail land along Dunstan Parade for formalised car parking
5.18 New Centres in Growth Areas

As noted earlier, growth areas are likely to require provision of new neighbourhood level centres and local shops over time.

Section 22.11 of Hume’s Local Planning Policy Framework - Hume Neighbourhood Shopping Centres – states that neighbourhood shopping centres typically accommodate up to 1,500 square meters of retail space and are located within close proximity to residential areas. They are characterised by the provision of a limited range of convenience goods and personal services, servicing a catchment of approximately 5,000 persons. Neighbourhood Shopping Centres should be developed in locations that:

- Are accessible and convenient to local residents;
- Have frontage to an internal collector or distributor Road (where possible);
- Are close to other community facilities, such as recreational areas and schools; and
- Have access to pedestrian, bicycle and public transport networks.

**Suggested Action:**
- Support development of new Neighbourhood Activity Centres and local shops where a need can demonstrated, and new centres do not undermine the role of existing centres.

5.19 Bulky Goods Retailing

This includes retailers of furniture, whitegoods, electrical goods, hardware goods and related goods that tend to occupy large and relatively cheap sites with good main road exposure. ‘Utilitarian’ warehouse style facilities are generally desired.

One of the challenges in managing this form of development is making appropriate sites available to facilitate development in desired locations.

In Hume, this form of development has generally occurred in accordance with the direction of Melbourne 2030: that activity centres should accommodate this form of retailing. Broadmeadows, Roxburgh Park and Sunbury have all been successful to some extent in accommodating bulky goods retailing within activity centre boundaries.

However, there has been some ‘leakage’ of this activity to dispersed locations in parts of the City, mainly on:

- Industrial and office / industry zoned land along Hume Highway between Western Ring Road and Somerton Road;
- Office / industry zoned land on the west side of Mickleham Road straddling the Tullamarine Freeway; and
- Industrial zoned land in Sunbury.
For reasons of population growth (and income and expenditure growth), this type of retail development can be expected to grow strongly, especially in the northern part of the Hume growth corridor. On this basis careful management of this activity is required to realise the objectives of the Melbourne 2030 framework.

The development projections for ‘Household Goods’ (as reported in Section 6.1), which is a close proxy for bulky goods retailing, suggests that Hume will experience total demand of:
- Up to 4 hectares of Household Goods floorspace occupying 11 hectares of land in the Broadmeadows / Craigieburn corridor between 2001 and 2021; and

A preliminary review of land stock availability suggests that the Hume / Craigieburn corridor has ample land stock to accommodate the anticipated bulky goods growth in its corridor as follows:
- Broadmeadows Transit City - the northern part of the Transit City has about 8 hectares of land which might be capable of bulky goods development;
- Roxburgh Park Shopping Centre - the bulky goods area is roughly 20 hectares in total and is substantially undeveloped; and
- The future Craigieburn Town Centre is a 64 hectare site in total.

Finding 3 hectares of land for future bulky goods development in Sunbury is more difficult but not impossible. There may be potential in the Horne Street / Vineyard Road retail and industrial corridor.

The conclusion here is that Hume City Council should continue its current policy position of pre-planning for this segment of the retail sector by identifying locations in and around activity centres for future bulky goods growth.

**Suggested Actions:**
- Focus bulky good retail development in the four main centres of Broadmeadows, Roxburgh Park, future Craigieburn Town Centre and Sunbury.

### 5.20 Business Parks

Mixed industrial and commercial areas play an important role in the economy, accommodating firms that can have an important export function. Some business parks are zoned Business 3, which enables mixed industry and office activity. In principle, this is a sound concept from an economic view by co-locating potentially complementary business services with production facilities.

In business parks, there are many legitimate commercially oriented firms that cannot be effectively located in traditional activity centres / CBD environment. This includes firms that have one or more of the following attributes:
- The firm seeks a recognisable address in a specific economic location;
The firm seeks co-location synergies with related firms and research institutes; and

The firm requires multi-purpose facilities such as offices in conjunction with R&D and / or warehousing and / or manufacturing facilities (that are not typically available in a CBD environment).

However, a Business 3 Zone has the potential to also accommodate ‘generic’ office developments, which should go into activity centres.

As noted earlier, this can include firms that eschew a CBD / activity centre location in favour of predominantly car-based locations that offer campus style accommodation, ‘large’ sites, high quality ‘detached’ buildings with large floorplates and superior landscaping (perhaps in conjunction with recreation facilities and cafes). This segment of the commercial office market is not necessarily supported by State Government policy.

However, Hume City Council has commercial and industrial development policies which manage the development of office locations.

<table>
<thead>
<tr>
<th>Suggested Actions:</th>
<th>Support industrial / commercial developments that contribute to economic development and jobs growth.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Continue to utilise local policy for screening development proposals to ensure generic offices do not select a non-activity centre location.</td>
</tr>
</tbody>
</table>

### 5.21 Synthesis

Activity centre profiles were developed to derive a set of strategic actions for the future management of each activity centre. The suggested actions are noted in each profile above, but in summary address land use mix, design and transport issues.

Each activity centre was rated according to housing development potential using land availability and public transport criteria. This approach provides a preliminary ranking regarding centres that should be the target for higher density housing investigation (but the rankings do not suggest that a centre should or should not accommodate housing). The results are as follows:

- Very High ranking for higher-density housing investigation - Broadmeadows Transit City and Roxburgh Park Shopping Centre;
- High ranking for higher-density housing investigation - Future Craigieburn Town Centre, Meadow Heights Shopping Centre, Greenvale Shopping Centre, Dallas Shopping Centre and Gap Road Shopping Centre;
- Medium ranking for higher-density housing investigation - Sunbury Town Centre, Craigieburn East Shopping Centre and Upfield Shopping Centre;
- Low ranking for higher-density housing investigation – Gladstone Park, Campbellfield Plaza, Westmeadows Village Shopping Centre, Tullamarine Shopping Centre, Olsen Place Shopping Centre and Homestead Centre; and
- Not Applicable - Melbourne Airport.
New neighbourhood centres can be expected to be required in growth areas, especially the fringe areas of Craigieburn and Sunbury. The policy here should be to support development of new Neighbourhood Activity Centres and local shops where a need can demonstrated, and new centres do not undermine the role of existing centres.

Bulky goods retail development can be expected in the municipality over time. It is recommended that the policy should be to focus this form of development in the four main centres of Broadmeadows, Roxburgh Park, future Craigieburn Town Centre and Sunbury.

Industrial development has a relationship to activity centre development in instances where office development is allowed in industrial areas (ie. in Business 3 Zoned areas). The policy here should be to support industrial / commercial developments that contribute to economic development and jobs growth, but continue to utilise local policy for screening development proposals to ensure generic offices do not select a non-activity centre location.
6 Expenditure Patterns and Growth Expectations

6.1 Social and Economic Context

The table below summarises key aspects of Hume's recent economic and social development (based on analysis in the Broadmeadows Transit City Land Use Mix Report). This indicates that Hume is growing and diversifying off a relatively low base.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Positives for the Transit City</th>
<th>Negatives for the Transit City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Forces</td>
<td>- Hume is the major employment node in the north-west metropolitan area.</td>
<td>- Hume has an under-representation of jobs and investment in a range of service sectors.</td>
</tr>
<tr>
<td></td>
<td>- Regional job stock is increasing at a fast rate, driven by transport, manufacturing, retail and education investment.</td>
<td>- Major regional services are located outside the municipality.</td>
</tr>
<tr>
<td></td>
<td>- The biggest employers are in manufacturing and transport (key exporters) and population-driven sectors.</td>
<td>- The municipality imports a wide range of activities including retailing, business and community services.</td>
</tr>
<tr>
<td></td>
<td>- Hume plays a key role in Melbourne’s global production economy strength and will add to and derive benefits from this development.</td>
<td>- A major constraint on business services development in Hume relates to the relatively low skills profile of the municipality.</td>
</tr>
<tr>
<td></td>
<td>- A major catalyst for growth in the region has been new infrastructure development.</td>
<td>- A major threat to the municipality is outsourcing of business services (from Hume’s manufacturers) to out-of-municipality locations and firms.</td>
</tr>
<tr>
<td></td>
<td>- Service sector jobs are growing; this is a sign that the regional economy is maturing and beginning to diversify.</td>
<td>- Indications are that central Melbourne and other inner urban business districts have firmed as the preferred location for advanced business services.</td>
</tr>
<tr>
<td></td>
<td>- There will be opportunity to attract business service firms that service major industrial players in the region.</td>
<td></td>
</tr>
<tr>
<td>Social Forces</td>
<td>- Hume comprises a significant regional population.</td>
<td>- Population in the vicinity of Broadmeadows has aged and adopted a lower income profile.</td>
</tr>
<tr>
<td></td>
<td>- Population and household numbers are growing.</td>
<td>- The skills profile of Hume is relatively low at the current time.</td>
</tr>
<tr>
<td></td>
<td>- Household size is falling and demand for smaller housing will increase over</td>
<td>- The population comprises a significant</td>
</tr>
<tr>
<td></td>
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</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 6.2 Retail Analysis

This section provides a summary of retail development potential in Hume. An analysis has been undertaken to determine:

- Available retail expenditure and trends in retail demand;
- Hume in the retail hierarchy – where do Hume residents shop?
- Hume’s retail catchment – where do people that shop in Hume come from?
- A comparison of Hume with other locations; and
- An estimate of future floorspace demand by commodity groups.

The methodology involves:

- Using existing and projected population, income and retail expenditure per capita by key commodity groups to calculate the amount of potential retail expenditure by these groups both now (2001) and in the future (to 2021).
- Calculating the number of retail jobs in the municipality by using journey-to-work (JTW) data.
- Applying turnover per retail employee by the number of jobs in the area to estimate retail expenditure in the area.
- Calculating escape expenditure by each key commodity group by comparing potential retail expenditure with estimated actual expenditure.
• Applying standard values per sqm of expenditure (Retail Turnover Density (RTD) values) for similar areas to actual and potential retail expenditure by key commodity groups to calculate floorspace demand.
• Making an assumption about the level of net escape expenditure that will be retained as the region matures.

Available Retail Expenditure

To estimate the changing patterns of retail expenditure, regression analysis was performed on data from 1983 to 2003 as published in the Australian Bureau of Statistics (ABS) Retail Trade publication (8501.0). This enabled an estimate of how real growth in national retail expenditure per capita has changed over time. Results of the regression analysis are shown in the figure below.

Figure 25 - National Retail Spending Per Capita

As shown, the proportion of money spent on food has been increasing and is expected to continue to do so in the near future. In comparison, the amount spent at department stores / discount department stores and on clothing has stagnated and is currently undergoing slight decline. This does not necessarily mean that people are buying fewer clothes, but instead is likely to indicate how the price of clothes has decreased relatively in recent times. The table below summarises the effect this pattern will have on retail expenditure per capita between years 2001 and 2021.
Table 2 - National Retail Expenditure Per Capita

<table>
<thead>
<tr>
<th>Retail Category</th>
<th>2001</th>
<th>2006</th>
<th>2011</th>
<th>2016</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>$2,407</td>
<td>$2,541</td>
<td>$2,657</td>
<td>$2,773</td>
<td>$2,889</td>
</tr>
<tr>
<td>Department Stores</td>
<td>$698</td>
<td>$694</td>
<td>$695</td>
<td>$696</td>
<td>$697</td>
</tr>
<tr>
<td>Other Food</td>
<td>$881</td>
<td>$930</td>
<td>$973</td>
<td>$1,015</td>
<td>$1,057</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>$530</td>
<td>$499</td>
<td>$493</td>
<td>$487</td>
<td>$482</td>
</tr>
<tr>
<td>Household Goods</td>
<td>$1,079</td>
<td>$1,146</td>
<td>$1,356</td>
<td>$1,532</td>
<td>$1,707</td>
</tr>
<tr>
<td>Other Retailing</td>
<td>$1,179</td>
<td>$1,223</td>
<td>$1,341</td>
<td>$1,440</td>
<td>$1,539</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>$1,375</td>
<td>$1,279</td>
<td>$1,275</td>
<td>$1,234</td>
<td>$1,214</td>
</tr>
<tr>
<td>Total</td>
<td>$8,149</td>
<td>$8,312</td>
<td>$8,790</td>
<td>$9,177</td>
<td>$9,585</td>
</tr>
</tbody>
</table>

Source: ABS Retail Trade publication (8501.0) and SGS projections (2001$).

As noted above, there has been a steady and slow decline in Hospitality and Service industries over the past twenty years, which includes retail services such as those provided by Restaurants, Cafes, Pubs and Taverns, Hairdressing and Video rental outlets. However, recent industry trends have shown a strong growth in demand for these services throughout Melbourne, possibly due to a shift towards greater employment in white-collar labour by Melbourne residents. Thus the estimates for this commodity group are likely to be conservative.

National retail expenditure by commodity group per capita was modified for application to residents throughout Hume. This modification was achieved through use of the 1998-1999 ABS Household Expenditure Survey (publication 6535.0), which contains statistics on how local demographics affect retail expenditure. This data is published on a household basis rather than a per capita basis and thus the household value and its variation from the national average has been used as a surrogate value for modifying the per capita expenditure figures. The basis of this modification is shown in the next table. For use in the market catchment analysis, this calculation was performed separately for each JTW Transport Zone.

Table 3 - Hume Retail Expenditure Variation by Income

<table>
<thead>
<tr>
<th>HES Income Quintile</th>
<th>Lower</th>
<th>Second</th>
<th>Third</th>
<th>Fourth</th>
<th>Upper</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage of Hume Households</td>
<td>18.39%</td>
<td>13.67%</td>
<td>26.07%</td>
<td>22.63%</td>
<td>19.24%</td>
<td>100.00%</td>
</tr>
<tr>
<td>Variation from the Average</td>
<td>1.61%</td>
<td>6.33%</td>
<td>-6.07%</td>
<td>-2.63%</td>
<td>0.76%</td>
<td></td>
</tr>
<tr>
<td>Retail Expenditure per HH per week - Australian Average</td>
<td>$142</td>
<td>$210</td>
<td>$268</td>
<td>$350</td>
<td>$490</td>
<td>$292</td>
</tr>
<tr>
<td>Retail Expenditure per HH per week - Study Area</td>
<td>$131</td>
<td>$144</td>
<td>$349</td>
<td>$396</td>
<td>$471</td>
<td>$298</td>
</tr>
<tr>
<td>Percentage Variation from Australian Average</td>
<td>+2.11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


By using population projections, income variation by percentile group and real growth in retail expenditure, it is possible to calculate the amount of expenditure available in a given location. Population projections are based on Department of Sustainability and Environment (DSE) estimates by Statistical Local Areas (SLAs) (which take into account variables such as policy (Melbourne
2030), natural growth and migration and are distributed to Transport Zones based on residential land availability as outlined in the DSE’s Urban Development Program 2003. The final retail expenditure estimates for 2001 and 2021 are shown in the tables below.

### Table 4 - Retail Expenditure from Hume in 2001

<table>
<thead>
<tr>
<th></th>
<th>Hume (C) - Broadmeadows</th>
<th>Hume (C) - Craigieburn</th>
<th>Hume (C) - Sunbury</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>$144.9m</td>
<td>$109.4m</td>
<td>$80.7m</td>
<td>$335.0m</td>
</tr>
<tr>
<td>Department Stores</td>
<td>$42.0m</td>
<td>$31.7m</td>
<td>$23.4m</td>
<td>$97.1m</td>
</tr>
<tr>
<td>Other Food</td>
<td>$53.0m</td>
<td>$40.0m</td>
<td>$29.6m</td>
<td>$122.6m</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>$31.9m</td>
<td>$24.1m</td>
<td>$17.8m</td>
<td>$73.8m</td>
</tr>
<tr>
<td>Household Goods</td>
<td>$65.0m</td>
<td>$49.1m</td>
<td>$36.2m</td>
<td>$150.2m</td>
</tr>
<tr>
<td>Other Retail</td>
<td>$71.0m</td>
<td>$53.6m</td>
<td>$39.5m</td>
<td>$164.1m</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>$82.7m</td>
<td>$62.5m</td>
<td>$46.1m</td>
<td>$191.4m</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$490.5m</strong></td>
<td><strong>$370.4m</strong></td>
<td><strong>$273.4m</strong></td>
<td><strong>$1,134.2m</strong></td>
</tr>
</tbody>
</table>

*Source: SGS Estimate.*

### Table 5 - Projected Retail Expenditure from Hume in 2021

<table>
<thead>
<tr>
<th></th>
<th>Hume (C) - Broadmeadows</th>
<th>Hume (C) - Craigieburn</th>
<th>Hume (C) - Sunbury</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>$264.1m</td>
<td>$175.5m</td>
<td>$166.0m</td>
<td>$605.6m</td>
</tr>
<tr>
<td>Department Stores</td>
<td>$66.7m</td>
<td>$3.5m</td>
<td>$31.0m</td>
<td>$101.3m</td>
</tr>
<tr>
<td>Other Food</td>
<td>$83.8m</td>
<td>$43.3m</td>
<td>$38.3m</td>
<td>$165.4m</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>$19.8m</td>
<td>$8.7m</td>
<td>$15.2m</td>
<td>$43.8m</td>
</tr>
<tr>
<td>Household Goods</td>
<td>$105.5m</td>
<td>$21.8m</td>
<td>$39.5m</td>
<td>$166.8m</td>
</tr>
<tr>
<td>Other Retail</td>
<td>$83.6m</td>
<td>$67.9m</td>
<td>$44.5m</td>
<td>$196.0m</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>$62.3m</td>
<td>$96.8m</td>
<td>$28.3m</td>
<td>$177.4m</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$685.8m</strong></td>
<td><strong>$407.6m</strong></td>
<td><strong>$362.8m</strong></td>
<td><strong>$1,456.3m</strong></td>
</tr>
</tbody>
</table>

*Source: SGS Estimate.*

### Hume in the Retail Hierarchy

Retail employment for each Journey to Work Destination Transport Zone was calculated using ABS Journey to Work Data from the 2001 Census. The number of retail jobs was then used to estimate the total turnover for each Transport Zone. The SGS retail model was then used to approximate the market shares for these Transport Zones based on these estimates of turnover. The table below summarises the initial turnover estimates for the three SLAs within Hume.
Table 6 - Retail Turnover within Hume in 2001

<table>
<thead>
<tr>
<th></th>
<th>Hume (C) - Broadmeadows</th>
<th>Hume (C) - Craigieburn</th>
<th>Hume (C) - Sunbury</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>$188.5m</td>
<td>$96.9m</td>
<td>$103.7m</td>
<td>$389.1m</td>
</tr>
<tr>
<td>Department Stores</td>
<td>$55.9m</td>
<td>$2.3m</td>
<td>$23.6m</td>
<td>$81.8m</td>
</tr>
<tr>
<td>Other Food</td>
<td>$59.4m</td>
<td>$25.6m</td>
<td>$24.3m</td>
<td>$109.2m</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>$19.3m</td>
<td>$7.0m</td>
<td>$12.6m</td>
<td>$38.8m</td>
</tr>
<tr>
<td>Household Goods</td>
<td>$57.2m</td>
<td>$9.7m</td>
<td>$19.4m</td>
<td>$86.4m</td>
</tr>
<tr>
<td>Other Retail</td>
<td>$55.5m</td>
<td>$37.5m</td>
<td>$25.7m</td>
<td>$118.7m</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>$60.2m</td>
<td>$74.0m</td>
<td>$25.1m</td>
<td>$159.3m</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$496.0m</strong></td>
<td><strong>$253.0m</strong></td>
<td><strong>$234.4m</strong></td>
<td><strong>$983.3m</strong></td>
</tr>
</tbody>
</table>

Source: SGS Estimate.

It can be seen that the Broadmeadows area is currently responsible for about half of the total retail spending capture within Hume. Note that retail turnover for the Hume region does not equate to the retail expenditure from it, because there is a significant amount of retail trade leaving the region (i.e. escape expenditure) as well as retail turnover flowing into the area from customers based outside Hume (i.e. turnover capture).

Figure 26 - Retail Turnover within Hume in 2001
Net Escape Expenditure

The extent of escape expenditure and turnover capture by Hume is detailed in the following two tables, which show the destinations for retail expenditure generated from Hume residents and the sources of retail turnover captured by Hume traders.

Table 7 - Major Retail Expenditure Destinations for Hume Residents

<table>
<thead>
<tr>
<th>Where Hume Residents Shop</th>
<th>Amount Spent</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hume (C)</td>
<td>$500.5m</td>
<td>44.1%</td>
</tr>
<tr>
<td>Melbourne (C)</td>
<td>$108.8m</td>
<td>9.6%</td>
</tr>
<tr>
<td>Moonee Valley (C)</td>
<td>$54.3m</td>
<td>4.8%</td>
</tr>
<tr>
<td>Brimbank (C)</td>
<td>$41.1m</td>
<td>3.6%</td>
</tr>
<tr>
<td>Whittlesea (C)</td>
<td>$38.8m</td>
<td>3.4%</td>
</tr>
<tr>
<td>Darebin (C)</td>
<td>$37.9m</td>
<td>3.3%</td>
</tr>
<tr>
<td>Moreland (C)</td>
<td>$36.6m</td>
<td>3.2%</td>
</tr>
<tr>
<td>Yarra (C)</td>
<td>$33.1m</td>
<td>2.9%</td>
</tr>
<tr>
<td>Maribyrnong (C)</td>
<td>$29.9m</td>
<td>2.6%</td>
</tr>
<tr>
<td>Stonnington (C)</td>
<td>$24.1m</td>
<td>2.1%</td>
</tr>
<tr>
<td>Port Phillip (C)</td>
<td>$23.6m</td>
<td>2.1%</td>
</tr>
<tr>
<td>Banyule (C)</td>
<td>$20.9m</td>
<td>1.8%</td>
</tr>
<tr>
<td>Boroondara (C)</td>
<td>$19.6m</td>
<td>1.7%</td>
</tr>
<tr>
<td>Hobsons Bay (C)</td>
<td>$17.6m</td>
<td>1.6%</td>
</tr>
<tr>
<td>Monash (C)</td>
<td>$16.0m</td>
<td>1.4%</td>
</tr>
<tr>
<td>Wyndham (C)</td>
<td>$13.9m</td>
<td>1.2%</td>
</tr>
<tr>
<td>Whitehorse (C)</td>
<td>$11.6m</td>
<td>1.0%</td>
</tr>
<tr>
<td>Kingston (C)</td>
<td>$11.5m</td>
<td>1.0%</td>
</tr>
<tr>
<td>Yarra Ranges (S)</td>
<td>$10.4m</td>
<td>0.9%</td>
</tr>
<tr>
<td>Knox (C)</td>
<td>$9.7m</td>
<td>0.9%</td>
</tr>
<tr>
<td>Other</td>
<td>$74.2m</td>
<td>6.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$1,134.2m</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>


As seen in the table above, Hume residents spend a large proportion of their spending at other LGAs, in particular at regions towards and in the Melbourne CBD.
### Table 8 - Major Retail Turnover Sources for Hume Traders

<table>
<thead>
<tr>
<th>Origin of Residents Who Shop in Hume</th>
<th>Turnover Generated</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hume (C)</td>
<td>$500.5m</td>
<td>50.9%</td>
</tr>
<tr>
<td>Brimbank (C)</td>
<td>$74.3m</td>
<td>7.6%</td>
</tr>
<tr>
<td>Moreland (C)</td>
<td>$71.4m</td>
<td>7.3%</td>
</tr>
<tr>
<td>Whittlesea (C)</td>
<td>$55.8m</td>
<td>5.7%</td>
</tr>
<tr>
<td>Moonee Valley (C)</td>
<td>$50.6m</td>
<td>5.1%</td>
</tr>
<tr>
<td>Darebin (C)</td>
<td>$37.4m</td>
<td>3.8%</td>
</tr>
<tr>
<td>Banyule (C)</td>
<td>$23.9m</td>
<td>2.4%</td>
</tr>
<tr>
<td>Melton (S)</td>
<td>$19.0m</td>
<td>1.9%</td>
</tr>
<tr>
<td>Wyndham (C)</td>
<td>$16.0m</td>
<td>1.6%</td>
</tr>
<tr>
<td>Hobsons Bay (C)</td>
<td>$15.8m</td>
<td>1.6%</td>
</tr>
<tr>
<td>Nillumbik (S)</td>
<td>$14.0m</td>
<td>1.4%</td>
</tr>
<tr>
<td>Manningham (C)</td>
<td>$9.3m</td>
<td>1.0%</td>
</tr>
<tr>
<td>Maribyrnong (C)</td>
<td>$9.0m</td>
<td>0.9%</td>
</tr>
<tr>
<td>Yarra Ranges (S)</td>
<td>$8.9m</td>
<td>0.9%</td>
</tr>
<tr>
<td>Borroondara (C)</td>
<td>$7.4m</td>
<td>0.8%</td>
</tr>
<tr>
<td>Yarra (C)</td>
<td>$7.2m</td>
<td>0.7%</td>
</tr>
<tr>
<td>Casey (C)</td>
<td>$6.9m</td>
<td>0.7%</td>
</tr>
<tr>
<td>Knox (C)</td>
<td>$5.5m</td>
<td>0.6%</td>
</tr>
<tr>
<td>Port Phillip (C)</td>
<td>$5.4m</td>
<td>0.5%</td>
</tr>
<tr>
<td>Melbourne (C)</td>
<td>$4.9m</td>
<td>0.5%</td>
</tr>
<tr>
<td>Other</td>
<td>$39.9m</td>
<td>4.1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$983.3m</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

*Source: SGS Estimate (2001$).*

As can be seen, Hume obtains the majority of its retail spending from within its own municipality, with a catchment that is naturally skewed to the south due to population densities.

Based on the analysis for 2001, the current pattern of net escape expenditure by retail group is set out in the next figure.
Overall, net escape expenditure within Hume is low at –13.3%. However, this figure is deceiving due to Hume’s over-representation in the Supermarket sector. When looking at commodities groups separately, Hume has rather high net escape in both the Clothing and Soft Goods and Household Goods sectors (47.3% and 42.5% respectively).

The absence of department stores and a large stock of bulky good retailers in part explains this leakage.

**Table 9 - Net Escape Expenditure in 2001**

<table>
<thead>
<tr>
<th>Commodity Group</th>
<th>Expenditure Potential</th>
<th>Turnover</th>
<th>Net Escape Expenditure</th>
<th>% by Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>$335.0m</td>
<td>$389.1m</td>
<td>$54.1m</td>
<td>16.1%</td>
</tr>
<tr>
<td>Department Stores &amp; DDSs</td>
<td>$97.1m</td>
<td>$81.8m</td>
<td>-$15.3m</td>
<td>-15.8%</td>
</tr>
<tr>
<td>Other Food</td>
<td>$122.6m</td>
<td>$109.2m</td>
<td>-$13.4m</td>
<td>-10.9%</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>$73.8m</td>
<td>$38.8m</td>
<td>-$34.9m</td>
<td>-47.3%</td>
</tr>
<tr>
<td>Household Goods</td>
<td>$150.2m</td>
<td>$86.4m</td>
<td>-$63.9m</td>
<td>-42.5%</td>
</tr>
<tr>
<td>Other Retail</td>
<td>$164.1m</td>
<td>$118.7m</td>
<td>-$45.4m</td>
<td>-27.7%</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>$191.4m</td>
<td>$159.3m</td>
<td>-$32.0m</td>
<td>-16.7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$1,134.2m</strong></td>
<td><strong>$983.3m</strong></td>
<td><strong>-$151.0m</strong></td>
<td><strong>-13.3%</strong></td>
</tr>
</tbody>
</table>

*Source: SGS Estimate.*
Hume Compared to Surrounding Areas

The table below shows the performance of Hume as compared to surrounding areas and municipalities. Hume performs quite well when compared to other locations. However, as the data used in the model is based on 2001 employment levels it does not take into account any recent expansions that may have changed the competitive performance of locations in recent years.

Table 10 - Hume Compared to Surrounding Areas in 2001

<table>
<thead>
<tr>
<th></th>
<th>Hume (C)</th>
<th>Whittlesea (C)</th>
<th>Moreland (C)</th>
<th>Moonee Valley (C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenditure Potential</td>
<td>$1,134.2m</td>
<td>$999.6m</td>
<td>$1,027.3m</td>
<td>$936.4m</td>
</tr>
<tr>
<td>Spent in Municipality</td>
<td>$500.5m</td>
<td>$414.2m</td>
<td>$323.8m</td>
<td>$374.3m</td>
</tr>
<tr>
<td>Percentage</td>
<td>44.1%</td>
<td>41.4%</td>
<td>31.5%</td>
<td>40.0%</td>
</tr>
<tr>
<td>Total Turnover</td>
<td>$983.3m</td>
<td>$678.8m</td>
<td>$667.4m</td>
<td>$818.5m</td>
</tr>
<tr>
<td>Turnover from Elsewhere</td>
<td>$482.8m</td>
<td>$264.6m</td>
<td>$343.7m</td>
<td>$444.2m</td>
</tr>
<tr>
<td>Percentage</td>
<td>49.1%</td>
<td>39.0%</td>
<td>51.5%</td>
<td>54.3%</td>
</tr>
<tr>
<td>Captured / (Escape) Expenditure</td>
<td>-$151.0m</td>
<td>-$320.8m</td>
<td>-$359.9m</td>
<td>-$117.9m</td>
</tr>
<tr>
<td>Percentage</td>
<td>-13.3%</td>
<td>-32.1%</td>
<td>-35.0%</td>
<td>-12.6%</td>
</tr>
</tbody>
</table>

Source: SGS Estimate.

Future Floorspace Demand in Hume

To calculate required retail floorspace in the future, it was first assumed that Hume would maintain its current market share within Victoria as the population grows and the retail offer in Hume becomes more mature and robust.

Population forecasts provided by the DSE were then used to calculate future expenditure for each Transport Zone in Melbourne and the forecasted growth in retail expenditure per capita was also used to predict future retail demand.

As can be seen from the Table below, there is expected to be significant growth in retail turnover up to 2021. However, the turnover increase is quite uneven, being very strong for Supermarkets, high for Other Food, Household Goods and Other Retail, and relatively minimal in other categories.
Table 11 - Retail Turnover within Hume in 2021

<table>
<thead>
<tr>
<th></th>
<th>Hume (C) - Broadmeadows</th>
<th>Hume (C) - Craigieburn</th>
<th>Hume (C) - Sunbury</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>$264.1m</td>
<td>$175.5m</td>
<td>$166.0m</td>
<td>$605.6m</td>
</tr>
<tr>
<td>Department Stores</td>
<td>$66.7m</td>
<td>$3.5m</td>
<td>$31.0m</td>
<td>$101.3m</td>
</tr>
<tr>
<td>Other Food</td>
<td>$83.8m</td>
<td>$43.3m</td>
<td>$38.3m</td>
<td>$165.4m</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>$19.8m</td>
<td>$8.7m</td>
<td>$15.2m</td>
<td>$43.8m</td>
</tr>
<tr>
<td>Household Goods</td>
<td>$105.5m</td>
<td>$21.8m</td>
<td>$39.5m</td>
<td>$166.8m</td>
</tr>
<tr>
<td>Other Retail</td>
<td>$83.6m</td>
<td>$67.9m</td>
<td>$44.5m</td>
<td>$196.0m</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>$62.3m</td>
<td>$86.8m</td>
<td>$28.3m</td>
<td>$177.4m</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$685.8m</strong></td>
<td><strong>$407.6m</strong></td>
<td><strong>$362.8m</strong></td>
<td><strong>$1,456.3m</strong></td>
</tr>
</tbody>
</table>

Source: SGS Estimate.

In order to estimate the required floorspace within an activity centre it is first necessary to determine the amount of turnover a shopping centre generates per sqm of floor space (known as the retail turnover density or RTD). It should be noted that the RTDs vary substantially from centre to centre; for example, past studies have shown that the RTDs achieved in a regional shopping centre may be as high as $8,000 whereas minor shopping strips can survive on an RTD of $2,000 due to the lower rents that prevail in such locations. In this case conservative RTDs were chosen, which are similar to modern enclosed shopping developments as this is primarily the form of retail development that may occur in the future.

Table 12 - Net Increase in Turnover Between 2001 and 2021

<table>
<thead>
<tr>
<th></th>
<th>Hume (C) - Broadmeadows</th>
<th>Hume (C) - Craigieburn</th>
<th>Hume (C) - Sunbury</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>+$75.6m</td>
<td>+$78.5m</td>
<td>+$62.3m</td>
<td>+$216.5m</td>
</tr>
<tr>
<td>Department Stores</td>
<td>+$10.8m</td>
<td>+$1.2m</td>
<td>+$7.4m</td>
<td>+$19.4m</td>
</tr>
<tr>
<td>Other Food</td>
<td>+$24.4m</td>
<td>+$17.7m</td>
<td>+$14.0m</td>
<td>+$56.2m</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>+$0.5m</td>
<td>+$1.8m</td>
<td>+$2.6m</td>
<td>+$4.9m</td>
</tr>
<tr>
<td>Household Goods</td>
<td>+$48.3m</td>
<td>+$12.1m</td>
<td>+$20.0m</td>
<td>+$80.5m</td>
</tr>
<tr>
<td>Other Retail</td>
<td>+$28.1m</td>
<td>+$30.5m</td>
<td>+$18.8m</td>
<td>+$77.3m</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>+$2.1m</td>
<td>+$12.8m</td>
<td>+$3.2m</td>
<td>+$18.1m</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>+$189.8m</strong></td>
<td><strong>+$154.7m</strong></td>
<td><strong>+$128.5m</strong></td>
<td><strong>+$473.0m</strong></td>
</tr>
</tbody>
</table>

Source: SGS Estimate.

5 A conservative RTD value is a high value as the higher the RTD value the lower the amount of floorspace needed to absorb the available expenditure.
Table 13 - Retail Turnover Densities Applied in the Analysis

<table>
<thead>
<tr>
<th></th>
<th>RTD ($/sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>8,000</td>
</tr>
<tr>
<td>Department Stores</td>
<td>2,500</td>
</tr>
<tr>
<td>Other Food</td>
<td>6,000</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>3,000</td>
</tr>
<tr>
<td>Household Goods</td>
<td>3,000</td>
</tr>
<tr>
<td>Other Retail</td>
<td>4,000</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>3,000</td>
</tr>
</tbody>
</table>

Source: SGS Estimate.

The above RTDs and the projected retail turnover are used to calculate the net demand for various types of retail floorspace in Hume. This represents the overall demand, but care should also be taken to accommodate the preferred floorspace size of retail establishments. For example, individual full-line Supermarkets usually operate best at around 3,500 sqm, and ‘neighbourhood level’ centres are generally accompanied by a 10 or so specialty shops around 120 sqm each.

Table 14 - Net Floorspace Demand with Current Market Share Between 2001 and 2021

<table>
<thead>
<tr>
<th></th>
<th>Hume (C) - Broadmeadows</th>
<th>Hume (C) - Craigieburn</th>
<th>Hume (C) - Sunbury</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>9,451</td>
<td>9,819</td>
<td>7,790</td>
<td>27,059</td>
</tr>
<tr>
<td>Department Stores</td>
<td>4,312</td>
<td>493</td>
<td>2,973</td>
<td>7,779</td>
</tr>
<tr>
<td>Other Food</td>
<td>4,071</td>
<td>2,953</td>
<td>2,338</td>
<td>9,363</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>176</td>
<td>592</td>
<td>881</td>
<td>1,649</td>
</tr>
<tr>
<td>Household Goods</td>
<td>16,105</td>
<td>4,045</td>
<td>6,678</td>
<td>26,828</td>
</tr>
<tr>
<td>Other Retail</td>
<td>7,026</td>
<td>7,617</td>
<td>4,689</td>
<td>19,332</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>696</td>
<td>4,267</td>
<td>1,082</td>
<td>6,045</td>
</tr>
<tr>
<td>Total</td>
<td>41,837</td>
<td>29,786</td>
<td>26,431</td>
<td>98,054</td>
</tr>
</tbody>
</table>

Source: SGS Estimate.

The above table shows that Hume could support up to another 98,000 sqm of floorspace by 2021 if it maintained its current market share in the Melbourne Statistical Division.

However, even with this additional floorspace, the net escape expenditure within Hume is expected to increase between 2001 and 2021, from about 13% to 20%. This is due to the fact that at present Hume is an undeveloped retail system which loses a large amount of retail spending to surrounding regions, especially in the Clothing and Soft Goods and the Household Goods sectors. This effect will worsen unless additional floorspace is supplied to counteract it.

The tables below show the amount of additional floorspace required to reduce this escape expenditure to ‘lower’ levels for:

- The Broadmeadows / Craigieburn corridor; and
- Sunbury corridor.
Separate tables are provided for these two corridors because they function independently to some extent.

**Table 15 – Adjusting Broadmeadows / Craigieburn’s Net Escape Expenditure to 2021**

<table>
<thead>
<tr>
<th></th>
<th>Current Net Escape 2001</th>
<th>Projected Net Escape 2021</th>
<th>Preferred Net Escape 2021</th>
<th>Additional Turnover Required</th>
<th>Addition Floorspace Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>12.2%</td>
<td>2.3%</td>
<td>2.3%</td>
<td>$0.0m</td>
<td>0</td>
</tr>
<tr>
<td>Department Stores</td>
<td>-21.0%</td>
<td>-32.3%</td>
<td>-15.0%</td>
<td>$17.9m</td>
<td>7,170</td>
</tr>
<tr>
<td>Other Food</td>
<td>-8.7%</td>
<td>-19.2%</td>
<td>-5.0%</td>
<td>$22.3m</td>
<td>3,716</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>-53.1%</td>
<td>-60.1%</td>
<td>-30.0%</td>
<td>$21.6m</td>
<td>7,195</td>
</tr>
<tr>
<td>Household Goods</td>
<td>-41.3%</td>
<td>-49.8%</td>
<td>-30.0%</td>
<td>$50.3m</td>
<td>16,781</td>
</tr>
<tr>
<td>Other Retail</td>
<td>-25.4%</td>
<td>-33.8%</td>
<td>-15.0%</td>
<td>$43.0m</td>
<td>10,757</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>-7.6%</td>
<td>-17.4%</td>
<td>-5.0%</td>
<td>$22.4m</td>
<td>7,471</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>-13.0%</td>
<td>-23.3%</td>
<td>-10.8%</td>
<td>$177.6m</td>
<td>53,090</td>
</tr>
</tbody>
</table>

Source: SGS Estimate.

**Table 16 – Adjusting Sunbury’s Net Escape Expenditure to 2021**

<table>
<thead>
<tr>
<th></th>
<th>Current Net Escape 2001</th>
<th>Projected Net Escape 2021</th>
<th>Preferred Net Escape 2021</th>
<th>Additional Turnover Required</th>
<th>Addition Floorspace Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>28.4%</td>
<td>35.3%</td>
<td>35.3%</td>
<td>$0.0m</td>
<td>0</td>
</tr>
<tr>
<td>Department Stores</td>
<td>0.8%</td>
<td>4.8%</td>
<td>4.8%</td>
<td>$0.0m</td>
<td>0</td>
</tr>
<tr>
<td>Other Food</td>
<td>-18.0%</td>
<td>-14.8%</td>
<td>-10.0%</td>
<td>$2.1m</td>
<td>358</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>-29.2%</td>
<td>-25.5%</td>
<td>-15.0%</td>
<td>$2.2m</td>
<td>718</td>
</tr>
<tr>
<td>Household Goods</td>
<td>-46.4%</td>
<td>-45.6%</td>
<td>-30.0%</td>
<td>$11.3m</td>
<td>3,772</td>
</tr>
<tr>
<td>Other Retail</td>
<td>-35.0%</td>
<td>-32.0%</td>
<td>-20.0%</td>
<td>$7.8m</td>
<td>1,960</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>-45.6%</td>
<td>-45.1%</td>
<td>-30.0%</td>
<td>$7.8m</td>
<td>2,592</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>-14.3%</td>
<td>-10.9%</td>
<td>-3.2%</td>
<td>$31.2m</td>
<td>9,400</td>
</tr>
</tbody>
</table>

Source: SGS Estimate.

The preferred net escape expenditure figures are based on judgements by SGS Economics & Planning as to what could be achieved for each commodity group. The judgements are based on current escape expenditure levels and time available to modify the results.

As can be seen in the tables above, about 53,000 sqm of floorspace in Broadmeadows / Craigieburn (mainly focused in Household Goods, Other Retail and Department Stores) would reduce the overall net escape expenditure to about –10.8% in 2021.
The corresponding figure for Sunbury is possible escape expenditure of −3.2% by 2021, with an addition of about 9,400 sqm of space mainly focused in Household Goods and Hospitality and Services.

In summary, the additional total floorspace potential by 2021 is shown in the following three tables (Broadmeadows / Craigieburn, Sunbury and Hume).

**Table 17 - Possible Retail Floorspace Provision in Broadmeadows / Craigieburn in 2021**

<table>
<thead>
<tr>
<th></th>
<th>Retail Growth</th>
<th>Reduction in Escape Expenditure</th>
<th>Total Floorspace Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>19,270</td>
<td>0</td>
<td>19,270</td>
</tr>
<tr>
<td>Department Stores</td>
<td>4,805</td>
<td>7,170</td>
<td>11,975</td>
</tr>
<tr>
<td>Other Food</td>
<td>7,024</td>
<td>3,716</td>
<td>10,740</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>768</td>
<td>7,195</td>
<td>7,963</td>
</tr>
<tr>
<td>Household Goods</td>
<td>20,150</td>
<td>16,781</td>
<td>36,931</td>
</tr>
<tr>
<td>Other Retail</td>
<td>14,643</td>
<td>10,757</td>
<td>25,400</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>4,963</td>
<td>7,471</td>
<td>12,434</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>71,623</strong></td>
<td><strong>53,090</strong></td>
<td><strong>124,713</strong></td>
</tr>
</tbody>
</table>

*Source: SGS Estimate.*

**Table 18 - Possible Retail Floorspace Provision in Sunbury in 2021**

<table>
<thead>
<tr>
<th></th>
<th>Retail Growth</th>
<th>Reduction in Escape Expenditure</th>
<th>Total Floorspace Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>7,790</td>
<td>0</td>
<td>7,790</td>
</tr>
<tr>
<td>Department Stores</td>
<td>2,973</td>
<td>0</td>
<td>2,973</td>
</tr>
<tr>
<td>Other Food</td>
<td>2,338</td>
<td>358</td>
<td>2,696</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>881</td>
<td>718</td>
<td>1,599</td>
</tr>
<tr>
<td>Household Goods</td>
<td>6,678</td>
<td>3,772</td>
<td>10,450</td>
</tr>
<tr>
<td>Other Retail</td>
<td>4,689</td>
<td>1,960</td>
<td>6,649</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>1,082</td>
<td>2,592</td>
<td>3,674</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>26,431</strong></td>
<td><strong>9,400</strong></td>
<td><strong>35,831</strong></td>
</tr>
</tbody>
</table>

*Source: SGS Estimate.*
Table 19 - Possible Retail Floorspace Provision in Hume in 2021

<table>
<thead>
<tr>
<th></th>
<th>Retail Growth</th>
<th>Reduction in Escape Expenditure</th>
<th>Total Floorspace Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>27,060</td>
<td>0</td>
<td>27,060</td>
</tr>
<tr>
<td>Department Stores</td>
<td>7,778</td>
<td>7,170</td>
<td>14,948</td>
</tr>
<tr>
<td>Other Food</td>
<td>9,362</td>
<td>4,074</td>
<td>13,436</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>1,649</td>
<td>7,912</td>
<td>9,561</td>
</tr>
<tr>
<td>Household Goods</td>
<td>26,828</td>
<td>20,553</td>
<td>47,381</td>
</tr>
<tr>
<td>Other Retail</td>
<td>19,332</td>
<td>12,717</td>
<td>32,049</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>6,045</td>
<td>10,063</td>
<td>16,108</td>
</tr>
<tr>
<td>Total</td>
<td>98,054</td>
<td>62,491</td>
<td>160,545</td>
</tr>
</tbody>
</table>

Source: SGS Estimate.

It is possible to apply an indicative floorspace to site area ratio to estimate, in very broad terms, the required land stock required to meet this potential development to 2021. The ratio adopted for this purpose is site coverage of 35%, leaving 65% for parking, access ways and landscaping.

This suggests that about 46 hectares might be needed across Hume to 2021 for retail expansion.

Household Goods (which represents ‘bulky goods’ retailing) will need about 14 hectares of land, of which 3 hectares could be allocated to Sunbury and about 10 in the remained of Hume.

Table 20 - Possible Site Area Needs to Accommodate Retail Growth to 2021

<table>
<thead>
<tr>
<th></th>
<th>Broadmeadows / Craigieburn</th>
<th>Sunbury</th>
<th>Hume</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Floorspace</td>
<td>Site Area</td>
<td>Floorspace</td>
</tr>
<tr>
<td>Supermarkets</td>
<td>19,270</td>
<td>55,057</td>
<td>7,790</td>
</tr>
<tr>
<td>Department Stores</td>
<td>11,975</td>
<td>34,214</td>
<td>2,973</td>
</tr>
<tr>
<td>Other Food</td>
<td>10,740</td>
<td>30,686</td>
<td>2,696</td>
</tr>
<tr>
<td>Clothing and Soft Goods</td>
<td>7,963</td>
<td>22,751</td>
<td>1,599</td>
</tr>
<tr>
<td>Household Goods</td>
<td>36,931</td>
<td>105,517</td>
<td>10,450</td>
</tr>
<tr>
<td>Other Retail</td>
<td>25,400</td>
<td>72,571</td>
<td>6,649</td>
</tr>
<tr>
<td>Hospitality and Services</td>
<td>12,434</td>
<td>35,526</td>
<td>3,674</td>
</tr>
<tr>
<td>Total</td>
<td>124,713</td>
<td>356,323</td>
<td>35,831</td>
</tr>
</tbody>
</table>

Source: SGS Estimate.
6.3 Local Level Growth Expectations

The following graphics show the location of available retail expenditure within Hume (now and in the future), measured by location of residents. This is most useful to highlight areas that will need provision of **local shops and neighbourhood centres** in the future.

Higher order centres tend to operate at metropolitan and regional levels, so the analysis in the previous part of this report is more suited to higher order centres.


The main features of this analysis are that significant growth in local level expenditure can be expected in Craigieburn and in areas around Greenvale / Roxburgh Park and Sunbury. This suggests the demand for local shops and neighbourhood level retailing will grow in these areas.

The established urban areas around Broadmeadows are not expected to experience growth in the future, and some pockets may be in a decline / consolidation phase.
Figure 28 - 2001 Retail Expenditure by Area in Hume

Source: SGS Estimate.
Figure 29 - 2011 Retail Expenditure by Area in Hume

Source: SGS Estimate.
Figure 30 - 2021 Retail Expenditure by Area in Hume

Source: SGS Estimate.
Figure 31 - 2001-2011 Retail Expenditure Change by Area in Hume

Source: SGS Estimate.
Figure 32 - 2011-2021 Retail Expenditure Change by Area in Hume

Source: SGS Estimate.
Figure 33 - 2001-2021 Retail Expenditure Change by Area in Hume

Source: SGS Estimate.
6.4 Synthesis

Social and economic context indicators suggest that Hume’s economy and demographic structure is growing strongly and diversifying. Hume is experiencing growth in industrial, retail and service jobs and is growing its population including skilled worker population. Despite this positive trend, some service sectors are under-represented in Hume, and a significant segment of the population has low skills.

Retail forecasting analysis suggests that Hume will be able to support an additional 98,000 sqm of retail floorspace between 2001 and 2021 (assuming the municipality maintains existing market share in a metropolitan context). By sub-area, this equals about 71,600 sqm in the Broadmeadows / Craigieburn corridor and about 26,400 sqm in the Sunbury corridor.

Assuming Hume takes a policy position of minimising escape expenditure to ‘lower’ levels (ie. a level deemed realistic by SGS Economics & Planning), then it could support a total increase of 160,500 sqm of retail floorspace between 2001 and 2021. By sub-area, this equals about 124,700 sqm in the Broadmeadows / Craigieburn corridor and about 35,800 sqm in the Sunbury corridor.

In land area terms, the upper end estimate would require about 46 hectares to be set aside for retail development in Hume in this time period (36 hectares in Broadmeadows / Craigieburn and 10 hectares in Sunbury).

At a more localised level, indicators suggest that growth in local level retail expenditure can be expected in Craigieburn and in areas around Greenvale / Roxburgh Park and Sunbury. That is, the demand for local shops and neighbourhood level retailing will grow in these areas. The established urban areas around Broadmeadows are not expected to experience growth in the future for local services, and some pockets may be in a decline / consolidation phase.
7 Findings and Recommendations

7.1 Findings

The main issues for Hume with respect to managing the activity centre hierarchy over the next 20 years will be as follows:

- Managing growth and expansion of the activity centre network in selected areas, including new demand for retailing, bulky goods retailing, other commercial uses and housing;
- Managing demand for new Neighbourhood Centres and local shops in growth areas;
- Managing demand for bulky goods retailing, and resisting pressures for diffusion of this form of development across industrial main road frontages and out of centre sites;
- Managing consolidation and renewal in some centres;
- Managing the location of activity centre housing development;
- Managing the tension between Broadmeadows as the primary centre in Hume versus a likely emergent major centre in Craigieburn;
- Managing growth of the future Craigieburn Town Centre in the context of opportunities and constraints imposed by the Urban Growth Boundary;
- Managing legitimate commercial developments in business parks whilst not encouraging out of centre development of generic office facilities;
- Integrating the network of centres into an improved public transport system; and
- Designing centres in a way that integrates with communities based on walking, cycling and public transport as dominant movement modes as opposed to the car.

Hume’s activity centres have been classified in the following table according to role, format and linkages to other centres.
Table 21 - Summary of Centre Role and Potential

<table>
<thead>
<tr>
<th>M2030 Classif.</th>
<th>Type of Centre</th>
<th>CBD / Strip</th>
<th>Car Based</th>
<th>Rail PPTN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadmeadows Transit City</td>
<td>PAC, TC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Melbourne Airport</td>
<td>SAC</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Future Craigieburn Town Centre</td>
<td>Future PAC / MAC</td>
<td>-</td>
<td>-</td>
<td>✓</td>
</tr>
<tr>
<td>Sunbury Town Centre</td>
<td>MAC</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Gladstone Park Shopping Centre</td>
<td>MAC</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Roxburgh Park Shopping Centre</td>
<td>MAC</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Campbellfield Plaza</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Craigieburn East Shopping Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Meadow Heights Shopping Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Greenvale Shopping Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Westmeadows Village Shopping Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Dallas Shopping Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Tullamarine Shopping Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Olsen Place Shopping Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Gap Road Shopping Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Homestead Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Upfield Shopping Centre</td>
<td>NAC</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>New Centres in Growth Areas</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Bulky Goods Retailing</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Business Parks</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Management Focus</th>
<th>Bulky Goods Retail Focus</th>
<th>Higher-Density Housing Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growth Consolidation</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Broadmeadows Transit City</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Melbourne Airport</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Future Craigieburn Town Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Sunbury Town Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Gladstone Park Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Roxburgh Park Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Campbellfield Plaza</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Craigieburn East Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Meadow Heights Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Greenvale Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Westmeadows Village Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Dallas Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Tullamarine Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Olsen Place Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Gap Road Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Homestead Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Upfield Shopping Centre</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>New Centres in Growth Areas</td>
<td>✓</td>
<td>-</td>
</tr>
<tr>
<td>Bulky Goods Retailing</td>
<td>✓</td>
<td>-</td>
</tr>
<tr>
<td>Business Parks</td>
<td>✓</td>
<td>-</td>
</tr>
</tbody>
</table>

‘Type of centre’ refers to the extent to which a centre is deemed ‘friendly’ to pedestrians / cyclists, with the general view that CBD and Strip style centres are better placed to facilitate pedestrian / cycling / public transport oriented movements as opposed to ‘box’ style centres that are surrounded by car parking (ie. car based centres).
This indicative rating suggests that ‘older’ style centres tend to be better designed than more modern equivalents.

Centres that are likely to be the focus of growth and expansion pressures are:
- Broadmeadows Transit City;
- Melbourne Airport;
- Future Craigieburn Town Centre;
- Roxburgh Park Shopping Centre;
- Gap Road Shopping Centre;
- New neighbourhood / local centres in growth areas;
- Bulky goods sites; and
- Business parks (ie. semi industrial and commercial areas).

7.2 Recommendations

7.2.1 Municipal Network

In accordance with the following Vision Map, the recommended network of centres in Hume is as follows:

Principal, Major and Specialised Activity Centres:
- Broadmeadows Transit City PAC, TC
- Melbourne Airport SAC
- Future Craigieburn Town Centre Future PAC or MAC (to be determined subject to more detailed economic, land use and public transport assessment)
- Sunbury Town Centre MAC
- Gladstone Park Shopping Centre MAC
- Roxburgh Park Shopping Centre MAC

Neighbourhood Activity Centres:
- Campbellfield Plaza NAC
- Craigieburn East Shopping Centre NAC
- Meadow Heights Shopping Centre NAC
- Greenvale Shopping Centre NAC
- Westmeadows Village Shopping Centre NAC
- Dallas Shopping Centre NAC
- Tullamarine Shopping Centre NAC
- Olsen Place Shopping Centre NAC
- Gap Road Shopping Centre NAC
- Homestead Centre NAC
- Upfield Shopping Centre NAC
- New Centres in Growth Areas To be determined
7.2.2 Growth / Expansion

The centres that should be the focus of growth and expansion are:
- Broadmeadows Transit City;
- Melbourne Airport;
- Future Craigieburn Town Centre;
- Roxburgh Park Shopping Centre;
- Gap Road Shopping Centre; and
- New neighbourhood / local centres in growth areas.

With respect to new neighbourhood and local centres:
- Support development of new Neighbourhood Activity Centres and local shops where a need can be demonstrated, and new centres do not undermine the role of existing centres.

7.2.3 Consolidation / Redevelopment

The centres that should be the focus of consolidation / redevelopment are:
- Sunbury Town Centre;
- Gladstone Park Shopping Centre;
- Campbellfield Plaza;
- Craigieburn East Shopping Centre;
- Meadow Heights Shopping Centre;
- Greenvale Shopping Centre;
- Westmeadows Village Shopping Centre;
- Dallas Shopping Centre;
- Tullamarine Shopping Centre;
- Olsen Place Shopping Centre;
- Homestead Centre; and
- Upfield Shopping Centre.
Figure 34 - Strategic Vision
7.2.4 Bulky Goods Retail Development

The centres that should be the focus for accommodating bulky goods retailing are:

- Broadmeadows Transit City;
- Roxburgh Park Shopping Centre;
- Future Craigieburn Town Centre; and
- Sunbury Town Centre.

Council should ensure these areas continue to be the focus for this form of retail development.

7.2.5 Residential Development

Two centres are deemed to have a ‘very high’ ranking for higher-density housing investigation. They are:

- Broadmeadows Transit City; and
- Roxburgh Park Shopping Centre (although this Centre may have significant land use conflicts with nearby industry).

A further five centres are deemed to have a ‘high’ ranking for higher-density housing investigation as follows:

- Future Craigieburn Town Centre;
- Meadow Heights Shopping Centre;
- Greenvale Shopping Centre;
- Dallas Shopping Centre; and
- Gap Road Shopping Centre.

Centres that are deemed to have a ‘medium’ ranking for higher-density housing investigation are:

- Sunbury Town Centre;
- Craigieburn East Shopping Centre; and
- Upfield Shopping Centre.

Centres that are deemed to have a ‘low’ ranking for higher-density housing investigation are:

- Gladstone Park;
- Campbellfield Plaza;
- Westmeadows Village Shopping Centre;
- Tullamarine Shopping Centre;
- Olsen Place Shopping Centre; and
- Homestead Centre.

Housing is not suitable at Melbourne Airport.
7.2.6 Business Parks

Actions with respect to business parks are to:

- Support industrial / commercial developments that contribute to economic development and jobs growth; and
- Continue to utilise local policy for screening development proposals to ensure generic offices do not select a non-activity centre location.

7.2.7 Individual Centre Actions

Actions recommended for each centre are as follows.

<p>| Broadmeadows: | In accordance with Broadmeadows Transit City Plan when adopted (refer to that Plan for details) |
|              | This includes development of retail, hospitality, entertainment, commercial, institutional and residential uses in the Transit City |
| Melbourne Airport: | Addressed by Melbourne Airport Master Plan by Australia Pacific Airports (Melbourne) Pty Ltd |
|              | Hume City Council should oppose this Centre from developing a 'general' retail, commercial and entertainment offer that is geared to serve the non-air travel population |
|              | Retail, commercial and entertainment activity that specifically serves air travellers should be supported |
| Future Craigieburn Town Centre: | Ensure this Centre develops in accordance with Melbourne 2030 Principal Activity Centres objectives, incorporating mixed land use integration, public transport and walking / cycling facilities |
|              | Ensure the Centre caters for bulky goods retail development to absorb the sub-regional demand for this form of retailing |
|              | Ensure the Centre is designed to integrate with other land uses as opposed to the traditional 'barrier wall' model adopted in stand alone shopping centres |
|              | Ensure this Centre has an adequate catchment to realise planning objectives |
|              | Ensure public transport services are provided |</p>
<table>
<thead>
<tr>
<th>Location</th>
<th>Key Points</th>
</tr>
</thead>
</table>
| Sunbury      | - Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage  
              - Monitor the retail performance of the town centre precinct on the east side of the rail line in the context of retail/shopping centre expansion on the west side of the rail line  
              - Review land stock needs for all types of development possibilities exploring opportunities to facilitate redevelopment for retail, housing and community uses  
              - Identify sites capable of accommodating large format bulky goods retailing in and around the Centre in order to direct the future location of this form of retail development |
| Gladstone Park| - Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage  
              - Integrate the bulky goods strip on Mickleham Road with the Centre to encourage multi-purpose trips  
              - Encourage reinvestment in the building stock and public realm |
| Roxburgh Park| - Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage  
              - Review land stock needs exploring opportunities to convert vacant land and car parks for other uses including housing, open space, community facilities  
              - Ensure industrial development adjacent to the Centre is compatible with activity centre uses |
| Campbellfield| - Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage |
| Craigieburn East| - Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage  
              - Monitor the retail performance of the Centre as the Craigieburn Town Centre develops  
              - Review land stock needs exploring opportunities to redevelop areas towards the rail station, including the older strip centre |
| Greenvale    | - Consolidate the neighbourhood role of this Centre and establish a high standard interface with residential activity  
              - Structure plan to better integrate precincts within the Centre and between the Centre and surrounding areas to encourage pedestrian, cycling and public transport usage  
              - Review possibility of releasing vacant land for housing development |
<table>
<thead>
<tr>
<th>Location</th>
<th>Recommendations</th>
</tr>
</thead>
</table>
| Westmeadows:     | - Restructure to take advantage of unique heritage features in and around the Centre and the Creek corridor, and develop a greater leisure retail focus  
                  - Undertake a traffic, parking and pedestrian / cycling management strategy |
| Dallas:          | - Continue structure planning for the Centre to reflect the Broadmeadows / Dallas Urban Renewal Project  
                  - Facilitate investment in building stock  
                  - Rationalise land stock exploring opportunities to convert vacant land and car parks for other uses including housing, open space and community facilities  
                  - Integrate surrounding residential areas to the site better with pedestrian and bike links |
| Tullamarine:     | - Manage the residential – activity centre interface  
                  - Integrate the Centre better with surrounding residential and industrial uses with walking / cycling facilities |
| Olsen Place:     | - Undertake further urban design improvements to ‘fine tune’ an otherwise good activity centre model  
                  - Seek to integrate bus services to the site  
                  - Encourage refurbishment of building stock |
| Gap Road:        | - Do not support expansion of this Centre beyond a neighbourhood role so its complements, but does not directly compete with, Sunbury Town Centre  
                  - Structure plan to establish a local community focused shopping centre that has integrated precincts, high quality design that encourage pedestrian, cycling and public transport usage |
| Homestead:       | - Maintain a neighbourhood role for this Centre  
                  - Review traffic and parking issues |
| Upfield:         | - Undertake a traffic, pedestrian and parking management strategy  
                  - Undertake a structure plan to determine possibility of using rail land along Dunstan Parade for formalised car parking |