

12.4	Housing Strategy Review and Update, including draft Neighbourhood Character Study
Directorate	City Development
Director	Kelvin Walsh
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Attachment(s)	<ol style="list-style-type: none"> 1. Housing Strategy Review and Update - PPN 90 planning for housing [12.4.1 - 16 pages] 2. Housing Strategy Review and Update - PPN 91 using the residential zones [12.4.2 - 25 pages] 3. Brimbank Neighbourhood Character Study Peer Review 2019 [12.4.3 - 35 pages] 4. Brimbank Housing Strategy Background Report [12.4.4 - 173 pages]
Purpose	For endorsing
For Council to endorse strategic work undertaken to inform future work to prepare the Brimbank Neighbourhood Character Study, an updated Brimbank Housing Strategy and Brimbank Residential Development Framework.	

COVID STATEMENT

This report, and the analysis, conclusions and recommendations in this report are based on conditions encountered and information reviewed at the date of preparation of this report.

Federal and State advice, policy and regulatory settings in relation to the COVID-19 pandemic is being updated regularly, and may change the underlying assumptions or situational conditions upon which this report was drafted.

Legislation/Council Plan/Policy Context

This report supports the Council Plan 2017-2021 goals and strategic objectives of:

1. An Inclusive Community

- Our community belong and are proud of where they live
- People have opportunities to participate in community life

2. A Liveable Community

- People can get around easily on foot, by bike, car or public transport
- The urban environment supports a growing population in designated areas while respecting neighbourhood character and heritage where appropriate

3. A Prosperous Community

- Brimbank is leading destination for business, working, learning, recreation and living
- Housing of good quality, well located and affordable

4. An Innovative and Responsive 'Community First Council'

- Council advocates and works in the interests of our community
- Council is fair, honest and transparent.

This report has been prepared in accordance with the Brimbank Planning Scheme, the *Planning and Environment Act 1987*, Planning Practice Note 90 - Planning for housing (PPN90), and Planning Practice Note 91 - Using the residential zones (PPN91).

Council officers contributing to the preparation and approval of this report, have no conflicts of interests to declare.

Issue For Consideration

Council has undertaken a range of work to inform preparation of the Brimbank Neighbourhood Character Study, a revised Brimbank Housing Strategy and Brimbank Residential Development Framework, including:

- A Peer Review of the draft Brimbank Neighbourhood Character Study 2019 (draft Study)
- A Housing Strategy Review & VCAT Decision Analysis
- A Housing Strategy Background Report including population and demographic, housing need and capacity.

This work positions Council to progress to the next stage, involving the finalisation of the Brimbank Neighbourhood Character Study, and preparing an updated Brimbank Housing Strategy and Brimbank Residential Development Framework.

Background

Councils develop housing strategies to guide the location, type and form of housing within a municipality, to cater for a growing population, and be responsive to a range of housing needs including affordable, accessible and adaptable housing. This is achieved by identifying the location, type and form of housing that will cater to the needs of a growing population and implemented through planning policy and zoning.

When developing a housing strategy, councils also need to consider how they appropriately manage neighbourhood character in specified areas and determine future design in others to achieve a balanced approach to manage residential development.

Council commenced preparation of a Neighbourhood Character Study in 2018 and conducted community engagement in 2019, however was required to cease work due to the release of two State Government Planning Practice Notes (PPN) in late 2019. At the Council Meeting on 23 June 2020, Council received a progress report (June 2020 Progress Report) about the draft Brimbank Neighbourhood Character Study 2019 (draft Study). The June 2020 Progress Report summarised community consultation on the draft Study, outlined State led policy changes, which significantly impacted previously anticipated project timelines and finalisation of the draft Study, and next steps required to progress work.

The State led policy changes, which related specifically to housing and character were captured in two planning practice notes, PPN90 - Planning for Housing, and PPN91 - Using the Residential Zones, which are shown at **Attachments 1 and 2**. The purpose of these two practice notes was to provide guidance to councils and stakeholders on how to interpret and implement this new policy. The timing and impact of these policy changes meant the draft Study had to be placed on hold, despite Council having already consulted the community about the draft Study in mid 2019.

PPN90 and PPN91 necessitated the need for additional strategic work to be prepared prior to, and in order to finalise the draft Study. This further strategic work was noted by Council at the June 2020 Council Meeting, and included the 'development of a municipal Residential Development Framework, and preparation of a revised Brimbank Housing Strategy, in addition to updating the draft Study'.

The June 2020 Progress Report established that the release of PPN90 and PPN91 had a consequential impact on the draft Study, and explained a number of key implications. Of

particular consequence was a new direction that tensions between housing growth and neighbourhood character objectives need to be managed, in order to reduce uncertainty about future development outcomes. This meant that preferred character statements identified in the draft Strategy for incremental change areas no longer aligned with the expected level of housing change.

Specifically, while Brimbank's Housing Strategy *Home and Housed 2014* (Home and Housed) and previous planning policy direction commonly identified areas of 'incremental change' by applying the General Residential Zone (GRZ), this was no longer appropriate given the new expectations for housing change established for the GRZ. In the context of Brimbank, the GRZ now had a new meaning and is more reflective of a *substantial* change area, given that this zone is where three storey housing development exists or is planned for. As the draft Study's preferred character statements for areas in the GRZ refer to "low-scale" development – of single or double storey height, and being "respectful of the existing character", a misalignment now existed between neighbourhood character objectives proposed in the draft Study and housing objectives established through the existing zone, which in turn would be in conflict with PPN90 and PPN91.

Importantly, this conflict could not just be resolved through site specific rezoning as this ad hoc approach to residential areas in metropolitan Melbourne is not supported by the Department of Environment, Land, Water and Planning (DELWP). Instead changes to residential zoning needed to be assessed and implemented at the municipal scale. On this basis, DELWP advised Council officers that the draft Study could not be finalised without first developing a revised municipal wide housing strategy and housing development framework that aligned with proposed neighbourhood character objectives.

The ultimate goal of PPN90 and PPN91 is to require that the housing strategy and neighbourhood character strategy be integrated and used to identify change areas through a residential development framework. To give full effect these strategies would then be implemented through the Brimbank Planning Scheme. As a consequence, the revision of Council's Housing Strategy *Home and Housed* was programmed to commence in the 2020/21 work program.

Consultation

Community consultation was previously undertaken for the draft Study over a six-week period in July/August 2019. During this period 70 submissions were received and noted in the June 2020 Progress Report.

The views and aspirations of the community put forward through this consultation process remain relevant and valuable, and will be considered as part of the preparation of a Brimbank Neighbourhood Character Study.

In addition to the consultation findings from the draft Study, a new program of community consultation and stakeholder engagement will be undertaken to inform the preparation of the revised Brimbank Housing Strategy, Brimbank Neighbourhood Character Strategy and Brimbank Residential Development Framework.

Analysis

Draft Neighbourhood Character Study 2019 – Peer Review

Given the substantial amount of work that had been undertaken to prepare the draft Study, an industry expert was engaged to peer review and identify those components of the draft Study that remained consistent with PPN90 and PPN91, and could therefore

potentially be used to inform the finalisation of the draft Study. Council officers also sought to understand the additional work that would be required to align the draft Study with new planning practice direction and allow for local neighbourhood character objectives to be implemented as planning policy.

The peer review makes 19 direct recommendations to align the draft Study with relevant practice guidance and best practice. The peer review, including these recommendations, are outlined in full at **Attachment 3**.

While the peer review identifies that the draft Study is capable of providing an appropriate assessment of the existing character of the municipality, it also indicated that further work is required to define preferred future character.

The peer review also reaffirmed Council's understanding that the draft Study is one input into the Residential Development Framework, and further strategic work was required, in addition to the finalisation of the draft Study, to inform the Residential Development Framework.

Relevantly, the peer review acknowledged that many of the matters identified in the peer review arise from more robust guidance offered by PPN90 and PPN91, and that this guidance simply did not exist at the time that the draft Study was prepared.

Taking into account the recommendations of the peer review and the guidance provided by PPN90 and PPN91, the draft Study will need to be revised and finalised, and should:

- continue to consider both the public and private realm in its assessment of existing character and defining a preferred future character
- continue to use preferred neighbourhood character statements and neighbourhood character objectives to guide future development, within specific and distinct areas in Brimbank
- undertake additional work to identify the comparative difference and significance, of each neighbourhood character precinct. In assessing the significance of areas, comparisons need to be made with other parts of the municipality and the wider region. It is anticipated that this will result in a reduction to the number of character precincts currently contained within the draft Study
- form the basis for neighbourhood character statements, policies, objectives and local variations to clause 54 and 55 being included in residential zone schedules, a Neighbourhood Character Overlay or other overlay.

A critical component of a finalised neighbourhood character strategy is its successful integration with the residential zones and State planning policy, particularly given that PPN90 notes:

It is important that preferred character statements are forward-looking; so that if an area is identified for increased housing growth, the growth is not undermined by neighbourhood character policies that seek to maintain existing neighbourhood character.

Additionally, Clause 15.01-5S (Neighbourhood character) requires that preferred neighbourhood character statements do not undermine the ability to achieve medium and higher density housing outcomes, where they are in incremental and substantial change areas.

In order to identify where Brimbank should seek to achieve medium and higher density housing outcomes and therefore, where incremental and substantial change areas should be located, it is necessary to revise the existing housing strategy. The current strategy

interprets the residential zones, and hence the level of change in those zones differently, as it reflected the intent of the zone at the time it was prepared. This is explored further below.

Housing Strategy Review & VCAT Decision Analysis

Brimbank's existing Housing Strategy – *Home and Housed* was adopted in 2014 and established a strategic approach to managing housing growth across the municipality. Home and Housed planned for projected population growth and housing need to 2021 and used 14 strategic actions to achieve identified housing objectives.

These strategic actions were successful in implementing the current residential zoning regime and local variations to clause 54 and 55 standards (Rescode), contained within the Brimbank Planning Scheme.

However, a review of *Home and Housed* has also identified a number of inconsistencies between the existing strategic directions and the new practice direction offered by PPN90 and PPN91. In particular, the designation of housing policy areas as either 'limited' 'incremental' or 'substantial' change, and the application of the Neighbourhood Residential Zone, General Residential Zone and Residential Growth Zone to achieve those housing policy objectives, conflict with PPN90 and 91.

A limited internal review of VCAT decisions since the implementation of Home and Housed has also been undertaken in order to identify any emerging issues with how current housing policy is operating within the planning scheme. From a review of 58 decisions, it has been possible to identify the following emerging themes:

- In those applications refused by the Tribunal, where an increase in density is supported by planning policy, VCAT has tended to find that proposed design responses do not respect existing neighbourhood character.
- As there are no specific preferred neighbourhood character statements in the Planning Scheme, an assessment of neighbourhood character needs to be based on the existing character of the area and generic policies.
- There is a tension between policies seeking increased housing diversity and policies seeking development that is respectful of existing or preferred neighbourhood character.
- There is limited neighbourhood character guidance within the GRZ, which is challenging given Brimbank's housing strategy identifies the GRZ as an incremental change area where townhouse development is specifically encouraged.
- The Tribunal is regularly required to consider issues relating to car parking, vehicle access, front setbacks, landscaping opportunities, amenity impacts and street trees.
- There is difficulty in achieving the level of housing density and change encouraged within the Residential Growth Zone, without causing unacceptable amenity impacts and/or compromising the internal amenity and design of buildings.
- The consolidation of lots is positive in RGZ applications and allows for greater density.
- The appropriateness of development in the RGZ is not measured by the character of an area as it currently exists, but by aspirations for the area as established by the purpose of the zone.

The review of VCAT decisions highlights the importance of resolving tensions between housing and neighbourhood character objectives, and in particular, the need for

preferred neighbourhood character statements to provide guidance on the particular outcomes sought.

The findings from this initial internal review of Home and Housed and relevant VCAT decisions will be used to inform a revised and finalised Neighbourhood Character Strategy, Housing Strategy and Residential Development Framework. Further work will also be undertaken by the consultant team (to be appointed), in consultation with Council officers, to supplement the initial review and identify key priorities.

Housing Strategy Background Report

In accordance with PPN90, a local housing strategy needs to ensure that a range of housing opportunities are available across the municipality to meet the needs of the projected population.

In order to identify what the housing needs of the projected population are likely to be, a Housing Strategy Background Report (Background Report) has been prepared. The Background Report collates relevant demographic, population, housing and capacity analyses in order to identify issues, opportunities and key considerations for a revised Housing Strategy. This Background Report is prepared using existing zoning and is shown at **Attachment 4**.

The Background Report establishes that Brimbank's population is projected to increase by approximately 34,000 residents by 2041, and that housing strategy should plan to facilitate the provision of an additional 12,700 dwellings in this period.

Projects show that Sunshine is expected to accommodate more than half of Brimbank's population and dwelling growth, with substantial growth also project for St Albans. Other parts of the municipality such as Sydenham, Deer Park and Keilor, are projected to experience only limited population growth, however, this is influenced by the relative lack of new housing supply proposed in these areas.

In order to understand how the projected population and dwellings can be accommodated, a capacity analysis of the municipality was also undertaken, which establishes an estimated total dwelling capacity in Brimbank for 63,466 dwellings within the municipality.

While the estimated dwelling capacity within the municipality is large enough to accommodate the projected number of dwellings and population increase, the Background Report highlights a number of key considerations relevant to this capacity estimate:

- While there is substantial capacity across the municipality, this relies on re-subdivision of existing residential lots
- Housing capacity relies on the willingness, expertise and financial capacity of landowners to redevelop, or sell
- The greatest redevelopment potential exists in Sunshine, aligned with transport investment
- The family market, that is generally seeking detached dwellings, is not supplied with many new options
- While there are some strategic development opportunities within the municipality, there is no broad hectare land, or greenfield sites available, and strong house price growth is expected
- An ageing community will increase demand for retirement living, aged care and multi-generational households.

These matters will need to be addressed by the revised Housing Strategy, and in turn the market. Additionally, the Background Report identifies a number of key issues related to housing need that will require careful consideration:

- There is currently a significant amount of existing dwelling stock that is suited to families, but is also suitable for redevelopment (and contributes to the capacity for additional dwellings)
- Apartments and units make up a small proportion of existing dwelling stock
- There has not been an upward trend in apartment development activity
- Generally, there is a lack of diversity in housing stock across the municipality
- Brimbank is relatively affordable compared with other municipalities, however there is also lower incomes and strong housing price growth (+6% per annum)
- There is primary demand for detached dwellings, with a growing interest in townhouses
- The apartment market is weak due to the relative affordability and availability of houses and townhouses.

Additionally, the Background Report highlights the following high-level considerations for a revised housing strategy:

- A diversity of housing is needed
- Development has been subdued by the Covid-19 pandemic
- Development can expect to normalise, and apartments will be a more realistic prospect when:
 - International borders re-open
 - Migration rates normalise
 - Land values increase
 - Planned infrastructure investment progresses.

The information contained within the Background Report is a key input into a new Housing Strategy and will be used as an evidence base from which to make key recommendations about housing policies to meet the needs of the Brimbank community into the future.

Developing a revised Brimbank Housing Strategy and Residential Development Framework

Using the insights from a review of *Home and Housed*, VCAT decisions and the issues, opportunities and projections contained within the Background Report, Council is now in a position to engage a consultant to assist in the preparation of a revised Housing Strategy.

Specifically, and in accordance with PPN90, Brimbank's revised Housing Strategy should:

- Ensure a range of housing opportunities are available across the municipality to meet the needs of the projected population
- Outline the strategies and implementation mechanisms to accommodate the projected population and household needs
- Identify where and how the housing needs of the future population will be met across the municipality
- Identify suitable locations for housing growth, including those areas close to services, jobs, public transport and activity centres, and strategic development areas.

As noted previously, the development of these integrated pieces of work will call on past consultation undertaken as part of the draft Neighbourhood Character Study 2019 and will require a new consultation strategy.

Together, PPN90 and PPN91 seek to resolve tensions between protecting neighbourhood character and providing for housing growth through a Residential Development Framework. Brimbank's Residential Development Framework will need to identify housing change areas, by integrating the Neighbourhood Character Strategy, Housing Strategy and any other relevant strategic work (such as heritage, landscape or environmental studies).

Next steps

While a significant amount of work has been achieved in the past twelve months, there remains a significant amount of work to do going forward. The background information presented in this report has been prepared to inform the next stage, which involves the preparation of a new Housing Strategy, Neighbourhood Character Strategy and Residential Development Framework.

Council recently sought technical consultancy expertise to assist with the preparation and of a new Housing Strategy, Neighbourhood Character Strategy and Residential Development Framework, however was unable to secure the required services.

Council officers will continue to undertake further work to secure the required expertise to progress work to prepare the new Housing Strategy, Neighbourhood Character Strategy and Residential Development Framework. As this work progress, further update reports will be provided to Council, including details about the community engagement program to accompany and inform this work.

Resource And Risk Implications

Resource requirements for the work to date has been met in 2020/21 Council budget and allocation has been made to continue work in the 2021/22 Council budget.

Community: potential impact on community, including public trust and customer service impact

- Yes – there are potential implications for the community given the extensive consultation that has already been undertaken regarding neighbourhood character and housing, that will need to be re-tested. There are also implications for residential land owners should change occur as part of future rezoning or character requirements.

Financial: significant financial impacts

- Yes – The project is significant and will require significant staff resourcing as well budget for consultant fees and consultation strategies. Further allocating of resources will be required in order in future financial years to complete the work highlighted in this report.

Regulatory: legal, legislative or regulatory implications including the rights/obligations of stakeholders

- Yes – a Planning Scheme Amendment will eventually be required to implement housing and neighbourhood character policy objectives into the Brimbank Planning Scheme. This is subject to approval by the Minister for Planning.

Officer Recommendation

That Council:

- Endorses the progress update regarding work undertaken to inform preparation of the new Housing Strategy, Neighbourhood Character**

Strategy and Residential Development Framework, including the findings and recommendations of the Peer Review –Draft Neighbourhood Character Study 2019 and Housing Strategy Background Report shown at Attachment 3 and Attachment 4 to this report.

- b. Notes that Council will progress the next stage of the project, to prepare and finalise the new Housing Strategy, Neighbourhood Character Strategy and Residential Development Framework, and that further update reports will be provided to Council as work progresses, including details about the community engagement program to accompany and inform this work.**
- c. Notes that the global, Federal and State response to the COVID-19 pandemic may change the conditions encountered and information reviewed at the date of the preparation of this report.**
- d. Authorises officers to redirect resources in order to give effect to the recommendations in this report if any such redirection is reasonably required as a result of a change caused by the COVID-19 pandemic, and in accordance with any delegations made by Council in effect at the time.**

Planning for housing

Planning Practice Note 90

December 2019

This practice note provides information and guidance about how to plan for housing growth and protect neighbourhood character to ensure a balanced approach to managing residential development in planning schemes.

This practice note should be read with Planning Practice Note 91: Using the residential zones.

Why is it important to plan for housing?

Housing is influenced by a range of demographic, environmental, physical, social and economic influences. These include population growth and changing household formation patterns, the natural and built environments, land use patterns, location and accessibility to infrastructure and services, social and cultural values, the cost of housing, employment opportunities, and individual preferences and lifestyle choices.

Many of the changes occurring to the Victorian housing market are due to population changes. Victorians are ageing, having fewer children, forming smaller households and preferring different lifestyles. These changes have impacted on the demand, type and location of housing. Housing markets are becoming much more diverse as evidenced by the increasing popularity of high-rise apartment living on the one hand and semi-rural and coastal living on the other.

Lifestyle and preference changes have affected the housing market in several ways, creating demand for new and diverse housing. Victoria is experiencing unprecedented population growth and Melbourne is projected to become Australia's largest city.

Each municipality will experience the effects of this growth in different ways and will need to plan for population growth and additional households in its local communities.

When planning to accommodate projected population and housing change, planning authorities are required to effectively plan for this change by considering relevant environmental, social and economic factors, and where conflict arises, balance competing objectives in favour of net community benefit and sustainable development.



Housing and the Planning Policy Framework

The Planning Policy Framework (the PPF) is part of all planning schemes in Victoria and sets out the context for spatial planning and decision making. It includes state, regional and local planning policies and set outs a planning authority's obligations in relation to planning for population growth and managing housing change. See Table 1.

The PPF requires planning authorities to:

Plan to accommodate projected population growth over at least a 15-year period and provide clear direction on locations where growth should occur. Residential land supply will be considered on a municipal basis, rather than a town-by-town basis.

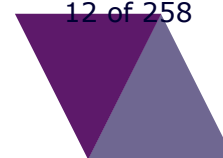
Planning for urban growth should consider:

- *Opportunities for the consolidation, redevelopment and intensification of existing urban areas.*
- *Neighbourhood character and landscape considerations.*
- *The limits of land capability and natural hazards and environmental quality.*
- *Service limitations and the costs of providing infrastructure.*

The PPF also requires planning authorities to consider the following region-specific strategies as relevant:

- Central Highlands Regional Growth Plan (Victorian Government, 2014)
- G21 Regional Growth Plan (Geelong Region Alliance, 2013)
- Gippsland Regional Growth Plan (Victorian Government, 2014)
- Great South Coast Regional Growth Plan (Victorian Government, 2014)
- Hume Regional Growth Plan (Victorian Government, 2014)
- Loddon Mallee North Regional Growth Plan (Victorian Government, 2014)
- Loddon Mallee South Regional Growth Plan (Victorian Government, 2014)
- Wimmera Southern Mallee Regional Growth Plan (Victorian Government, 2014)
- Plan Melbourne 2017-2050: Metropolitan Planning Strategy (Department of Environment, Land, Water and Planning, 2017).

Planning authorities should use Victorian Government population projections and land supply estimates when planning for population growth and managing housing change.

**Table 1:** Key PPF housing and settlement policies

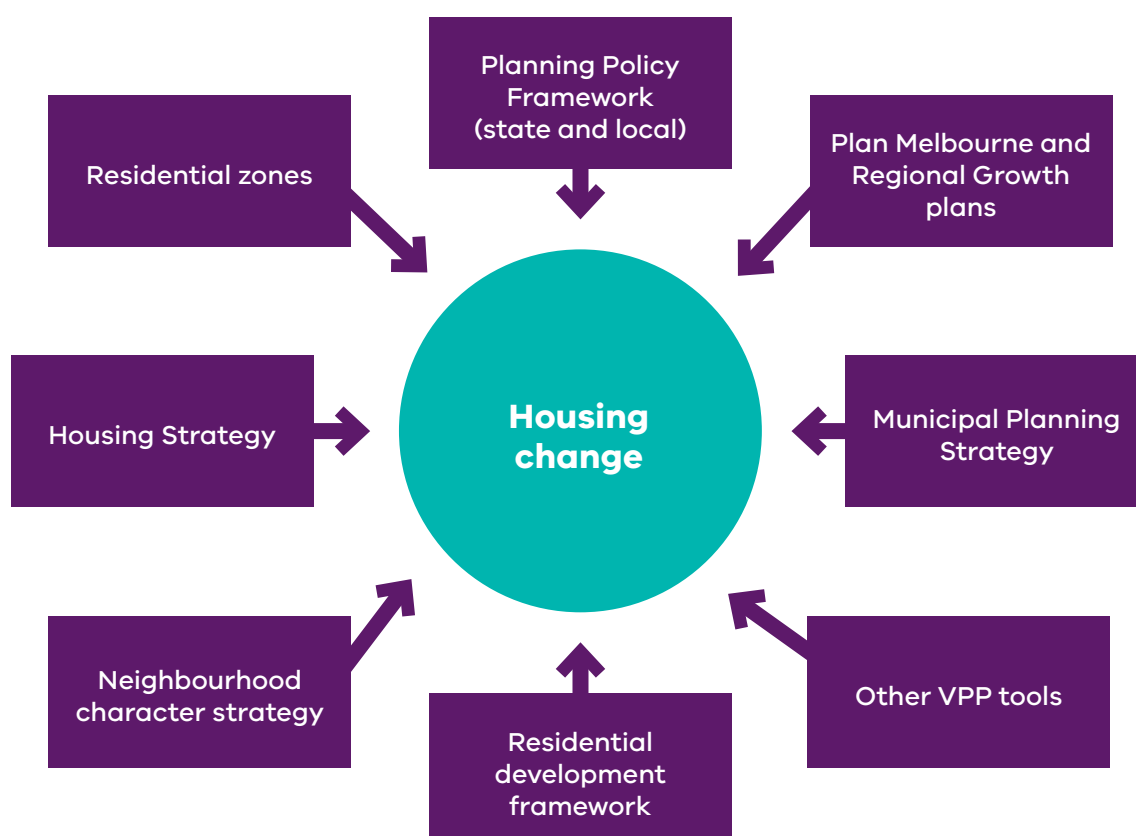
Clause	Policy
11.01-1S	<p>Ensure regions and their settlements are planned in accordance with their relevant regional growth plan, or Plan Melbourne.</p> <p>Develop compact urban areas that are based around existing or planned activity centres to maximise accessibility to facilities and services.</p>
11.02-2S	<p>Plan to accommodate projected population growth over at least a 15-year period and provide clear direction on locations where growth should occur.</p> <p>Residential land supply will be considered on a municipal basis, rather than a town-by-town basis.</p> <p>Planning for urban growth should consider:</p> <ul style="list-style-type: none"> • opportunities for the consolidation, redevelopment and intensification of existing urban areas • neighbourhood character and landscape considerations • the limits of land capability and natural hazards and environmental quality • service limitations and the costs of providing infrastructure.
15.01-5S	Ensure development contributes to existing or preferred neighbourhood character.
16.01-1S	<p>Increase the supply of housing in existing urban areas by facilitating increased housing yield in appropriate locations, including under-utilised urban land.</p> <p>Ensure that an appropriate quantity, quality and type of housing is provided.</p>
16.01-2S	<p>Increase the proportion of new housing in designated locations within established urban areas and reduce the share of new dwellings in greenfield and dispersed development areas.</p> <p>Encourage higher density housing development on sites that are well located in relation to services, jobs and public transport.</p> <p>Ensure an adequate supply of redevelopment opportunities within established urban areas to reduce the pressure for fringe development.</p> <p>Identify opportunities for increased residential densities to help consolidate urban areas.</p>
16.01-3S	<p>Ensure housing stock matches changing demand by widening housing choice.</p> <p>Facilitate diverse housing that offers choice and meets changing household needs.</p>

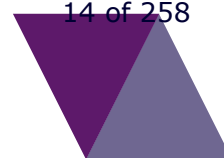
Housing and local area planning

Housing change is an inevitable and ongoing process. Tensions can arise between housing and neighbourhood character objectives. If these tensions are not adequately managed this creates uncertainty about future development outcomes.

Planning authorities play a critical role in guiding the location and form of housing and settlement patterns to meet the needs of Victoria's growing population.

Figure 1: *Planning for housing change*





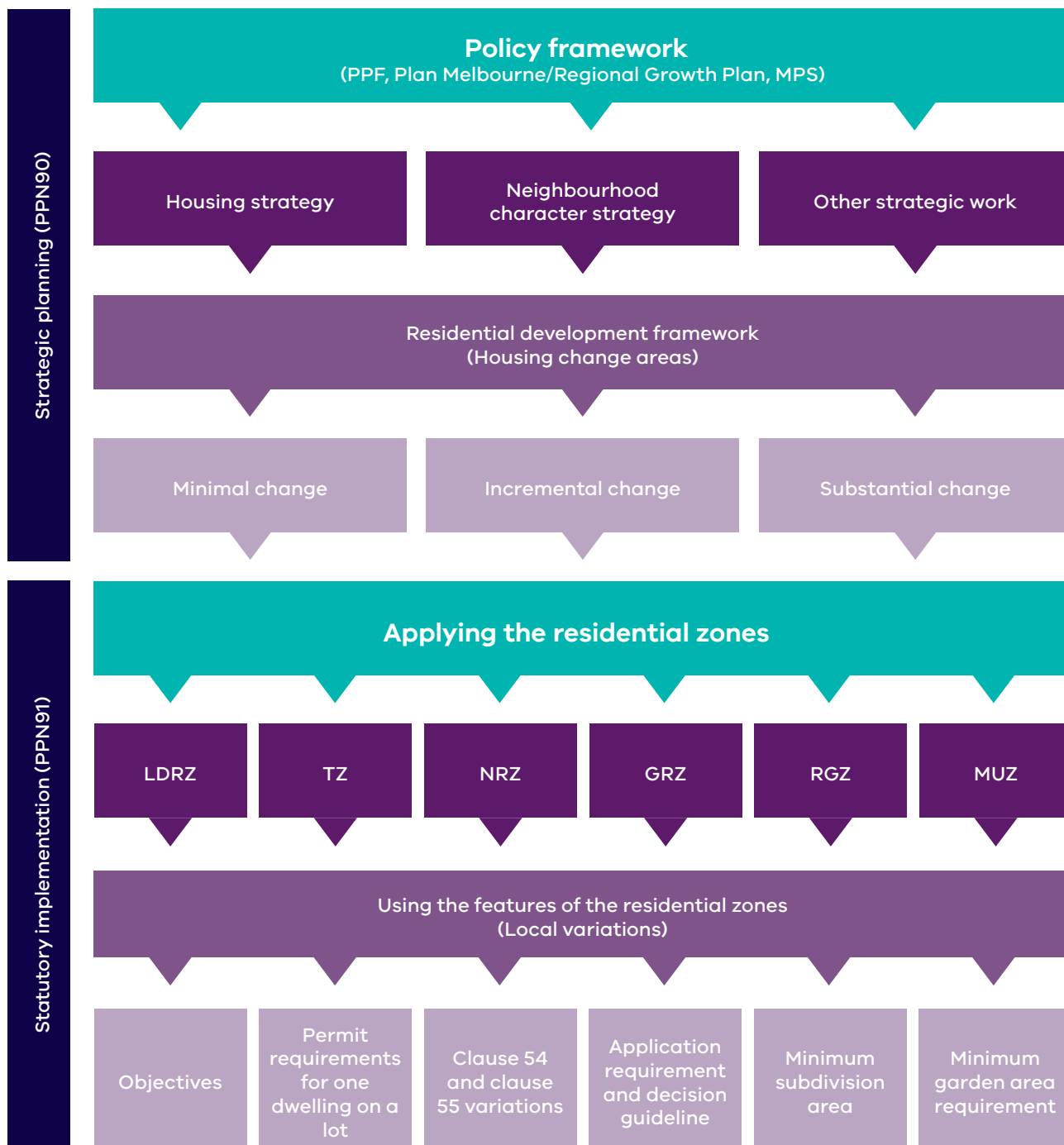
The strategic planning process

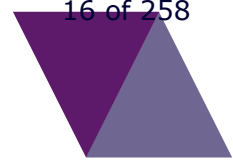
Planning for housing change can provide certainty for the community about where change is likely to occur as well as what form it should take.

To respond to state and regional planning policies and provide clear directions about where housing growth should occur, a planning authority will normally undertake some form of strategic planning to underpin the vision and strategic directions set out in the Municipal Planning Strategy (the MPS).

Figure 2: *The strategic planning process*



Figure 3: *Balancing housing growth and protection of neighbourhood character*



Undertaking local strategic studies

This strategic planning is typically expressed in the form of a housing strategy which may also be accompanied by a neighbourhood character strategy along with other relevant strategic work such as heritage, landscape, environmental or land capability studies.

A local housing strategy:

- ensures a range of housing opportunities are available across the municipality to meet the needs of the projected population
- outlines the strategies and implementation mechanisms to accommodate the projected population and household needs
- identifies where and how the housing needs of the future population will be met across the municipality
- identifies suitable locations for housing growth including those areas close to services, jobs, public transport and activity centres, and strategic development areas.

While a housing strategy identifies the extent and nature of future housing, a neighbourhood character strategy assists in identifying valued characteristics of areas that need to be considered when identifying the preferred future character for residential areas. Actions can then be identified to ensure that existing character is respected, or a preferred new character is achieved.

A local neighbourhood character strategy:

- considers both the public and private realms
- provides strategic direction for neighbourhood character to guide future development through preferred neighbourhood character statements or neighbourhood character objectives
- identifies the comparative significance of each neighbourhood character area. In assessing the significance of areas, comparisons need to be made, not only with other parts of the municipality but also with the wider region
- forms the basis for neighbourhood character statements, policies, objectives and local variations to clause 54 and clause 55 being included in residential zone schedules, a Neighbourhood Character Overlay or other overlay.

Neighbourhood character is not a static concept, it is dynamic and evolves over time to meet contemporary housing needs. For example, **respecting** character does not mean **protecting** character in an incremental change area.

The neighbourhood character strategy should demonstrate that housing objectives have not been prejudiced when determining areas for the protection of existing neighbourhood character.

To achieve this, a neighbourhood character strategy should feed into a residential development framework that identifies minimal, incremental and substantial change areas to balance the need to protect valued character with the need to ensure housing growth and diversity.



What does 'respect' mean?

Respecting character does not mean preventing change. In simple terms, respect for the character of a neighbourhood means that development should be designed in response to its context.

Depending on the neighbourhood, there are two broad approaches to respecting character:

- respecting the bulk and form of surrounding development
- respecting the architectural style of surrounding development.

Respecting neighbourhood character does not mean mimicry and pattern book design or limiting the scope of design interpretation and innovation. Instead, it means designing the development in response to the features and characteristics identified in the neighbourhood.

What is preferred neighbourhood character?

Under clause 54 and clause 55, new development should respect the existing neighbourhood character or contribute to a preferred neighbourhood character.

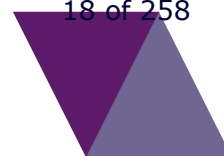
Preferred neighbourhood character is either:

- the existing character of an area; or
- an identified future neighbourhood character different from the existing character of an area.

Where the existing neighbourhood character is the preferred neighbourhood character, it is important to identify the existing features and characteristics of the area to be respected.

A preferred neighbourhood character statement can articulate the valued features and characteristics of an area to be respected by new development. There is no prescribed format for a preferred neighbourhood character statement. Its form will depend on several factors including the features and characteristics of an area or municipality, the housing outcomes sought, and the views of the local community.

It is important that preferred neighbourhood character statements are 'forward-looking' so that if an area is identified for increased housing growth, the growth is not undermined by neighbourhood character policies that seek to maintain the existing neighbourhood character.



Creating a residential development framework

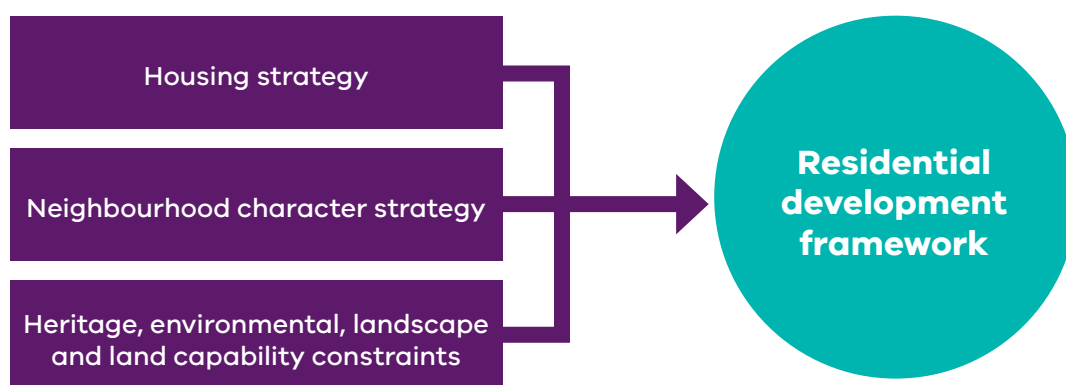
A residential development framework provides a means to balance the outputs of a housing strategy and neighbourhood character strategy by enabling a planning authority to holistically plan for housing change over 15 years to meet their obligations under clause 11.02-1S of the PPF.

A residential development framework will normally comprise the outputs of the strategic work undertaken through the development of a local

housing strategy and/or a local neighbourhood character strategy and any other pieces of strategic work such as a heritage, landscape, environmental or land capability study.

Creating a residential development framework can help to bring all these issues together into a coherent strategic vision containing a plan, or plans, that balances competing objectives by prioritising preferred development outcomes for different areas.

Figure 4: *Inputs for a residential development framework*





Identifying change areas

One of the key actions associated with developing a residential development framework is the identification of housing change areas.

Change is relative to its context. The existing built form of an area should always be the starting point when planning for change.

This should inform strategic planning work for identifying housing change areas of minimal, incremental and substantial change through a residential development framework.

Identifying housing change areas provides a means for prioritising competing housing and neighbourhood character objectives arising out of local strategic work. It also provides the basis for the application of requirements through zones and overlays to give effect to desired planning outcomes.

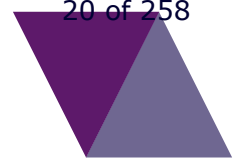
Identifying preferred development outcomes provides certainty to the community about where growth and intensification will occur, where valued neighbourhood character will be either respected or protected and where development is constrained by other characteristics or values.

A framework for managing change typically comprises the delineation of minimal, incremental and substantial change areas.

A greater breakdown of housing change areas may be acceptable provided there is a strong strategic basis for the approach and the additional housing change areas reflect preferred development outcomes that are legible and clear so that the type of change being sought broadly falls within the boundaries of the broader minimal, incremental and substantial change categories.

Figure 5: *Housing change areas and a residential development framework*





Minimal change areas

Minimal change areas have characteristics that are 'sufficiently special' to a municipality, metropolitan Melbourne or Victoria, and should be protected because of their special neighbourhood, heritage, environmental or landscape characteristics.

Minimal change areas can also be areas that are constrained by planning considerations such as the physical capability of the land to safely accommodate more residential development. For example, restricting additional housing in areas close to airports, land subject to bushfire risk, flooding or erosion.

Minimal change areas should not be identified based on remoteness from activity centres, jobs, services or transport, or because single-dwelling covenants or other restrictive instruments exist. While a relevant consideration, these restrictions are only one factor to consider when determining an appropriate strategic response to relevant state, regional and local settlement, housing and neighbourhood character policies.

Minimal change areas may appear differently in different built form contexts. For example, inner city heritage terraces and large lots with landscape values may both be considered minimal change areas but are very different residential environments. In both cases, the special characteristics of each area is the principal input into whether they are categorised as minimal change.

Minimal change areas:

- ✓ have special characteristics that distinguish them from other parts of the municipality or surrounding area
- ✓ have special neighbourhood, heritage, environmental, or landscape characteristics identified in the planning scheme
- ✓ are identified in a housing strategy, or in the planning scheme, as unsuitable for providing future housing growth
- ✓ tend to have overlays that reflect neighbourhood, heritage, environmental or landscape characteristics or other physical constraints which may impact their capacity for change.



Incremental change areas

Incremental change areas are where housing growth occurs within the context of existing or preferred neighbourhood character.

The built form context of incremental change areas can vary widely. For example, incremental change in an inner urban area can represent a very different scale of development from an incremental change area in an outer suburban area, or a regional town or city.

The key point is that incremental change is relevant to its context.

Incremental change areas:

- ✓ have capacity for housing growth and more diverse types of housing
- ✓ are where new development should respect existing valued neighbourhood character attributes
- ✓ are where existing neighbourhood character will evolve and change over time with reference to the key identified neighbourhood attributes.

Substantial change areas

Substantial change areas are where housing intensification will occur that results in a substantially different scale and intensity of housing compared to other areas of a municipality. This may include areas in and around activity centres, along public transport corridors and strategic development areas.

Substantial change areas will reflect a different degree of change in different built form contexts. For example, a substantial change area in an outer urban and regional context may more closely resemble an incremental change area in an inner urban context.

Substantial change areas:

- ✓ are close to jobs, services, facilities or public transport
- ✓ facilitate housing growth that takes advantage of their proximity to jobs, services, and public transport
- ✓ make the most of strategic development areas or opportunity sites that either exist or are identified from time to time
- ✓ promote housing diversity
- ✓ result in a new built form and neighbourhood character.

Remember

Key residential development framework questions to consider:

- Do characteristics exist that distinguish an area from other parts of the municipality or the surrounding area to warrant a different approach?
- Are there policies or provisions already in place to protect, improve or develop the characteristics of the area going forward?
- Does protecting or respecting identified characteristics in the area
 - unduly constrain the provision of housing?
 - have an impact on the provision of housing in other parts of the municipality?
- What measures are needed to balance the effects of protecting or respecting identified characteristics in an area?



Gumnut Residential Development Framework Plan

Figure 6: Gumnut housing change areas

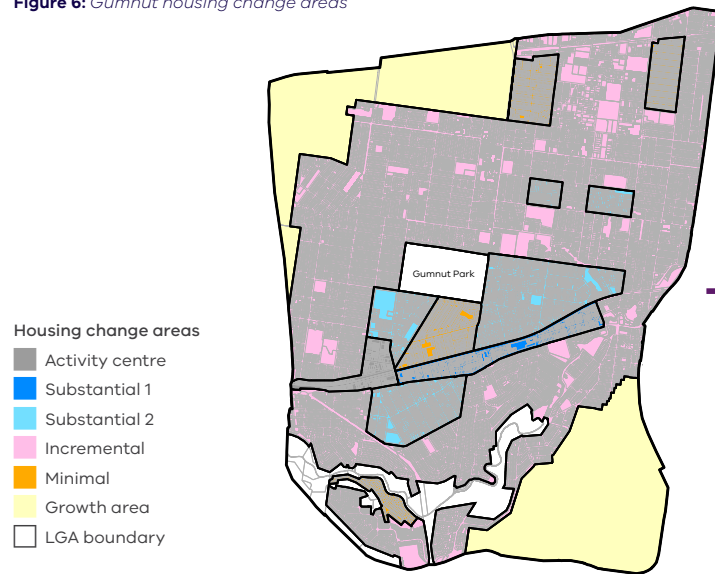


Figure 7: Gumnut character precincts

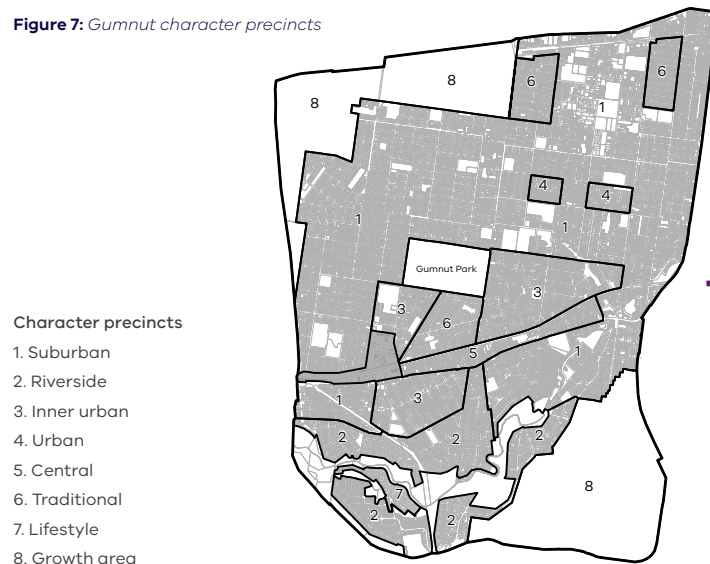
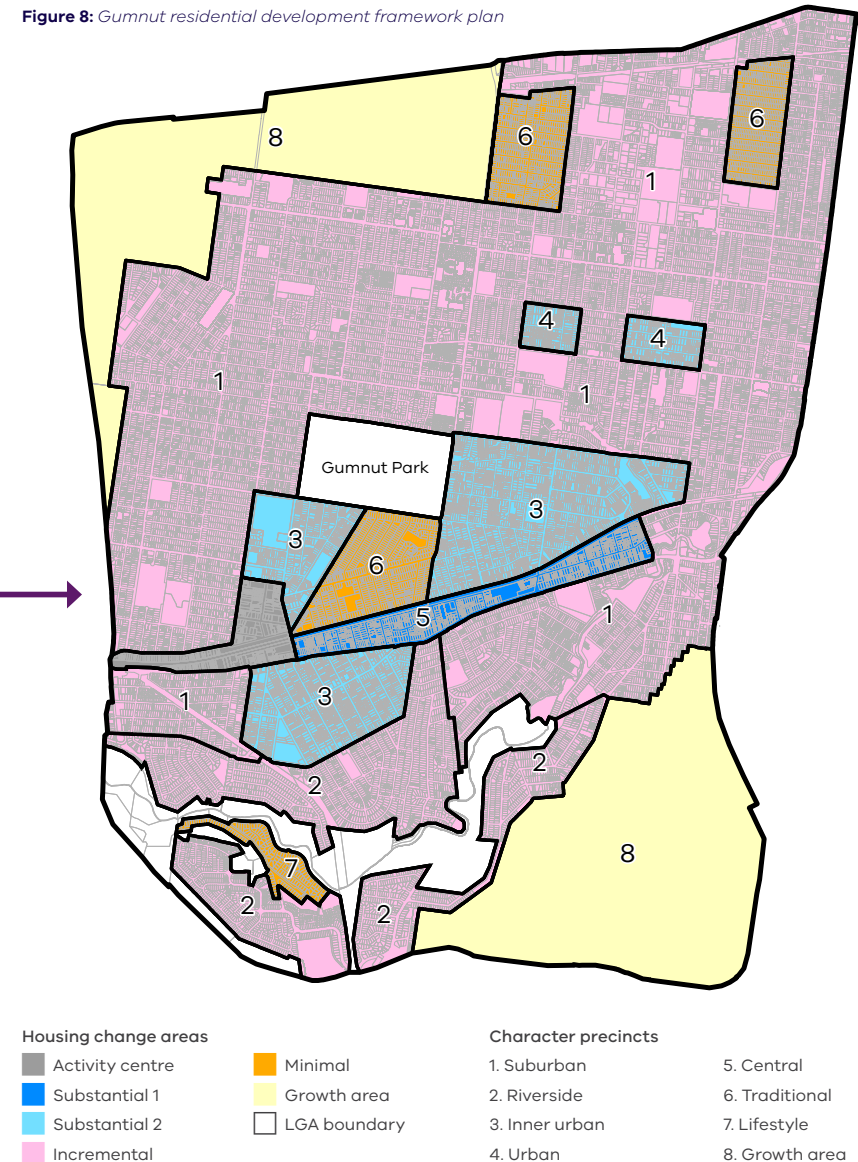


Figure 8: Gumnut residential development framework plan



Implementing a residential development framework

The PPF and the MPS form the strategic foundation of a planning scheme and provide the basis for the application of requirements through zones and overlays to give effect to identified planning outcomes in a residential development framework.

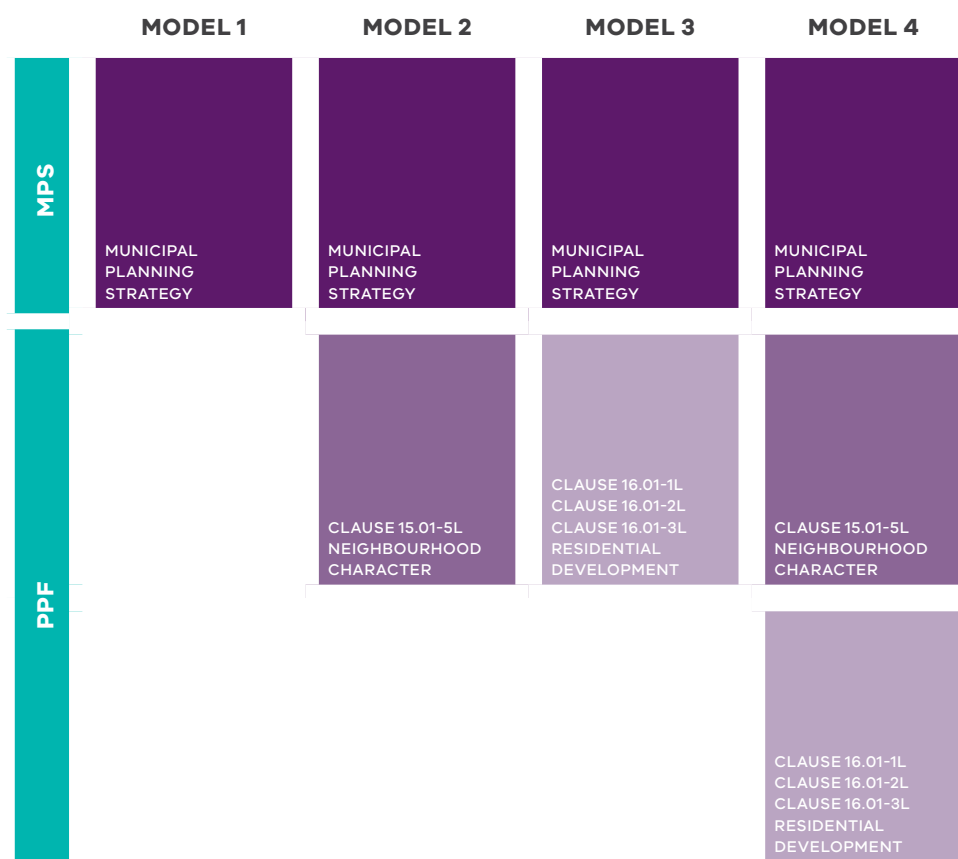
A residential development framework can be implemented into the PPF and MPS in several ways depending on the amount of local strategic work undertaken to give effect to the vision and strategic directions for a municipality.

If a planning authority only wishes to rely on the MPS to provide local strategic direction for housing it should contain:

- an overarching vision and strategic directions for the built environment and housing
- a municipal-wide strategic framework plan or inclusion of a separate residential development framework plan identifying housing change areas
- delineation and description of desired housing and neighbourhood character outcomes for each housing change area.

The MPS can be complemented by local housing and neighbourhood character policies.

Figure 9: Ways to implement a residential development framework





The role of the Municipal Planning Strategy

The MPS outlines the planning outcomes the municipality seeks to achieve that will be implemented by the policies and requirements of the planning scheme.

It may be enough to use the MPS in conjunction with state and regional planning policy to successfully implement a residential development framework and not include local planning policy in the PPF.

This will be dependent on whether the key strategic directions can be sufficiently expressed through a map or maps showing housing change areas and policy statements for these housing change areas within the MPS only.

The PPF and role of local planning policies

The PPF is the single integrated policy content of a planning scheme and provides a context for spatial planning and decision making by planning and responsible authorities.

A local planning policy complements state and regional planning policy by setting out the strategic basis for the application of a provision and, where appropriate, guides the exercise of discretion under that provision.

Where it is necessary to use a local planning policy in addition to the MPS to implement a residential development framework, the relevant sub-clauses of clauses 15 and 16 should be used. The use of sub-clauses to clause 11 may also be appropriate.

The locations of housing change areas do not need to be described. A map should be used instead.

Any matters that relate to the exercise of discretion in housing change areas should be included in local planning policy.

Using preferred character statements

Under clause 54 and clause 55, new development should respect the existing neighbourhood character or contribute to a preferred neighbourhood character.

If a preferred character statement is required for an area, it may be included in the MPS or in a local planning policy. When including preferred character statements in the MPS, these may form part of the strategic directions.

When including preferred character statements in a local planning policy, these could be either converted to, or accompanied by, appropriate objectives, strategies and policy guidelines in clause 15.01-5L to give effect to standard A1 in clause 54 and standard B1 clause 55.

A map should be used to show areas where preferred character statements apply.

Using maps

Maps should be used to provide visual expression of a residential development framework.

This could be mapped through a municipal-wide strategic framework plan or inclusion of a separate residential development framework plan identifying housing change areas.

A residential development framework in the MPS may include more than one map if a single map cannot legibly contain the necessary information. The map or maps should include housing change areas and may also include character areas or place-based maps as these set out how state and regional planning policy will be implemented at the local level.

Additional maps must align with the residential development framework.

More information

Contact

planning.vic.gov.au

planning.systems@delwp.vic.gov.au

136 186 (8am to 6pm Monday to Friday, excluding public holidays)

Planning Practice Notes

PPN8: Writing a local planning policy

PPN27: Understanding the residential development provisions

PPN43: Understanding neighbourhood character

PPN84: Applying the minimum garden area requirement

PPN91: Using the residential zones

View all planning practice notes at
<https://www.planning.vic.gov.au/resource-library/planning-practice-notes>

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Using the residential zones

Planning Practice Note 91

December 2019

This practice note provides information and guidance about how to:

- use the residential zones to implement strategic work
- use local policies and overlays with the residential zones
- make use of the key features of the residential zones.

This practice note should be read with Planning Practice Note 90: Planning for housing.

Reforms to the residential zones

Reforms to the Neighbourhood Residential Zone (NRZ), General Residential Zone (GRZ), and Residential Growth Zone (RGZ) were approved on 27 March 2017 through Amendment VC110 to the *Victoria Planning Provisions* (VPP). Changes were also made to the Mixed Use Zone (MUZ) and Township Zone (TZ) to bring them into line with the key new reforms.

The reformed residential zones provide more certainty and consistency about housing growth and built form outcomes by creating consistent and strengthened maximum building height controls and the introduction of a minimum garden area requirement in the GRZ and the NRZ.

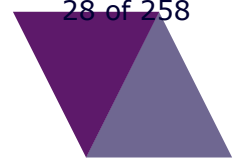
Further refinements to the residential zones were introduced by Amendment VC143 on 15 May 2018 to clarify the operation of the garden area requirement along with changes to permissible uses in the RGZ.

The residential zones

The VPP contains a suite of standard residential zones for statewide application.

Table 1: *The role and application of the residential zones*

Reformed zones	Residential zone	Role and application
	Clause 32.03 Low Density Residential Zone (LDRZ)	Applied to areas on the fringe of urban settlements and townships with reticulated sewerage (0.2 ha minimum) or without reticulated sewerage (0.4 ha minimum) to ensure lots remain large enough to treat and retain all wastewater but small enough to be maintained without the need for agricultural techniques or equipment.
	Clause 32.04 Mixed Use Zone (MUZ)	Applied to areas suitable for a mixed-use function, including a range of residential, commercial, industrial and other uses. Suitable for areas identified for residential development at higher densities including urban renewal and strategic redevelopment sites.
	Clause 32.05 Township Zone (TZ)	Applied to small towns with no specific structure of residential, commercial and industrial land uses.
	Clause 32.07 Residential Growth Zone (RGZ)	Applied to areas suitable for housing diversity and housing at increased densities in locations offering good access to services, jobs and public transport, and to provide a transition between areas of more intensive use and development such as activity centres, and other residential areas.
	Clause 32.08 General Residential Zone (GRZ)	Applied to areas where housing development of three storeys exists or is planned for in locations offering good access to services and transport.
	Clause 32.09 Neighbourhood Residential Zone (NRZ)	Applied to areas where there is no anticipated change to the predominantly single and double storey character. Also to areas that have been identified as having specific neighbourhood, heritage, environmental or landscape character values that distinguish the land from other parts of the municipality or surrounding area.



Principles underpinning the residential zones

Principle 1

Housing and neighbourhood character plans need to be consistent and align with one another when specifying preferred future housing and neighbourhood character outcomes for an area.

Inconsistencies between housing and neighbourhood character objectives do not provide certainty for the community or industry about whether housing growth or the protection of existing neighbourhood character is to be prioritised in a defined area or neighbourhood.

Principle 2

All residential zones support and allow increased housing, unless special neighbourhood character, heritage, environmental or landscape attributes, or other constraints and hazards exist.

Planning for urban growth requires the development of compact urban areas that are based around existing and planned activity centres to maximise accessibility to these facilities and services, including considering opportunities for the consolidation, redevelopment and intensification of existing urban areas more generally.

Principle 3

The Residential Growth Zone promotes housing intensification in locations close to jobs, services and facilities serviced by public transport including activity centres.

While the Residential Growth Zone promotes greater housing intensification up to four storeys, it can also be used to facilitate taller residential development by specifying a maximum building height greater than 13.5 metres in the schedule to the zone.

Principle 4

The General Residential Zone is a three-storey zone with a maximum building height of 11 metres.

The General Residential Zone should be applied to areas where housing development of three storeys exists or is planned for. It is inappropriate to apply the General Residential Zone to areas where a planning authority seeks to respect the existing single and double storey character of an area.

Principle 5

The density or number of dwellings on a lot cannot be restricted in the Neighbourhood Residential Zone unless special neighbourhood character, heritage, environmental or landscape attributes, or other constraints and hazards exist.

Dwelling density is no longer the basis for restricting development outcomes in the Neighbourhood Residential Zone.

It is no longer appropriate to limit housing growth in existing urban areas just because an area is perceived to be remote from jobs, services and public transport.

Applying the right residential zone

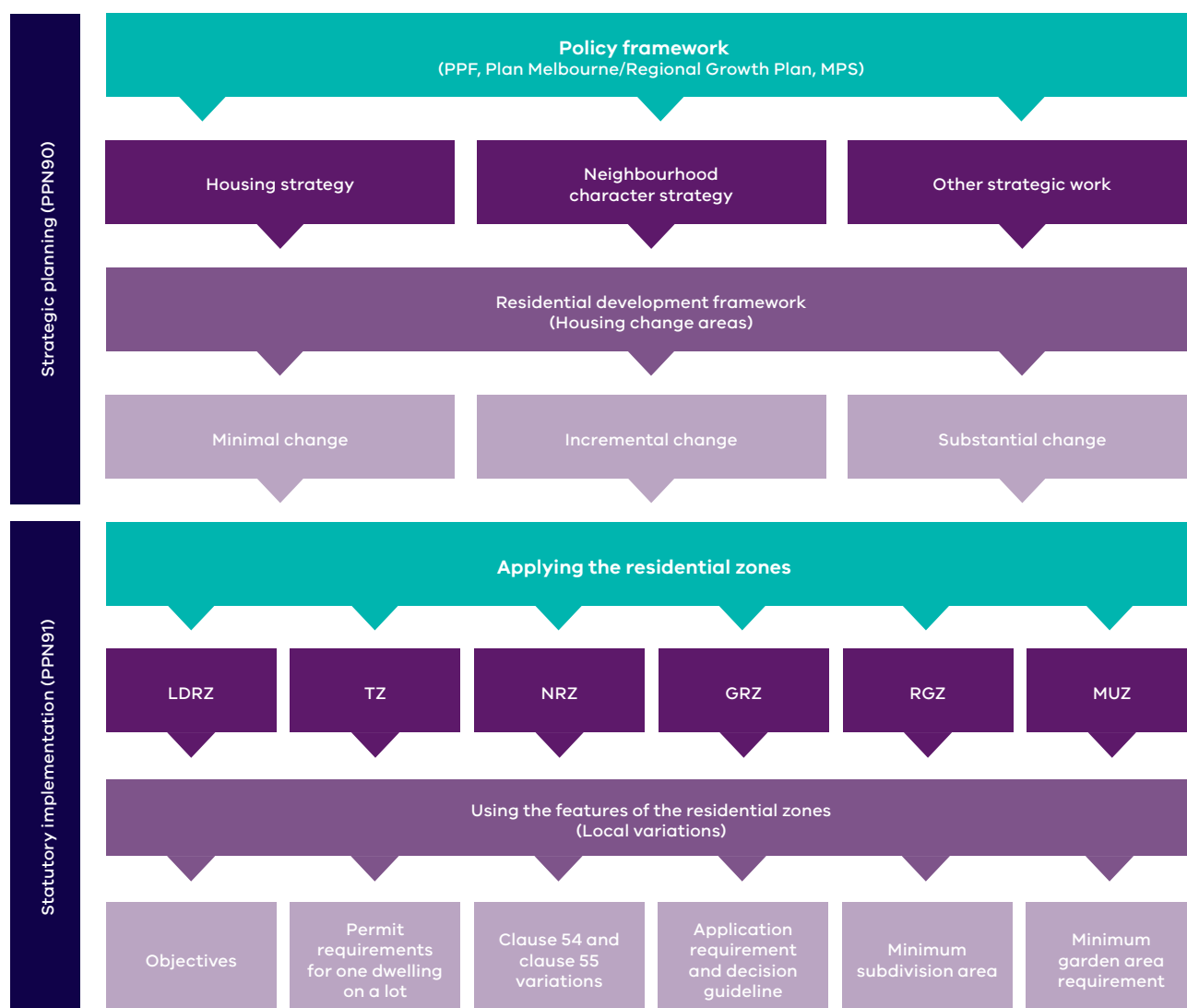
Planning schemes in Victoria are strategically focused and driven. Any planning control should have a clear reason to be imposed and be based on achieving a strategic, amenity or design outcome.

Applying the right residential zone must be derived from the municipal-wide strategic framework plan or residential development framework plan contained

in a Municipal Planning Strategy (MPS). The MPS should be developed in response to relevant state and regional planning policies in the Planning Policy Framework (PPF).

This process for strategic planning and statutory implementation is shown in Figure 1.

Figure 1: *Balancing housing growth and protection of neighbourhood character*





There is no 'default' residential zone to be applied to a residential area in Victoria.

All six residential zones can be applied to residential land in a municipality, as appropriate.

There is no prescribed percentage for how much land in a municipality should be in each residential zone.

A choice about which residential zone to apply will always need to be made. This choice must be based on the strategic outcomes being sought by the MPS and PPF.

The 'test' is whether the residential zone implements the relevant strategic framework plan or residential development framework plan identified in the MPS.

The right residential zone will reflect the true development capacity of the land. If land is impacted by special attributes or physical constraints that are identified in the MPS and PPF, then a residential zone should be applied that aligns with these attributes or constraints.

Applying the right residential zone also provides the opportunity to apply local requirements to achieve preferred built form outcomes identified in the MPS and local policies.

Table 2: *Aligning the housing change areas and the residential zones*

Zone	Special or constrained	Minimal	Incremental	Substantial
Low Density Residential Zone	✓	✓		
Mixed Use Zone			✓	✓
Township Zone		✓	✓	
Residential Growth Zone			✓	✓
General Residential Zone			✓	✓
Neighbourhood Residential Zone	✓	✓	✓	



Building heights and zone selection

One of the key features of the reformed residential zones is the different maximum building height for each zone. This is a key factor to consider when selecting a residential zone to give effect to housing and neighbourhood character objectives.

As a general principle, applying a residential zone should align with either existing building heights if they are sought to be maintained, or align with future building heights identified in strategic work.

When a varied maximum building height is sought to be specified in a schedule to a residential zone it should not exceed the maximum building height of a zone with the next highest maximum building height, unless the existing built form of the area warrants a unique approach.

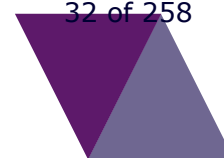
For example, allowing an 11 metre / three-storey height to be specified in the NRZ would be inconsistent with the purpose of the NRZ. However, allowing the maximum building height to be increased to 10 or 11 metres may be appropriate to recognise the characteristics of existing double storey housing in an NRZ area.

The GRZ has a maximum building height of 11 metres and three storeys. It is important to remember that through the building system, a single dwelling can be constructed to a height of 11 metres and three storeys in the GRZ without the need to obtain a planning permit. If applying the GRZ, this should be considered.

If an area has an existing single and double storey character that is sought to be maintained, applying the GRZ is likely to be inconsistent with this preferred neighbourhood character outcome.

While the purpose of the GRZ includes 'To encourage development that respects the neighbourhood character of the area', it is unlikely that neighbourhood character can be respected if existing development is single and double storey. However, the GRZ may be the appropriate zone to apply to areas with existing three-storey development.

After selecting the zones to apply, check that they align with the strategic work undertaken and any strategic objectives.

**Table 3:** *Maximum building height matrix*

Maximum building height	Best zone	Best height tool	Rationale
Less than 9m or 2 storeys	NRZ	Overlay	A maximum building height lower than the NRZ cannot be specified in a zone schedule. An overlay is required to recognise the special characteristics.
9m (2 storeys)	NRZ	NRZ	The zone mandates this maximum building height and storey control.
Greater than 9m (retain 2 storeys)	NRZ	NRZ schedule	The schedule to the zone enables a greater maximum building height to be specified while maintaining the 2-storey requirement.
11m (3 storeys)	GRZ	GRZ	The zone mandates this maximum building height and storey control.
Greater than 11m (retain 3 storeys)	GRZ	GRZ schedule	The schedule to the zone enables a greater maximum building height to be specified while maintaining the 3-storey requirement.
13.5m (4 storeys)	RGZ	RGZ schedule	The schedule to the zone forces the discretionary maximum building height to be mandatory.
Greater than 13.5m and greater than 4 storeys	RGZ	Overlay	Maximum building height requirements along with other specific design and built form requirements should be included in an overlay so all built form requirements are included in the one provision.

The role of overlays and maximum building height

A maximum building height lower than the maximum building height specified in a residential zone can only be implemented by using an overlay to recognise a special neighbourhood, heritage, environmental, and landscape value or constraint.

In such cases, the height requirement in the overlay applies **in addition** to the height requirement in the zone.

Gumnut residential development framework plan

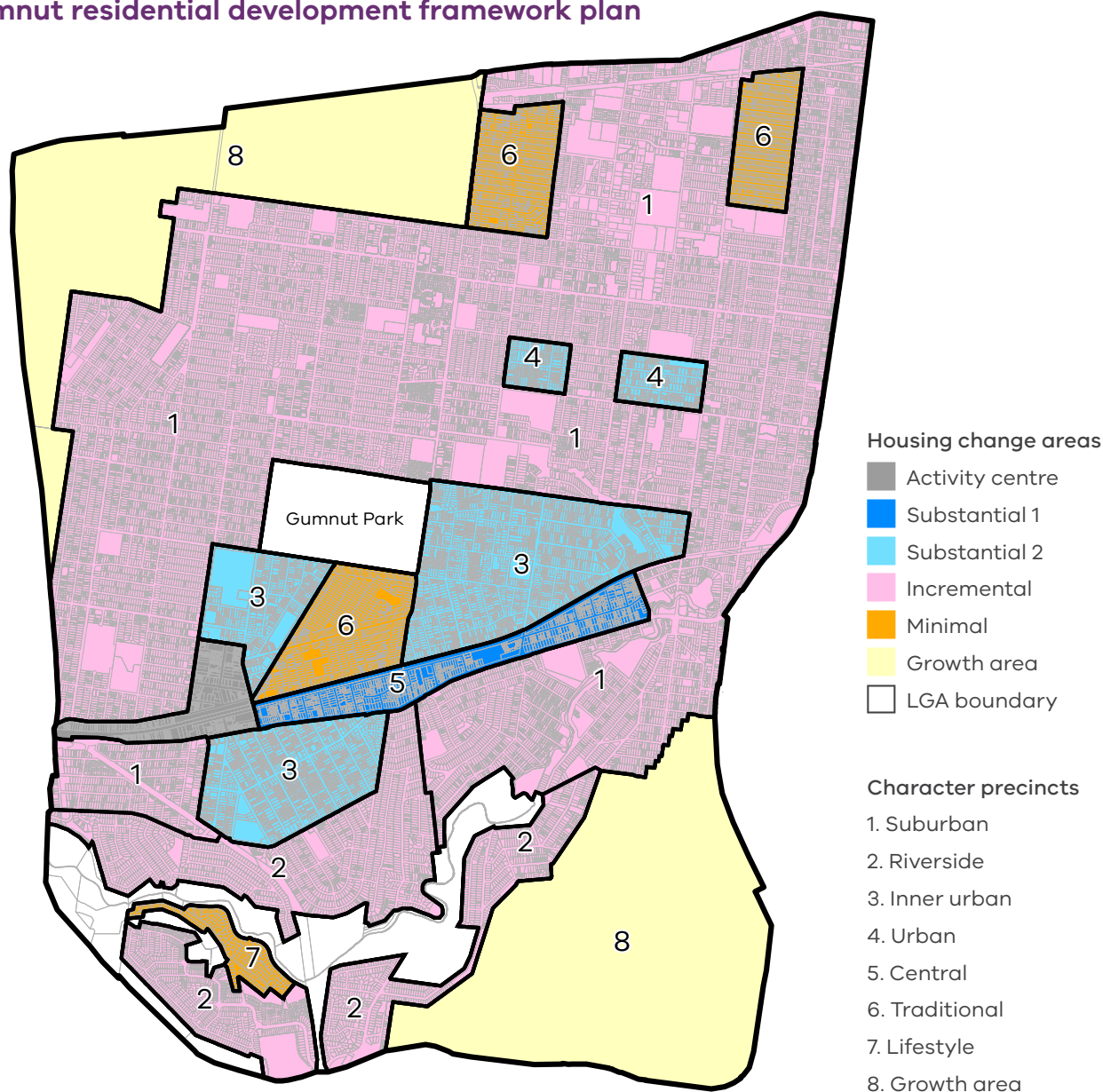


Figure 2: Gumnut residential development framework plan

Remember

A residential development framework plan:

- ✓ is a plan that is included in the MPS or local planning policy
- ✓ implements identified housing and neighbourhood objectives
- ✓ balances housing growth with the protection of neighbourhood character
- ✓ is municipal-wide
- ✓ is forward looking with at least a 15-year horizon, and should align with the relevant regional plan (Plan Melbourne or Regional Growth Plan)
- ✓ is regularly reviewed based on the changing conditions.

Gumnut residential zones application

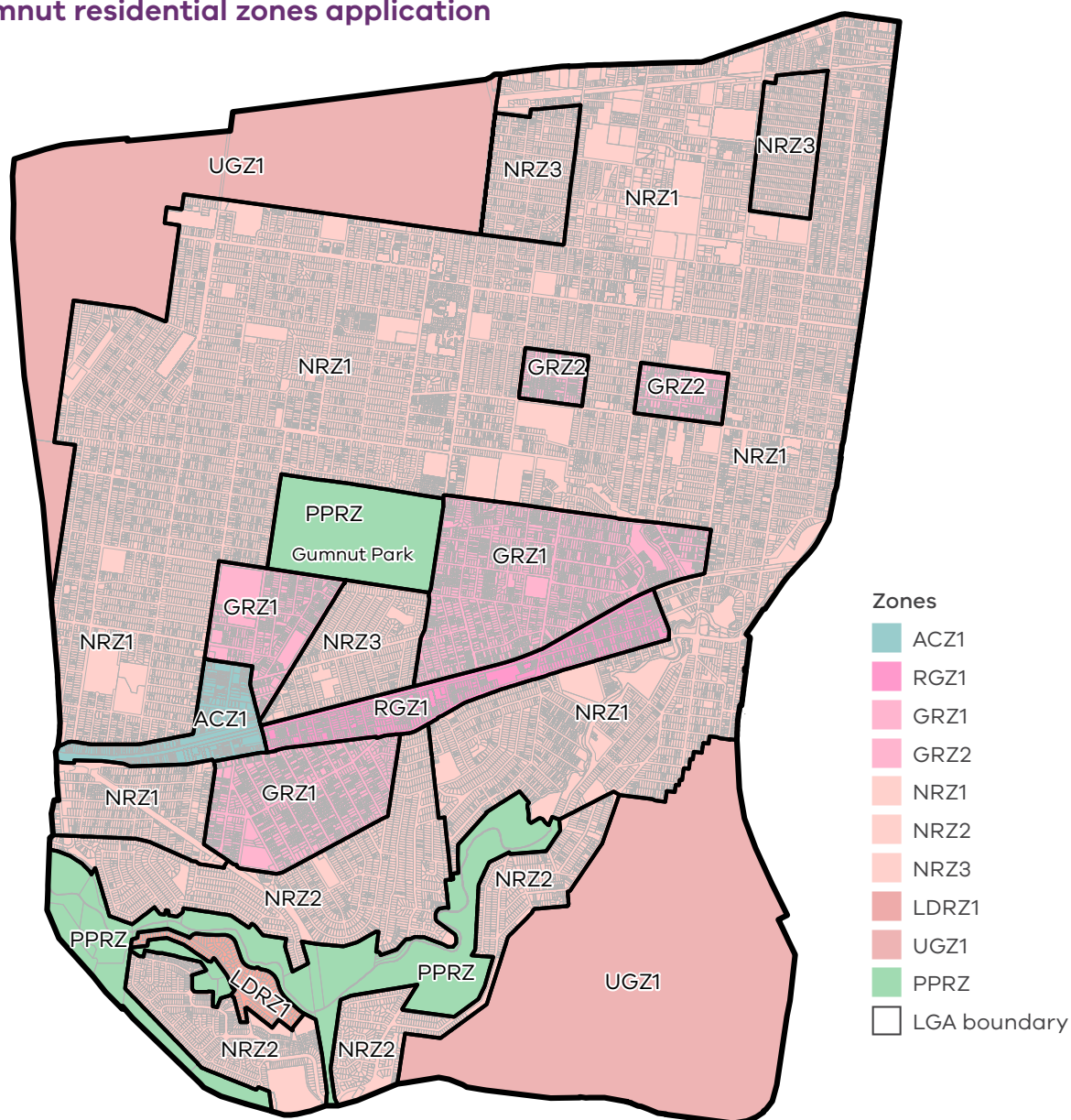


Figure 3: Gumnut residential zones application

Remember

Applying the residential zones should:

- ✓ be consistent with the residential development framework plan and implement the identified housing change areas
- ✓ not undermine the intent of the housing change areas
- ✓ provide greater certainty to the planning authority and the community about future development in an area
- ✓ facilitate long-term housing growth and diversity as well as protection of neighbourhood character in the right locations.



Using other VPP tools

While selecting the right residential zone is fundamental, the zone is one of several VPP tools to implement local strategic work.

Different areas have different characteristics and expectations, and the VPP allows different residential requirements to be set through either a schedule to the residential zones or the application of an appropriate overlay.

Local policies also have a role to play in how discretion is exercised.

The role of local planning policy

Key elements of a housing strategy or neighbourhood character strategy may be included in a local planning policy. This can clarify how a planning authority will exercise discretion in decision making.

When housing and neighbourhood character objectives have been established and the intended outcomes are clear, a local planning policy may be warranted.

Local planning policy can be used to:

- set out housing change areas
- set out neighbourhood character precincts
- set out preferred neighbourhood character statements
- include maps to show housing change areas and neighbourhood character precincts
- specify how housing or neighbourhood character should be considered across the municipality, or for an area
- clarify how discretion will be exercised to achieve objectives in clauses 54, 55 or 58.

The role of overlays

Overlays play an important role to give effect to preferred built form outcomes when a zone will not fully achieve the identified housing or neighbourhood character objectives for an area.

Neighbourhood Character Overlay

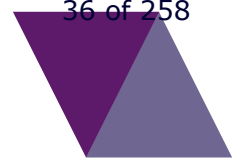
The Neighbourhood Character Overlay (NCO) can be used when the following criteria can be met:

- the proposed area exhibits existing characteristics that need to be protected, or need to be changed to achieve a preferred character
- the area, relative to the rest of the municipality, can be demonstrated to require a specific approach to neighbourhood character
- the application of local planning policy, the objectives and standards of clause 54 and clause 55 or variations to clause 54 and clause 55 in the schedule to the residential zone will not meet the neighbourhood character objectives for that area.

The NCO should not be used as a 'blanket' control across the municipality. It should be applied strategically to areas where variations to clause 54 and clause 55 standards fail to meet the specific objectives for neighbourhood character, and locally tailored and rewritten standards are required and can be justified.

Rewriting the standards to clause 54 and clause 55

The NCO can be used to rewrite most clause 54 and clause 55 standards, except for several standards specified in the overlay at clause 43.05-3. Any rewritten standard must be consistent with the relevant objective and decision guideline in clause 54 or clause 55.



The NCO cannot be used to rewrite the objectives or decision guidelines in clause 54 and clause 55. The objectives and decision guidelines continue to apply to a rewritten clause 54 and clause 55 standard in the NCO. Additional local neighbourhood character objectives and decision guidelines may be specified in the schedule to the NCO to achieve a preferred neighbourhood character.

Demolition

The demolition control in the NCO holds the existing pattern of development until the character features of the site and the new development have been evaluated.

The demolition control should not be used to conserve existing buildings, but rather to ensure that demolition does not occur until the planning authority is satisfied that the new development meets the neighbourhood character objectives for the area.

Heritage Overlay

It is important to understand the differences between neighbourhood character and heritage.

While all areas have a history or a heritage, not all areas are historically significant. Heritage significance is determined by recognised criteria set by Commonwealth, state and local agencies, with reference to the Burra Charter.

The Heritage Overlay (HO) should be used where the objective is to conserve the existing building or buildings.

The HO has different objectives from the NCO and is not intended to operate as a neighbourhood character control. However, heritage descriptors may also contribute to the neighbourhood character of an area.

The NCO and HO should not be applied to the same areas.

The application of the HO and underlying residential zoning should be consistent with the strategic intent outlined in the MPS and PPF.

For example, if an area is zoned for housing change, a planning authority must satisfy itself that this is compatible with the conservation of existing buildings otherwise a direct conflict between the purpose of the zone and the overlay will be created making it difficult to interpret and apply the controls.

Design and built form overlays

A Design and Development Overlay (DDO), Development Plan Overlay (DPO) or Incorporated Plan Overlay (IPO) may be used to implement specific built form outcomes that cannot be achieved through a schedule to a residential zone.

Design and Development Overlay

The DDO should not be used as a substitute for an NCO.

The schedule to the DDO does not provide a specific framework for rewriting standards in clauses 54 and 55 in the way that the NCO does.

If using a DDO instead of an NCO, it should be clear about the neighbourhood character objective it is seeking to achieve.

While the DDO has similar features to the NCO, it is more appropriately applied to promote specific urban design outcomes for an area that cannot be achieved by varying the standards to clause 54 and clause 55. This occurs when a built form different from the existing neighbourhood character is sought.



The DDO can also apply built form controls to developments greater than four storeys.

For areas in the RGZ, clause 54 and clause 55 variations will not apply to developments greater than four storeys. If residential development greater than four storeys is sought, it is likely that another VPP tool is required to be used with the RGZ to achieve the desired built form outcomes.

Depending on the built form outcomes sought for residential development up to four storeys, an overlay may also be required to be used with the RGZ if built form outcomes sought are substantially different from the existing built form.

When using the DDO, DPO or IPO to control development greater than four storeys, all built form requirements (including maximum building height) should be specified in the DDO, DPO or IPO instead of the schedule to the zone. This provides greater clarity and transparency by ensuring all local requirements can be found in the relevant local provision.

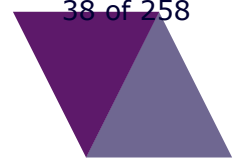
Environmental and landscape overlays

The Environmental Significance Overlay, Significant Landscape Overlay and Vegetation Protection Overlay can be used to recognise and protect specific attributes.

Other overlays

There are other overlays that recognise hazards or constraints that impact the capacity to develop residential land such as the Bushfire Management Overlay, Melbourne Airport Environs Overlay, Restructure Overlay and Erosion Management Overlay.

These overlays should be applied as appropriate.

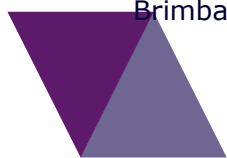


Using the key features of the residential zones

Each residential zone has a different role and purpose, and this is reflected in the different features in the schedules for each zone.

Table 4: Residential zone features

Feature	LDRZ	MUZ	TZ	RGZ	GRZ	NRZ
Can objectives be specified?	No	Yes	Yes	Yes	Yes	Yes
Is there a minimum garden area requirement?	No	No	No	No	Yes	Yes
Can the minimum garden area requirement be exempted?	N/A	N/A	N/A	N/A	Yes	No
Is there a minimum subdivision area requirement?	Yes	No	No	No	No	Yes
Is there a maximum building height/ number of storeys requirement?	No	No	Discretionary 9m	Discretionary 13.5m	Mandatory 11 metres and 3 storeys	Mandatory 9 metres and 2 storeys
Can a mandatory maximum building height be specified in the schedule?	No	Yes Height only	Yes Height only and not less than 9 metres	Yes Height only and not less than 13.5 metres	Yes Height and storeys and not less than 11 metres and 3 storeys	Yes Height and storeys and not less than 9 metres and 2 storeys
Can application requirements and decision guidelines be specified?	No	Yes	Yes	Yes	Yes	Yes



The role of local objectives

While state, regional and local planning policy sets out how discretion should be exercised, the ability to specify local objectives in a residential schedule enables detailed expression to be given to desired neighbourhood, heritage, environmental, landscape or design outcomes to be achieved for an area.

The Minister's Direction on the Form and Content of Planning Schemes only allows a maximum of five objectives to be expressed in a schedule to a residential zone.

Table 5: *Operation of local objectives*

Zone	Operation of local objectives
LDRZ	No provision for stating objectives in the schedule as the purposes of the zone clearly express the intention of the zone.
MUZ	Objectives may be specified in the schedule. There is no constraint on the type of objective that can be specified.
TZ	Neighbourhood character objectives may be specified in the schedule.
RGZ	Design objectives must be specified in the schedule.
GRZ	Neighbourhood character objectives may be specified in the schedule.
NRZ	Neighbourhood, heritage, environmental or landscape character objectives must be specified in the schedule.

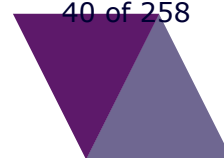
Writing neighbourhood character objectives

The schedules to the TZ, GRZ and NRZ enable neighbourhood character objectives to be expressed to provide clear direction on preferred neighbourhood character outcomes.

Neighbourhood character objectives in the schedule also provide a basis for varying clause 54 and clause 55 standards where variations can be strategically justified.

Objectives in the schedule to the NRZ should specify the relevant neighbourhood character, heritage, environmental or landscape characteristics of the area.

Objectives in the schedule to the GRZ should specify the attributes of the neighbourhood character to be achieved in the context of a preferred built form outcome of three storeys.



Writing design objectives

Objectives in the schedule to the RGZ should specify the preferred design and built form outcomes for new residential development.

Design objectives can specify matters related to built form and urban design. Design objectives should only specify public realm matters where they relate to the design of buildings that affect the function and amenity of the public realm.

Preferred character statement or local objective?

Preferred neighbourhood character statements typically found in local policies can often easily translate into objectives.

Rather than specifying preferred neighbourhood character statements in local planning policy, objectives can be specified in a schedule to a residential zone to implement the preferred neighbourhood character.

Consider whether it is necessary to have both preferred character statements and local neighbourhood character objectives.

Table 6: *Translating a preferred neighbourhood character statement into neighbourhood character objectives*

Preferred neighbourhood character statement	Neighbourhood character objectives
<p>This precinct will maintain a streetscape rhythm of detached dwellings set behind landscaped front gardens while preserving the intact nature of the streetscape.</p> <p>Built form to side boundaries will be avoided and garages, carports and second- storey development will not visually dominate dwellings or streetscapes.</p> <p>Built form and hard surfaces will continue to occupy a low portion of the site area.</p> <p>The built form will be a modest scale and be sympathetic to the existing heritage character of the precinct, however innovative and unique built form that blends with the existing character will be encouraged.</p> <p>New development will complement the existing landscape environment and native landscaping throughout the precinct will be encouraged.</p>	<ul style="list-style-type: none"> To maintain a streetscape rhythm of detached dwellings set behind landscaped front gardens with generous side setbacks. To support garages, carports and second storeys that are recessed from the ground floor facade to not visually dominate dwellings or streetscapes. To support built form and hard surfaces that cover a low portion of the site. To provide innovative and unique designs that integrate with the existing character. To encourage new development to provide native landscaping.



What happens where an overlay exists or is proposed?

It is not necessary to be as detailed or explicit when writing objectives for the desired outcome in the schedule to the zone affected by an existing or proposed overlay, because the overlay contains detailed objectives.

Heritage Overlay

Where a HO exists over a precinct or an area, as opposed to an individual site, it is unnecessary to identify detailed heritage objectives through the schedule to the relevant residential zone.

Heritage *evaluators* (the way a heritage place is valued) are dealt with by applying the HO.

It is enough to generally specify in the schedule to the zone that the objective to be achieved is derived from the heritage values of the area.

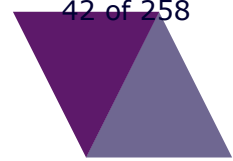
Design, built form, neighbourhood character, environmental, landscape and other overlays

All these overlays require some form of statement of significance or risk along with specifying detailed objectives.

In all these instances, it is generally enough to specify the relevant characteristic that is being sought to be recognised and rely on the detailed objectives and statements of significance in the overlay to articulate the desired outcome.

Remember

- ✓ Do be sufficiently clear and specific.
- ✓ Do recognise a specific characteristic or constraint reflected through the application of an overlay.
- ✗ Don't specify building heights (the zone or overlay does this).
- ✗ Don't specify the type of housing change sought (the strategic framework and zone application already does this).
- ✗ Don't include statements of policy (this belongs in local policy).
- ✗ Don't repeat objectives from other parts of the scheme, or reference other clauses in the scheme.
- ✗ Don't reference policy background documents or studies or other tools in the scheme.
- ✗ Don't specify scale, density, typology or number of dwellings unless strategically justified.



Minimum garden area requirement

A minimum garden area requirement is a mandatory requirement that applies to all lots in the NRZ and GRZ that are 400 square metres or more.

A minimum percentage of the land must be set aside for a garden area at ground level in accordance with the table below.

The minimum garden area requirement **cannot** be exempted in the NRZ. The minimum garden area requirement **can** be exempted through the schedule to the GRZ.

The decision to exempt the minimum garden area requirement in the GRZ must be based on the strategic outcomes being sought by the PPF and MPS.

For example, it may be appropriate to exempt the minimum garden area requirement in the GRZ where a planning authority is seeking to recognise existing development conditions or to promote a denser urban form of housing than currently exists to achieve other housing objectives.

Table 7: *Minimum garden area requirement*

Lot size	Minimum garden area requirement
400-500m ²	25%
501-650m ²	30%
>650m ²	35%

Minimum subdivision area

A minimum subdivision area may only be specified in the schedule to the LDRZ or the NRZ.

Specifying a minimum lot size in the NRZ provides another mechanism to protect existing neighbourhood character for an area categorised as minimal change.

Table 8: *Minimum subdivision area*

LDRZ	NRZ
<p>Any minimum subdivision area specified in the schedule to the LDRZ must be at least:</p> <ul style="list-style-type: none"> 0.4 hectare for each lot where reticulated sewerage is not connected. 0.2 hectare for each lot with connected reticulated sewerage. 	<p>Any minimum subdivision area may be specified in the schedule to the NRZ.</p>

Varying the residential development standards

A schedule to the MUZ, TZ, RGZ, GRZ and NRZ enables the following key siting and amenity standards of clause 54 and clause 55 to be varied, where it can be strategically justified:

- Standard A3 and B6 Minimum street setback
- Standard A5 and B8 Site coverage
- Standard A6 and B9 Permeability
- Standard B13 Landscaping
- Standard A10 and B17 Side and rear setbacks
- Standard A11 and B18 Walls on boundaries
- Standard A17 and B28 Private open space
- Standard A20 and B32 Front fences

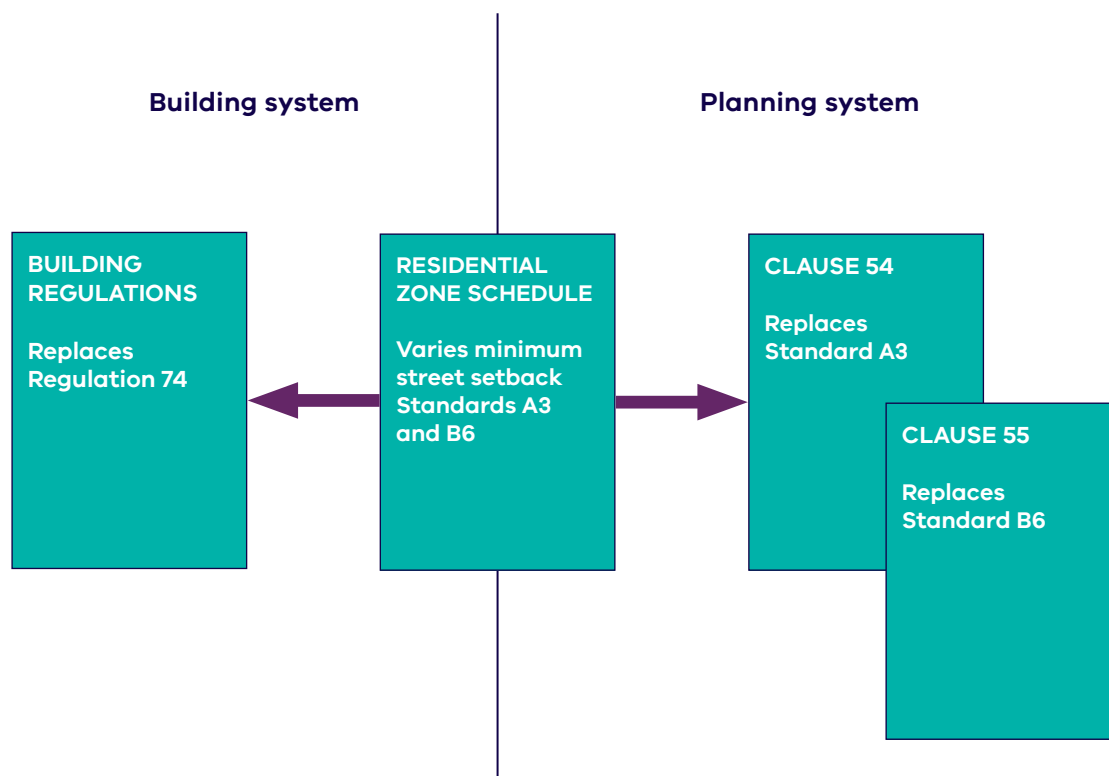
How do the varied standards operate?

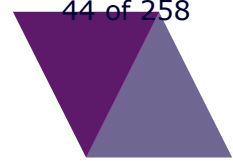
An important feature of the schedules to the residential zones is that a change to a value in the schedule will affect all dwellings in the schedule, whether a planning permit is required or not.

When a local value is specified in a schedule, the value replaces the relevant value in both the clause 54 and clause 55 standard and in the corresponding building regulation.

Standard B13 Landscaping only applies to a permit for two or more dwellings on a lot.

Figure 4: Operation of clause 54 and clause 55 variations





When assessing a building permit application, a

building practitioner must use the value in the schedule to the residential zone instead of the value expressed in the relevant building regulation. Schedule 6 to the Building Regulations identifies which planning schemes have schedules that specify a local value.

When assessing a planning permit application, the varied standard continues to be read with the relevant objective and decision guidelines in clause 54 and clause 55. The schedule simply substitutes one value for another. The remainder of the standard in clause 54 and clause 55 continues to apply.

When a residential zone not currently used in the planning scheme is proposed, and a clause 54 standard is proposed to be varied, a consequential amendment to Schedule 6 to the Building Regulations is also necessary to apply the planning scheme change to a single dwelling that does not require a planning permit in the new residential zone.

If the schedule to the building regulations is not amended to reference the new residential zone in the planning scheme, the varied standard will not apply to a single dwelling that does not require a planning permit.

This is undesirable because it:

- undermines the strategic intent that all dwellings are developed to achieve the preferred neighbourhood character outcomes for an area
- adds complexity and confusion to the application of the standards between the two approval systems.

Writing varied standards

The schedule cannot be used to vary the objective or decision guideline of the relevant standard in clause 54 and clause 55.

It is not possible to apply different standards for different types of residential development in the schedule, except for private open space which allows for a distinction between single dwellings and two or more dwellings on a lot. This is because a different method of measurement applies for calculating open space for one dwelling on a lot under the building regulations.

When varying clause 54 and clause 55 standards in the schedule, it is important to use the existing standard to determine what value can be substituted or varied. The substituted value may be a dimension, area, distance or percentage.

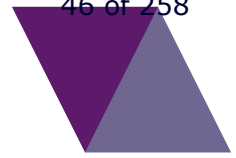
It is important to ensure that the variation can be understood without reference to the state standard or relevant building regulation. Variations to clause 54 standards must be clear and legible for a building practitioner when issuing a building permit for one dwelling on a lot that does not require a planning permit.

Any omission of text or values between the clause 54 and clause 55 standard and the variation may have unintended consequences. It is therefore important that the variation uses the format and language of the relevant standard to ensure that there is no confusion.

Only the numerical value of the relevant standard should be changed. The schedule cannot be used to apply a different value to only some land in the zone because the building regulations refer to the application of the variation uniformly throughout the zone. A building certifier's point of reference is what the land is zoned in the planning scheme.

Table 9: Drafting clause 54 and clause 55 variations

Standard	✓	✗
A3 and B6 Minimum street setback	Walls of buildings should be set back at least 3 metres from the front street including corner sites. No encroachments are allowed into this setback. Side street setback requirements specified in the table to standards A3 and B6 continue to apply.	3 metres This variation is inadequately expressed, and its application may be confusing as it is unclear if the street setback standard applies to all street contexts.
A5 and B8 Site coverage	The site area covered by buildings should not exceed 50 per cent .	50%, including all buildings, swimming pools, tennis courts, paving and other hard surfaces. Site coverage and permeability are separate standards and should not be combined.
A17 Private open space	A dwelling should have private open space consisting of an area of 80 square metres or 20 per cent of the area of the lot, whichever is the lesser, but not less than 40 square metres. At least one part of the private open space should consist of secluded private open space with a minimum area of 25 square metres and a minimum dimension of 4 metres at the side or rear of the dwelling with convenient access from a living room.	Minimum dimension of 4 metres. Even if only partially modified, for clarity all parts of standard A17 that can be modified should be included in the schedule.
A20 and B32 Front fence height	A front fence within 3 metres of a road in a Road Zone, Category 1 should not exceed 1.5 metres in height, or 1.2 metres for all other streets.	Front fences should be at least 50% transparent and constructed from timber. The standard does not regulate the design of the fence, only the height. Additional planning controls like an overlay are required to regulate design and materials.



Remember

- The residential zone schedule simply substitutes one value for another. The remainder of the standard continues to apply to dwellings that require a planning permit under the residential zone.
- When a varied standard is specified it applies to all dwellings in both the planning and building systems.
- When assessing a building permit application, a building certifier must use the varied standard specified in the schedule to the residential zone instead of the value expressed in the relevant building regulation.
- When assessing a planning permit application, the variation continues to be read with the relevant objective and decision guidelines in clause 54 and clause 55.
- The schedule cannot be used to vary the objective or decision guideline of the standard in clauses 54 and 55.
- A17 and B28 Private open space is the only standard which allows a different standard to be specified for each of clause 54 and clause 55.
- It is not possible to specify a variation to the landscaping standard for a single dwelling.
- When drafting variations to a clause 54 and clause 55 standard, it is best to start by including the variation in its entirety and modifying the numeric values of the standard as required.



Maximum building height

Maximum building height is managed in different ways according to the role and purpose of each residential zone.

A schedule must not specify a height or number of storeys lower than the height and number of storeys specified in the zone. Only one maximum building height and number of storeys (where applicable) may be specified in each schedule.

The maximum building height only applies to a dwelling or residential building, except in the MUZ where it applies to all buildings.

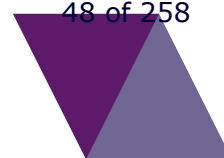
The maximum building height is always mandatory when specified in a schedule to the TZ, MUZ, RGZ, GRZ and NRZ.

A schedule to the GRZ or NRZ should specify a maximum building height in both metres and storeys. A schedule to the MUZ, TZ and RGZ should only specify a maximum building height in metres.

If a higher discretionary maximum building height is sought in the RGZ, the schedule should not be used as specifying a maximum building height in the schedule makes the maximum building height mandatory.

If a discretionary maximum building height greater than 13.5 metres is sought in the RGZ, another VPP tool such as a local policy or overlay should be used to specify an appropriate discretionary maximum building height above 13.5 metres.

The operation of maximum building heights and the number of storeys in the residential zones is set out in Table 10.

**Table 10:** *Operation of maximum building heights*

Zone	Operation
LDRZ	No height control applies. Maximum building height cannot be specified in a schedule.
MUZ	No maximum building height in the zone. No control over the number of storeys. Maximum building height may be specified in the schedule. When specified it applies to all development and is a mandatory maximum building height.
TZ	A discretionary maximum building height of 9 metres applies to a dwelling or residential building. No control over the number of storeys. Maximum building height may be specified in the schedule. When specified it applies to a dwelling or residential building and is a mandatory maximum building height.
RGZ	A discretionary maximum building height of 13.5 metres applies to a dwelling or residential building. No control over the number of storeys. Maximum building height may be specified in the schedule. When specified it applies to a dwelling or residential building and is a mandatory maximum building height.
GRZ	A mandatory maximum building height of 11 metres and 3 storeys (excluding a basement) applies to a dwelling or residential building. Maximum building height or number of storeys may be specified in the schedule. When specified it applies to a dwelling or residential building and is a mandatory maximum building height or number of storeys.
NRZ	A mandatory maximum building height of 9 metres and 2 storeys (excluding a basement) applies to a dwelling or residential building. Maximum building height or number of storeys may be specified in the schedule. When specified it applies to a dwelling or residential building and is a mandatory maximum building height or number of storeys.



Writing application requirements and decision guidelines

Application requirements set out information and other materials required to accompany a planning permit application.

Schedules may specify additional application requirements to supplement those in a residential zone. Schedules should not repeat application requirements in other planning provisions. Application requirements should have a clear nexus with the provisions of the schedule, and not require information about matters that are not controlled by a schedule to a residential zone.

Decision guidelines provide greater certainty about decision making for planning permit applications.

Schedules may specify additional decision guidelines to supplement those in a residential zone. Schedules should not repeat general decision guidelines, or decision guidelines in other planning provisions. Decision guidelines should have a clear nexus with the provisions of the schedule.

Some principles for drafting decision guidelines are included in Table 11.

Table 11: *Principles for drafting decision guidelines*

Principle	✓	✗
Avoid referencing other clauses in the planning scheme	Whether garages and upper floors are appropriately set back.	Whether the development meets the objectives and standards of clause 54 or clause 55.
Avoid referencing background documents that may broaden the matters for consideration	Whether the development provides an appropriate response to the public realm.	Whether the development is consistent with the <i>Gumnut Town Centre Structure Plan, 2002</i> .
Use neutral expression, and avoid phrasing as additional requirements	Whether the development provides adequate storage to meet the needs of future occupants.	Whether the development provides 10 square metres of storage.



More information

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136 186 (8am to 6pm Monday to Friday, excluding public holidays)

Planning Practice Notes

PPN8: Writing a local planning policy

PPN27: Understanding the residential development provisions

PPN43: Understanding neighbourhood character

PPN84: Applying the minimum garden area requirement

View all planning practice notes at
<https://www.planning.vic.gov.au/resource-library/planning-practice-notes>

Reformed residential zones

[Amendment VC110](#)

[Reformed residential zones booklet \(PDF, 1.4 MB\)](#)

[Amendment VC143](#)

[Planning Advisory Note 69 Amendment VC143](#)

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Peer Review

Draft Brimbank Neighbourhood
Character Study 2019

Glossop Quality System			
Author	MG	Checked By	JG
Date Issue	January 2021	Revision Number	2

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1. Introduction

Glossop Town Planning was engaged by Brimbank City Council (the 'Council') to undertake a peer review of the *Draft Brimbank Neighbourhood Character Study (May 2019)*¹ (the 'Study').

The purpose of this review is to consider whether the Study is sound and robust, having regard to emerging practice direction and State government policy for housing and neighbourhood character studies.

This report outlines the findings of the peer review.

1.1 Our Approach

The primary focus of this review is to:

- Review and assess the methodology used to identify and categorise neighbourhood character areas within the municipality.
- Determine the consistency of the Study with *Planning Practice Note No. 90: Planning for Housing* (PPN90) and *Planning Practice Note No. 91: Using the Residential Zones* (PPN91), as well as other relevant practice guidance and policy within the Brimbank Planning Scheme.
- Identify the steps required to finalise a Neighbourhood Character Study for Brimbank that can be used to inform an update to the Brimbank Housing Strategy (including the Residential Development Framework) that is consistent with PPN90 and PPN91.

Our approach to this review is to be 'implementation focused'. We consider whether the Study could be used to strategically justify a planning scheme amendment and ultimately form part of the Brimbank Planning Scheme.

The key focus of our review is to test whether the methodology that underpins the Study is sound and robust, having regard to the strategic influences outlined at Chapter 2 of this report.

1.2 Summary of Findings

Our peer review is explored in Chapters 2-5 of this report, with options for progression towards a new Residential Development Framework outlined in Chapter 6.

Our overarching finding is that the Study is sound, but not entirely robust. While the Study generally adequately considers elements of existing neighbourhood character effectively, the desktop-led approach has limited the ability to 'ground truth' the findings of the Study and consider character commonality between suburbs.

¹ In this report, references to page numbers within the Study report are based on the version of the report that was appended as an Attachment to the Council meeting in May 2019. Notably this version of the report includes precinct assessments multiple times throughout the report.



This has resulted in a large number of character precincts, where many contain a high degree of similarity.

The instruction to base the assessment from existing zones has been both an advantage and a disadvantage. On the one hand, it has meant that the Study has had regard to the level of housing change expected, however, it does not analyse whether those assumptions are correct or need to be changed.

Emerging practice guidance in the form of PPN90 and PPN91 mean that the Study's approach is no longer consistent with best practice guidance. There will be a need for the Study to consider the implications of these practice notes and emerging policy.

In terms of implementation, we find that the Study generally adopts the right 'tools' within the Victoria Planning Provisions (VPPs) and the Brimbank Planning Scheme (BPS). However, there is a need to closely review those tools against direction in the Practitioner's Guide to Victorian Planning Schemes, PPN91 and having regard to the significant changes that have been made to the residential zones since their implementation in the Brimbank Planning Scheme in 2014.²

We make a total of 19 direct recommendations for improvement of the Study to align it with the relevant practice guidance and best practice. These recommendations are to:

- Amend Chapter 2 of the Study to refer to relevant local character and housing policy.
- Amend Chapter 2 of the Study to incorporate changes to State policy arising from Amendment VC169 and analyse what this means for the Study's outcomes.
- Amend Chapter 2 of the Study to outline the relevant context in Plan Melbourne 2017-2050 and analyse what this means for the Study's outcomes.
- Strengthen the analysis of existing policy within Chapter 2 of the Study.
- Articulate the findings of the review of VCAT decisions within Chapter 2 of the Study.
- Consider undertaking a further limited review of VCAT decisions and a review of recently completed development. This review should identify the extent to which existing character policy was considered in decision-making and whether the completed development is consistent with those directions.
- Explore opportunities to consolidate character precincts, where statements of existing character and identification of characteristics are similar.
- Review statements of existing character, preferably through physical inspection, to confirm that character elements reflect the general pattern of development within each precinct.

² These reforms include the introduction of the mandatory garden area and building height provisions within the General Residential Zone and the Neighbourhood Residential Zone and changes to the purposes of all zones.



- Revise the Study to assess whether it is appropriate to apply different planning controls (such as the Neighbourhood Character Overlay or Design and Development Overlay) to some areas, where stronger intervention may be more appropriate.
- Consider opportunities to reference comparative differences within character types.
- Explore whether any precincts (or parts of precincts) identified for minimal change display a sufficient level of comparative significance to warrant further planning protection.
- Consider merging Character Types 2 and 3 into one typology following a review of the character precincts.
- Review other Character Types to ensure that there is sufficient comparative difference, following a review of the character precincts.
- Review the preferred character statements for incremental change areas to reflect expectations for development within this zone and guidance in PPN90 and PPN91.
- Undertake further analysis of substantial change areas to inform their preferred character direction, having regard to their strategic context.
- Review and redraft neighbourhood character objectives to delete repetition and conflict with other parts of the Brimbank Planning Scheme.
- Review and ensure that the justification for all ResCode variations is articulated within the report.
- Reword ResCode variations to ensure that they can be correctly interpreted as 'standalone' standards, without reference to the Clause 54 and Clause 55 values.
- Undertake a detailed review of the existing local character policy within the Brimbank Planning Scheme.

These recommendations are not exhaustive and reflect a high level peer review. Due to the limited scope of this review, the examples we have highlighted may result in a need for further amendment to the Study, generally aligned with the themes we have explored throughout this paper.

The findings of this peer review should not be read as criticism of either the Council or the consultants who prepared the draft Study.

Many of the matters identified in this peer review arise from the more robust guidance that is outlined in PPN90 and PPN91. This guidance simply did not exist at the time that the draft Study was prepared.

Our findings and recommendations are designed to allow Council and the consultants to meaningfully progress with the Study towards implementation and subsequent development of a Residential Development Framework.

However, it is clear from the advice provided by DELWP that has informed this review, that the Study is one input into the Residential Development Framework. Council will need to progress



further strategic work on housing, in addition to the finalisation of this Study, in order to inform the Residential Development Framework.

Although outside the scope of this review to consider, the clear advice from DELWP is that Council's Housing Strategy, which was finalised in 2014, must be reviewed to align with the intent for the application of the residential zones and changes in policy arising from Amendment VC169.

In our view, the draft neighbourhood character study is capable of providing an appropriate assessment of the existing character of the municipality. However, it is clear to us that this work will be a key input into a future housing strategy (including a rationale for residential zone selection). In moving towards a future Residential Development Framework, Council will need to undertake further work to define a preferred future character. That work should be done as part of a future housing strategy.

To ensure the success of that task, we recommend that Council engage actively and regularly with DELWP throughout the development of future strategic work to inform the development of the Residential Development Framework.

It is also recommended that Council establish a working group with DELWP and other councils³ to ensure that the methodological approach for its future housing strategy is appropriate.

³ At the very least, this group should include Hobsons Bay City Council, given that Amendment C131 is seeking to implement both a housing and neighbourhood character study and will shortly be before a Planning Panel.



2. Strategic Influences for this Review

Our approach to this review has been influenced by the following relevant 'external' and 'internal' strategic influences.

2.1 External Strategic Influences

There are various external influences that have guided this review.

External influences include relevant practice guidance, strategic work undertaken by Council and the content of its planning scheme.

We have particularly considered the Study in the context of the following key documents:

Practice Guidance

- Planning Practice Note No. 43: Understanding Neighbourhood Character (PPN43).
- Planning Practice Note No. 90: Planning for Housing (PPN90).
- Planning Practice Note No. 91: Using the Residential Zones (PPN91).
- The Practitioner's Guide to Victorian Planning Schemes.
- The Ministerial Direction on the Form and Content of Planning Schemes.

Relevant Strategies and Strategic Work

- Plan Melbourne 2017-2050.
- Home and Housed: The Brimbank Housing Strategy (the 'Housing Strategy').
- Brimbank Urban Forest Strategy 2016-2046.
- Albion Neighbourhood Plan.
- Sunshine Town Centre Structure Plan.
- St Albans Activity Centre Structure Plan.
- Keilor Village Vision Document.
- Sydenham Regional Activity Centre Structure Plan.

Brimbank Planning Scheme

- Clause 11 – Settlement.
- Clause 15 – Built Environment and Heritage.
- Clause 16 – Housing.
- Clause 21.01 – Brimbank Municipal Profile.



- Clause 21.02 – Key Land Use Issues.
- Clause 21.03 – Council's Strategic Vision.
- Clause 21.04 – Strategic Land Use Vision.
- Clause 21.06 – Built Environment.
- Clause 21.07 – Housing.
- Clause 21.08 – Retailing and Activity Centres.

We have also had regard to the zoning of land and overlays that apply to residential areas.

2.2 Internal Strategic Influences

Internal strategic influences relate to the Study itself.

Our review is particularly informed by:

- The instructions that guided the consultant's brief.
- The scope and methodological approach of the Study.
- The details and outcomes of any consultation.
- The extent to which the Study has had regard to the external strategic influences.
- The way in which precincts and character areas are identified and analysed.
- The consideration of implementation mechanisms.

2.3 Consultation with DELWP

This review has been informed by a meeting with officers from the Department of Environment, Land, Water and Planning ('DELWP'), who were responsible for the drafting of PPN90 and PPN91 and assisting councils with the development and implementation of housing and neighbourhood character studies.

The purpose of the meeting was to explore some aspects of the guidance within the practice notes, particularly around:

- General guidance for the preparation of housing and neighbourhood character studies.
- A consideration of whether 'substantial change areas' in the Residential Growth Zone should form part of a neighbourhood character study, given the absence of a Purpose in that zone for neighbourhood character.
- The interpretation of the term 'comparative significance' set out in PPN90.



- DELWP's views on how Council can meaningfully progress towards a future Residential Development Framework, informed by housing and neighbourhood character strategies, as anticipated by PPN90 and PPN91.

While the guidance provided by DELWP is relevant to this project, many of the matters discussed are more directly relevant to the preparation of a future housing strategy and Residential Development Framework (which we comment on in Chapter 6 of this report) and how neighbourhood character analysis might inform or even complement that process.

DELWP identified that the level of change expected within each zone (as set out in PPN91) is different to that articulated within the Brimbank Housing Strategy, which was prepared at a time when the three residential zones had different characteristics. In DELWP's view, the Neighbourhood Residential Zone in Brimbank maybe either a zone for minimal change (where development constraints are identified through an overlay) or incremental change. The General Residential Zone is a zone for substantial change, noting that it can allow development of up to three storeys and that the Residential Growth Zone is a zone for more substantial change.

However, we note that PPN91 establishes that (for instance) the General Residential Zone can be applied as both a substantial change and incremental change zone.

Nevertheless, a designation of General Residential Zone land as being for substantial change is at odds with Council's Housing Strategy. DELWP's concern is that if the neighbourhood character study was informed by out-of-date housing guidance in terms of the level of change expected within each zone, then it will not be strategically justifiable in the current policy climate.

It is certainly challenging for planning authorities to be in a position like this: after all, Council has prepared a character study based on the policy settings of that day and now that these settings have changed, there is real doubt about the usefulness of that work. Consequently, we urge Council to take a prudent, long term and cautious approach to this issue moving forward.

Much of DELWP's feedback was focussed on the Council's housing strategies and not on the character study. In some respects, the Department's focus on the future direction of your housing policies, while understandable, was somewhat tangential to the purposes of our review. That is to say that while we were asked to comment on the role between the character study and housing policy that was not our main area of focus.

In terms of comments that are directly relevant to the character study, DELWP's advice is that comparative differences is the relevant test for precinct boundaries, while comparative significance is the threshold test for determining whether an area should be protected by a Neighbourhood Character Overlay or other control.

Moreover, it highlighted that the most successful approach to neighbourhood character in the context of the zones is to consider what ResCode allows a council to vary in zone schedules. This approach will ensure that any variation for planning requirements is also accompanied by alignment with local specifications to relevant building regulations.

In respect of this last point, we find ourselves in wholehearted agreement with the Department.



We have considered these influences in our peer review, which is set out across the following chapters of the report.



3. The Study's Methodology

3.1 The Study is sound, but not entirely robust

The overarching finding of our review is that the Study is sound, but not entirely robust in its methodological approach.

A guiding principle for a study of this sort is that the methodology needs to be both sound and robust.

Soundness considers whether the Study is based on valid reasoning and good judgements in its findings. Robustness is a higher threshold, which not only considers whether the reasoning was valid, but also whether it can withstand scrutiny from outside parties. That is, that there are no weaknesses in the methodological approach.

These two tests are important for any strategic planning policy development exercise. The planning scheme amendment process, and particularly the Panel process, will test the soundness and robustness of the strategic work that underpins the amendment itself.

All studies sit on a continuum within this framework. A study can be sound and robust, but can equally be sound without being robust or it can be neither sound nor robust.

There are many factors that influence the soundness and robustness of the Study, including:

- The instructions that defined the consultant's brief.
- The methodological approach itself, including:
 - The extent to which the Study has considered the relevant physical and policy context.
 - The extent to which the Study is consistent with relevant practice guidance.⁴
 - The extent to which the Study is integrated with other relevant strategic studies (such as the Housing Strategy).
 - Whether the Study is predominantly desktop-based or predominantly site-based.
 - The identification, inspection and reporting of precincts.
- The timing and age of the Study and its implementation in the planning scheme.

In our view, the Study adopts a reasonably sound methodological approach.

⁴ Relevant practice guidance includes the Ministerial Direction on the Form and Content of Planning Schemes, A Practitioner's Guide to Victoria's Planning System and relevant practice notes. It is acknowledged that PPN90 and PPN91 were introduced following the preparation of the draft Study, but they are important considerations to finalising the Study.



It starts from the premise of being cognizant of the Council's adopted Housing Strategy's general recommendations with regard to the level of change anticipated for each housing area (substantial, incremental and minimal change).⁵ To this extent, while it is not integrated with the Housing Strategy, it has had regard to that context. This context is important, because it recognises the Council's current position in relation to the level of change each area is expected to experience.⁶

It has also adopted a precinct analysis that has sought to identify existing characteristics and attempted to distinguish between what makes each precinct 'different' from other precincts within the Study area, having regard to the types of characteristics that are expected to be considered under PPN43.

In terms of implementation, it adopts zoning as the primary implementation mechanism. At a high level, this approach is supported by the relevant practice guidance and is consistent with emerging practice among other municipalities for guiding implementation of housing and neighbourhood character studies.

Notwithstanding this, there are some key limitations to the Study's methodological approach that limit its robustness. These limitations include:

- The age of the Housing Strategy that formed a key input and basis for the work and its consistency with emerging practice outlined in PPN90 and PPN91.
- The instructions that defined the consultant's brief, which limited consideration of character to existing zoning.
- The absence of a detailed review of existing policy context and existing development outcomes.
- The precinct analysis being a predominantly desktop-led assessment.
- The comparative analysis approach to precincts and character types.
- The lack of a clear, identifiable connection between precincts and character types.
- The way in which character objectives and ResCode variations in the zones have been prepared.

We explore these issues in this and following chapters of the report.

This chapter considers gaps in the Study's overall methodology, while subsequent chapters focus particularly on precincts, character types and implementation.

⁵ Primarily, this consideration is through a consideration of the zone controls that applied to land within the study area, with the Residential Growth Zone applied to substantial change areas, the General Residential Zone applied to incremental change areas and the Neighbourhood Residential Zone applied to minimal change areas.

⁶ Setting aside the issue that this direction is now out of step with contemporary practice guidance, which is discussed later in this report.



For clarity, some of these issues have been grouped together and explored in one chapter, even though they may be relevant across chapters.

3.2 The Study needs to better reflect emerging guidance

The most relevant practitioner guidance that is informative to this Study is:

- Planning Practice Note No. 43: Understanding Neighbourhood Character (PPN43).
- Planning Practice Note No. 90: Planning for Housing (PPN90).
- Planning Practice Note No. 91: Using the Residential Zones (PPN91).
- The Practitioner's Guide to Victorian Planning Schemes.
- The Ministerial Direction on the Form and Content of Planning Schemes.

PPN43, PPN90 and PPN91 are particularly influential, with the latter two practice notes emerging following the preparation of the draft Study.

While the report has generally had appropriate regard to PPN43, it will need to be updated to ensure that it is consistent with the practice direction outlined in PPN90 and PPN91.

PPN90 acknowledges that:

Tensions can arise between housing and neighbourhood character objectives. If these tensions are not adequately managed this creates uncertainty about future development outcomes.⁷

This is an all-pervasive tension within our planning system that has existed for many years. The contemporary guidance provided by PPN90 seeks to better resolve the issue, by outlining that neighbourhood character studies should be 'forward-looking' in areas where increased growth is expected, so that growth expectations are not undermined by neighbourhood character policies that seek to maintain existing character.⁸

The Study does address some actions for character studies identified by PPN90, including to:

- Consider the public and private realms.
- Provide strategic directions for neighbourhood character to guide future development through preferred neighbourhood character statements or neighbourhood character objectives.
- Use the study to form the basis for neighbourhood character statements, policies, objectives and local ResCode variations.

⁷ PPN90, p. 4.

⁸ PPN90, p. 8.



However, our overarching view is that the Study will need to be reviewed to achieve greater alignment with the practice notes – particularly with regard to identifying comparative ‘significance’ between character areas and to resolving the tension between character and growth.

Addressing the directions in PPN90 and PPN91 is critical if the Council is determined to implement its findings in the Brimbank Planning Scheme.⁹ In addition to practice guidance, some of the directions from these practice notes are now reflected in State policy as a result of Amendment VC169. While some changes were made to the Study in early January 2020 to better reflect the new practice notes, further work is required.

We return to these practice notes throughout this peer review and outline where particular regard to their direction will be necessary in order to prepare a final Study.

It is necessary to reflect at this point that the guidance provided by PPN90 and PPN91, along with new State policy implemented by Amendment VC169, will have ramifications beyond this Study. It will be necessary for Council to undertake further strategic work to progress a new or updated Housing Strategy that is aligned with these directions. We make further comment about this in Chapter 6.

3.3 The Study’s existing context summary has some gaps

A consideration of relevant physical and policy context is an important part of establishing the existing context for neighbourhood character and is a relevant starting point for informing the character assessment.

The context for neighbourhood character is explored within Chapter 2 of the Study.

The chapter acknowledges relevant practice guidance that defines neighbourhood character and the increased role that the reformed residential zones can serve in a planning response to character.

It also considers State level policy at Clause 15.01-5S, the existing residential zones, Council’s housing and urban forest strategies, along with the structure plans for the City’s higher order activity centres and the Albion Neighbourhood Plan.

While all of this is relevant to the policy context, the Study has not had appropriate regard to some other, equally relevant considerations.

There is an absence of a consideration of Council’s existing local policies, particularly at Clause 21.07 ‘Housing’. This policy provides the key local guidance for the assessment of character within planning permit applications and is highly relevant to the Study and the City’s character context.

Recommendation: Amend Chapter 2 of the Study to refer to relevant local character and housing policy.

⁹ We acknowledge that the draft Study pre-dates the release of the practice notes.



Additionally, policy at Clauses 15.01-5S and 16.01 has been updated as a result of Amendment VC169. While this policy emerged following the draft Study, it will nevertheless need to be incorporated into the final version of the report.

Recommendation: Amend Chapter 2 of the Study to incorporate changes to State policy arising from Amendment VC169 and analyse what this means for the Study's outcomes.

In a strategic policy sense, the Study has not articulated the relevance of the metropolitan strategy, *Plan Melbourne 2017-2050* and how the Study responds to its directions.

Recommendation: Amend Chapter 2 of the Study to outline the relevant context in *Plan Melbourne 2017-2050* and analyse what this means for the Study's outcomes.

Notwithstanding these omissions, we also observe that there is limited detailed assessment of how the relevant policy context guides a consideration of character in permit assessment or the extent to which it is influencing an existing or emerging character on the ground.

The lack of analysis around this existing policy and development context limits the effectiveness of the Study to articulate a narrative that explains (let alone supports) a finding that the existing settings within the planning scheme have failed to deliver the type of character outcomes that might be expected by policy.

Instead, the Study proceeds on the basis that character precincts and character types are necessary to lead to a better response to neighbourhood character, without adequately explaining how or why the existing settings are leading to a loss of the existing or preferred character expected within these areas.

This is, in our view, a significant gap in the methodological approach and the strategic justification for any future intervention.

A more robust approach to this issue would be to review the existing local character policy direction, to consider whether it is consistent with relevant State policy and *Plan Melbourne 2017-2050*.

A limited review of recently completed developments and the way in which the Victorian Civil and Administrative Tribunal ('VCAT') has considered and interpreted character policy in Brimbank cases would also be influential in undertaking this analysis.

This limited research might assist in resolving what (if any) the key issues are with the existing character policy response and whether or why further intervention is required.

We are instructed by Council that the consultants did undertake a review of VCAT decisions as part of the preparation of the Study. However, this is not articulated or analysed within the report. This commentary is important in establishing evidentiary findings about the appropriateness (or otherwise) of the existing character settings. These findings cannot simply be inferred. Instead, it is important that the Study methodology outlines that this was a key input into the review and articulates its findings, along with any other consideration of the existing policy settings, as we have highlighted above. It is also important to demonstrate how these findings have informed the Study's recommendations for further intervention.



If this review has been undertaken, a further limited review will be necessary to consider more contemporary VCAT decisions since the preparation of the Study. Moreover, a limited review of recently constructed development should also be undertaken, to consider whether it is consistent with the existing policy settings and how it presents in the streetscape. This analysis is also relevant to inform the development of a future housing strategy.

Recommendation: Strengthen the analysis of existing policy within Chapter 2 of the Study.

Recommendation: Articulate the findings of the review of VCAT decisions within Chapter 2 of the Study.

Recommendation: Consider undertaking a further limited review of VCAT decisions and a review of recently completed development. This review should identify the extent to which existing character policy was considered in decision-making and whether the completed development is consistent with those directions.

3.4 Basing analysis on existing zones is a weakness of the methodological approach

Existing zone boundaries have been determinative in undertaking both the assessment of character precincts and the formulation of character types.

The existing residential zone structure of the municipality generally implements Council's current Housing Strategy. Substantial change areas are generally within the Residential Growth Zone, incremental change areas generally fall within the General Residential Zone and minimal change areas generally fall within the Neighbourhood Residential Zone.

This approach means that the Study is at least cognizant of the level of change that is expected within these areas, in accordance with the direction outlined in the Housing Strategy.

However, the risk is that if the zone settings are 'wrong' from a character perspective (i.e. an area identified for incremental change displays a strong single storey character that should be retained), there does not appear to be scope for this Study to recommend that that land be rezoned to support its protection.

Indeed, DELWP's guidance in relation to interpretation of PPN91 advances this proposition even further. In DELWP's view, the General Residential Zone is a zone to identify 'substantial change' in a Brimbank context.¹⁰

In our view, it is not the role of this Study to resolve the conflict between the change designations identified within Council's Housing Strategy and the position advanced in PPN91 and by DELWP about how the zones should be applied within a Brimbank context.

¹⁰ We note that PPN91 would also seem to allow the General Residential Zone to be applied to incremental change areas.



This issue does need to be resolved, but a more holistic assessment of housing, in the form of an updated or new housing strategy, is required to consider how these change areas should be applied spatially across the municipality, having regard to the updated practice direction.

However, this Study does have a role in that exercise. It should be within the scope of this Study to recommend that changes be made to zoning if appropriate, based on an analysis of the existing or emerging character of an area and whether that area has a level of comparative significance that deserves protection.

We return to this issue later in our advice.



4. The Study's Approach to Precincts & Character Type Areas

The identification, assessment and documentation of character precincts is a significant part of any character study. Precinct investigations inform assessments about the existing character of an area, which of those characteristics are valued and how they are to be retained or modified in an existing or preferred character.

The Study has adopted the approach of using precincts to describe existing character. These precincts are then collectively grouped into 'character types', which are largely statements of the preferred character to be achieved (which in some cases is the existing character).

4.1 The precinct analysis has identified relevant character elements

PPN43 outlines the matters to be considered when considering what makes up the character of an area. It is primarily a document to guide the consideration of neighbourhood character in planning permit applications, but has also been influential in guiding neighbourhood character studies.

The matrix template adopted by the Study for the assessment of each precinct generally aligns with types of characteristics that are outlined in PPN43.

The characteristics appropriately consider the public realm, pattern and spacing of development, architectural and roof styles, fencing and other notable characteristics.

We support this approach and the way it has been documented.

4.2 There are too many character precincts, with insufficient difference between them

The Study identifies 39 distinct precincts. However, once sub-precincts (sections within precincts separated by zone boundaries) are included, there are a total of 84 different precincts.

In terms of how precinct boundaries were determined, the Study outlines that:

The boundaries for each precinct were primarily determined by scaling down to small scale areas based on locality boundaries, existing zones, era of development and lot size.¹¹

The analysis was undertaken across 8 separate study areas, generally commencing from the northern extent of the municipality and working south.

¹¹ Draft Study, p. 112.



It is immediately apparent from reviewing the Study that many of these precincts (whether sub-precincts across zone boundaries, or separate precincts) are largely similar in terms of key aspects of their existing character to neighbouring (and in some cases more distant) precincts.

An example of this is Precincts 16 and 17B, which are both incremental change areas¹² in St Albans, separated by the substantial change area in Precinct 18, closer to the railway line and St Albans railway station. In both precincts, the existing character statement and characteristics such as topography, lot sizes, architectural style, building siting and type, fencing and landscaping are strikingly similar, with only very minor differences between them.



Precinct 16



Precinct 17B

The above photographs are reflective of 'typical' development within these precincts, with a high degree of commonality between era of development within the precincts, dwelling design and siting, roof styles, landscaping and fencing.

Where there are some differences, they are largely minor matters that are within the tolerances of difference that might be expected in any area with an evolving character.

This is to be expected, given that these precincts would likely have developed at similar times, given their proximity to the railway line, distance from the CBD and other factors.

This example highlights that the approach to precinct identification has focused on suburb and zone boundaries almost exclusively, which has resulted in missed opportunities to draw similarities between precincts across these boundaries.

Given that the role of precincts is to identify 'what makes this area different from another area', the similarity between many precincts risks undermining the methodological approach to some degree, because these connections have not been explored.

To some extent, this issue is mitigated by the fact that the precincts do not drive the character response in future development. This is, instead, the role of the 11 character types that each

¹² As identified by the Housing Strategy. PPN91 would consider that these areas may be 'substantial change' areas.

precinct falls into. Within this context, it could be argued that it does not matter that there are so many precincts, as they are ultimately not determinative in the assessment of applications.

Nevertheless, we consider that opportunities to consolidate precincts should be explored. There is no compelling reason why precincts with similar characteristics across suburb boundaries or on opposite sides of railway lines or the arterial road network cannot be grouped together if they share common characteristics.

This exercise could be undertaken as a 'desktop-based' review, but would also best be ground-truthed by on-the-ground observations.

Recommendation: Explore opportunities to consolidate character precincts, where statements of existing character and identification of characteristics are similar.

4.3 The desktop-led approach has limited the effectiveness of precinct analysis

As identified above, the precinct analysis has been predominantly a desktop-led exercise. Site inspections appear to have been undertaken in a limited capacity to inform the analysis, but not on the basis that those inspections would necessarily validate or test whether precinct boundaries were appropriate or whether characteristics and character statements within each precinct were correct.

In our view, this is a limitation to the Study's methodology, as it has missed opportunities to notice similarities between precincts across zone and suburb boundaries and variances in built form and character responses.

This is not to say that a desktop-led approach is necessarily 'wrong', but rather that it is not as robust as one which values visual inspection as a key determinant in precinct boundary identification and analysis of built form within precincts.

In some areas, such as Albion (Precincts 28B and 28C), this is largely inconsequential. The existing planning controls (including the Heritage Overlay in Precinct 28C) recognise that these areas have a different character and different development expectations. Our visual inspections of these precincts conclude that the boundaries are appropriate and that the character statements adequately describe the differences.

In other areas, such as St Albans (again returning to Precincts 16 and 17B), we have observed above that there is significant commonality between these precincts. The other reflection on these precincts is that the desktop-led approach has misdescribed certain character elements.

For instance, in both of these precincts, the Study observes that building siting includes:

Wide side setbacks with no walls on boundaries.

This statement puts forward an absolute position that there are no walls on boundaries within these precincts. Our visual inspections confirmed that there was a noticeable presence of development



with walls to one or both boundaries within both of these precincts¹³ and that while some development included wide side setbacks, others may have had setbacks more in the order of 1 metre to a service yard.

While this is one example, it highlights a challenge with character statements which do not reflect the 'on the ground' experience of character. Taking this problem to its ultimate conclusion, in an adversarial hearing process, if an applicant can establish to the Tribunal that the street bears no resemblance to the existing character statement, it can potentially invite the decision-maker to form the view that the Study may also have the preferred character outcomes for an area set incorrectly.

This ultimately has the potential to undermine the application of the Study as an authoritative character position in decision-making.

Recommendation: Review statements of existing character, preferably through physical inspection, to confirm that character elements reflect the general pattern of development within each precinct.

We return to this issue in the context of implementation mechanisms later in this review.

4.4 The extent to which 'comparative significance' and comparative differences between precincts has been demonstrated is variable

PPN90 outlines that a key component to a neighbourhood character study is that it:

*Identifies the **comparative significance** of each neighbourhood character area. In assessing the significance of areas, comparisons need to be made, not only with other parts of the municipality but also with the **wider region**.¹⁴*

This is a fundamental goal of the precinct and character type identification of these studies.

A core task of this peer review exercise is to consider whether the Study is consistent with this direction of the practice note.

DELWP clarified the context for the term 'comparative significance' in a meeting with Council and this firm. In their view, comparative **differences** should be established between precincts and be a determinant for precinct boundaries, while **comparative significance** is a test to demonstrate whether it might be appropriate to protect areas for minimal change, based on a strong existing character.

In minimal change areas, consideration should be given to whether additional or other planning controls should be applied, such as the Neighbourhood Character Overlay, which affords greater protection to areas of strong, special or highly intact character.

¹³ Within Precinct 16, this was particularly noticeable in development south of Main Road West, although it was also observed in some streets to the north within this precinct.

¹⁴ PPN90, p. 7. **Bold** is our emphasis.



In assessing whether it is consistent with this direction in PPN90, it can be noted that the Study seeks to assess or put forward comparative differences between areas within the municipality in two ways:

- It identifies **precincts** largely based on existing character and zoning and considers what makes each precinct different.
- It identifies **character types** that guide future development (i.e. a 'preferred' character) – how these areas will look different from each other in the future.

While comparative **differences** are identified between precincts (to varying degrees, as explored in Sections 4.2 and 4.3 of this report), we are concerned that there is insufficient difference between these areas, which has likely resulted in many more precincts than are necessary.

The use of character types demonstrates a stronger understanding of comparative differences. The preferred character statements and character objectives will seek to develop a preferred character that ultimately sets different character type areas apart from one another. In this regard, it might be an assessment of 'future comparative significance' to some degree, although greater explanation is required as to how this meets the intent of the practice note. As we explore below, there will also need to be an assessment of whether there are sufficient differences between some character types or whether they display sufficient differences to warrant different designations.

In terms of **comparative significance**, the extent to which this has been established is also varied.

In small and discrete precincts like Keilor Village (Precinct 7G) and Petrik Drive, Keilor (Precinct 7B), the comparative significance is well established. For example, Petrik Drive is a rare example of a streetscape that is open, with limited front fencing¹⁵ and established formal gardens, with dwellings set on large lots. It has a significant character that sets it apart from other parts of the municipality and reflects the direction in PPN90.

In considering comparative significance of these discrete areas in the context of PPN90, there is an absence of an examination as to whether any areas display a sufficiently 'intact' special character that warrants protection through the application of other controls, such as the Neighbourhood Character Overlay. This is not explored within the Study at all, notwithstanding that the Albion Neighbourhood Plan recommended the application of the Neighbourhood Character Overlay to Albion, that Council has previously undertaken work relating to this recommendation and this Study considers that Petrik Drive, Keilor displays a highly intact character.

While the Study may have formed the view that the application of the Neighbourhood Character Overlay is not justified to these areas, this should be explored in detail in the report.

Recommendation: Revise the Study to assess whether it is appropriate to apply different planning controls (such as the Neighbourhood Character Overlay or Design and Development Overlay) to some areas, where stronger intervention may be more appropriate.

¹⁵ No front fencing is a characteristic feature of the western half of Petrik Drive, while development towards the eastern end is more mixed in terms of its fencing style. It nevertheless still presents as a *largely* open streetscape with a formal garden setting.



Recommendation: Consider opportunities to reference comparative differences within character types.

Recommendation: Explore whether any precincts (or parts of precincts) identified for minimal change display a sufficient level of comparative significance to warrant further planning protection.

4.5 The connection between character precincts and character types is not always obvious

The Study divides the 84 character precincts and sub-precincts into 11 distinct character type areas, based largely on an existing or preferred character outcome that is being sought and existing zoning.

The Study observes:

These have been defined by grouping precincts according to commonalities based on their existing characteristics and their preferred character. While some precincts might not share exactly the same existing characteristics, they may share the same preferred future character objectives and are thus grouped in the same Character Type.

The connection between precincts and character types is not always obvious. It is particularly difficult to ascertain whether certain precincts are grouped based on existing character or to move them towards a preferred outcome.

The missing link in this process is an assessment of valued characteristics and threats to character, which might draw better connections between precincts to typologies. An inspection-led approach to precinct identification, a rigorous VCAT review and a review of recently completed development would better inform these links and they should be articulated within the Study.

We have made recommendations throughout this report that would, when undertaken collectively, encourage this outcome.

4.6 Some character type areas are not sufficiently distinct to warrant separate typology

Building on the comparative significance discussion in Section 4.4, we consider that the Study does not draw sufficient distinctions between some character types.

This is most noticeable between two incremental change character type areas – Character Type 2 and Character Type 3. While these areas have different eras of development, there is a high degree of similarity between the preferred character statements and neighbourhood character objectives.

This ultimately leads to a conclusion that they are being directed towards a very similar preferred outcome in development.



We have reproduced these statements for both character types below. Text in **green** is text that is identical across both areas. Text in **red** reflects text with similar intent, but slightly different wording, while **black** text reflects differences between the typologies.

Character Type 2 – GRZ1 Development from the 1950s onwards	Character Type 3 – GRZ2 Development from the 2000s
Preferred Character Statement	
<p>The character of the area will be one that accommodates incremental change in the form of low-scale (single or double storey) unit or town house development that is respectful of the existing residential character, and that contributes positively to the street and open space areas. The deep blocks within this Character Type offers opportunities for development of multi-unit housing that maintains a generally consistent built form interface at the street.</p> <p>Front setbacks will be consistent with the surrounding character and will be landscaped to include canopy trees that will enhance the streetscape. Fencing will also be consistent with the prevailing character. Garages and vehicle access ways will not visually dominate the frontage, and accessways will be landscaped to soften their appearance.</p> <p>New development will have high on-site amenity, including generously proportioned private open space areas, consistent with the objectives of the zone and the Housing Strategy.</p> <p>Development fronting open space, such as Selwyn Park, Maribyrnong River and Kororoit Creek will provide an active built form frontage, with low front fencing.</p>	<p>The character of the area will be one that accommodates incremental change in the form of low-scale (single or double storey) unit or town house development of contemporary design, that is respectful of the existing residential character, and that contributes positively to the street and open space areas.</p> <p>Front setbacks will be consistent with the surrounding character and will be landscaped to include canopy trees that will enhance the streetscape. Fencing will also be consistent with the prevailing character (i.e. limited front fencing). Garages and vehicle access ways will be designed to feature less prominently from the street, and accessways will be landscaped to soften their appearance.</p> <p>New development will have high on-site amenity, including generously proportioned private open space areas, consistent with the objectives of the Housing Strategy.</p>

The direction for both areas is that:

- Incremental change¹⁶ is anticipated.
- It will be low scale.
- Front setbacks are consistent with surrounding character.
- Landscaping will be in the front setback.

¹⁶ This is consistent with the Housing Strategy designation of GRZ being incremental change.



- Garages will not be visually dominant or will be less prominent (the difference in language does not seem substantial).
- There will be high amenity provided on site.

The key differences are that Character Type 3 will be 'of contemporary design', while Character Type 2 refers to deep blocks (which are only evident in some precincts within the Character Type) and active frontages to open space.

There is a question as to whether there is sufficiently different to warrant being within separate typologies. The most substantive difference is the reference to 'contemporary design', although the thrust of both preferred character statements is to ensure development responds to existing character and notionally addresses these differences.

The similarities between the character types continue within the objectives. The only substantive difference between the two areas in this regard is that Character Type 2 requires 'wide setbacks of buildings on one side'. As we address later, we think that there are some challenges to this aspiration.

In our view, there is insufficient difference between these two character types to warrant their separation.

Recommendation: Consider merging Character Types 2 and 3 into one typology following a review of the character precincts.

Recommendation: Review other Character Types to ensure that there is sufficient comparative difference, following a review of the character precincts.

For clarity, it should be noted that the recommendations at this section on their own will not solve the more fundamental issues of the Study being misaligned with contemporary practice and particularly that these areas may be 'substantial change' rather than incremental change in the future. Further strategic work will be required, as we identify in Chapter 6. This further strategic work will ultimately need to inform the future strategic direction for these areas and character types.

4.7 The preferred character statements for incremental change areas do not reflect their expected level of change

Character Types 2, 3, 4 and 5 are within the General Residential Zone. Under Council's Housing Strategy, these areas are identified for incremental change.

As we explored in Section 2.3, we are aware that DELWP considers that areas where the General Residential Zone is applied should (in the Brimbank context) may constitute substantial change. We have set aside this issue for the purpose of this analysis, for the reason that the Council's existing housing strategy designates these areas as incremental change. While DELWP may consider that this is a mischaracterisation (based on its expectations for change in the zone), this is an issue that needs to be explored in a future (or updated) housing strategy. In the absence of a change in direction in that strategy, the Study is appropriately considering these areas as incremental change because this is the existing policy position.



The preferred character statements for these areas refer to “low-scale” development – of single or double storey height, being “respectful of the existing character”.

This approach appears inconsistent with the guidance outlined in PPN90 and PPN91 for areas within the General Residential Zone or identified for incremental change.

PPN90 observes:

It is important that preferred character statements are ‘forward-looking; so that if an area is identified for increased housing growth, the growth is not undermined by neighbourhood character policies that seek to maintain the existing neighbourhood character.’¹⁷

Within the ‘principles underpinning the residential zones’ outlined in PPN91, the following are particularly relevant:

Principle 1

Housing and neighbourhood character plans need to be consistent and align with one another when specifying preferred future housing and neighbourhood character outcomes for an area.

Inconsistencies between housing and neighbourhood character objectives do not provide certainty for the community or industry about whether housing growth or the protection of existing neighbourhood character is to be prioritised in a defined area or neighbourhood.

...

Principle 4

The General Residential Zone is a three-storey zone with a maximum building height of 11 metres.

The General Residential Zone should be applied to areas where housing development of three storeys exists or is planned for. It is inappropriate to apply the General Residential Zone to areas where a planning authority seeks to respect the existing single and double storey character of an area.

These preferred character statements ultimately fail to resolve the core tension between character protection and providing for housing growth. PPN90 and PPN91 collectively seek for this tension to be resolved in a Residential Development Framework, which is informed by the neighbourhood character study. Changes to Clause 15.01-5S as a result of Amendment VC169 also require statements of preferred character to not undermine the ability to achieve medium and higher density housing outcomes, where they are in incremental and substantial change areas.

¹⁷ PPN90, p. 8.



The preferred character statements and subsequent neighbourhood character objectives for these precincts will need to be carefully reviewed to ensure that development expectations are not reduced beyond what is anticipated by the level of change.

That review should be cognizant of any analysis in a future housing strategy, which may further elevate the level of change expected in these areas.

Recommendation: Review the preferred character statements for incremental change areas to reflect expectations for development within this zone and guidance in PPN90 and PPN91.

4.8 The guidance for Character Type 1 requires further consideration

Character Type 1 applies to substantial change areas in and around the City's activity centres, including Sunshine, Watergardens, St Albans, Keilor Village and Keilor Downs. These centres fulfil different roles ranging from Metropolitan Activity Centre (Sunshine) to Major Activity Centre to Neighbourhood Activity Centre.

These areas are all within the Residential Growth Zone.

The preferred character statements for these areas are largely based on direction outlined for residential areas within the St Albans Structure Plan and it seeks a unified preferred character across all of the residential parts of these centres. This preferred outcome does not appear to have had sufficient regard to the different role and function of many of these centres.

Moreover, some of the proposed development outcomes are more restrictive than development expectations for the incremental change areas (i.e. a two storey presentation to the streetscape, with recessed third and fourth levels).

There is a further question as to whether a character study should ultimately define the design outcome for these centres. We note that the Residential Growth Zone does not include a purpose that relates to neighbourhood character, and it contains 'design objectives' instead of neighbourhood character objectives. PPN91 identifies that design objectives should be guided by urban design and built form outcomes, rather than neighbourhood character outcomes.

DELWP has advised Council that it considers any approach to character and design requirements must be holistic and the municipality should be assessed as a whole. It considers that a precinct by precinct (or zone by zone) response is not preferred. In this regard, the advice from DELWP is that substantial change areas should be considered within housing and neighbourhood character studies in order to direct them toward a preferred housing (and preferred character) outcome.

We do not disagree with this view. However, we consider that it must be informed by a stronger analysis of the role of housing within each of these centres and the different role that each centre will play. In this regard, it may not be appropriate to simply package all substantial change areas into one zone schedule. A more balanced and nuanced approach may be required, which has stronger regard to existing Structure Plans and policy guidance for these activity centres and their peripheral residential areas.



This approach should be further explored as part of a new or updated housing strategy, in addition to the character study. This is necessary as the housing strategy must consider the role each centre's residential areas will play in delivering substantial change.

Recommendation: Undertake further analysis of substantial change areas to inform their preferred character direction, having regard to their strategic context.



5. The Study's Implementation

The Study adopts an exclusively zone-focused approach to implementation. The Study recommends that the zoning of land within the Study area remain the same, but that revised and new schedules to the residential zones be applied, based on the 11 character types identified by the Study.

5.1 The use of zones as the primary implementation mechanism is appropriate

The *Practitioner's Guide to Victorian Planning Schemes* identifies that:

The zone is the primary tool for guiding the use and development of land.¹⁸

The Schedules to the General Residential Zone and Neighbourhood Residential Zone both include the opportunity to include neighbourhood character objectives and vary several ResCode standards.

The Study takes advantage of these attributes of the zones and their schedule to include each character type within a different zone schedule.

This provides the most transparent and effective way to identify character types within the planning scheme.

The use of the neighbourhood character objectives and ResCode variations (along with decision guidelines) allows the zone to be the primary tool that guides a consideration of neighbourhood character and, by extension, land use and development, within the residential zones.

This approach is appropriate and consistent with relevant practice guidance.

5.2 The neighbourhood character objectives should be carefully reviewed

Our review of the neighbourhood character objectives identifies that many of these objectives are either expressions that are amenity-focused (and do not relate to character) or are general urban design matters that are likely to be covered by ResCode, policy at Clause 15 'Built Environment and Heritage' or are referred to in the policy document *Urban Design Guidelines for Victoria*.

An example of this is:

To encourage housing that has a high level of internal and on-site amenity, including generously proportioned open space areas. (GRZ1 and GRZ2)

¹⁸ A Practitioner's Guide to Victorian Planning Schemes, p. 31.



To encourage development to provide passive surveillance of the streetscape and open space areas. (GRZ1 and GRZ2)

The amenity objective is not strictly a character objective. However, reference to generous open spaced areas could be reworded and more directly related to the preferred character statement.

The passive surveillance objective is repetition of policy at Clause 15.01-1S 'Urban design' and the *Urban Design Guidelines for Victoria*.

The Practitioner's Guide discourages repetition of directions from other parts of the planning scheme, which are still relevant for decision-making whenever a permit application is received.

Each zone schedule should be carefully reviewed to avoid this repetition.

Other character objectives are difficult to give effect to, because they are seeking outcomes which are not controlled by the permit triggers. For instance, an objective in Schedule 1 to the Neighbourhood Residential Zone is:

To promote retention of existing front dwellings and the restoration, reuse and/or incorporation of heritage buildings and elements.

Objectives of this nature are problematic. One interpretation of this objective is that it amounts to a de-facto heritage control and is unjustified. We recommend that it be deleted. Moreover, as we have identified earlier, the Study has not assessed whether parts of the municipality warrant special protection through the introduction of a Neighbourhood Character Overlay to protect areas of strong, intact character. There has been no analysis within the Study that establishes a compelling case to warrant the introduction of a control (like the Neighbourhood Character Overlay) that would provide for the retention of the existing dwelling (through a demolition permit trigger).

Within this context, the objective is not appropriately justified, nor does it provide the adequate level of statutory protection that is sought. This is problematic because we also have experience of these statements leading to confusion among objectors (at both Council and VCAT level) who, quite justifiably feel that a new dwelling at the front is at odds with policy in the planning scheme. These statements raise false hopes that the existing dwelling will be retained when it will almost certainly be lost.

Recommendation: Review and redraft neighbourhood character objectives to delete repetition and conflict with other parts of the Brimbank Planning Scheme.

5.3 Some ResCode variations are not justified by the Study

Schedule 1 to the General Residential Zone applies to Character Type 2 areas.

The Schedule to the zone includes a variation to Standard B17, which seeks a side setback of:

A minimum of 2.5 metres from at least one side boundary for at least 60% of the length of the lot.



The justification for this approach is articulated in the report as being based (in part) on the 'prevailing character, when viewed from the street'.

As we identified in Section 4.3, the challenge with this approach is that Character Type 2 applies to precincts where wide side setbacks are not characteristic of all precincts. In many of these precincts, the Study and our own observations identify development constructed to at least one side boundary and, in some cases, both side boundaries. In cases where side setbacks are provided, some precincts include smaller setbacks in the order of 1 metre to service yard.

Within this context, a side setback of 2.5 metres is an aspirational outcome that is less 'intense' than some forms of existing development. In the context of the land being within the General Residential Zone, where incremental change is expected, there is a high threshold that must be satisfied to justify such a variation to the side setback standard.

In our view, this justification has not been adequately explained.

As we foreshadowed in Section 4.3, the risk of this approach is that it allows permit applicants in adversarial hearings to undermine the Study's findings and weaken its application.

We also note the comments from DELWP that the most successful character studies are based on ResCode variations. This is because these variations also find their way into the building regulations and mean that single dwelling development, which may not require a planning permit, will have to achieve the same outcome.

In our view, this highlights the importance of justifying ResCode variations and ensuring that they are a key part of the implementation mechanism. In this respect, there may be opportunities as part of finalising this strategy to consider whether further variations should be articulated.

Where these cannot be expressed as ResCode variations, consideration may need to be given to whether a different statutory tool is required, such as a Neighbourhood Character Overlay or Design and Development Overlay, as explored elsewhere in this advice.

Recommendation: Review and ensure that the justification for all ResCode variations is articulated within the report.

5.4 ResCode variations need to be carefully worded

All three of the residential zones subject to the Study can vary standards of Clause 54 and Clause 55.

PPN91 notes that:

An important feature of the schedules to the residential zones is that a change to a value in the schedule will affect all dwellings in the schedule, whether a planning permit is required or not



When a local value is specified in a schedule, the value replaces the relevant value in both the clause 54 and clause 55 standard and in the corresponding building regulation.¹⁹

In terms of writing varied standards, PPN91 notes that:

It is important to ensure that the variation can be understood without reference to the state standard or relevant building regulation. Variations to clause 54 standards must be clear and legible for a building practitioner when issuing a building permit for one dwelling on a lot that does not require a planning permit.

Any omission of text or values between the clause 54 and clause 55 standard and the variation may have unintended consequences. It is therefore important that the variation uses the format and language of the relevant standard to ensure that there is no confusion.²⁰

The type of 'confusion' that PPN91 alludes to is highlighted in *Frankcom Blossom v Whitehorse CC* [2019] VCAT 1790, where the Tribunal interpreted that a variation to the front setback standard to require a new wall on a boundary to be setback at least 12 metres replaced all of the state standard street setback provision, meaning that a wall not on a boundary did not need to have any setback from the street.

A similar risk exists with the variations to Standard A3 and B6 in the Neighbourhood Residential Zone schedules, where the Study adopts the following standard:

Garage should be set behind the front building line.

We think it is unlikely that this is intended to be the only requirement for the front setback standard, given that these areas are identified for minimal change.

For clarity, the ResCode variation needs to be amended to clarify how the remainder of the building is to be setback.

All ResCode variations should be carefully reviewed in light of this observation and relevant practice guidance.

Recommendation: Reword ResCode variations to ensure that they can be correctly interpreted as 'standalone' standards, without reference to the Clause 54 and Clause 55 values.

5.5 There is a lack of analysis and recommendations regarding existing policy

While the zone-led implementation of the Study is appropriate, there is no examination within the Study of the effectiveness of the existing policy and whether further changes are required to better guide a consideration of character in the assessment of applications. Indeed, it is unclear whether

¹⁹ PPN91, p. 18.

²⁰ PPN91, p. 19.



the report considers that the existing policy should remain 'as is', be modified or whether it should be removed entirely.

This is a significant gap within the Study, as policy will still play a key role in decision-making, either within the Municipal Strategic Statement at Clause 21 or as part of a consolidated Planning Policy Framework ('PPF') when that translation amendment occurs. While the migration of local policy into the PPF may result in a reduction of local policy, there may be relevant local policy that remains or should be considered for removal, if it is not serving its purpose.

Indeed, observations shared with us by statutory planning staff are that the existing policy at Clause 21.07 is being interpreted by the Tribunal as emphasising a protection of existing character, even in areas where substantial change is expected. This appeared out of step with Council expectations and the manner in which the policy was being applied by the responsible authority in decision-making.

In our view, this observation supports a need for the local policy to be reviewed. As we alluded to in Section 3.3 of this report, that review should consider:

- The alignment between State and local policy.
- How local policy is considered by the responsible authority in decision-making.
- How the Tribunal, on review of decisions, is considering and interpreting the local policy.
- Whether and how recently completed development reflects the intent of the policy.
- Whether and how any local policy should be retained in a consolidated PPF.

Recommendation: Undertake a detailed review of the existing local character policy within the Brimbank Planning Scheme.



6. Towards a New Residential Development Framework

PPN90 outlines that a Residential Development Framework for a municipality should be informed by a Housing Strategy and potentially a Neighbourhood Character Study, where appropriate.

Council has an existing Residential Development Framework at Clause 21.07 of the planning scheme. However, it is lacking the detail expected by PPN90, including an identification of areas for change and character precincts.

A key question that informs this review is what will be required to progress a new Residential Development Framework, consistent with direction in PPN90.

It is clear that further strategic work will be required to finalise the draft Neighbourhood Character Study.

The recommendations outlined throughout this report are designed to be practical and achievable. They recognise the body of strategic work that has already been invested in the draft Study. They acknowledge that there is a pathway forward to complete the Study, although the Study may be substantially different to that in the current draft report.

The more challenging aspect of developing a future Residential Development Framework is that Council's Housing Strategy, which was adopted and implemented in 2014 no longer represents best practice.

In that respect, while it provided a solid foundation for setting the growth and change framework for the municipality, its guidance has limitations, in that since it was implemented:

- Further changes have occurred to the residential zones, including the removal of the dwelling cap in the Neighbourhood Residential Zone and the introduction of mandatory height and garden area requirements for the General Residential and Neighbourhood Residential Zones.
- Plan Melbourne 2017-2050 has been adopted as the metropolitan strategy, superseding Plan Melbourne 2014.
- PPN90 and PPN91 provide updated guidance in relation to housing, character and the residential zones.
- Amendment VC169 has been gazetted, which provides different direction at Clauses 15 and 16 for character policies, in line with the guidance in PPN90 and PPN91.
- Victoria in Future forecasts released in 2019 identify that Melbourne's population growth is expected to increase at a higher rate than forecast in Plan Melbourne 2017-2050.

Collectively, this context results in a housing strategy that does not represent a contemporary or best practice approach to housing within the municipality. Guidance from DELWP as part of this



engagement says that Council will need to prepare an updated (or new) housing strategy that has appropriate regard to this context.

The most significant challenge may be that the General Residential Zone could be considered appropriate in substantial change areas, with the Neighbourhood Residential Zone applied to areas identified for both minimal and incremental change.

This is a departure from the way the residential zones are currently applied within Brimbank. Responding to this advice and direction in PPN91 will present some significant challenges for the drafting of a future housing strategy.

That review should be informed by a series of inputs. The work undertaken as part of the neighbourhood character study will inform that review. A finalised neighbourhood character study should sufficiently identify areas for minimal change, where there is a strong or intact character that is worthy of protection. Other inputs will include a capacity analysis of housing supply and demand and a consideration of Victoria in Future forecasting.

We are wary of suggesting one pathway forward. In our view, there are many ways that Council could satisfy PPN90 and PPN91 .

However, in our view, the neighbourhood character study that has formed part of this review will be insufficient to appropriately inform preferred character direction for a Residential Development Framework and planning scheme guidance.

If it appropriately considers the recommendations of this review, it will be sufficient to identify existing character and areas that have comparative significance that warrants protection. However, a more holistic assessment of future character will be required, having regard to the identified level of change expected within parts of the municipality. This analysis should be integrated with the future housing strategy.

The key to the successful development of the housing strategy, a final neighbourhood character study and the Residential Development Framework will be extensive engagement with DELWP and municipalities who are more advanced in this process, such as the City of Hobsons Bay, which has prepared Amendment C131 to implement a new housing and neighbourhood character regime in its municipality.

In this regard, we would encourage Council to engage regularly with DELWP, including in the setting of the scope that informs the development of any future housing and neighbourhood character work. DELWP should be involved in engagement at various stages throughout these projects, to ensure that they continue to meet the practice guidance. This collaboration will be important to the success of the development of the Residential Development Framework.

Glossop Town Planning

January 2021





BRIMBANK HOUSING STRATEGY

BACKGROUND ANALYSIS **DRAFT REPORT**

BRIMBANK CITY COUNCIL | JUNE 2021



www.urbanenterprise.com.au

Attachment 12.4.4

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FILE

Brimbank Housing Strategy Background Analysis

VERSION

1

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ACRONYMS

AAG	Average Annual Growth
AAGR	Average Annual Growth Rate
CBA	Commonwealth Bank of Australia
C1Z	Commercial 1 Zone
CDZ	Comprehensive Development Zone
CIV	Capital Improved Value
DELWP	Department of Environment Land Water & Planning
GRZ	General Residential Zone
HO	Heritage Overlay
LGA	Local Government Area
MAC	Major Activity Centre
MAC	Metropolitan Activity Centre
MAEO	Melbourne Airport Environs Overlay
MUZ	Mixed Use Zone
NEIC	National Employment and Innovation Cluster
NRZ	Neighbourhood Residential Zone
PPN	Planning Practice Note
PPRZ	Public Parks and Recreation Zone
RBA	Reserve Bank of Australia
RGZ	Residential Growth Zone
SEIFA	Social Economic Index For Areas
SHWEP	Sunshine health Wellbeing and Health Precinct
SV	Site Value
VIF	Victoria in Future

EXECUTIVE SUMMARY

Brimbank City Council are in the process of preparing a new Housing Strategy. It will be used as a key input into the development of an updated Residential Development Framework and will influence a Neighbourhood Character Strategy. **The purpose of this project is to compile and analyse demographic and development information that will form part of a Housing Strategy Background Report.** This will be used to inform the revised Housing Strategy and Residential Development Framework for the municipality.

The planning horizon adopted for this project is 20 years (2021 to 2041).

ECONOMY AND DEMOGRAPHICS

- The Victorian economy is recovering from a pandemic induced recession experienced throughout 2020. The job market is improving quickly, but Brimbank is experiencing higher rates of unemployment compared with metropolitan Melbourne, particularly in the southern and central districts.
- Population growth rates across Melbourne are below historical levels due to international border closures – this will impact population growth and housing demand in Brimbank which usually attracts substantial overseas migration. This will impact housing demand until migration rates begin to normalise (2023/24).
- Major public sector investment is planned for the Sunshine Metropolitan Activity Centre, including the Melbourne Airport Rail Link.
- Brimbank has experienced moderate to strong population growth, however historical growth rates have been variable across districts, with limited growth in Keilor and Sydenham/Taylors Lakes, but strong growth in Sunshine, St Albans and Deer Park.
- Brimbank is the second most disadvantaged municipality in metropolitan Melbourne. There are pockets of highly disadvantaged areas in the southern and central districts (e.g., St Albans and Sunshine).
- The housing implications of higher rates of unemployment and lower household incomes include a higher proportion of rental tenure and a lower financial capacity for home ownership.
- A lower spending and borrowing capacity in populous districts such as Sunshine and St Albans indicates a higher need and support for affordable housing (buy and rent).
- Families account for the majority of households, but adult couple and lone person households are projected to make up the greatest share of growth over the planning period.
- There is an ageing population in suburbs in the northern districts (e.g., Keilor, Sydenham & Taylor's Lakes). An ageing community will increase demand for retirement living, aged care and multi-generational households.

HOUSING CHARACTERISTICS, MARKET DEMAND & DEVELOPMENT ACTIVITY

- The overwhelming majority of housing stock is characterised by larger, separate houses (3+ bedrooms). Currently, apartments and units make up a very small proportion of housing stock.
- There is a lack of diversity in housing stock, particularly in established suburbs such as Keilor, Taylors Lakes and parts of Sunshine.
- A greater diversity of housing is needed in Brimbank to serve the projected change in households and demographics over time.
- Housing affordability is an increasingly important issue in Brimbank – only 15% of rental listings in Brimbank are now classed as 'affordable', while a variety of forces are expected to result in decreasing affordability of housing to purchase and a resultant further decline in home ownership.
- Demand for housing in Brimbank is primarily driven by buyers and renters seeking separate houses. These dwellings are in the highest demand both historically and currently.
- Buyers primarily originate from within Brimbank and peripheral suburbs in neighbouring municipalities. Typically, young adult couple and young family first home buyers in Brimbank are either renting in Brimbank

or the neighbouring municipalities of Maribyrnong and Moonee Valley. They are seeking to buy their first house in Brimbank due to greater affordability, housing characteristics and amenity.

- Overseas migrants are an important market segment within Brimbank. Typically, migrant couples and families rent in Brimbank as a steppingstone to later purchase a house in Brimbank or the growth areas in Wyndham and Melton.
- Townhouses are a secondary option for the majority of buyers in Brimbank. With the declining availability of new housing, the market for townhouses is starting to gain momentum, particularly for first home buyers and downsizers.

POPULATION & DWELLING PROJECTIONS

- Population in Brimbank is projected to grow strongly to 2041. Brimbank is forecast to need to approximately 12,700 dwellings over the next 20 years (635 p.a.) to meet demand.
- Sunshine is projected to accommodate more than half of Brimbank's population and dwelling growth, and St Albans is projected to accommodate one quarter of Brimbank's population and dwelling growth.
- In the short term, population growth is expected to be strongly impacted by international border closures given the importance of net overseas migration to Brimbank's historical growth.

DWELLING CAPACITY

- Analysis of potential additional dwelling capacity across the municipality found that the municipality currently has a total capacity for an additional 63,000 dwellings.
- The estimates of housing capacity relate only to land that is currently zoned for residential purposes and exclude sites and precincts are currently under consideration for potential future residential zoning, such as the Sunshine Health, Wellbeing and Employment Precinct (SHWEP) and the Ginifer Station Precinct.
- There is no broadhectare residential land supply available in Brimbank. This is likely to contribute to further growth in land values and house prices as competition increases.
- The vast majority of housing capacity requires the redevelopment of occupied land and therefore is likely to be relatively slow to develop, especially in the GRZ and NRZ. Delivering capacity in these zones depends on the willingness, expertise and financial capacity of thousands of landowners to sell or re-subdivide.
- The future supply of separate dwellings is very limited, meaning that there is unlikely to be a material increase in the number of separate houses available over the strategy period to accommodate the projected increase in families (up to 7,000 additional households). This will manifest in higher house prices and less housing available for rental purposes.
- Larger developments comprise a relatively small proportion of overall future capacity. Larger projects, especially strategic redevelopment sites, present the opportunity to deliver larger volumes of housing that can be masterplanned to meet a variety of housing needs.
- Fragmented landownership is likely to be an ongoing issue in Brimbank, with many areas identified for housing growth requiring consolidation of parcels to create viable development sites (such as the RGZ).
- Most future supply is concentrated in the southern and central sections of the municipality. If there are limited opportunities for new housing to be provided in the northern sections of Brimbank, this limit the extent to which the housing stock 'turns over' in this area, particularly if smaller dwellings are not available for older residents to downsize or move to retirement living alternatives.
- Notable capacity exists in the ACZ, CDZ and RGZ in the Sunshine, Sydenham and St Albans Activity Centres. The housing typologies that will be delivered across these zones will primarily be apartments and will therefore serve market demand for this housing type (a historically weak market in Brimbank). The realisation of capacity in the ACZ, CDZ and RGZ depends on a significant uplift in apartment market demand. This is unlikely to occur until land values increase, migration rates normalise and major public sector investment progresses.

KEY ISSUES FOR STRATEGY

The following key issues have been identified from the analysis for consideration as part of the Housing Strategy.

1. Although the Victorian economy is recovering from the initial impacts of the COVID pandemic, Brimbank is experiencing high rates of unemployment. Maintaining **housing affordability** will be important given these circumstances.
2. Major public sector investment is planned for the Sunshine Metropolitan Activity Centre, including the Melbourne Airport Rail Link, which could increase the attractiveness of this area to future residents and improve the **viability of higher density development** in the medium term.
3. Brimbank is the second most disadvantaged municipality in metropolitan Melbourne, with disadvantage concentrated more in the southern and central districts of St Albans and Sunshine. The availability of **affordable rental and social housing** in these areas will be critical to supporting the social and economic well-being of communities in these areas.
4. An increasing proportion of the Brimbank community is living in rental housing, as opposed to owner-occupied stock. There is both the need to ensure a suitable supply and housing mix of affordable rental accommodation in the municipality, and the need to investigate ways to support **home ownership**.
5. Families account for the majority of households, but adult couple and lone person households are projected to make up the greatest share of growth, meaning that **a variety of housing types will be required** over the planning period to meet needs. This is particularly important in the context of a relatively homogenous housing stock at present.
6. The ageing population in the northern district (e.g., Keilor, Sydenham & Taylors Lakes) will result in increased **demand for retirement living, aged care and multi-generational households** in these areas.
7. The significant and increasing incidence of residents with **south-east Asian ethnicity** should be taken into account when planning for housing needs in the southern and central parts of the municipality.
8. The housing stock in Brimbank is still relatively homogenous, especially compared with neighbouring areas. As housing needs change, a **greater diversity of housing** is required.
9. Most recent housing development has occurred in the GRZ and NRZ, with only limited growth occurring in zones where higher density is encouraged. Measures to **identify and address constraints** to development in the RGZ should be considered by the Strategy.
10. Housing affordability relative to incomes is decreasing, along with home ownership. In particular, rental affordability has decreased dramatically. **Addressing rental affordability is a critical issue** for the strategy.
11. The housing strategy should plan to **facilitate ongoing increases to the housing stock** so that in the order of 13,000 additional dwellings are provided over the period 2021 – 2041.
12. Current and recent demand for housing is primarily for separate houses, especially families and adult couples originating from within Brimbank and neighbouring municipalities. Given that opportunities for separate houses are almost exhausted, the Strategy should seek **new opportunities** where a variety of housing types can be provided to meet family needs.
13. There is a need for a greater supply of smaller dwellings encouraging **downsizing and retirement** moves across the municipality, especially in northern areas, as well as aged care and retirement village opportunities.
14. Although there is sufficient 'capacity' to accommodate dwelling needs over the planning horizon, there is a strong reliance on intensification of existing residential areas and apartment development to convert capacity into supply. Ongoing **large development opportunities** will be important in the short to medium term, especially in the northern district.
15. Sunshine, St Albans and Watergardens present significant opportunities for **apartment development** in locations of high transport accessibility and activity. The realisation of high density housing supply in these areas is likely to be a relatively long term proposition reliant on increases in apartment market demand, normalisation of migration rates, increases in overall housing prices and land values and completion of major public transport and community projects. The Strategy should encourage supporting investment in these locations to underpin their attractiveness to future residents and developers whilst acknowledging the long term nature of their delivery.

1. INTRODUCTION

1.1. PROJECT BACKGROUND

The City of Brimbank's current Housing Strategy (*Home and Housed*) was first adopted in 2012. The Strategy outlined directions to guide housing growth and, to an extent, neighbourhood character. Following the State government release of the new residential zones in 2013, the Strategy was revised and re-adopted in 2014.

Amendment C158 was prepared and gazetted in 2014 and implemented the current Housing Development Framework contained within the Housing Strategy by introducing the full suite of new residential zones.

In 2017, Amendment VC110 modified the Neighbourhood Residential Zone and General Residential Zone to provide the opportunity for neighbourhood character objectives, and for the Residential Growth Zone to include design objectives, in their respective schedules. Councils were given three years to implement neighbourhood character and design objectives to be informed by a municipal neighbourhood character strategy. Council commenced this process in 2018, however, the current draft Neighbourhood Character Study was not finalised and adopted due to the release of two new Planning Practice Notes (PPN).

In December 2019, DELWP released PPN90 (Planning for Housing) and PPN91 (Using the Residential Zones) which established the requirement for an integrated approach to planning for housing and neighbourhood character. As a result of the new guidance, **Brimbank City Council resolved to review and update the current Strategy.**

1.2. PURPOSE

Brimbank City Council are in the process of preparing a new Housing Strategy. It will be used as a key input into the development of an updated Residential Development Framework and will influence a Neighbourhood Character Strategy. **The purpose of this project is to compile and analyse demographic and development information that will form part of a Housing Strategy Background Report.** This will be used to inform the revised Housing Strategy and Residential Development Framework for the municipality.

The planning horizon adopted for this project is 20 years (2021 to 2041).

1.3. SCOPE OF WORK

The scope of this Report is as follows:

- **Strategic & Planning Policy Context** - Review local and state strategies and planning controls relevant to the municipality, including housing and development objectives.
- **Demographic and Housing Profile** - Analyse Brimbank's population, demographics, housing and property market.
- **Housing & Development Activity** - Assess housing and development trends across the municipality to identify the location, scale and type of development that has occurred, is underway or planned. Summarise the key buyer profiles and market segments across residential areas in Brimbank.
- **Population and Dwelling Projections** - Prepare population and dwelling demand projections to identify the scale and location of demand for housing in Brimbank. Estimate housing need in Brimbank and local areas, including the scale and key housing typologies.
- **Housing Capacity Assessment** - Prepare a municipal-wide housing supply assessment that quantifies residential land and estimates the dwelling capacity across Brimbank City Council. Assess the adequacy of residential land supply relative to demand.

- **Findings** - Summarise findings from the research and analysis, and discuss key housing, development and residential land supply and demand considerations that will inform a new Housing Strategy for the municipality.

1.4. BRIMBANK MUNICIPAL PROFILE

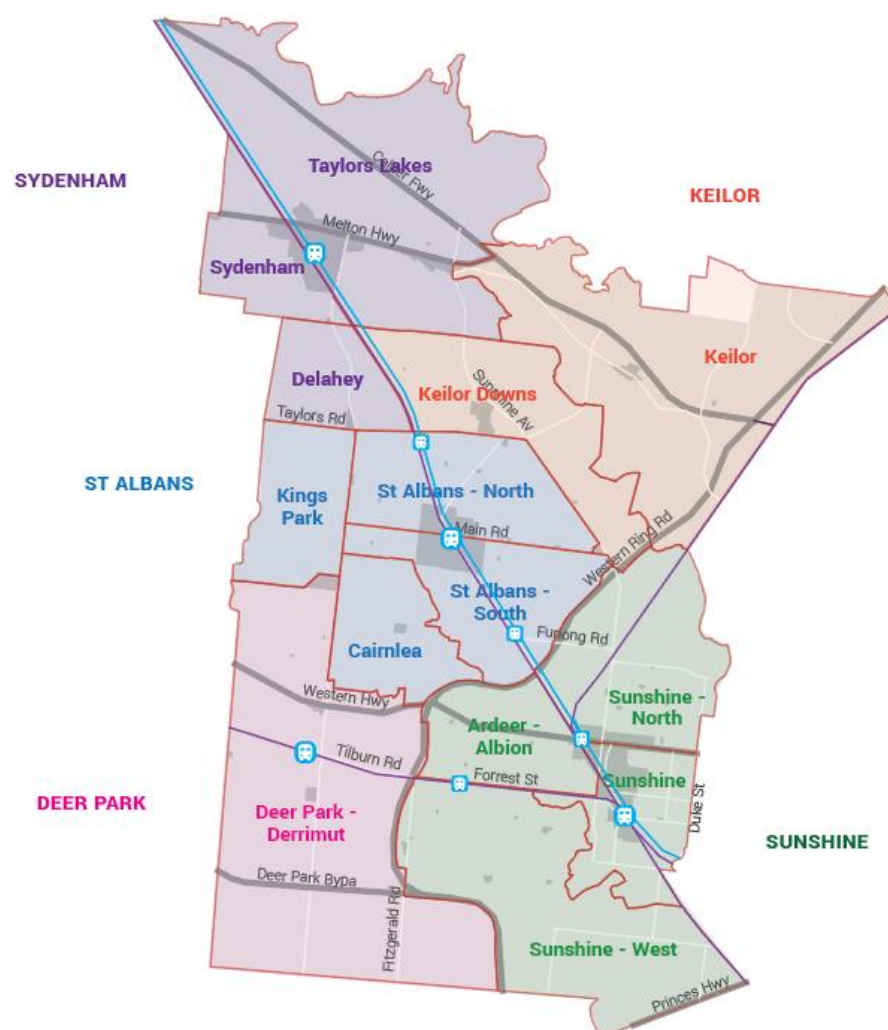
Brimbank is a fast growing municipality in western Melbourne which includes 25 suburbs across five local 'districts', each possessing a distinct identity, culture and heritage.

The municipality is located between 11 and 23 kilometres north-west of the Melbourne Central Business District (CBD) and is centrally positioned between the CBD and residential growth areas to the west.

Brimbank is bound by the City of Hume in the north, the Cities of Maribyrnong, Moonee Valley and Moreland in the east, the Cities of Hobsons Bay and Wyndham to the south and the City of Melton to the west.

The City is well served by an extensive road network that includes the Calder Freeway, the Western Ring Road, Deer Park Bypass, Melton Highway and Ballarat Road. Passenger and freight rail connections include the Sydenham rail line, Melbourne-Ballarat and Melbourne-Bendigo V-lines and the Melbourne to Sydney passenger and freight lines. Transport nodes provide good internal and external connections to central Melbourne, rural Victoria, the Port of Melbourne, Melbourne Airport and the Hume Freeway.

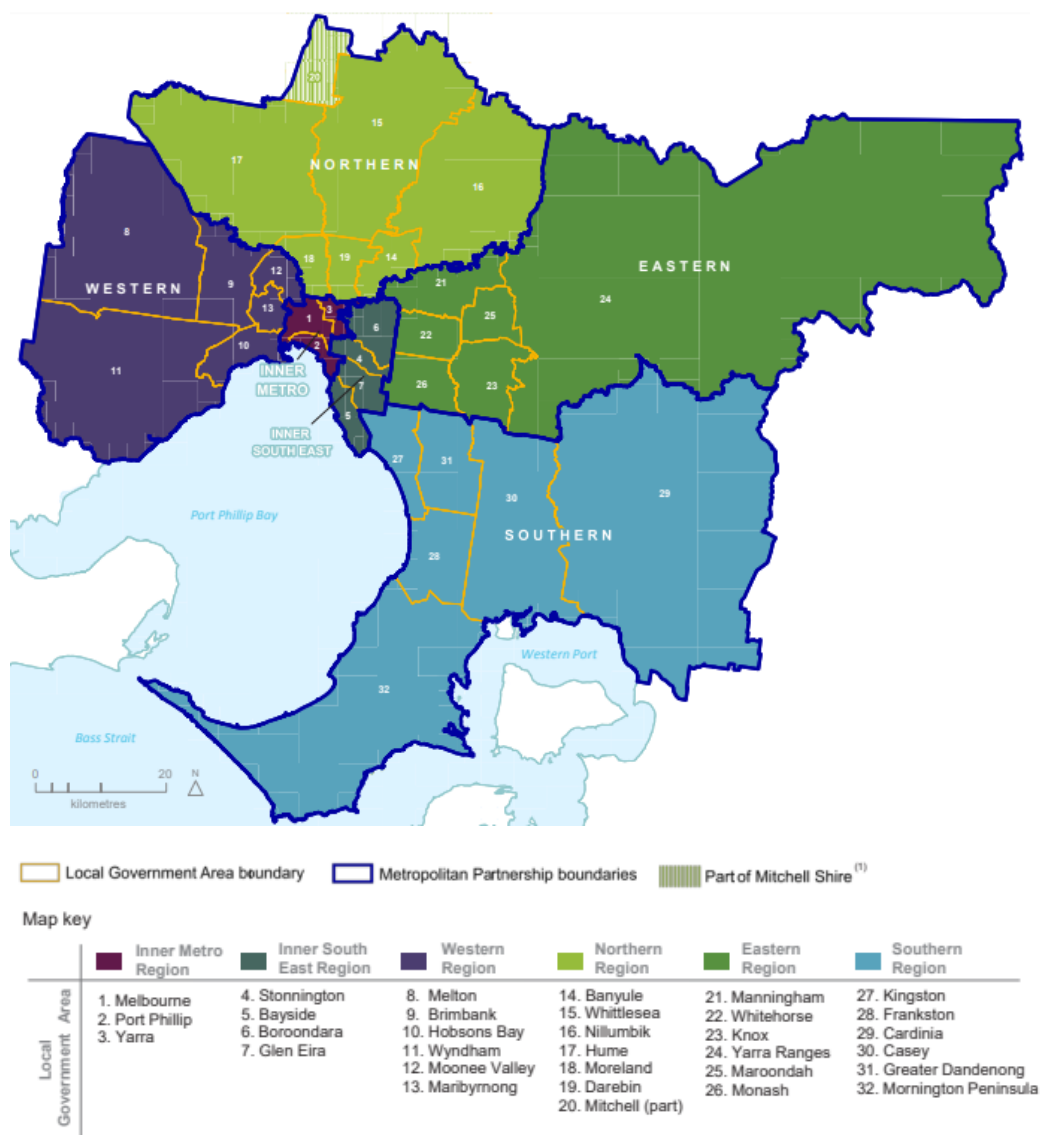
F1. BRIMBANK MUNICIPALITY & DISTRICTS



1.5. WESTERN MELBOURNE

Brimbank is located in the Western Metropolitan Region of Melbourne as shown in Figure 2. The municipality sits between the inner metropolitan region and growth area municipalities of Wyndham and Melton. In terms of housing role, Brimbank is considered an established residential area that is at the interface of fast growing greenfield growth areas such as Tarneit, Rockbank, Melton and Wyndham Vale.

F2. METROPOLITAN MELBOURNE REGIONS, PLAN MELBOURNE



Source: Plan Melbourne, 2017

PLANNING & STRATEGIC CONTEXT



This section includes:

- An overview of local and state planning policy context that is relevant to residential uses, housing, settlement and development in Brimbank.
- An overview of the local and state strategies that are relevant to housing in Brimbank, including priorities for residential development, neighbourhood character, housing diversity and the vision and hierarchy for the activity centre network.
- An assessment of macroeconomic conditions and influences that are influencing the housing market in Brimbank.

2. PLANNING CONTEXT

2.1. INTRODUCTION

This section provides an overview of the current planning policies, controls and Practice Notes most relevant to housing in the municipality.

2.2. STATE PLANNING POLICY

The following state planning policies for housing and settlement are relevant:

Clause 11.01-1R Settlement – Metropolitan Melbourne

- Provides a series of strategies for settlement in Melbourne including maintaining a permanent Urban Growth Boundary, focusing investment to NEICs and Metropolitan Activity Centres, developing a network of activity centres and creating mixed use neighbourhoods including through urban renewal precincts.

Clause 11.02-1S Supply of urban land

- Outlines the need for a supply of urban land with the objective of the policy being “to ensure a sufficient supply of land is available for residential, commercial, retail, industrial, recreational, institutional and other community uses”. Relevant strategies include the need to plan for projected population growth and ensure 15 years supply of land.

Clause 11.02-3S Sequencing of development

- Outlines the need to manage the sequencing of development to ensure services are available for new communities.

Clause 11.03-1S Activity Centres

- Outlines need to encourage a “concentration of major retail, residential, commercial, administrative, entertainment and cultural developments into activity centres that are highly accessible to the community”. The Clause also identifies the need to encourage a diversity of higher density housing in and around activity centres.

Clause 11.03-1R Activity Centres - Metropolitan Melbourne

- Identifies a series of strategies including the need to support the development / growth of MACs through ensuring they are able to accommodate significant growth. In addition, Neighbourhood Activity Centres should be located within walking distance of new development.

Clause 16.01-1S Housing supply

- Provides an objective and a series of strategies for housing supply. The objective is to “facilitate well located, integrated and diverse housing that meets community needs”. Key strategies include:
 - Ensuring an appropriate amount of housing is provided including a range of types such as aged care, supported accommodation for people with disability and social housing;
 - Encourage higher density development (in suitable locations);
 - Facilitate a diverse range of housing; and
 - Plan for growth areas to accommodate a mix of housing types.

Clause 16.01-1R Housing supply - Metropolitan Melbourne

- Provides a series of strategies including identifying opportunities for medium and high-density housing near employment and transport, in established areas facilitate increased housing to create 20-minute

neighbourhoods and create mixed use neighbourhoods with varying densities, and allow for a range of minimal, incremental and high change residential areas.

Clause 16.01-2S Housing affordability

- Identifies an objective “to deliver more affordable housing closer to jobs, transport and services” with supporting strategies including improving housing affordability through a variety of methods including ensuring land supply meets demand, increasing choice in housing type, promoting good design and encouraging new development to include a significant proportion of affordable housing for those with low to moderate incomes.
- Other strategies include increasing supply of well-located housing through ensuring affordable housing and social housing in suburbs, urban renewal precincts and activity centres.

Clause 16.01-5S Residential aged care facilities

- Provides policy for residential aged care facilities identifying the need for the development of well-designed and appropriately located residential aged care facilities be facilitated. Key strategies include provide a mix of housing for older people and ensure local housing strategies and other strategic plans provide for residential aged care facilities.

2.2.1. AMENDMENT VC110

Victorian Planning Scheme Amendment VC110 gazetted on 27 March 2017 implemented the recommendations of the Managing Residential Development Advisory Committee and amended residential zones and introduced minimum garden area requirements. Residential zones included in the Amendment were Mixed Use Zone (MUZ), Township Zone (TZ), Residential Growth Zone (RGZ), General Residential Zone (GRZ) and Neighbourhood Residential Zone (NRZ). Key changes included in the amendment are:

- Allowed neighbourhood character and design objectives to be specified in schedules to residential zones;
- Removed the number of dwellings on a lot requirement in the NRZ;
- Included minimum garden area requirements for the NRZ and GRZ; and
- Introduced maximum building heights in the RGZ, NRZ and GRZ.

2.2.2. PRACTICE NOTES

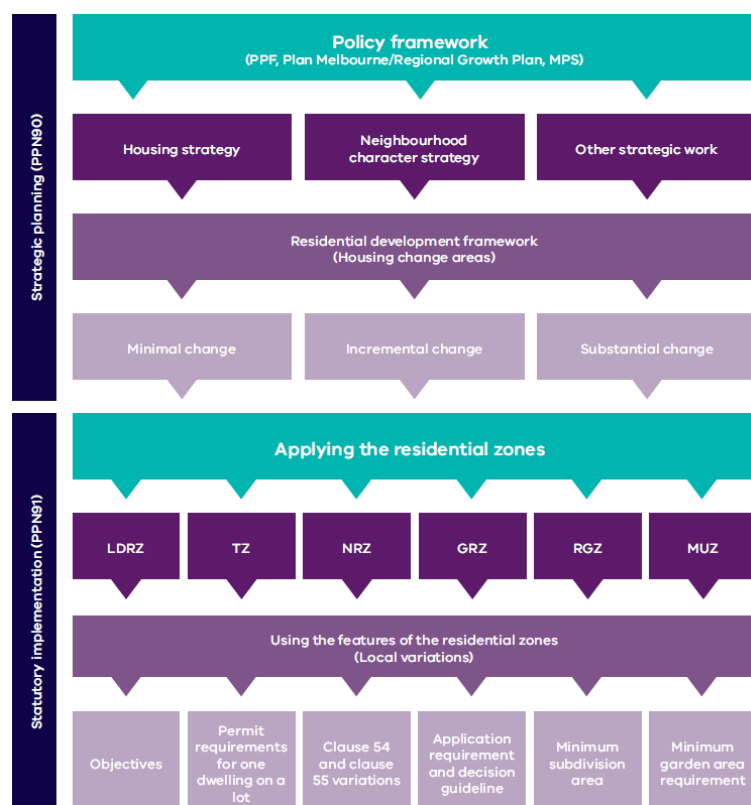
PLANNING PRACTICE NOTE 90

Planning Practice Note 90 (PPN90), released by the Department of Environment, Land, Water and Planning in December 2019 provides guidance for planning for housing. This includes planning for housing growth and protecting neighbourhood character.

PPN90 identifies challenges that can arise from the need for and delivery of housing change and neighbourhood character, and the need to undertake strategic planning work and monitor and review outcomes. In accordance with this, it is identified that a housing strategy should be prepared which:

- *“Ensures a range of housing opportunities are available across the municipality to meet the needs of the projected population;*
- *Outlines the strategies and implementation mechanisms to accommodate the projected population and household needs;*
- *Identifies where and how the housing needs of the future population will be met across the municipality; and*
- *Identifies suitable locations for housing growth including those areas close to services, jobs, public transport and activity centres, and strategic development areas.”*

2.2.3. STATE POLICY FRAMEWORK



Source: Planning Practice Note 90, Department of Environment, Land, Water and Planning.

PLANNING PRACTICE NOTE 91

Planning Practice Note 91 (PPN91), released by the Department of Environment, Land, Water and Planning in December 2019, provides an overview of reforms to the residential zones and guidance for their application.

Key principles identified in PPN91 are:

- Housing and neighbourhood character plans need to be consistent and align with one another when specifying preferred future housing and neighbourhood character outcomes for an area.
- All residential zones support and allow increased housing, unless special neighbourhood character, heritage, environmental or landscape attributes, or other constraints and hazards exist;
- The Residential Growth Zone promotes housing intensification in locations close to jobs, services and facilities serviced by public transport including activity centres;
- The General Residential Zone is a three-storey zone with a maximum building height of 11 metres; and
- The density or number of dwellings on a lot cannot be restricted in the Neighbourhood Residential Zone unless special neighbourhood character, heritage, environmental or landscape attributes or other constraints and hazards exist.

2.3. LOCAL PLANNING POLICY

The following local planning policies for housing and settlement are relevant (noting that these will be reviewed and potentially updated as part of the Housing Strategy process):

Clause 21.02 Key Land Use Issues

- Identifies there are no greenfield development sites remaining in the municipality and therefore population growth will need to be accommodated in infill development. In addition, the Clause identifies the need for smaller and aged care accommodation due to an ageing population.

Clause 21.04 Strategic Land Use Vision

- Identifies the need for neighbourhoods which are well designed of high quality that meet housing diversity needs and higher density in activity centres and the Residential Growth Zone (RGZ). The Clause also identifies the need to identify sites for strategic redevelopment that will provide large scale residential developments.

Clause 21.07 Housing

- Provides a series of issues and objectives to support the implementation of the Brimbank Housing Strategy. Key issues identified include residential growth, housing diversity, residential design and non-residential uses in residential areas. Relevant objectives include:
 - Residential growth objectives - "accommodate appropriate residential growth in identified locations", "protect the operations of Melbourne Airport";
 - Housing diversity objectives - "Ensure a range of housing types are available to meet the diverse needs of residents" and "encourage the development of older persons accommodation".
 - Residential design objectives - "To promote development that is well designed, innovative and responds to its location and context", "To facilitate the development of attractive, safe, high amenity neighbourhoods that have a strong sense of identity and neighbourhood character" and "To ensure new development demonstrates best practice environmentally sustainable design"; and
 - Non-residential uses in residential areas objectives - "To provide community with access to local services" and "to protect the amenity of residential areas from negative impacts of non-residential uses".

Figure 3 shows the 'Residential Framework' plan of Clause 21.07.

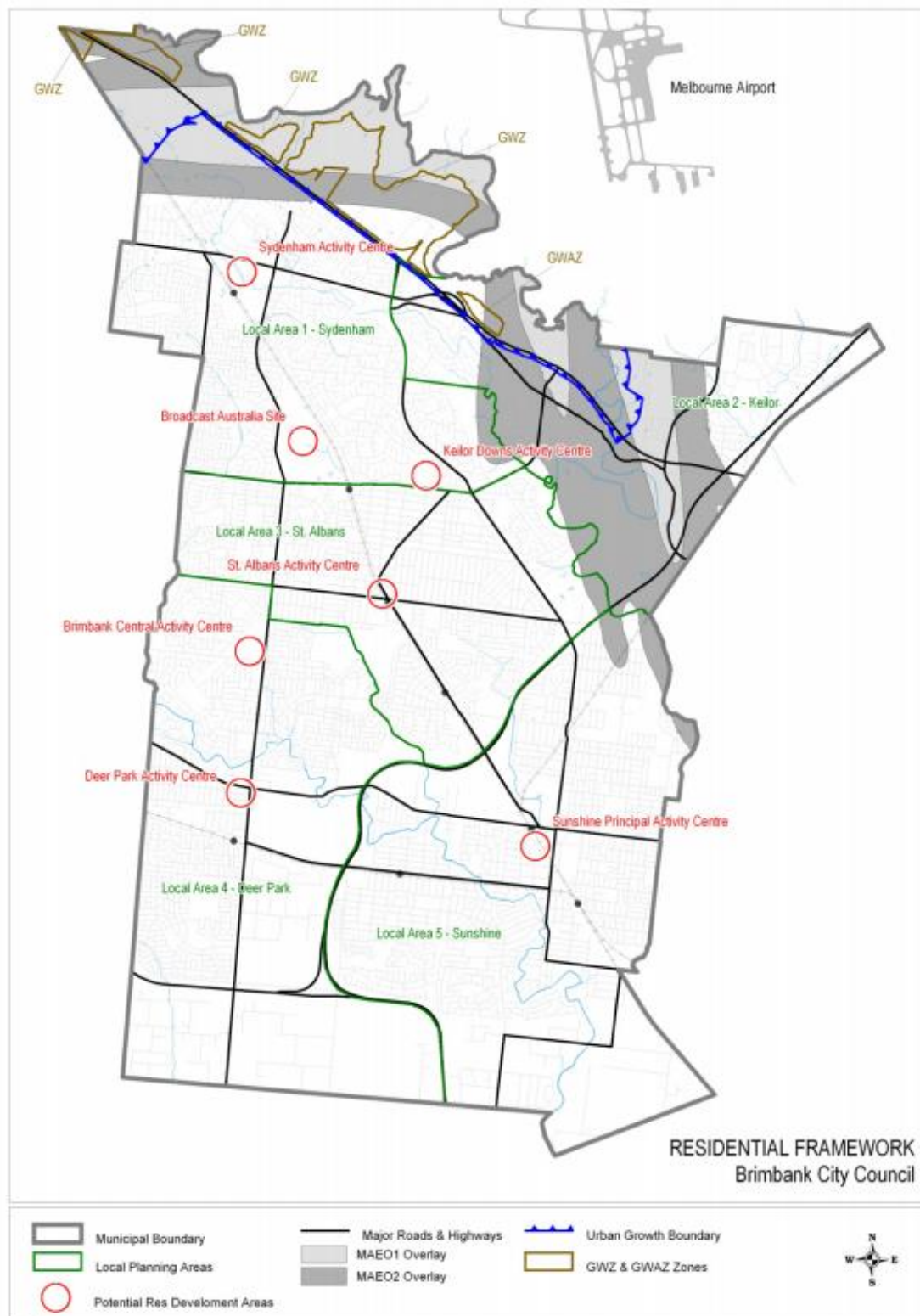
Clause 21.08 Retailing and Activity Centres

- Identifies a series of issues and objectives for activity centres within Brimbank. Relevant policy includes encouraging higher density residential development in activity centres such as Sunshine MAC, Brimbank Central MAC, Deer Park Village MAC, Keilor Downs MAC and Sydenham Regional Activity Centre. In addition, medium density development is encouraged in St Albans MAC.

Clause 22.01 Brimbank Heritage Policy

- Identifies policy relating to the protection of heritage places in the municipality. Key policies include encouraging the retention and restoration of heritage places and to ensure that subdivision or alterations and additions to existing buildings do not adversely affect the significance of heritage places.

F3. RESIDENTIAL FRAMEWORK



Source: Clause 21.07-5 Brimbank Planning Scheme.

2.4. RESIDENTIAL PLANNING CONTROLS

ZONES

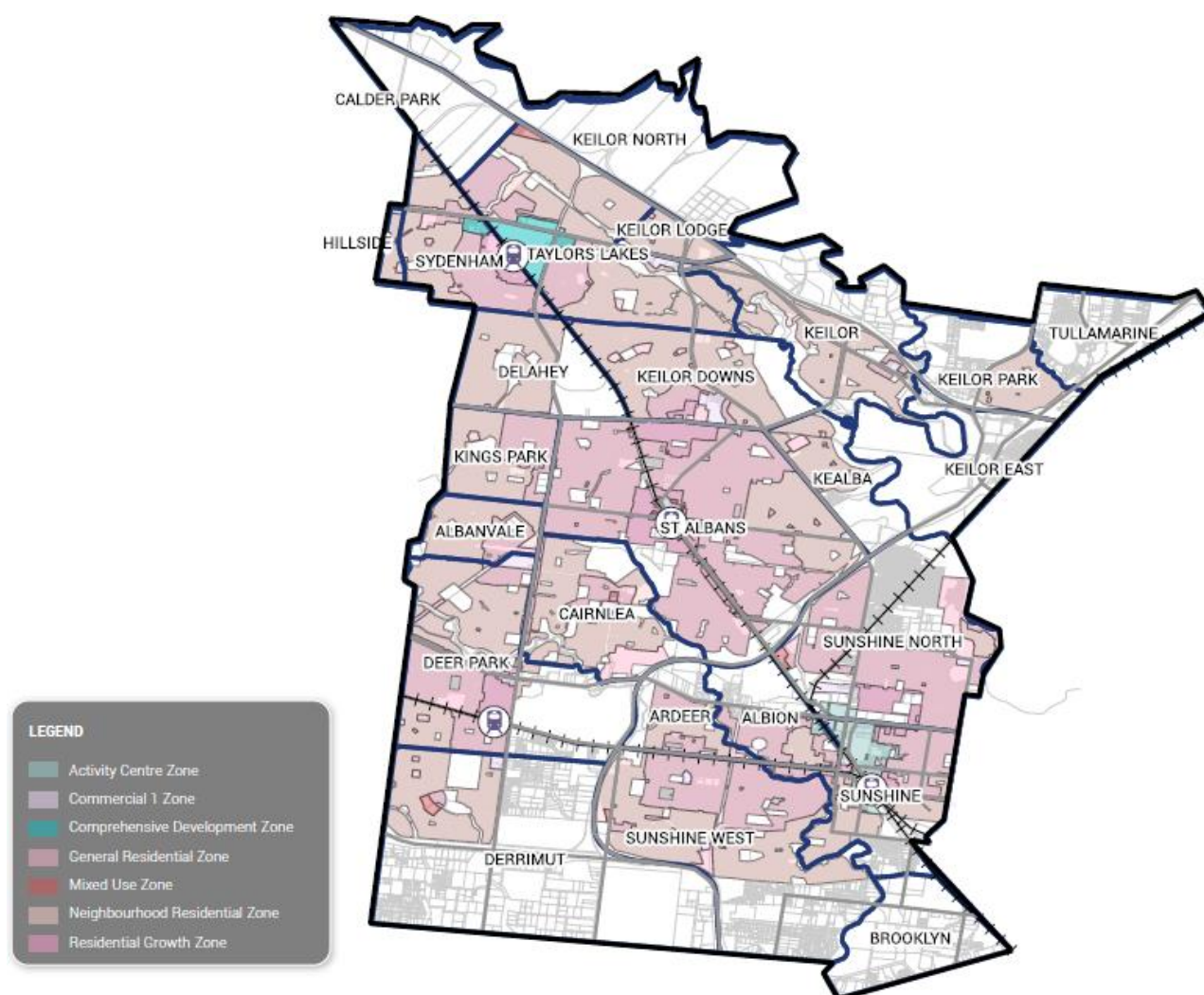
The distribution of residential zones is shown in Figure 4 and summarised in Table 1.

Large sections of land are included in the General Residential Zone and Neighbourhood Residential Zone, with smaller sections of Residential Growth Zone land around the activity centres of St Albans, Deer Park, Keilor Downs and Sydenham.

Several precincts are in zones which contemplate residential uses as part of activity centres such as the Comprehensive Development Zone at Watergardens / Sydenham and the Activity Centre Zone in Sunshine Activity Centre.

Very few properties are in the Mixed Use Zone.

F4. RESIDENTIAL ZONES IN BRIMBANK



Source: Urban Enterprise, 2021.

T1. RESIDENTIAL ZONES IN THE BRIMBANK PLANNING SCHEME

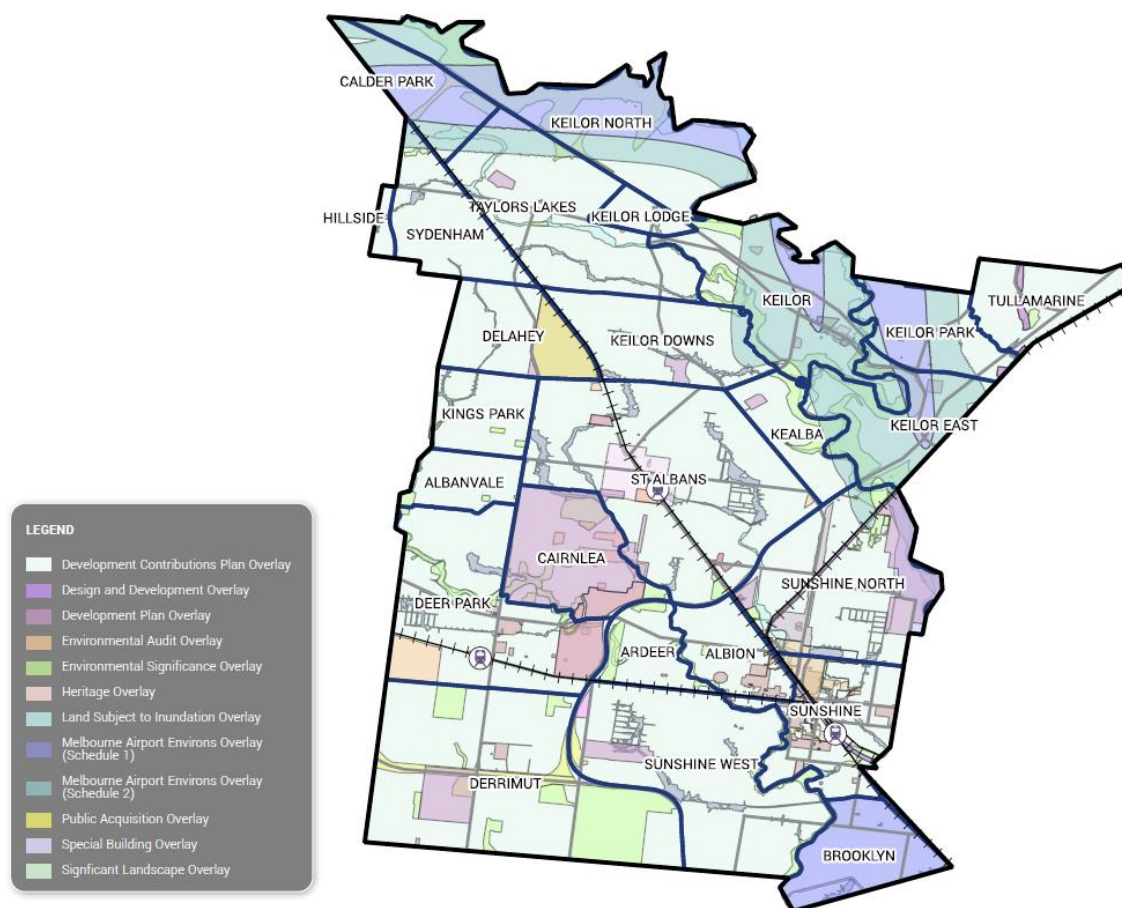
Zone	Purpose	Schedules
Residential Growth Zone (RGZ)	<p>To provide housing at increased densities in buildings up to and including four storey buildings.</p> <p>To encourage a diversity of housing types in locations offering good access to services and transport including activity centres and town centres.</p> <p>To encourage a scale of development that provides a transition between areas of more intensive use and development and other residential areas.</p> <p>To ensure residential development achieves design objectives specified in a schedule to this zone.</p> <p>To allow educational, recreational, religious, community and a limited range of other non-residential uses to serve local community needs in appropriate locations.</p>	Schedule 1
General Residential Zone (GRZ)	<p>To encourage development that respects the neighbourhood character of the area.</p> <p>To encourage a diversity of housing types and housing growth particularly in locations offering good access to services and transport.</p> <p>To allow educational, recreational, religious, community and a limited range of other non-residential uses to serve local community needs in appropriate locations.</p>	Schedule 1 Schedule 2
Neighbourhood Residential Zone (NRZ)	<p>To recognise areas of predominantly single and double storey residential development.</p> <p>To manage and ensure that development respects the identified neighbourhood character, heritage, environmental or landscape characteristics.</p> <p>To allow educational, recreational, religious, community and a limited range of other non-residential uses to serve local community needs in appropriate locations</p>	Schedule 1 Schedule 2
Comprehensive Development Zone (CDZ)	To provide for a range of uses and the development of land in accordance with a comprehensive development plan incorporated in this scheme	Schedule 1 Schedule 2
Activity Centre Zone (ACZ)	<p>To encourage a mixture of uses and the intensive development of the activity centre:</p> <p>As a focus for business, shopping, working, housing, leisure, transport and community facilities.</p> <p>To support sustainable urban outcomes that maximise the use of infrastructure and public transport.</p> <p>To deliver a diversity of housing at higher densities to make optimum use of the facilities and services.</p> <p>To create through good urban design an attractive, pleasant, walkable, safe and stimulating environment.</p> <p>To facilitate use and development of land in accordance with the Development Framework for the activity centre.</p>	Schedule 1
Mixed Use Zone (MUZ)	<p>To provide for a range of residential, commercial, industrial and other uses which complement the mixed use function of the locality.</p> <p>To provide for housing at higher densities</p> <p>To encourage development that responds to the existing or preferred neighbourhood character of the area.</p> <p>To facilitate the use, development and redevelopment of land in accordance with the objectives specified in a schedule to this zone.</p>	Schedule 1
Commercial 1 Zone (C1Z)	<p>To create vibrant mixed use commercial centres for retail, office, business, entertainment and community uses.</p> <p>To provide for residential uses at densities complementary to the role and scale of the commercial centre.</p>	

Source: Brimbank Planning Scheme

OVERLAYS

Planning overlays that apply to residential land in Brimbank are shown in Figure 5. The overlays which have the greatest impact on housing capacity and development are the Design and Development Overlay (with various schedules) and the Melbourne Airport Environs Overlay.

F5. OVERLAYS IN BRIMBANK



Source: Urban Enterprise, 2021.

2.5. KEY POINTS

- The current housing strategy and policy acknowledges the absence of greenfield residential land in the municipality and directs housing growth to six activity centres and one major urban renewal site.
- State planning policy and guidance for housing directs residential development and intensification to activity centres, urban renewal precincts and other locations near employment and transport.
- State policy requires Councils to provide at least 15 years supply of residential land and to ensure that a variety of housing types are available to meet projected demand.
- Recent Practice Notes confirm that all residential zones support and allow increased housing.
- Brimbank currently has land across all urban residential zones, as well as isolated local areas in other zones which can accommodate housing including the Mixed Use Zone, Commercial 1 Zone, Comprehensive Development Zone and Activity Centre Zone.
- Few overlays apply to residential areas. The overlays which have the greatest impact on housing capacity and development are the Design and Development Overlay (with various schedules) and the Melbourne Airport Environs Overlay.

3. STRATEGIC CONTEXT

3.1. OVERVIEW

This section provides an overview of the local and state strategies that are relevant to housing in Brimbank, including priorities for residential development, neighbourhood character, housing diversity and the vision and hierarchy for the activity centre network.

3.2. STATE STRATEGY

3.2.1. PLAN MELBOURNE (2017)

Plan Melbourne is a 35-year Strategy prepared by the Department of Environment, Land, Water and Planning in 2017 to guide the future development of Melbourne. The Plan provides guidance for long term planning including infrastructure and transport and supports the economic development of the City.

Plan Melbourne identifies **Sunshine** as a **Metropolitan Activity Centre** and as the location of a National Employment and Innovation Cluster (**NEIC**), supporting significant development and investment in the suburb. The Sunshine NEIC encompasses the Sunshine Metropolitan Activity Centre as well as Sunshine Hospital and the St Albans Major Activity Centre.

The Plan also promotes 20-minute neighbourhoods which support local communities having most of their everyday needs within a 20-minute walk, cycle or public transport trip from their house. Everyday needs include having local shopping centres, schools, playgrounds, affordable housing options, public transport and local employment opportunities.

Plan Melbourne identifies designates substantial areas for urban growth (primarily residential) in the western region. Major urban growth is planned for the municipalities of Melton and Wyndham in close proximity to Brimbank's western boundary.

3.3. LOCAL STRATEGY

3.3.1. BRIMBANK HOUSING STRATEGY

Brimbank's Housing Strategy (Home and Housed, 2014), provides guidance and policy for ensuring adequate housing is available for the current and future community in the municipality. The Strategy identifies locations for future residential development including infill development and strategic redevelopment sites.

The Strategy identifies issues and future directions for a series of planning districts in the municipality. The key issues and future directions for each district is summarised in Table 2.

T2. ISSUES AND DIRECTION FOR PLANNING DISTRICTS

District	Population Issues	Current Housing	Housing Issues	Directions
Sunshine	Significant population growth. Ageing population.	Primarily one or two storey units or houses. Limited housing in around Sunshine Town Centre.	Need for greater variety and choice.	Higher density housing in / around Sunshine Town Centre and medium density around the edge of the Sunshine Town Centre.
Deer Park	Moderate population growth.	Primarily one or two storey units or houses; Established housing in Deer Park.	Need for greater variety and choice.	Focus on higher density housing in / around Deer Park town centre and Deer Park railway station. Medium density housing around the edge of Deer Park Town Centre, Brimbank Central, Cairnlea Town Centre and Lennon Parkway Community Hub. Protect remaining residential suburbs and neighbourhood character. Ensure adequate physical and social infrastructure, including green open space.
St Albans	Moderate population growth.	Primarily one or two storey units or houses.	Need for greater variety and choice.	Higher density housing in / around St Albans town centre with medium density around the town centre. Protect residential suburbs and neighbourhood character, ensure adequate physical and social infrastructure.
Sydenham	Moderate population growth.	Primarily one or two storey units or houses. Number of new aged care and apartments.	Need for greater variety and choice.	Focus higher density in / around Watergardens and areas to north of Keilor Downs shopping centre
Keilor	Little population growth. Ageing population.	Primarily one or two storey units or houses.	Need for self-contained housing for elderly.	Focus medium density housing in / around Keilor Village. Retain low density outside Keilor Village, protect remaining residential suburbs and neighbourhood character. Ensure adequate physical and social infrastructure, including green open space.

Source: Brimbank City Council Housing Strategy 'Home and Housed', 2014, pp 11.

The Strategy outlines a need to address the following:

- **Adaptable housing** - encouraging adaptable design in new developments, advocate to the Australian Building Code for a minimum amount of housing within multi-unit developments to be adaptable and engage with the Victorian Government for an adaptable housing regulatory framework.
- **Social housing** - actions include facilitating the provision of indigenous, public and community housing, ensuring existing social housing is protected and future supply is encouraged, and advocating to the Office of Housing for the maintenance / replacement of existing residential buildings.
- **Housing diversity and choice** - actions including increasing housing choice (style of homes, number of bedrooms etc), encourage a mix of private and social housing, encourage housing to meet needs of people with a disability as well as older and younger people.
- **Housing affordability** - actions include encouraging developers to supply dwellings at varying price points as well as affordable housing, promote higher density housing in suitable locations such as town centres and development partnerships with organisations and government to facilitate additional community and crisis housing.

3.3.2. NEIGHBOURHOOD CHARACTER STUDY, DRAFT (2019)

The Draft Neighbourhood Character Study prepared by Council in 2019 identifies a series of neighbourhood objectives for residential land in Brimbank.

The Study included consultation with the community and an audit of neighbourhood character across all residential land in Brimbank. As a result, the Study identified 11 distinct character types including surrounds of activity centres and transport hubs (RGZ1), residential development from the 1950s onwards (GRZ1), development from 2000s (GRZ2) and River Valley in General Residential Zone (GRZ4). For each character type, the existing character and preferred future character as well as new objectives and ResCode requirements are identified.

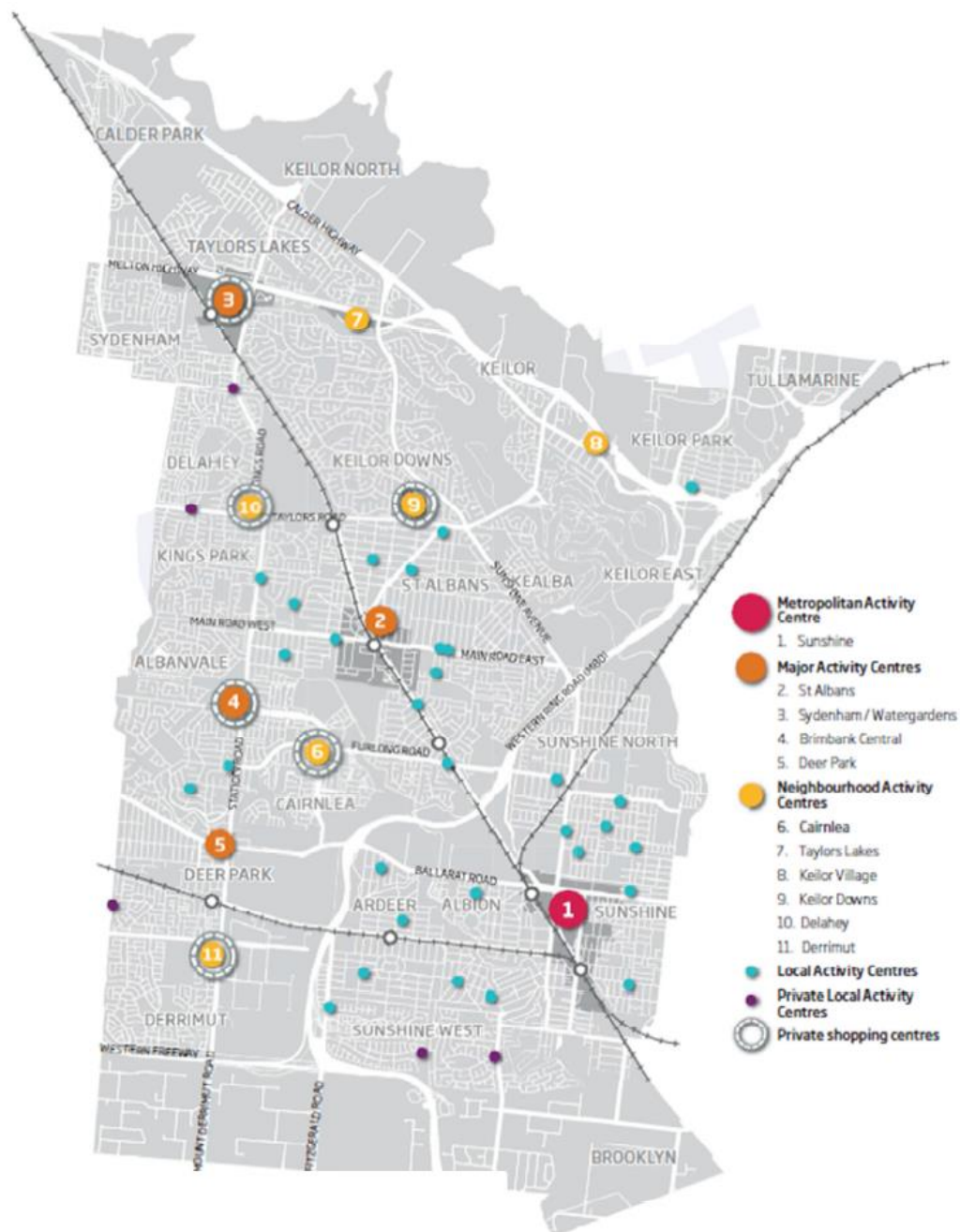
The Study has not progressed to a Planning Scheme Amendment due to the release of Planning Practice Notes 90 and 91 which include changes to planning for residential areas.

3.4. ACTIVITY CENTRES

3.4.1. ACTIVITY CENTRE STRATEGY

The Brimbank Activity Centre Strategy was prepared by Council in 2018 and provides guidance for the future development of activity centres within the municipality. The Activity Centre Hierarchy is shown in Figure 6.

F6. ACTIVITY CENTRE HIERARCHY



Source: Brimbank Activity Centre Strategy, 2018.

The Strategy identifies six principles to assist Council in decision making for Activity Centres:

16. All residential areas within Brimbank should be able to conveniently access a range of Activity Centres;
17. Activity Centres should be attractive, safe and a focus for the surrounding neighbourhood and community life;
18. Encourage a business-friendly environment that supports local employment and service opportunities;
19. Encourage sustainability through mixed use centres with commercial, retail services and housing and environmentally sustainable design;
20. Activity Centres should be accessible, integrated, street-based centres that are connected by multiple modes of transport; and
21. Encourage investment to improve Activity Centres.

3.4.2. PLANNING DIRECTIONS AND OBJECTIVES

Several planning strategies have been prepared for the Sunshine and St Albans Activity Centres. Table 3 summarises the relevant directions and objectives from each document.

The following directions are considered relevant to residential development and housing:

- In the Sunshine NEIC:
 - Provide a greater range of new housing stock and accommodation in locations that are well-served by transport and services.
 - Intensify density in the Main Street and Albion Station Precinct and increase opportunities for higher density housing in the Ballarat Road Precinct. In the Southern Village Precinct, investigate opportunities to transition industrial area to commercial/residential, and encourage shop top housing.
- In St Albans, increase infill redevelopment and medium density development in close proximity to retail and transport amenity.

T3. ACTIVITY CENTRE PLANNING DIRECTIONS & OBJECTIVES

Activity Centre	Planning Document (source)	Relevant directions, objectives
Sunshine National Employment & Innovation Centre (NEIC)	Framework Plan (draft), 2017	Provide a greater range of new housing stock and accommodation in locations that are well-served by transport and services.
Sunshine Town Centre	Structure Plan, 2014	<p>Main Street Precinct – residential density to intensify in the east to medium density and the west to intensify over time. Strategies including promoting housing above the ground floor.</p> <p>Ballarat Road Precinct – increase opportunities for higher density housing.</p> <p>Southern Village Precinct – transition of existing industrial areas to commercial or residential and encouraging shop top housing.</p> <p>Albion Station Precinct – Supports the intensification of uses.</p>
St Albans	Structure Plan, 2015	<p>Key opportunities: Student housing in accordance with the expansion of the Victoria University St Albans Campus Increased infill development and locations for larger scale redevelopment.</p> <p>Key objectives: Increase infill redevelopment, increase medium density residential development (in close proximity to retail core and train station).</p>

Source: Refer to table.

3.5. KEY POINTS

- Planning policy and strategic objectives outline the need to:
 - Provide sufficient, adequate and affordable housing accessible to the activity centre network.
 - Ensure a range of housing types are available to meet the diverse needs of residents.
- Given the absence of broadhectare land supply, future residential development will occur through infill development, urban renewal areas and redevelopment of sites that permit residential intensification.
- Sunshine is a Metropolitan Activity Centre that will support ongoing development and investment, and is expected to accommodate significant population, housing and employment growth.
- St Albans and Watergardens (Sydenham) are planned to accommodate residential intensification through application of the RGZ and CDZ.
- Other Neighbourhood Activity Centres in Brimbank are in more established residential areas that perform a local retail service role and are not expected to undergo major residential change or development in the near future.
- An ongoing priority for Brimbank is to ensure residents have access to retail, hospitality, community, commercial, transport and cultural amenity within Activity Centres.

4. ECONOMIC AND PROPERTY MARKET CONDITIONS

4.1. INTRODUCTION

This section provides an assessment of macroeconomic conditions and trends that are influencing the housing market in Brimbank. The focus of this section is primarily on current market conditions, recent trends and major projects that are likely to influence the municipal property market and economic during the planning period.

The municipality is undergoing a period of change through urban growth, development and intensification that is being driven by a combination of population and employment growth, private and public sector investment and major infrastructure projects.

4.2. STATE AND NATIONAL HOUSING MARKET

Median house prices fell across Melbourne during 2020, however since Melbourne emerged from lockdown in October 2020, confidence has returned to the market and house prices recently surpassed pre-pandemic levels.

Melbourne is expected to experience strong house price growth throughout 2021 and 2022. The Commonwealth Bank of Australia (CBA) forecast national house prices to rise between 12%-16% over the next two years, however the outlooks for houses and units vary, with the latter forecast to increase by around 9% over the next two years.¹

All major banks have recorded an uplift in new home loan commitments in 2021, which is attributed to improving employment conditions, lower than expected rates of unemployment and record low interest rates. Based on the Reserve Bank of Australia's (RBA) forward guidance, interest rates are expected to remain at very low levels until 2024.²

Government related stimulus measures have supported national and Victorian prices over the past 12 months such as the homebuilder stimulus and stamp duty concessions. These measures have brought forward demand to an extent, and both will cease in 2021.

IMMIGRATION

A key factor affecting the property market at present is international border closures. Australia's immigration program has underpinned close to three decades of consistent economic growth and has contributed to population-led demand for housing. The Federal Government projects that there will be a notable loss of overseas migration in Australia in the 2021 and 2022 financial years (both temporary and permanent residents).

The Federal Budget projects that Net Overseas Migration will fall to -72,000 by the end of 2021 financial year. The net loss is expected to continue until international borders are reopened (planned for mid-2022). From there, a gradual increase in overseas migration is forecast, with the attraction of up to 200,000 migrants in 2024 financial year (pre-covid levels). This is discussed further in the 'Housing Need' section.

¹ Australian Property Values, CBA, March 2021

² RBA / CBA Property Price Analysis, February 2021

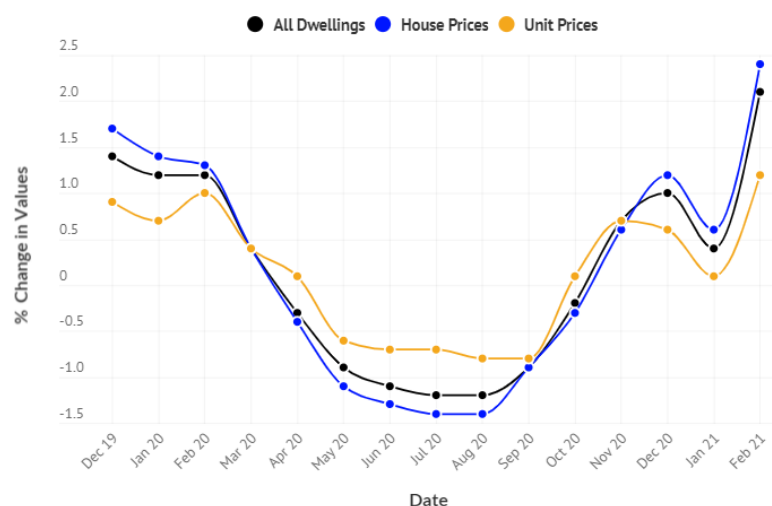
4.3. MELBOURNE HOUSE AND UNIT PRICES

Melbourne's property market has experienced long term price growth, underpinned by strong population growth and stable economic conditions. Over the past 12 months, economic and property market conditions have been severely disrupted due to the impacts of the COVID-19 pandemic. The following indicators summarise the key recent movements in the market since 2019.

Recent house and unit price trends in Melbourne include the following:³

- Melbourne emerged from its second lockdown in October 2020 and confidence returned to the market. Dwelling values started rising again to end 2020 (+3%), largely driven by pent-up buyer demand.
- House values rose again in early 2021 supported by low interest rates, government incentivised building grants and renewed participation from first-home buyers and surpassed pre-pandemic highs by 1% in February 2021.
- Apartments are expected to weigh down the overall Melbourne market in 2021, largely due to international border closures and a reduction in internal and overseas migration.
- House prices have increased strongly in 2021 and are projected to continue to increase strongly in 2022 and 2023. Apartment price growth is likely to be more subdued, particularly in inner Melbourne.

F7. HOUSE AND UNIT PRICE GROWTH, MELBOURNE, DEC 2019 TO FEB 2021



Source: CoreLogic Hedonic Home Value Index, January 2021

4.4. RENTAL MARKET, MELBOURNE

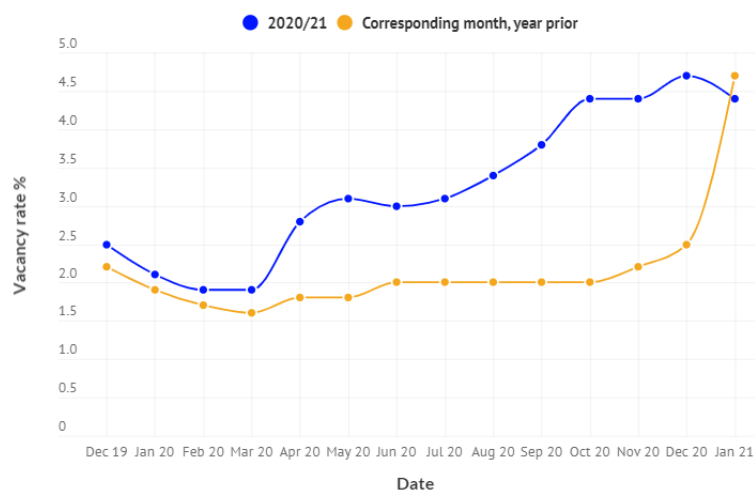
Recent trends across Melbourne's rental market are as follows:⁴

- The relatively low levels of rental investment activity may have been compounded by weak rental markets, particularly in highly-concentrated investment markets like inner-city Melbourne, which are largely comprised of unit stock.
- Rental listings have more than doubled across Melbourne in the last 12 months, indicating a potential oversupply. This has led to a slight decline in rental prices for both units and houses.
- Unit rents have seen weaker performance than houses over the year, which may see investor demand gravitate toward houses.

³ Melbourne Housing Market Insights, Urban Developer, February 2021

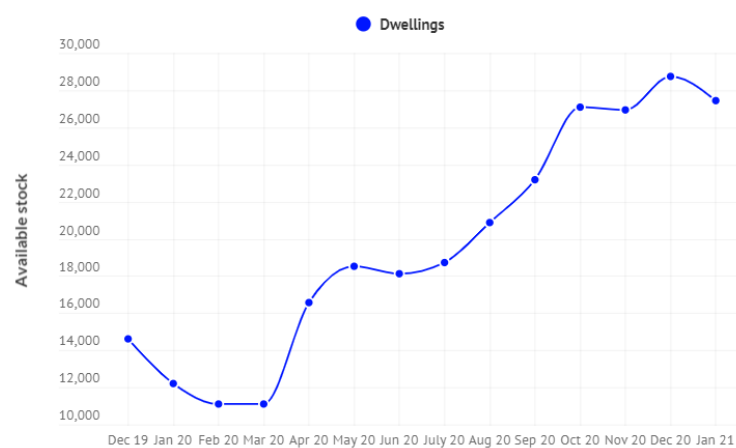
⁴ Melbourne Housing Market Insights, Urban Developer, February 2021

F8. RENTAL VACANCY RATE, MELBOURNE



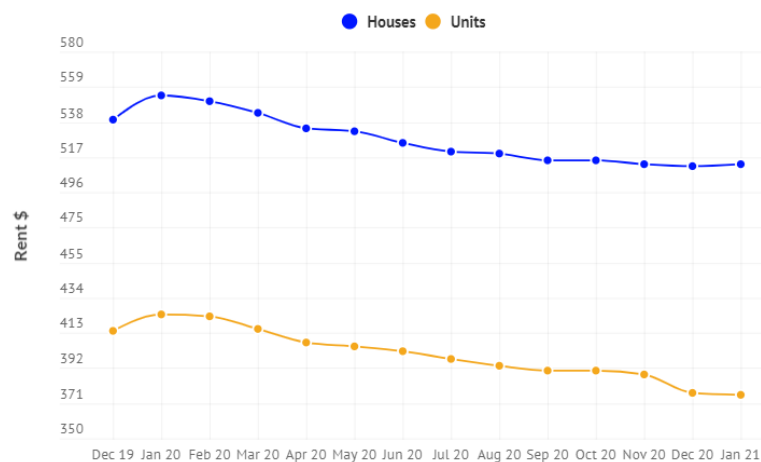
Source: SQM Research, January 2021

F9. RENTAL LISTINGS, MELBOURNE



Source: SQM Research, January 2021

F10. RENT PRICES, MELBOURNE



Source: SQM Research, January 2021

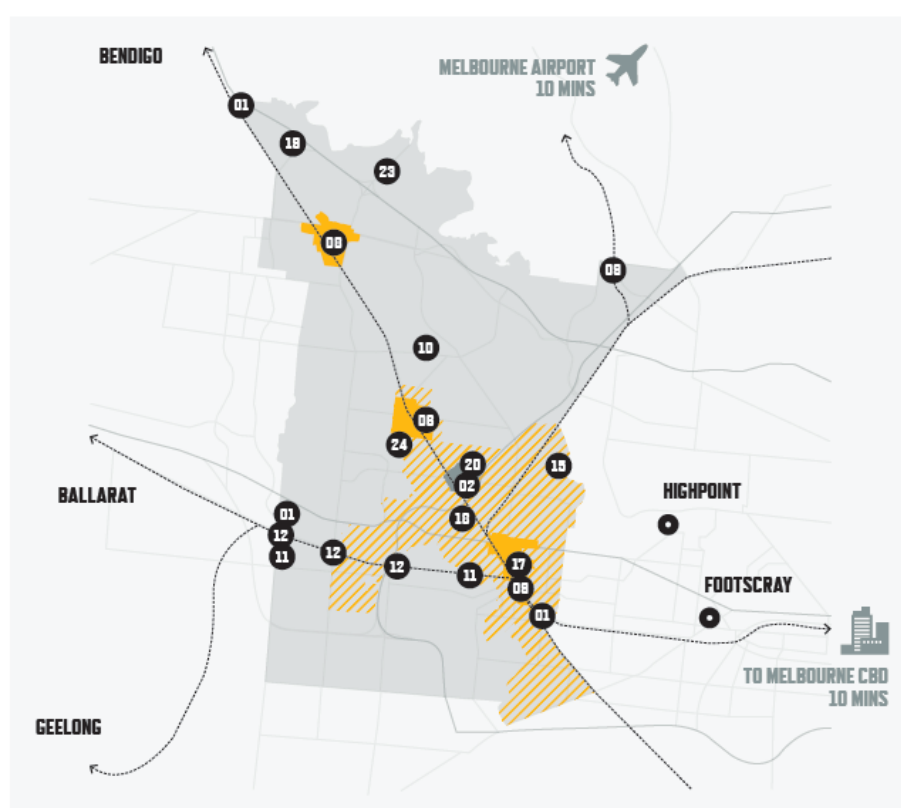
4.5. MAJOR INFRASTRUCTURE AND INVESTMENT

Over the last decade over \$2 billion in private and public investment has been delivered in Brimbank. Figure 11 shows the location of major projects that have either recently been completed, are in the investment pipeline or form part of the infrastructure 'vision' for Brimbank⁵.

The investments proposed:

- Are primarily concentrated in and around the Sunshine Activity Centre;
- Commonly relate to road and rail transport infrastructure;
- Include several community facilities and health, wellbeing and education uses;
- Include several employment precincts and retail investments; and
- Include few projects relevant to residential development.

F11. MAJOR PROJECTS, BRIMBANK



- | | |
|---|-----------------------------------|
| 01. MAJOR RAIL INVESTMENT | 10. ENERGY PARK |
| 02. SUNSHINE HEALTH AND WELLBEING PRECINCT | 18. CALDER PARK DRIVE INTERCHANGE |
| 08. DOWERY THEATRE AND ST ALBANS COMMUNITY CENTRE | 20. SHWEP |
| 08. WATERBARDENS SHOPPING CENTRE UPGRADE | 22. NO NET EMISSIONS* |
| 08. MELBOURNE AIRPORT RAIL AND SUNSHINE SUPER HUB | 23. SYDENHAM PARK |
| 10. ST ALBANS HEALTH AND WELLBEING HUB | 24. VIC UNI @ ST ALBANS |
| 11. ELECTRIFICATION OF MELTON AND WYNDHAM VALE LINE | |
| 12. DEER PARK LEVEL CROSSING REMOVALS | |
| 15. NEW RESIDENTIAL ESTATES | |

*All of Brimbank.

Source: Leading with Vision, Transforming Brimbank Future Priorities 2050 (draft), Brimbank City Council 2021.

⁵ Leading with Vision, Transforming Brimbank Future Priorities 2050 (draft), Brimbank City Council 2021.

RECENTLY COMPLETED PROJECTS

Recently completed major projects in Brimbank are summarised in Table 4. Major projects that have been delivered relate to range of uses, precincts, facilities and activities. One of the most significant ongoing projects is the Sunshine Health, Wellbeing and Education Precinct (SHWEP). Since 2013, more than \$300 million has been invested in the precinct, strengthening its role as a major health, wellbeing and education precinct.

T4. RECENTLY COMPLETED PROJECTS, BRIMBANK

Project	Project Type	Overview
Sunshine Health, Wellbeing and Education Precinct (SHWEP)	Health, wellbeing, education	Since 2013 there has been approximately \$324m of major projects delivered within the SHWEP: - \$200 million Joan Kirner Women's and Children's Centre - Victoria University \$30 million nursing practice education - \$34.9 million redevelopment of the emergency department at the hospital
Major Rail Investment	Transport	Grade separations and new stations at Ginifer and St Albans. Relocation of the Ginifer Station closer to Furlong Road.
VicRoads the Hub at Sunshine	Commercial, transport, employment	\$25 million development of VicRoads' North West regional offices.
Brimbank Community and Civic Centre	Community	\$52 million Brimbank Community and Civic Centre and Sunshine Library
Victoria University Sunshine Skills Hub & Construction Futures Training Facility	Education	\$35 million Sunshine Skills Hub comprises innovation spaces, health and community services and early childhood and paramedical education. \$44.2 million trade training centre accommodated the Polytechnic construction program.
Watergardens Shopping Centre Upgrade	Retail, hospitality	\$50 million upgrade to create a new 5,000 sqm food marketplace
Bowery Theatre and St Albans Community Centre (STACC)	Community, arts and culture	\$8.9 million St Albans Community Centre (STACC) and Bowery Theatre includes performance, exhibition and arts space.

Source: Leading with Vision, Transforming Brimbank Future Priorities 2050 (draft), Brimbank City Council 2021.

PIPELINE PROJECTS

The most significant pipeline project planned for Brimbank is the Melbourne Airport rail link, which is proposed to travel through Sunshine; transforming the Activity Centre into a major transport hub. Planning and development work is underway for the airport rail link, with construction due to start in 2022. The target completion date is 2029.

The Western Rail Plan has also committed to extending the metropolitan train network into Melton and Wyndham Vale, presenting further opportunities for Brimbank to leverage increased trains and passengers.

T5. PIPELINE PROJECTS, BRIMBANK

Project	Project Type	Overview
Melbourne Airport Rail and Sunshine Super Hub	Transport	Melbourne Airport Rail will transform Sunshine Station into a Super Hub for the Victorian rail network.
St Albans Health and Wellbeing Hub	Health and wellbeing	\$60 million St Albans Health and Wellbeing Hub which will provide an integrated centre for social cohesion, wellbeing and healthy living in St Albans.
Western Rail Plan (WRP)	Transport	Western Rail Plan (WRP) commits to extending the metropolitan train network to Melton and Wyndham Vale.
Hampshire Road, Sunshine	Transport, public realm, open space	Council has already invested \$13 million to upgrade Sunshine's Hampshire Road to create a grand boulevard and public space for the CBD.
New Residential Estates	Housing	Major residential in-fill developments in Brimbank will deliver 63 ha of new residential land accommodating an additional 3,520 dwellings. 3,100 new residential lots created in Cairnlea on 41 hectares. 300 dwellings at the 12.5 ha former City West Water site in Sunshine North. 120 lots on 9.5 hectare site in Taylors Lakes. Additional sites are being actively developed / considered for rezoning.
Deer Park Level Crossing Removal	Transport	Mt Derrimut Road/Station Road and Robinsons Road will be delivered by 2025. The Mount Mt Derrimut Road/Station Road level crossing removal will also include a new Deer Park Station.

Source: Leading with Vision, Transforming Brimbank Future Priorities 2050 (draft), Brimbank City Council 2021

VISIONARY PROJECTS

Visionary projects are outlined in Transforming Brimbank, Future Priorities 2050, prepared by Brimbank City Council. Visionary projects are consistent with current planning priorities and mostly relate to strengthening the role and function of Sunshine CBD and the SHWEP.

T6. VISIONARY PROJECTS, BRIMBANK

Project	Project Type	Overview
Sunshine CBD	Employment, housing, retail, community, transport, arts and culture	<p>Vision for Sunshine CBD:</p> <ul style="list-style-type: none"> - World-class public transport at Sunshine Super Transport Hub - Significant office use anchored by a government and law district and education facilities. - An expanded tertiary education offering - Medium to high density residential and mixed use developments supporting a vibrant café culture and nightlife. - New hotels and convention centres. - A new state significant art gallery or museum. - Enhanced community facilities including a modern leisure centre.
Sunshine Health, Wellbeing and Education Precinct (SHWEP)	Health, wellbeing, education	<p>The vision for SHWEP:</p> <ul style="list-style-type: none"> - A recognised centre of excellence for health, wellbeing, education and research. - A focus for medical research, biotechnology, teaching and conference services.
Sunshine CBD Light Rail Connections	Transport	<p>Expansion of light rail. Potential new light rail routes connecting with Sunshine CBD include:</p> <ul style="list-style-type: none"> - Ballarat Road corridor, Footscray and Moonee Ponds; - SSHWEP and St Albans; and Deer Park; and - Caroline Springs (Melton Council).
Energy Park	Renewal	<p>Energy Park comprises 44 hectares of vacant land including former quarry and landfill sites.</p> <p>Opportunity for remediated sites to be reimagined for a solar farm, with a longer term opportunity for a regional scale sporting precinct.</p>

Source: Leading with Vision, Transforming Brimbank Future Priorities 2050 (draft), Brimbank City Council 2021

4.6. KEY POINTS

The following key points are relevant to Brimbank's housing and apartment market:

- House prices in Melbourne have surged in 2021, fuelled by record low interest rates, constrained listings and pent-up demand. The upward trend in pricing is forecast to continue throughout 2021 and 2022.
- There are short term concerns for the apartment market, indicated by stagnant and declining rents, increasing rental listings and higher vacancy rates. This could manifest in lower levels of apartment investment activity in the short term.
- Population growth rates across Melbourne are below historical levels due to international border closures which will impact population growth and housing demand in Brimbank which usually attracts substantial overseas migration.
- The Federal Government forecasts that Australia will lose more than 70,000 overseas migrants in the 2021 financial year. Population growth rates are expected to rebound in 2023 and normalise in 2024.
- If house prices continue to increase throughout 2021 and 2022 as predicted, housing affordability will be impacted. This may have the effect of increasing housing demand in Brimbank, given that the municipality is relatively affordable compared with many parts of metropolitan Melbourne. Comparatively, demand may also soften from certain markets (e.g., first home buyers) due to buyers being priced out of the market.
- Rising house prices may also lead to a shift in investment demand towards rental tenure and direct a greater share of home buyer demand to more affordable dwellings (such as townhouses and apartments).
- There is a significant pipeline of investment and infrastructure projects planned for Brimbank. Most investment is proposed in the Sunshine NEIC, with a major focus on public transport, community facilities and residential and employment growth. This level of public investment will improve the attractiveness of nearby parts of the municipality to prospective residents.
- Significant investment in infrastructure will lead to property value uplift, particularly in areas proximate to transport amenity. This could catalyse private sector investment and development across the Sunshine MAC.

DEMOGRAPHIC & HOUSING PROFILE & TRENDS



This section provides a profile of the existing resident population, housing stock and composition across Brimbank. The purpose of this section is to identify the demographic and housing characteristics and trends across the municipality.

5. DEMOGRAPHIC AND HOUSING PROFILE & TRENDS

5.1. INTRODUCTION

This section provides an analysis of the demographic profile of each of the five Brimbank 'districts' and a profile of the existing housing available.

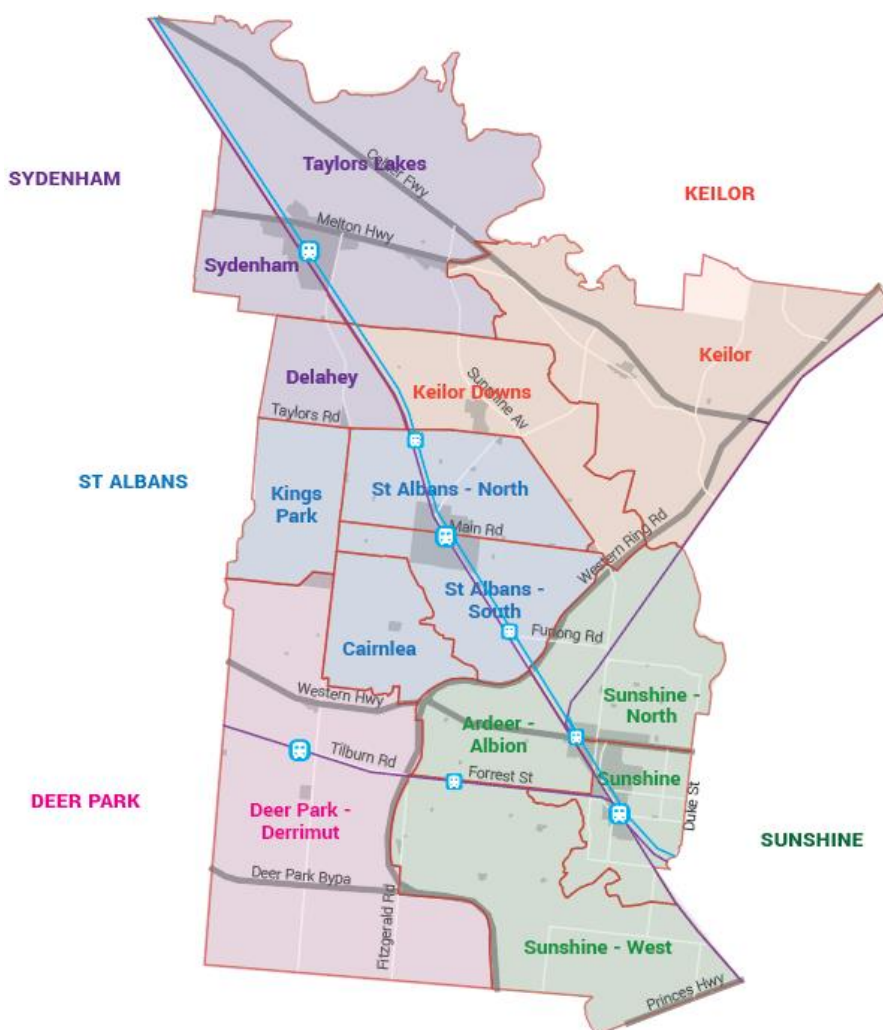
5.2. DISTRICT AREAS

For this assessment, demographic and housing data has been collected for the municipality and the following districts:

- **Sunshine** – includes Sunshine, Sunshine North, Sunshine West, Ardeer and Albion.
- **Sydenham & Taylors Lakes** – includes Sydenham, Taylors Lakes and Delahey.
- **Keilor** – includes Keilor and Keilor Downs.
- **Deer Park** – includes Deer Park and Derrimut.
- **St Albans** – includes St Albans North and South, Cairnlea and Kings Park.

Districts are shown in Figure 12.

F12. DISTRICT BOUNDARIES



Source: Urban Enterprise



BRIMBANK



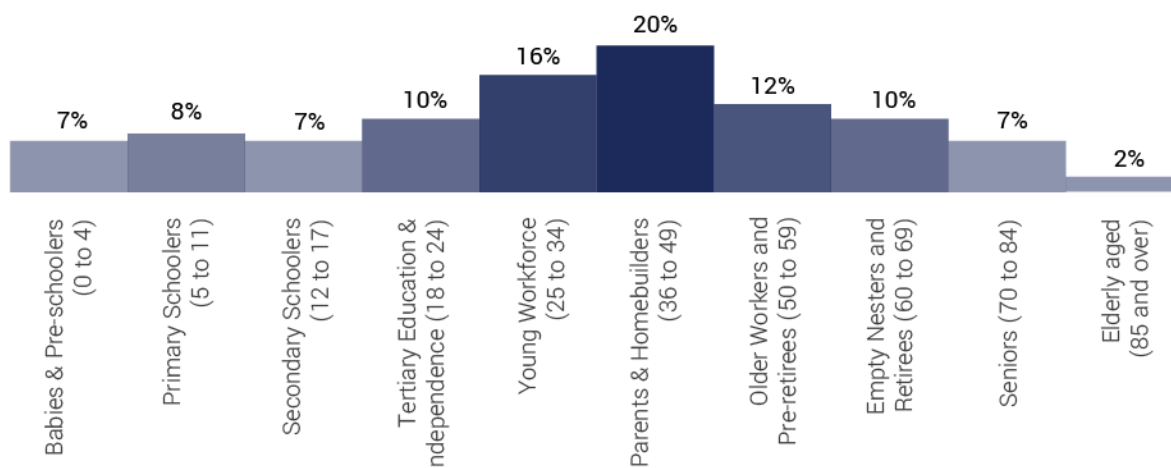
5.3. BRIMBANK DEMOGRAPHICS

209,523

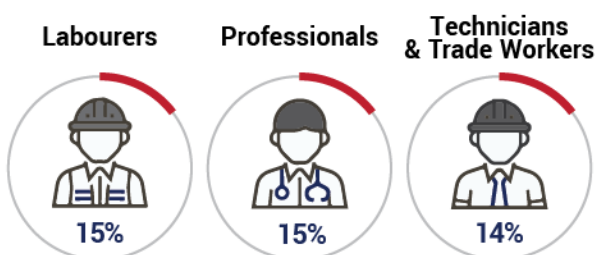
Estimated Resident Population 2019

35

Median Age 2016



Occupations 2016



\$1,291

Average Weekly Household Income 2016

11.1%

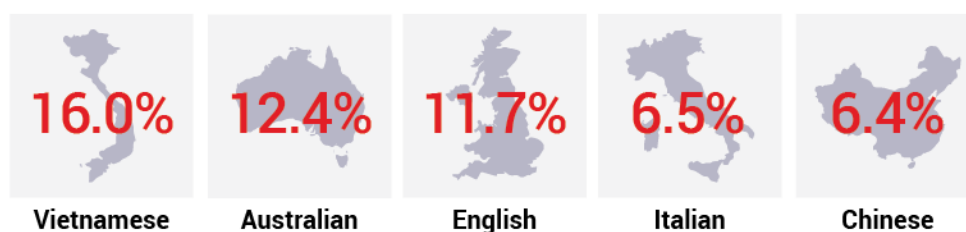
Unemployment Rate Dec 2020

- 14% Clerical and Administrative Workers
- 12% Machinery Operators and Drivers
- 11% Community and Personal Service Workers
- 10% Sales Workers
- 9% Managers

930

SEIFA Score 2016

Top Ancestries 2016



Source: ABS Census of Population and Housing 2016, Profile Id 2020 – City of Brimbank

5.3.1. DEMOGRAPHIC TRENDS, BRIMBANK

Demographic trends in Brimbank relate to the scale and location of historical population growth, age profile projections and socio-economic indicators such as household income, unemployment rate, occupations and SEIFA index.

HISTORICAL POPULATION GROWTH

As of 2019, Brimbank's population was approximately 210,000 residents. The population has experienced moderate but consistent population growth over the past 10 years, with the population increasing by over 24,000 residents between 2009 and 2019 at an average rate of 1.2% per annum.

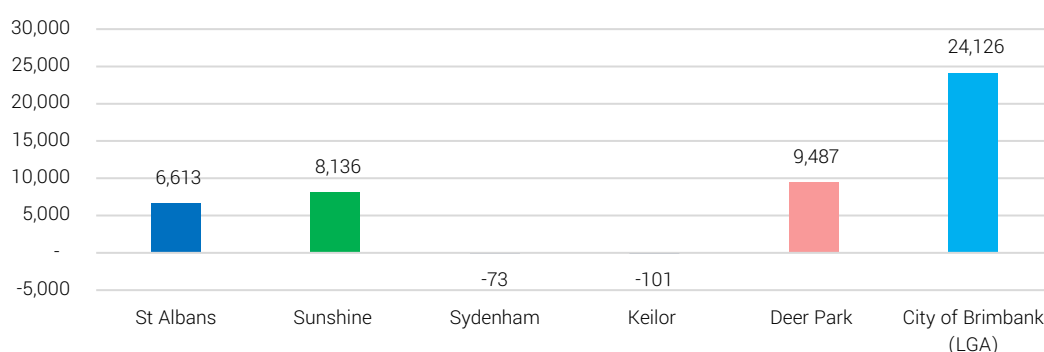
Most population growth over this period occurred in Deer Park and Sunshine. Together these areas accounted for 73% of Brimbank's population growth. The Sydenham and Taylors Lakes and Keilor districts precincts in the north of the municipality both experienced a loss of population.

T7. HISTORICAL POPULATION GROWTH, BRIMBANK & DISTRICTS, 2009 TO 2019

District	2009	2019	Change 2009 to 2019		% of Total Growth
			No.	%	
St Albans (St Albans, Kings Park & Cairnlea)	59,070	65,683	+6,613	11%	27%
Sunshine (Sunshine, Ardeer & Albion)	43,835	51,971	+8,136	19%	34%
Sydenham & Taylors Lakes (Sydenham, Taylors Lakes & Delahey)	40,011	39,938	-73	-0.2%	0%
Keilor (Keilor & Keilor Downs)	23,048	22,947	-101	-0.4%	0%
Deer Park (Deer Park & Derrimut)	19,433	28,920	+9,487	49%	39%
Total Brimbank	185,397	209,523	+24,126	13%	100%

Source: ABS Stat Estimated Resident Population, 2009 to 2019, Year (ending June 30)

F13. NET POPULATION CHANGE BY DISTRICT, 2009 TO 2019



Source: ABS Stat Estimated Resident Population, 2009 to 2019, Year (ending June 30)

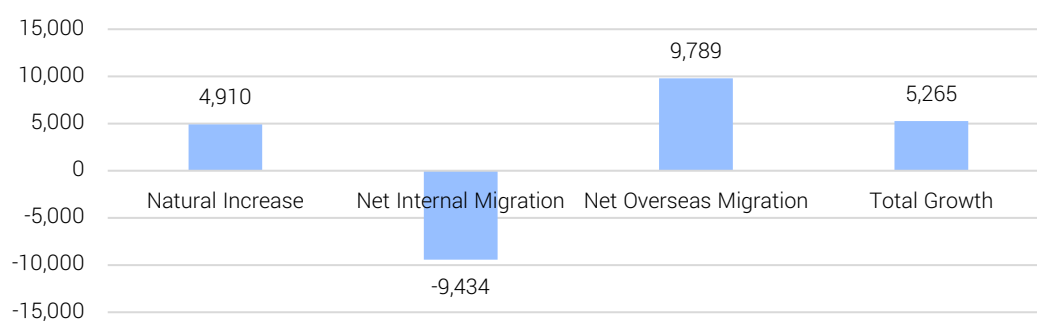
COMPONENTS OF POPULATION CHANGE

Between 2017 and 2019, Brimbank recorded:

- Almost 5,000 net additional residents through natural increase (births minus deaths);
- An internal migration outflow of almost 9,500 residents (those leaving for another location in Australia); and
- An overseas migration net inflow of over 9,500 residents.

Whilst Brimbank experienced a significant loss of population due to internal migration patterns, the municipality remains an attractive resident destination for overseas migrants which offset this loss. These flows will be impacted by the COVID-19 pandemic, with international borders closing early in 2020. Brimbank's housing market is exposed to population growth disruptions resulting from the pandemic - this is discussed further in Section 5 (Housing Need).

T8. COMPONENTS OF POPULATION GROWTH, 2017 TO 2019



Source: ABS Stat Components of Growth, 2017 to 2019, Year (ending June 30).

ETHNICITY

The Brimbank community is strongly influenced by migration, with the most common ethnicity being Vietnamese (16% in 2016).

Between 2011 and 2016, the ethnicity of Brimbank residents shifted further towards residents with Asian ethnicities⁶. Of the net increase of 26,130 usual residents over the period, 7,787 were of Vietnamese ethnicity, and a further 5,485 net additional residents had ethnicities from elsewhere in Asia, together accounting for 51% of the population increase over the period.

When combined with the recent overseas migration data shown earlier in Table 8, it is clear that Brimbank is a popular location for migrants and residents of non-Australian ethnicity. This should be captured as part of the issues relevant to the preparation of the new Housing Strategy.

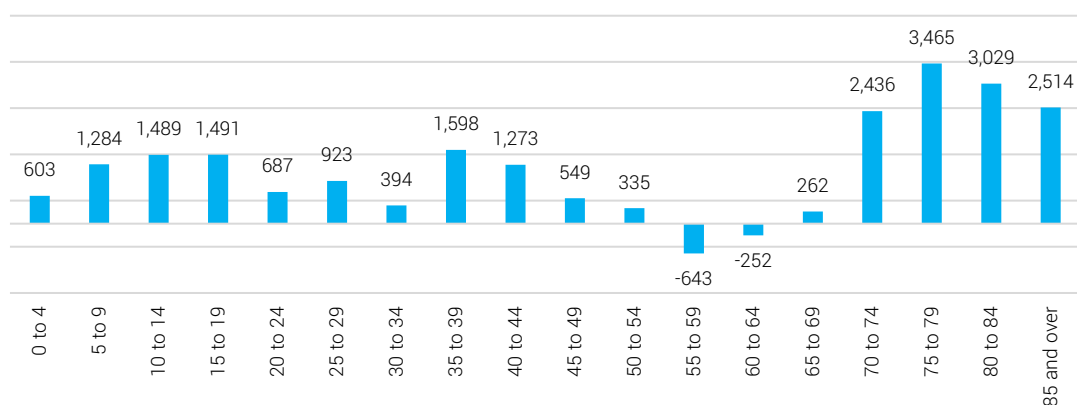
⁶ Forecast ID, based on 2011 and 2016 ABS Census.

AGE STRUCTURE

The median age in Brimbank in 2016 was 35 years, comparable to that of metropolitan Melbourne. Age projections shows that Brimbank's age profile is expected to change substantially over the next 15 years, with many age cohorts forecast to increase. Key observations include the following:

- The most significant growth is forecast to occur across senior and elderly cohorts (i.e., over 70 years);
- Infants and adolescents (0 to 19 years) along with young workforce (25 to 45 years) is projected to increase; and
- A slight decline in middle aged and pre-retirees (55 to 65 years) is projected.

F14. AGE STRUCTURE FORECAST BY COHORT, BRIMBANK, 2016 TO 2041



Source: Population and household forecasts, 2016 to 2041, prepared by .id (informed decisions), September 2017.

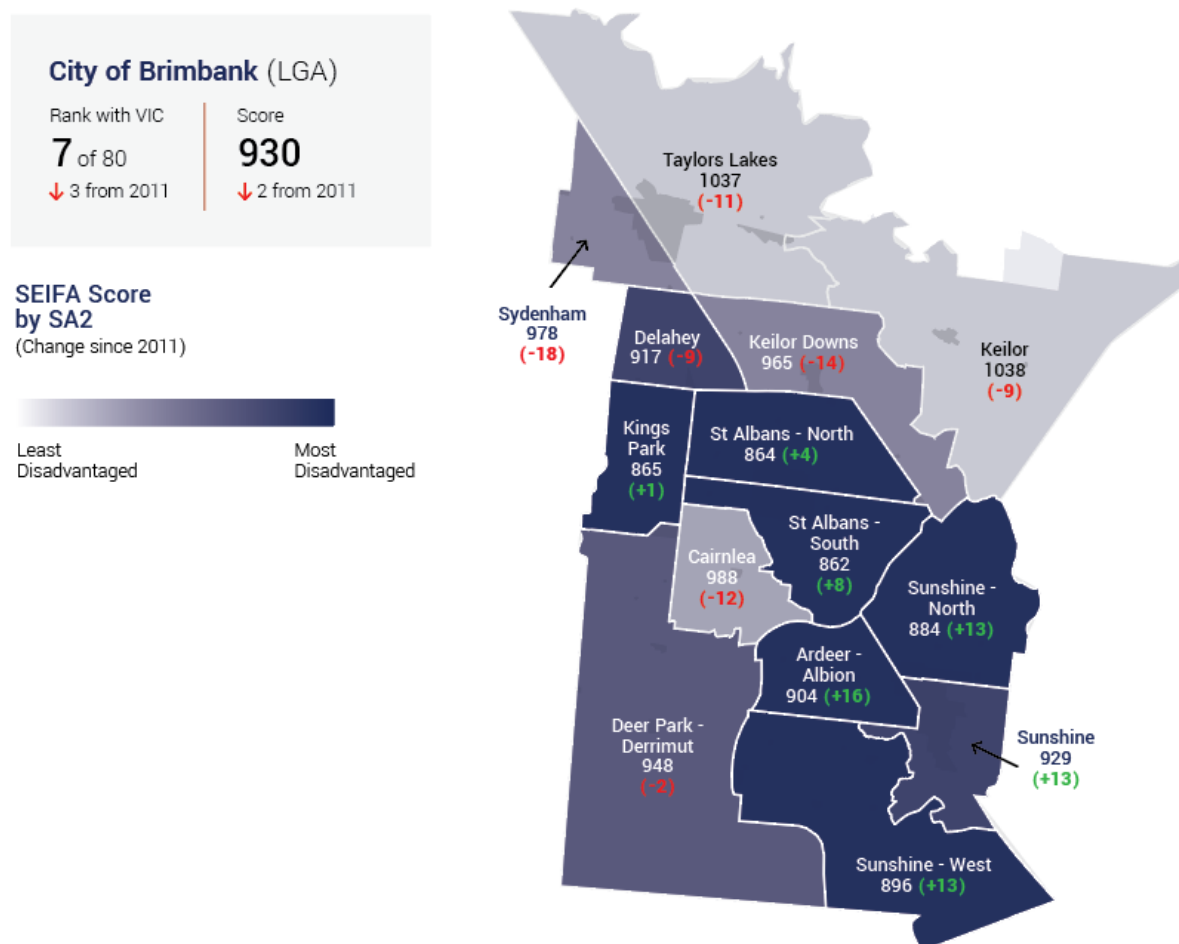
SOCIO ECONOMIC INDEX FOR AREAS (SEIFA)

The Socio-Economic Index for Areas (SEIFA) index measures the relative level of socio-economic disadvantage based on a range of Census characteristics. The index is derived from attributes that reflect disadvantage such as low income, low educational attainment, high unemployment, and jobs in relatively unskilled occupations. A higher score on the index means a lower level of disadvantage (or higher level of advantage). The national average index score is 1,000, with a score below 1,000 on the index indicating that area has a higher level of disadvantage relative to the national average.

Key observations in relation to SEIFA in Brimbank are as follows:

- In 2016, Brimbank recorded a SEIFA score of 930, which indicates a considerably higher level of disadvantage relative to the national average.
- Brimbank is the 7th most disadvantaged Local Government Area in Victoria, and the 2nd most disadvantaged in metropolitan Melbourne.
- Since 2011, the level of disadvantage improved in areas such as Sunshine, Ardeer, Albion and St Albans, but declined in areas such as Sydenham, Keilor Downs, Cairnlea and Taylors Lakes.

F15. SEIFA INDEX 2016 (AND CHANGE SINCE 2011)

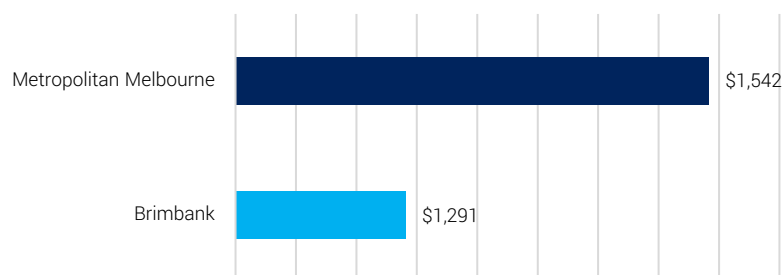


Source: ABS Stat, Dataset - SEIFA 2011 to 2016 by Local Government Area (LGA)

HOUSEHOLD INCOME

The median weekly household income in Brimbank is \$1,291, which is notably less than metropolitan Melbourne (\$1,542). The income circumstances for Brimbank households indicate a lower spending and borrowing capacity for housing. This means that it is important for Brimbank to plan for an adequate provision of affordable housing and rental stock.

F16. WEEKLY MEDIAN HOUSEHOLD INCOME, BRIMBANK, 2016



Source: ABS Census, 2016.

OCCUPATIONS

Brimbank's labour force includes a broad mix of occupations due to the diverse education qualifications, skills and locational attributes (proximity to employment areas).

Brimbank's network of activity centres (e.g., Sunshine, St Albans, Watergardens) contains population and professional service related industries, and thus is a notable source of local employment (particularly for sales workers, professionals).

The municipality is proximate to inner metropolitan areas (e.g., CBD, Yarra) where there is a higher concentration of professional service industries. Brimbank is also located in between the Western and Northern State-Significant Industrial Precincts where there is an agglomeration of industrial-related uses that employ labourers, machinery operators and drivers.

The most common occupations held by employed residents are labourers (15%), professionals (15%), technicians and trade workers (14%) and clerical and administrative workers (14%).

Between 2011 and 2016, the growth in occupations was weighted towards:

- Community and personal service workers (+1,350 jobs);
- Labourers (+1,112 jobs) and
- Professionals (+1,110 jobs).

T9. OCCUPATION TRENDS, BRIMBANK, 2011 TO 2016

	2016	%	Change (2011-16)	Change %
Labourers	11,825	15.1%	1,112	27%
Professionals	11,587	14.8%	1,110	27%
Technicians and Trades Workers	11,083	14.2%	-222	-5%
Clerical and Administrative Workers	10,989	14.1%	-584	-14%
Machinery Operators and Drivers	9,411	12.1%	283	7%
Community and Personal Service Workers	8,471	10.9%	1,350	32%
Sales Workers	8,015	10.3%	411	10%
Managers	6,665	8.5%	708	17%
Total	89,284	100%	4,168	100%

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

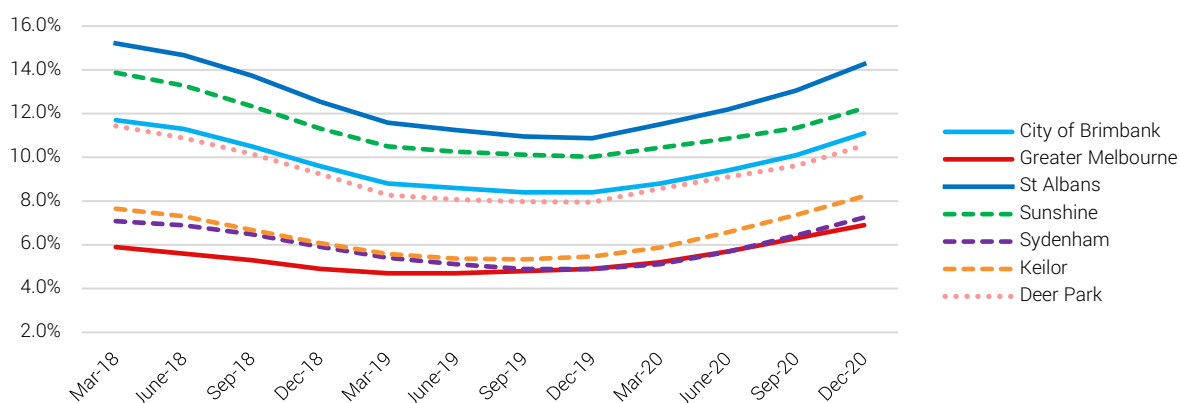
UNEMPLOYMENT RATE

Figure 17 shows the unemployment rate across Brimbank between March 2018 and December 2020. Key observations are as follows:

- Brimbank's unemployment rate was 11% in December 2020, considerably higher than the metropolitan Melbourne rate (7%).
- The highest rates of unemployment are in St Albans and Sunshine.
- There are significant differences between the relatively low levels of unemployment in the north sections of the municipality (Sydenham and Keilor) and high unemployment across most of the central and south of Brimbank.

Although recent unemployment rates are strongly influenced by the COVID-19 pandemic, the unemployment rate in Brimbank has been significantly higher than the metropolitan Melbourne average for several years, consistent with lower incomes and high levels of disadvantage.

F17. UNEMPLOYMENT RATE, BRIMBANK, 2018 TO 2020



Source: SA2 Data Tables, Small Area Labour Markets (SALM) Report, December Quarter 2020

Source: Australian Bureau of Statistics, Labour force survey catalogue, and Department of Employment, Small Area Labour Markets, compiled and presented in economy.id

5.4. BRIMBANK HOUSING PROFILE

69,225

Total Dwellings 2016

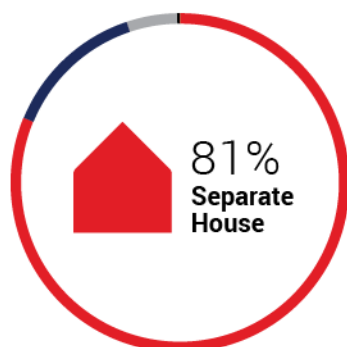
94%

Dwelling Occupancy Rate
2016

■ = 1000



Dwelling Structure 2016



13%

Semi-detached,
townhouse, etc.



5%

Apartment or
flat



<1%

Other dwelling

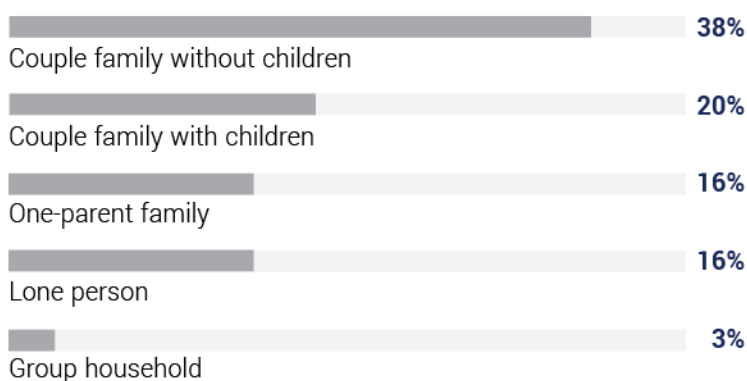
72,695

Total Households
2016

3.0

Average Household
Size 2016

Household Composition 2016



Tenure 2016

34% Fully Owned

33% Mortgage

24% Renting

Source: ABS Census of Population and Housing 2016

5.4.1. HOUSING PROFILE TRENDS

DWELLING GROWTH TRENDS

Between 2006 and 2016, the number of dwellings in Brimbank increased by approximately 14,200, equating to 1,420 additional dwellings per annum. The most common dwelling typology is separate houses, making up 81% of housing stock, followed by semi-detached, row, terrace and townhouses (13%), and flats and apartments (5%).

Given the location in relatively close proximity to central Melbourne and the presence of public transport, a very low proportion of the housing stock in 2016 (5%) was comprised of apartments and units. This is a particular opportunity for investigation through the Strategy.

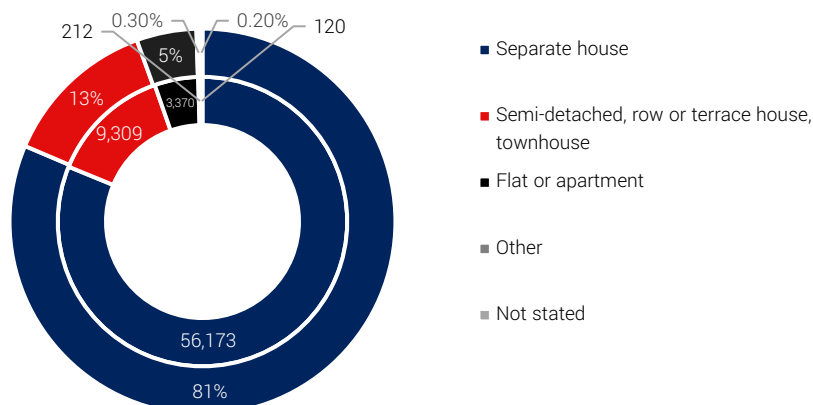
Dwelling approvals data is analysed later in this report, and provides a more recent insight into the location, scale and nature of dwelling growth in Brimbank.

T10. HISTORICAL DWELLING GROWTH, BRIMBANK, 2006 TO 2016

Indicator	2006	2016	Change (2006-16)	AAG	AAGR %
Total Dwellings	55,025	69,225	14,200	1,420	2.3%
Occupied Private Dwellings	51,879	64,860	12,981	1,298	2.3%
Unoccupied Private Dwellings	3,146	4,365	1,219	122	3.3%
Occupancy Rate	94%	94%			

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2006, 2011 & 2016

F18. DWELLING STRUCTURE, BRIMBANK, 2016



Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2016

HOUSEHOLD SIZE & COMPOSITION

The average household size in Brimbank is 3 people, higher than metropolitan Melbourne (2.7 persons) and reflecting the substantial proportion of family households (36%). Family households experienced notable growth between 2011 and 2016.

Another household type that has also experienced growth is adult couples. This household type makes up 38% of all households. Given the age profile of Brimbank, this is likely to be a mix of young workforce, retirees/pre-retirees and seniors.

The dwelling sizes (number of bedrooms) in Brimbank indicate the following:

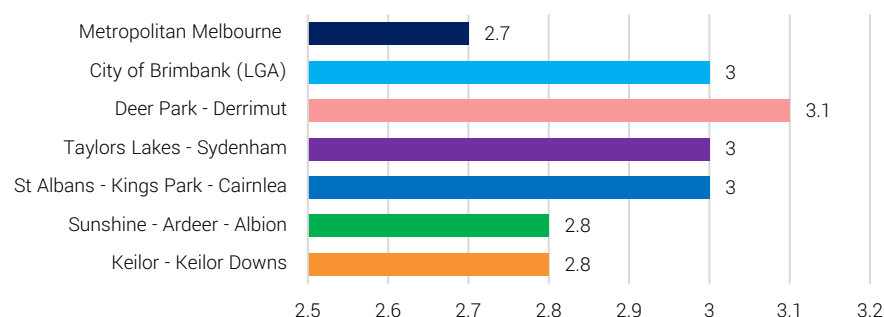
- A high proportion of 3 and 4-bedroom dwellings (57% and 25% respectively); and
- A low proportion of 1 and 2-bedroom dwellings (2% and 11% respectively).

T11. HOUSEHOLD COMPOSITION, BRIMBANK, 2006 TO 2016

Households by type	2006	2016	Change (2006-16)	
Couples with children	23,159	24,390	1,231	5%
Couples without children	11,099	13,120	2,021	18%
One parent families	8,412	9,463	1,051	12%
Other families	857	1,194	337	39%
Group household	1,287	2,052	765	59%
Lone person	9,421	11,350	1,929	20%
Other	2,401	3,289	888	37%
Total households	56,636	64,858	8,222	15%

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2006, 2016

F19. HOUSEHOLD SIZE, BRIMBANK, 2016



Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2006, 2011 & 2016

T12. DWELLING SIZE (NO. OF BEDROOMS), BRIMBANK & DISTRICTS, 2016

District	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms
St Albans	2%	12%	61%	20%	6%
Sunshine	5%	17%	59%	16%	3%
Sydenham & Taylors Lakes	1%	6%	52%	35%	6%
Keilor	1%	6%	55%	32%	6%
Deer Park	1%	6%	56%	32%	4%
Brimbank	2%	11%	57%	25%	5%

Source: ABS Census - Counting Dwellings, no. of bedrooms, Place of Enumeration (MB), 2016.

TENURE

Key observations in relation to dwelling tenure information in Brimbank are as follows:

- There is a fairly even split between full ownership (34%), ownership with a mortgage (22%) and renting (24%).
- There was significant growth in rental tenure in Brimbank between 2011 and 2016, recording an increase of 18% (+2,390 dwellings) compared with only a 5% overall increase in occupied dwellings.

T13. TENURE, BRIMBANK, 2011 TO 2016

	2016		Change 2011 to 2016	
Fully Owned	21,816	34%	316	1.5%
Mortgage	21,139	33%	79	0.4%
Renting	15,616	24%	2,390	18%
Other Tenure Type	954	1%	113	13%
Not Stated	5,335	8%	403	8%
Total Households	64,860	100%	3,301	5%

Sources: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

5.4.2. HOUSING MARKET CHARACTERISTICS

Certain demographic and socio-economic characteristics influence the type of housing that is occupied. Table 14 summarises common demographic and household characteristics across the key dwelling types. The following observations are relevant:

- Separate houses make up 81% of housing stock in Brimbank and are occupied by all household types, age profiles and occupations. The most common are families, adult couples and one parent families.
- Semi-detached terrace/townhouses account for 13% of housing stock in Brimbank and are most commonly occupied by lone person households, group households, one parent families and adult couples.
- Semi-detached terrace/townhouses are most commonly occupied by younger to middle aged cohorts (18-49 years) and have a higher proportion of renters.
- Flats and apartments account for only 5% of housing stock in Brimbank, and are most commonly occupied by lone person households, group households, one parent families and adult couples.
- Flats and apartments are most commonly occupied by younger cohorts (25-34 years) or elderly (85+ years) and are primarily renting.
- Flats and apartments are most commonly occupied by persons working in 'blue collar' industries, with occupations such as labourers, machinery operators and community/personal service workers.

T14. SUMMARY OF HOUSING MARKET CHARACTERISTICS

Dwelling structure	Housing stock %	Household type	Age profile	Occupation	Tenure
Separate house	81%	87% Families 83% Adult couples 83% One parent families 71% Lone person 72% Group households	All age cohorts	All occupations ranging between 82%-86%	38% owned 35% mortgage 19% renting
Semi-detached, row or terrace, townhouse	13%	19% Lone person 19% Group households 13% One parent families 12% adult couples	17% 25 to 34 years 14% 0 to 4 years 12% 18 to 24 years 12% 35 to 49 years	All occupations ranging between 11%-14%	43% renting 24% mortgage 18% owned
Flat or apartment	5%	10% lone person 7% group households 7% other family 4% one parent family 4% adult couples	6% 25 to 34 years 4% 0 to 4 years 4% 85+ years	5% labourers 4% machinery operators / drivers 4% community & personal service workers	61% renting 14% mortgage 14% not stated. 10% owned

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2016, derived and compiled by Urban Enterprise 2021

5.4.3. HOUSING PROPENSITY, MELBOURNE'S WEST

Table 15 shows the propensity of household types in Melbourne's West (SA4) to live in certain dwelling types. Key observations are as follows:

- Separate houses are the most commonly occupied for all household types, making up 77% of almost 250,000 dwellings.
- Families, one parent families and adult couples have the greatest propensity to live in separate houses.
- Group households, single person and adult couples have the greatest propensity to live in townhouses.
- Group and single person households have the greatest propensity to live in flats and apartments.

These propensities will influence the dwelling types that are needed to meet growth in different market segments in Brimbank. For example, apartments are generally (although not exclusively) less attractive to families and larger households, so a substantial increase in the capacity to develop apartments is not likely to align well with any projected increase in family households. This is analysed further in Section 8 (Housing Capacity).

T15. SUMMARY OF HOUSEHOLD TYPE BY DWELLING STRUCTURE, MELBOURNE WEST

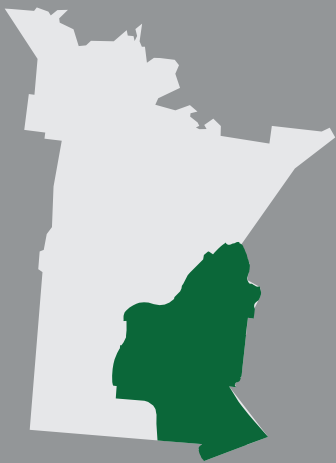
Household Type	Separate house		Semi-detached, row or terrace, townhouse		Flat, apartment		Other		Total
Couple Family	39,806	76.7%	8,807	17.0%	3,153	6.1%	130	0.3%	51,896
Family	82,354	85.5%	11,872	12.3%	1,980	2.1%	113	0.1%	96,319
One Parent Family	24,296	79.8%	4,886	16.0%	1,228	4.0%	41	0.1%	30,451
Other	11,424	68.7%	2,921	17.6%	1,972	11.9%	310	1.9%	16,627
Lone Person Household	28,217	62.7%	10,202	22.7%	6,209	13.8%	344	0.8%	44,972
Group Household	5,555	64.1%	1,881	21.7%	1,178	13.6%	54	0.6%	8,668
Total	191,652	77.0%	40,569	16.3%	15,720	6.3%	992	0.4%	248,933

Sources: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2016

5.4.4. HOUSING MARKET COMMENTARY, BRIMBANK

Consultation was undertaken with local real estate agents to obtain current insights into the housing market, including buyer and renter profiles across Brimbank. The following points are relevant:

- The Brimbank housing market is driven by buyers and renters seeking separate houses. These dwellings are in the highest demand both historically and currently.
- Most commonly, buyers seeking separate houses in Brimbank are young and middle aged families and younger adult couples. Buyers primarily originate from within Brimbank and adjacent suburbs.
- Typically, young adult couples and young family first home buyers in Brimbank are either currently renting in Brimbank or the neighbouring municipalities of Maribyrnong and Moonee Valley. They are seeking to buy their first house in Brimbank due to greater affordability, housing characteristics and amenity.
- For families, buyers typically originate from within Brimbank, and they mostly consist of second and third home buyers who are looking for larger properties in more desirable locations and neighbourhoods.
- Overseas migrants are an important market segment within Brimbank. Typically, migrant couples and families rent in Brimbank as a steppingstone to later purchase a house in the growth areas in Wyndham and Melton.
- Demand for townhouses is weak compared with that for separate houses – townhouses are seen as a second choice for the majority of buyers in Brimbank. With the declining availability of new separate houses, the market for townhouses is starting to gain momentum, particularly for first home buyers and downsizers.
- Apartments make up a low proportion of housing stock in Brimbank. Apartments are typically bought by investors who rent to young singles, couples and students. Overall, there is limited demand for apartments in Brimbank. Agents expect that demand for apartments in the Activity Centres of Sunshine, St Albans and Sydenham (Watergardens) will grow over time, once infill development opportunities begin to exhaust and land values rise.



SUNSHINE

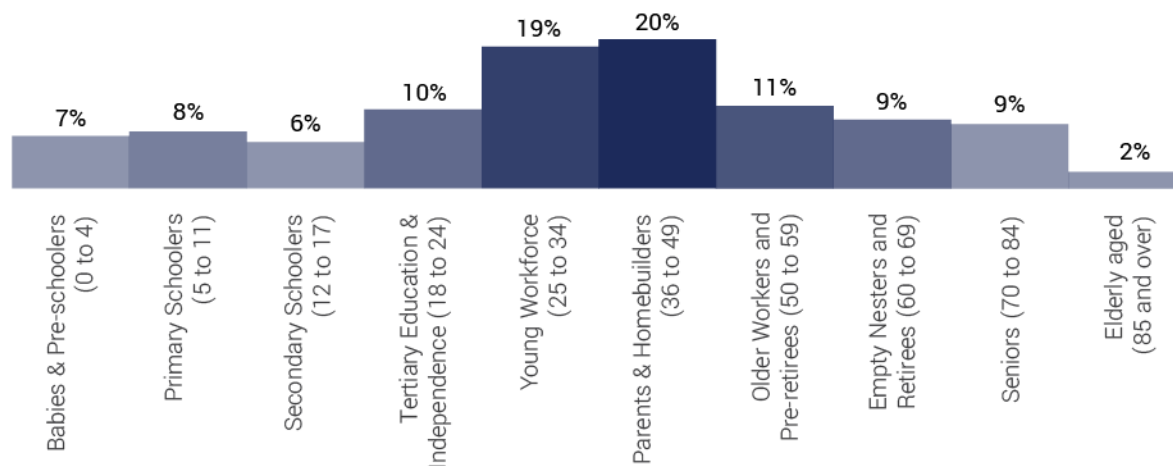


Sunshine;
Sunshine North;
Sunshine West;
Ardeer; and
Albion.

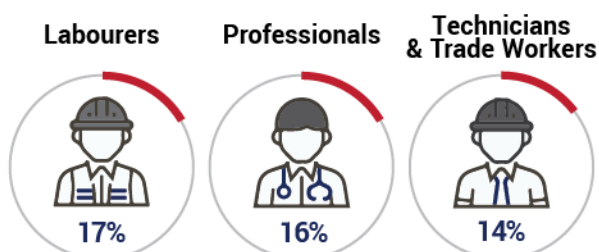
5.5. SUNSHINE DEMOGRAPHICS

51,971

Estimated Resident Population 2019



Occupations 2016



13% Clerical and Administrative Workers
 12% Machinery Operators and Drivers
 11% Community and Personal Service Workers
 9% Sales Workers
 7% Managers



\$1,129

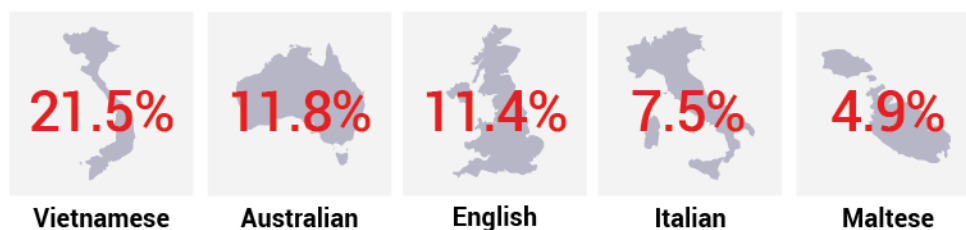
Average Weekly Household Income 2016



12.2%

Unemployment Rate
Dec 2020

Top Ancestries 2016



Source: ABS Census of Population and Housing 2016, Profile Id 20202, City of Brimbank

5.5.1. DEMOGRAPHIC TRENDS

HISTORICAL POPULATION GROWTH

As of 2019, Sunshine's population was 51,971. The population experienced moderate growth between 2009 and 2019 at an average rate of 1.7% per annum.

Table 17 summarises the components of population change in Sunshine between 2017 and 2019. The main driver of population growth in Sunshine is overseas migration, with more than 2,500 residents arriving in Sunshine in that time.

T16. HISTORICAL POPULATION GROWTH, SUNSHINE, 2009 TO 2019

	2009	2019	Change 2009 to 2019		AAGR
			No.	%	
Sunshine - Ardeer - Albion	43,835	51,971	8,136	19%	1.7%
Brimbank (LGA)	185,397	209,523	24,126	13%	1.2%

Source: ABS Stat Estimated Resident Population, 2009 to 2019, Year (ending June 30)

T17. COMPONENTS OF POPULATION GROWTH, SUNSHINE, 2017 TO 2019

	Sunshine - Ardeer - Albion	Brimbank (LGA)
Total natural Increase	961	4,910
Net Internal Migration	-1,818	-9,434
Net Overseas Migration	2,521	9,789
Total change	1,664	5,265

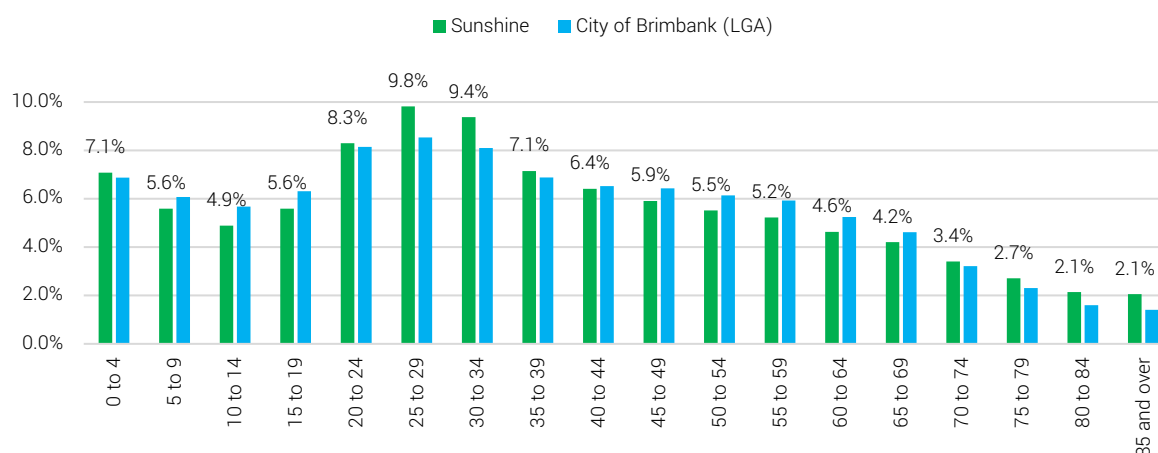
Source: ABS Stat Components of Growth, 2017 to 2019, Year (ending June 30)

AGE STRUCTURE

In Sunshine, there is a higher proportion of persons aged between 20 and 40 years, a lower proportion of persons aged between 40 and 70 years, but a higher proportion of senior and elderly cohorts.

This demonstrates that Sunshine includes more young adult couples, young families and seniors, elderly, but less middle-aged and older families.

F20. AGE STRUCTURE, SUNSHINE, 2016



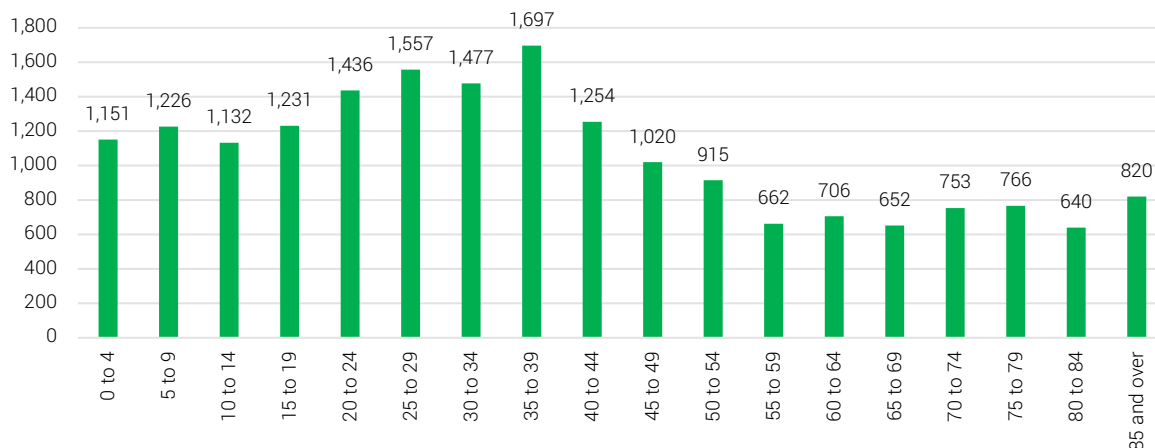
Source: Population and Age Structure Forecasts, Victoria in Future (VIF) 2019

AGE FORECAST

Age profile forecasts for the Sunshine district are shown in Figure 21. Key observations are as follows:

- All age cohorts in Sunshine are projected to increase over the next 15 years, reflecting the strong population growth forecasts.
- The most notable increase is projected to occur across young workforce and young families.

F21. AGE STRUCTURE FORECAST BY COHORT, SUNSHINE, 2016 TO 2036



Source: Population and household forecasts, 2016 to 2041, prepared by .id (informed decisions), September 2017.

OCCUPATIONS

Similar to Brimbank, Sunshine includes a wide mix of occupations. The most common occupations held by Sunshine residents are:

- Labourers (17%)
- Professionals (15%)
- Technicians and trade workers (14%)
- Clerical and administrative workers (13%).

Professionals, clerical and administrative workers and labourers experienced the highest jobs growth in Sunshine between 2011 and 2016.

T18. OCCUPATION TRENDS, SUNSHINE, 2011 TO 2016

	2016	%	Change (2011-16)	Proportion of Change
Managers	1,334	7.3%	260	11%
Professionals	2,821	15.5%	586	26%
Technicians and Trades Workers	2,517	13.9%	174	8%
Community and Personal Service Workers	2,080	11.4%	502	22%
Clerical and Administrative Workers	2,295	12.6%	33	1%
Sales Workers	1,683	9.3%	216	10%
Machinery Operators and Drivers	2,266	12.5%	84	4%
Labourers	3,167	17.4%	411	18%
Total	47,896	18,171	2,266	100%

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

HOUSEHOLD INCOME

The median weekly household income in Sunshine is \$1,129. This is slightly lower than the City of Brimbank, and considerably lower than metropolitan Melbourne.


F22. WEEKLY MEDIAN HOUSEHOLD INCOME, SUNSHINE, 2016



Source: ABS Census Quickstats, 2011 and 2016

5.6. SUNSHINE HOUSING PROFILE

18,023 93%

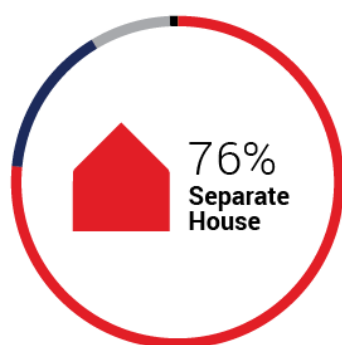
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Total Dwellings 2016


Dwelling Occupancy Rate 2016




Dwelling Structure 2016



 15%
Semi-detached,
townhouse, etc.

 8%
Apartment or
flat

 <1%
Other dwelling

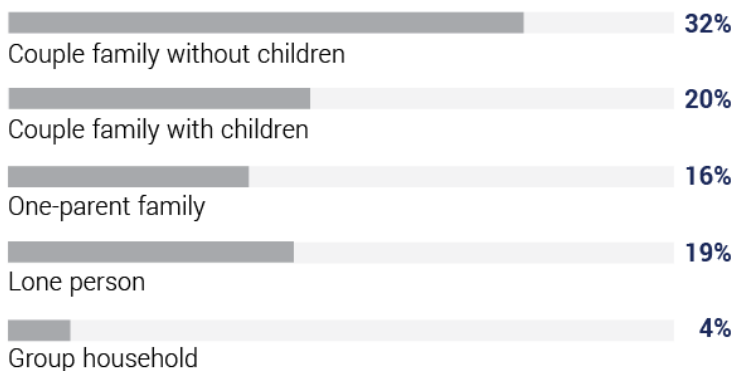
18,784

Total Households
2016

2.8

Average Household
Size 2016

Household Composition
2016



Tenure 2016



Source: ABS Census of Population and Housing 2016

5.6.1. HOUSING PROFILE TRENDS, SUNSHINE

The following key observations relate to Sunshine's housing profile:

- 76% of Sunshine's dwelling stock is made up of separate houses, followed by semi-detached, row, terrace and townhouses (15%), and flats/apartments (8%).
- Between 2006 and 2016 the number of dwellings in Sunshine increased by more than 2,300. Most new housing stock in that time was semi-detached, row, terrace and townhouses, adding approximately 1,850 new dwellings.
- The number of separate houses increased by more than 750 dwellings over the same period.
- Historical dwelling growth in Sunshine reflects that the availability of vacant broadhectare land and the opportunity to construct separate housing is practically exhausted.
- The average household size is 2.8 persons. One-third of households are adult couples, followed by couples with children (20%), lone persons (19%) and single parent families (16%).
- Almost 80% of dwellings have 3 bedrooms or more.
- One-third of households in Sunshine are owned outright, followed by rental tenure (30%) and owned with a mortgage (27%).

T19. DWELLING STRUCTURE, SUNSHINE, 2006 TO 2016

	2016		Change (2006-16) #	Change (2006-16) %
Separate house	13,730	76%	755	6%
Semi-detached, row or terrace house, townhouse	2,710	15%	1,849	215%
Flat or apartment	1,482	8%	-286	-16%
Other	47	0.30%	-46	-49%
Not stated	55	0.30%	42	323%
Total	18,047	100%	2,327	15%

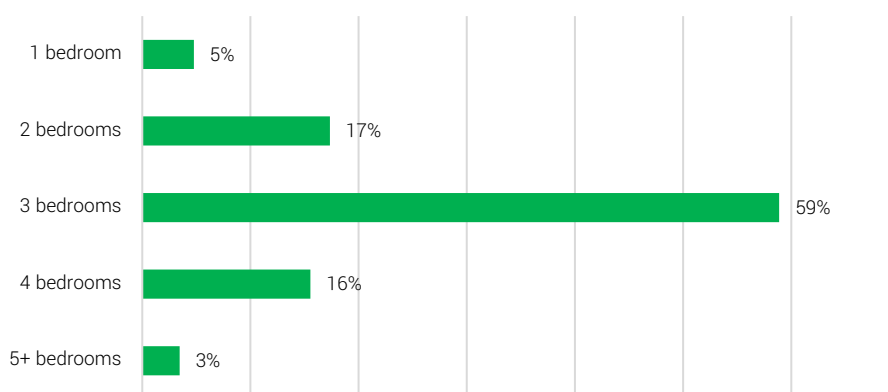
Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

F23. HOUSEHOLD SIZE & COMPOSITION, SUNSHINE, 2011 TO 2016

	2016	%	Change 2011 to 2016	% of Growth
Average Household Size	2.8		-0.1	
Couples with children	3,790	20%	554	17%
Couples without children	6,042	32%	1331	28%
One parent families	3,052	16%	724	31%
Other families	549	3%	178	48%
Group household	813	4%	151	23%
Lone person	3,617	19%	320	10%
Other not classifiable household	921	5%	149	19%
Total households	18,784	100%	3,407	22%

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

F24. DWELLING SIZE (NO. OF BEDROOMS), SUNSHINE, 2016



Sources: ABS Census - Counting Dwellings, No. of Bedrooms, Place of Enumeration (MB), 2016

T20. TENURE, SUNSHINE, 2011 TO 2016

	2011	2016		Change 2011 to 2016	
Fully Owned	5,692	5,477	33%	-215	-4%
Mortgage	4,094	4,457	27%	363	9%
Renting	3,975	4,955	30%	980	25%
Other Tenure Type	248	244	1%	-4	-2%
Not Stated	1,357	1,574	9%	217	16%
Total Households	15,366	16,707	100%	1,341	9%

Sources: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

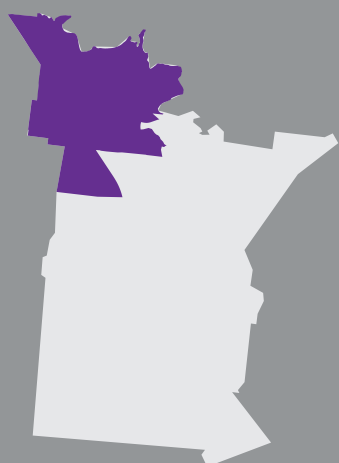
5.6.2. DEMOGRAPHIC & HOUSING PROFILE SUMMARY, SUNSHINE

Sunshine's demographic & housing profile summary:

- Sunshine is Brimbank's second most populous district behind St Albans.
- Sunshine has experienced consistently strong population growth.
- There is a younger age profile in Sunshine compared with Brimbank, with a higher proportion of young workforce and young families. These cohorts are projected to grow further over the next 15-20 years.
- A highly multi-cultural population. Almost one-quarter of Sunshine residents have Vietnamese ethnicity.
- The unemployment rate is higher than the municipal average, and the median household income is lower.
- Most housing stock is made up of large separate houses (3+ bedrooms).
- Almost one-third of residents are renting.

Implications

- **A need to ensure development and new housing keeps pace with population growth.**
- **A need to provide affordable housing and rental stock for the younger cohorts who are projected to increase further over time (young workforce, young families).**
- **A need to provide suitable and affordable housing for students.**
- **A reliance on overseas migration, and thus the housing market is more exposed to international border closures. This has the potential to soften housing demand in the short term, especially for rental properties.**



SYDENHAM & TAYLORS LAKES

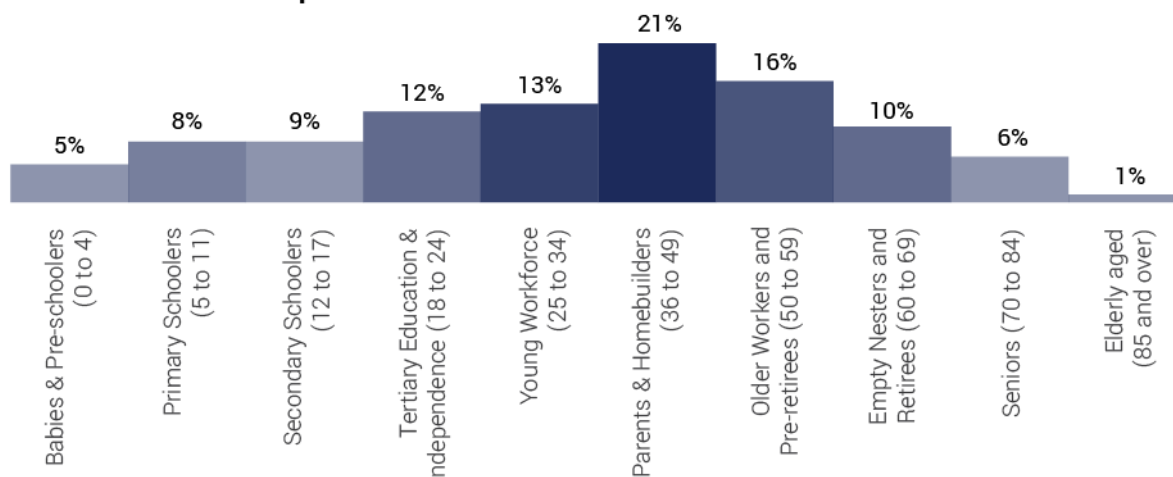


Sydenham;
Taylors Lakes; and
Delahey.

5.7. SYDENHAM & TAYLORS LAKES DEMOGRAPHICS

39,938

Estimated Resident Population 2019



Occupations 2016

Clerical & Admin Workers



Professionals



Technicians & Trade Workers



\$1,620

Average Weekly Household Income 2016

12% Sales Workers

11% Labourers

11% Managers

10% Community and Personal Service Workers

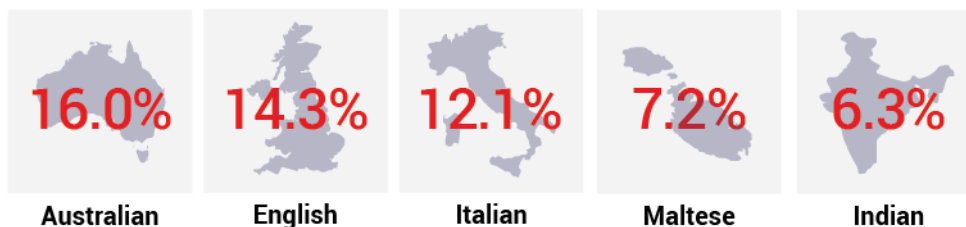
10% Machinery Operators and Drivers



7.3%

Unemployment Rate
Dec 2020

Top Ancestries 2016



Source: ABS Census of Population and Housing 2016, Profile Id 20202 – City of Brimbank

5.7.1. DEMOGRAPHIC PROFILE AND TRENDS

HISTORICAL POPULATION GROWTH

As of 2019, Sydenham's population was 39,938. The population experienced a negligible decline over the past 10 years.

The components of population change between 2017 and 2019 is summarised in Table 22. Recent growth has largely been driven by natural increase. Migration inflows and outflows were comparable, but the district experienced a net loss of migrants in the order of 100 residents.

T21. HISTORICAL POPULATION GROWTH, SYDENHAM & TAYLORS LAKES, 2009 TO 2019

	2009	2019	Change 2009 to 2019		AAGR
			No.	%	
Taylors Lakes - Sydenham	40,011	39,938	-73	-0.2%	-0.02%
City of Brimbank (LGA)	185,397	209,523	24,126	13%	1.2%

Source: ABS Stat Estimated Resident Population, 2009 to 2019, Year (ending June 30)

T22. COMPONENTS OF POPULATION GROWTH, SYDENHAM & TAYLORS LAKES, 2017 TO 2019

	Taylors Lakes & Sydenham	City of Brimbank
Total Natural Increase	1,563	4,910
Net Internal Migration	-2,539	-9,434
Net Overseas Migration	2,442	9,789
Total Growth	1,466	5,265

Source: ABS Stat Components of Growth, 2017 to 2019, Year (ending June 30)

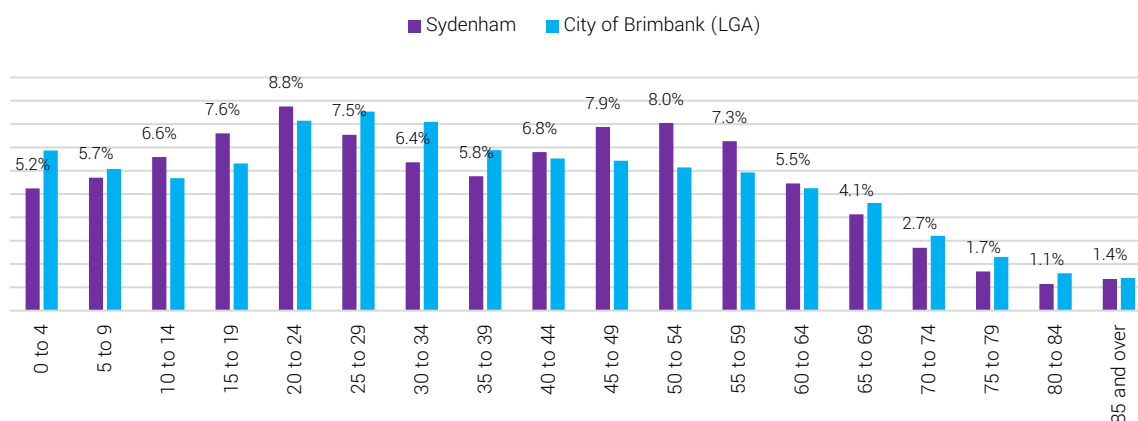
AGE STRUCTURE

In the Sydenham & Taylors Lakes district there is:

- A higher proportion of middle aged cohorts and pre-retirees (40 to 65 years), adolescents and tertiary students (10 to 25 years).
- A lower proportion of young children (0-10 years) and young workforce (25 to 40 years).

This indicates that there is a higher proportion of middle aged and older families with older children, and a lower proportion of young families and adult couples.

F25. AGE STRUCTURE, SYDENHAM & TAYLORS LAKES, 2016



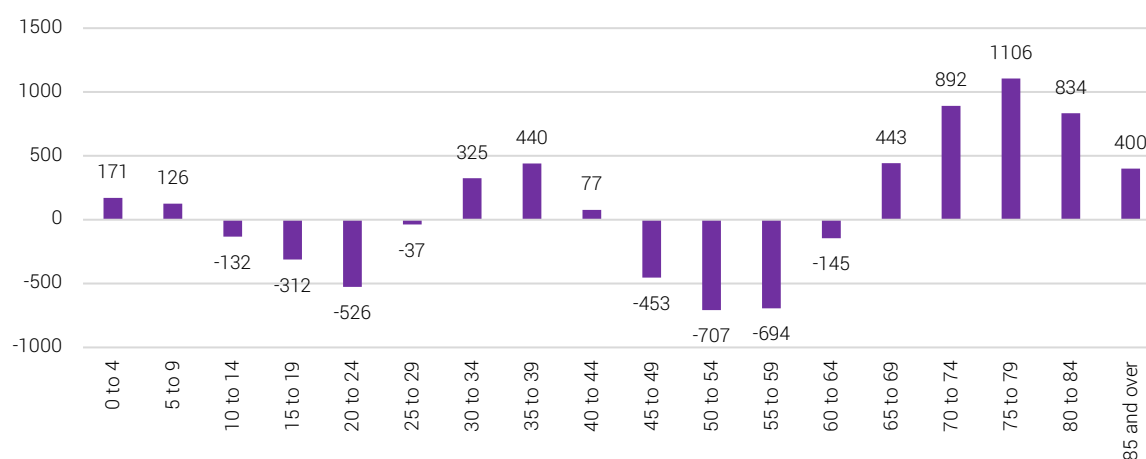
Source: Population and Age Structure Forecasts, Victoria in Future (VIF) 2019

AGE FORECAST

Age profile forecasts for Sydenham & Taylors Lakes are shown in Figure 26. Key observations are as follows:

- The resident population in Sydenham & Taylors Lakes is projected to get older over the next 15 years.
- The number of persons aged over 65 years is forecast to increase, with the most notable rise in persons aged between 70-85 years.
- Primary school, adolescents and tertiary aged cohorts are projected to decline.
- Residents aged 30-45 years are projected to increase, along with babies and young children, meaning that there will be a minor replenishment of young families in the district.

F26. AGE STRUCTURE FORECAST BY COHORT, SYDENHAM & TAYLORS LAKES, 2016 TO 2036



Source: Population and household forecasts, 2016 to 2041, prepared by .id (informed decisions), September 2017.

OCCUPATIONS

The most common occupation held by employed residents in Sydenham & Taylors Lakes include clerical and administrative workers (17%), professionals (16%), technicians and trade workers (14%) and sales workers (12%). There is also a higher proportion of managers (10%) in this district compared with Brimbank (7%).

T23. OCCUPATION TRENDS, SYDENHAM & TAYLORS LAKES, 2011 TO 2016

	2011	2016	%	Change (2011-16)	Proportion of Change
Managers	1,840	1,944	10.8%	104	-34%
Professionals	2,653	2,815	15.7%	162	-53%
Technicians and Trades Workers	2,876	2,534	14.1%	-342	111%
Community and Personal Service Workers	1,651	1,814	10.1%	163	-53%
Clerical and Administrative Workers	3,238	2,966	16.5%	-272	89%
Sales Workers	2,273	2,180	12.2%	-93	30%
Machinery Operators and Drivers	1,749	1,721	9.6%	-28	9%
Labourers	1,972	1,971	11.0%	-1	0%
Total	37,910	37,687	17,931	-307	100%

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

HOUSEHOLD INCOME

The median weekly household income in Sydenham & Taylors Lakes is higher than metropolitan Melbourne, and much higher compared with Brimbank. This indicates that this district has a much higher spending and borrowing capacity compared with other areas of Brimbank.

F27. WEEKLY MEDIAN HOUSEHOLD INCOME, SYDENHAM & TAYLORS LAKES, 2016

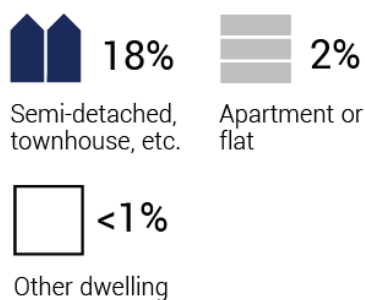
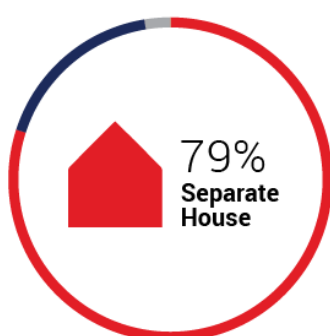


Source: ABS Census Quickstats, 2011 and 2016

5.8. SYDENHAM & TAYLORS LAKES HOUSING PROFILE



Dwelling Structure 2016



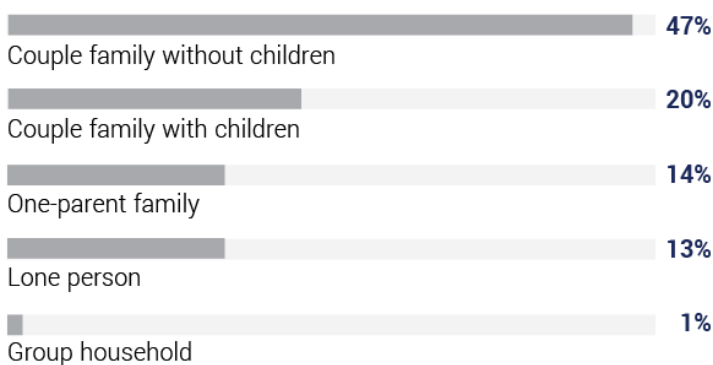
13,351

Total Households
2016

3.0

Average Household Size
2016

Household Composition 2016



Tenure 2016



Source: ABS Census of Population and Housing 2016

5.8.1. HOUSING PROFILE TRENDS

The following key observations relate to Sydenham & Taylors Lakes housing profile:

- 79% of dwelling stock is made up of separate houses, followed by semi-detached, row, terrace and townhouses (18%), and flats/apartments (2%).
- Between 2006 and 2016 the number of dwellings increased by more than 1,700. The majority of new housing stock in that time was separate houses, adding 1,380 dwellings.
- The average household size is 3 persons. Almost half of households are adult couples, followed by couples with children (20%), single parent families (14%) and singles (13%).
- 93% of dwellings have 3 bedrooms or more.
- 39% of households are owned with a mortgage, followed by owned outright (35%) and renting (18%).

T24. DWELLING STRUCTURE, SYDENHAM & TAYLORS LAKES, 2006 TO 2016

Dwelling Type	2006	2016	% 2016	Change (2006-16) #	Change (2006-16) %
Separate house	8,834	10,214	79%	1,380	16%
Semi-detached, row or terrace house, townhouse	1,747	2,295	18%	548	31%
Flat or apartment	527	314	2%	-213	-40%
Other	-	9	0.10%		
Not stated	-	12	0.10%		
Total	11,107	12,849	100%	1,742	16%

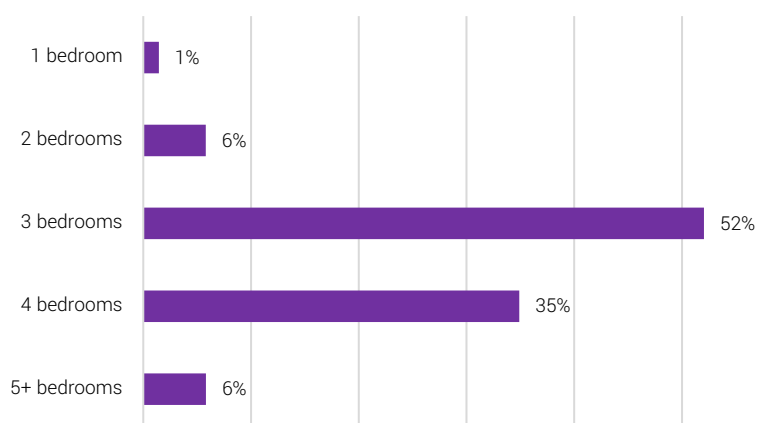
Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

F28. HOUSEHOLD SIZE & COMPOSITION, SYDENHAM & TAYLORS LAKES, 2011 TO 2016

Indicator	2016	%	Change 2011 to 2016		% of Growth
Ave Household size	3.0		-0.2		
Couples with children	2,648	20%	432	19%	30%
Couples without children	6,266	47%	268	4%	19%
One parent families	1,852	14%	398	27%	28%
Other families	197	1%	70	55%	5%
Group household	188	1%	1	1%	0%
Lone person	1,727	13%	177	11%	12%
Other not classifiable household	473	4%	89	23%	6%
Total households	13,351	100%	1435	12%	100%

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

F29. DWELLING SIZE (NO. OF BEDROOMS), SYDENHAM & TAYLORS LAKES



Sources: ABS Census - Counting Dwellings, No. of Bedrooms, Place of Enumeration (MB), 2016

T25. TENURE, SYDENHAM & TAYLORS LAKES, 2011 TO 2016

	2011	2016		Change 2011 to 2016	
Fully Owned	3,992	4,248	35%	256	6%
Mortgage	5,157	4,754	39%	-403	-8%
Renting	1,944	2,218	18%	274	14%
Other Tenure Type	147	172	1%	25	17%
Not Stated	680	765	6%	85	13%
Total Households	11,920	12,157	100%	237	2%

Sources: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

5.8.2. DEMOGRAPHIC & HOUSING PROFILE SUMMARY, SYDENHAM & TAYLORS LAKES

Sydenham and Taylors Lakes demographic and housing profile summary:

- There is an older age profile compared with Brimbank, with a higher proportion of middle aged/older families and older workforce/retirees.
- Pre-retirees, retirees and seniors are projected to increase over the next 15-20 years.
- A lower unemployment rate and a higher proportion of 'white collar' workers.
- Higher weekly household incomes.
- The overwhelming majority of housing stock is larger, homogenous separate houses in the NRZ.

Implications

- **The need to diversify housing stock to accommodate for the projected decrease in household sizes and ageing population (e.g., homes for downsizers, aged care).**
- **Opportunity to intensify development in and around the Watergardens town centre to provide more affordable dwellings (e.g., townhouses, apartments and rental options).**



KEILOR

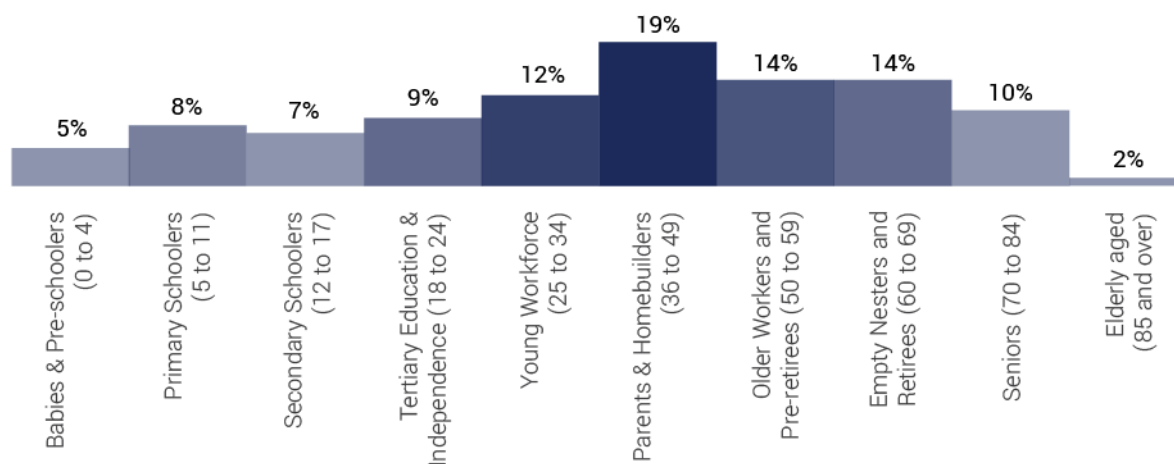


Keilor; and
Keilor Downs.

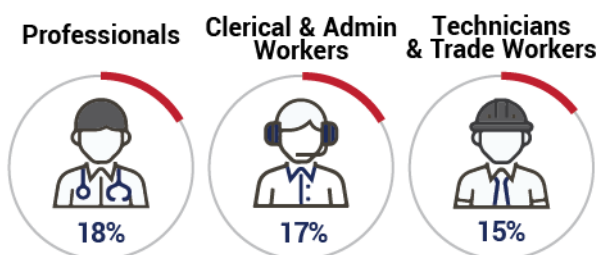
5.9. KEILOR DEMOGRAPHICS

22,947

Estimated Resident Population 2019



Occupations 2016



- 12% Managers
- 11% Sales Workers
- 10% Community and Personal Service Workers
- 9% Labourers
- 8% Machinery Operators and Drivers



\$1,439

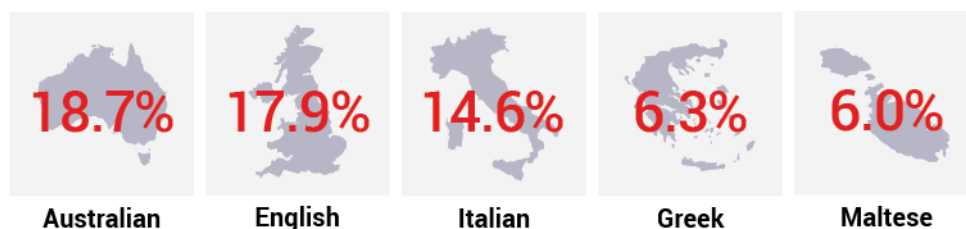
Average Weekly Household Income 2016



8.2%

Unemployment Rate
Dec 2020

Top Ancestries 2016



Source: ABS Census of Population and Housing 2016, Profile Id 20202 – City of Brimbank

5.9.1. DEMOGRAPHIC TRENDS

HISTORICAL POPULATION GROWTH

As of 2019, Keilor district's population was close to 23,000. The population has experienced a slight decline over the past 10 years, with the population decreasing by 101 residents.

Components of population change between 2017 and 2019 shows that the key driver behind the population loss is internal migration. Overseas migration and natural increase both grew over that period, but not enough to offset the overall outflow of residents.

T26. HISTORICAL POPULATION GROWTH, KEILOR, 2009 TO 2019

Area	2009	2014	2019	Change 2009 to 2019		AAGR %
				No.	%	
Keilor - Keilor Downs	23,048	22,820	22,947	-101	-0.4%	-0.04%
City of Brimbank (LGA)	185,397	198,468	209,523	24,126	13%	1.2%

Source: ABS Stat Estimated Resident Population, 2009 to 2019, Year (ending June 30)

T27. COMPONENTS OF POPULATION GROWTH, KEILOR, 2017 TO 2019

Item	Keilor - Keilor Downs	City of Brimbank (LGA)
Total Natural Increase	407	4,910
Net Internal Migration	-1,115	-9,434
Net Overseas Migration	574	9,789
Total Change	-134	5,265

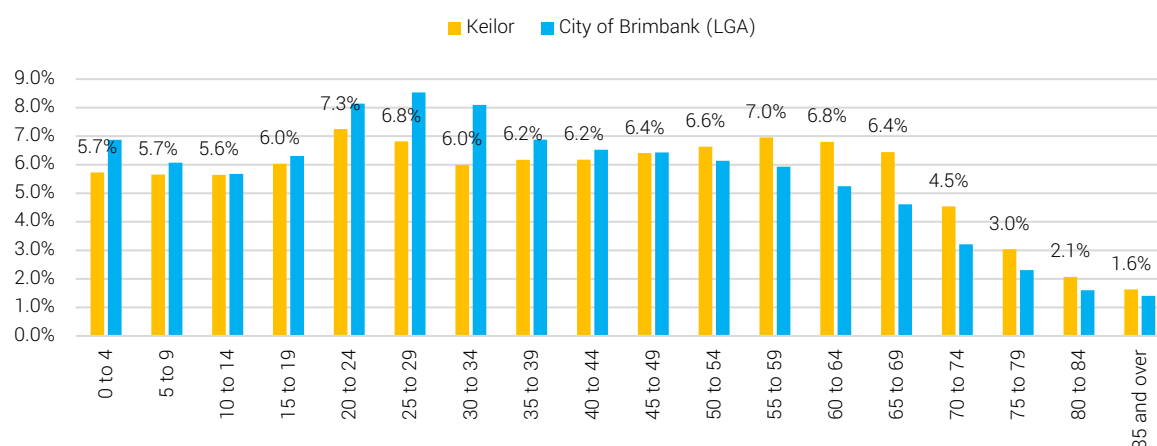
Source: ABS Stat Components of Growth, 2017 to 2019, Year (ending June 30)

AGE STRUCTURE

In the Keilor district there is:

- An older age profile, with a higher proportion of pre-retirees, retirees, seniors and elderly.
- A lower proportion of young children, tertiary students, young workforce and middle aged persons.

F30. AGE STRUCTURE, KEILOR, 2016



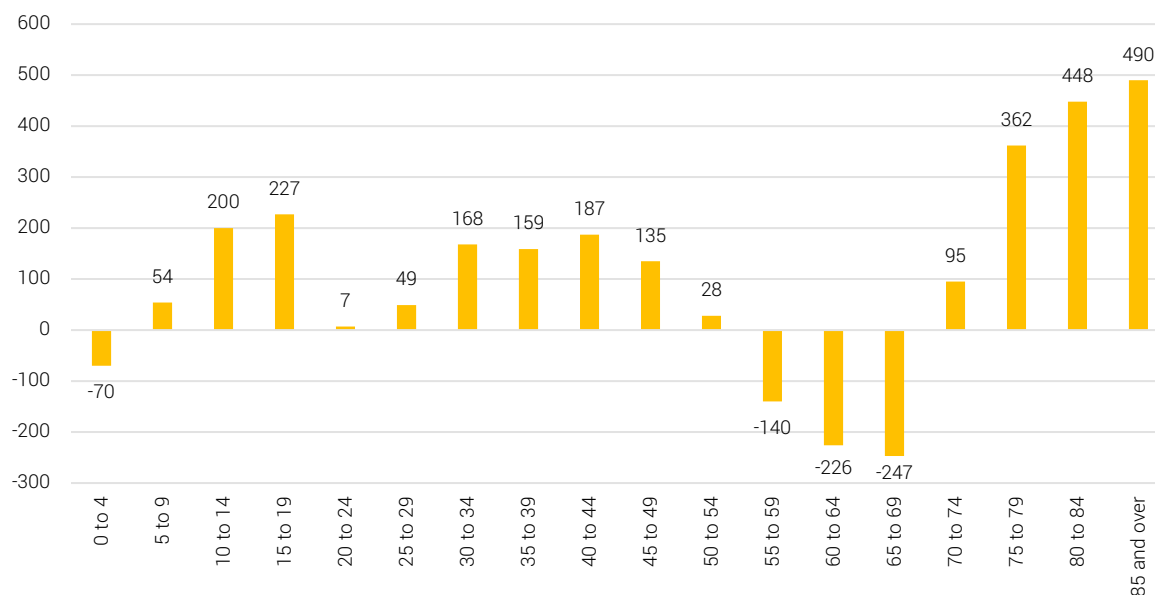
Source: Population and Age Structure Forecasts, Victoria in Future (VIF) 2019

AGE FORECAST

Age profile forecasts for Keilor are shown in Figure 31. Key observations are as follows:

- The resident population in Keilor is projected to age further over the next 15 years.
- The number of persons aged over 70 years is forecast to increase, with the most notable rise in persons aged 75+ years.
- The number of residents aged between 25-55 years is projected to increase, along with adolescents, meaning that there the number of middle-aged and older families will increase.

F31. AGE STRUCTURE FORECAST BY COHORT, KEILOR, 2016 TO 2036



Source: Population and household forecasts, 2016 to 2041, prepared by .id (informed decisions), September 2017.

OCCUPATIONS

The most common occupations held by employed residents in Keilor include professionals (18%), clerical and administrative workers (17%), technicians and trade workers (15%) and managers (12%).

Keilor has a higher proportion of professionals and managers compared with Brimbank.

T28. OCCUPATION TRENDS, KEILOR, 2011 TO 2016

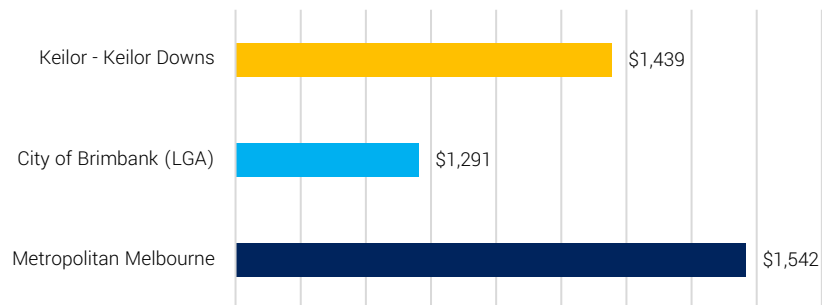
	2011	2016	%	Change (2011-16)	Change (2011-16)
Managers	1,098	1,131	11.7%	33	3%
Professionals	1,745	1,764	18.3%	19	1%
Technicians and Trades Workers	1,592	1,418	14.7%	-174	-11%
Community and Personal Service Workers	922	921	9.6%	-1	0%
Clerical and Administrative Workers	1,868	1,605	16.7%	-263	-14%
Sales Workers	1,173	1,095	11.4%	-78	-7%
Machinery Operators and Drivers	848	777	8.1%	-71	-8%
Labourers	917	909	9.4%	-8	-1%
Total	21,780	21,690	9,630	-543	-2%

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

HOUSEHOLD INCOME

The median weekly household income in Keilor is \$1,439, which is slightly less than metropolitan Melbourne, but higher compared with Brimbank.

F32. WEEKLY MEDIAN HOUSEHOLD INCOME, KEILOR, 2016



Source: ABS Census Quickstats, 2011 and 2016


5.10. KEILOR HOUSING PROFILE

8,228

Total Dwellings 2016

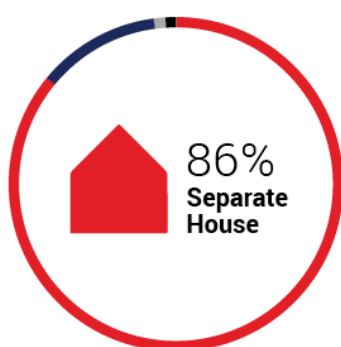
93%

Dwelling Occupancy Rate 2016

 = 1000



Dwelling Structure 2016



12%

Semi-detached,
townhouse, etc.



1%

Apartment or
flat



1%

Other dwelling

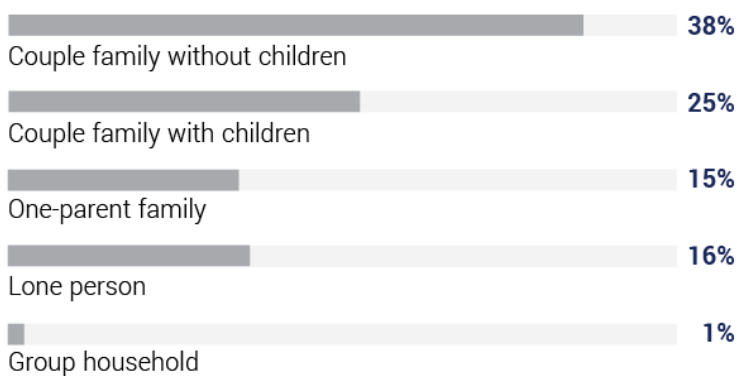
8,243

Total Households
2016

2.8

Average Household
Size 2016

Household Composition 2016



Tenure 2016

44% Fully Owned

33% Mortgage

15% Renting

Source: ABS Census of Population and Housing 2016

5.10.1. HOUSING PROFILE TRENDS, KEILOR

The following key observations relate to Keilor's housing profile:

- 86% of dwelling stock is made up of separate houses, followed by semi-detached, row, terrace and townhouses (12%), and flats/apartments (1%).
- Between 2006 and 2016 the number of dwellings increased by approximately 2,500. The majority of new housing stock in that time was separate houses, adding 2,250 dwellings.
- The average household size is 2.8 persons. 38% of households are adult couples, followed by couples with children (25%), single parent families (16%) and singles (15%).
- 93% of dwellings have 3 bedrooms or more.
- 44% of dwellings are owned outright, followed by owned with a mortgage (33%) and renting (15%).

T29. DWELLING STRUCTURE, KEILOR, 2006 TO 2016

Dwelling type	2006	2016	% 2016	Change (2011-16)	Change (2011-16)
Separate house	4,799	7,050	86%	2,251	47%
Semi-detached, row or terrace house, townhouse	759	1,007	12%	248	33%
Flat or apartment	155	84	1%	-71	-46%
Other	8	66	1%	58	725%
Not stated	-	5			
Total	5,723	8,230	100%	2,507	100%

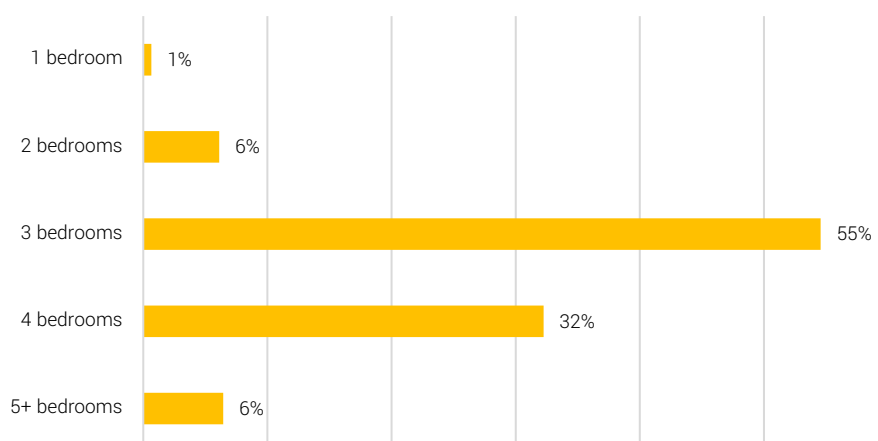
Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

F33. HOUSEHOLD SIZE & COMPOSITION, KEILOR, 2011 TO 2016

Indicator	2016	% 2016	Change 2011 to 2016		% of Growth
Average Household Size	2.8		-0.1	-0.2%	
Couples with children	2,101	25%	192	10%	27%
Couples without children	3,149	38%	44	1%	6%
One parent families	1,219	15%	296	32%	42%
Other families	106	1%	16	18%	2%
Group household	117	1%	-7	-6%	-1%
Lone person	1,290	16%	132	11%	19%
Other not classifiable household	261	3%	30	13%	4%
Total households	8,243	100%	703	9%	100%

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

F34. DWELLING SIZE (NO. OF BEDROOMS), KEILOR, 2016



Sources: ABS Census - Counting Dwellings, No. of Bedrooms, Place of Enumeration (MB), 2016

T30. TENURE, KEILOR, 2011 TO 2016

Tenure	2011	2016	% 2016	Change 2011 to 2016	
Fully Owned	3,390	3,376	44%	-14	-0.4%
Mortgage	2,557	2,526	33%	-31	-1%
Renting	999	1,120	15%	121	12%
Other Tenure Type	131	147	2%	16	12%
Not Stated	449	449	6%	-	-
Total Households	7,526	7,618	100%	92	1%

Sources: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

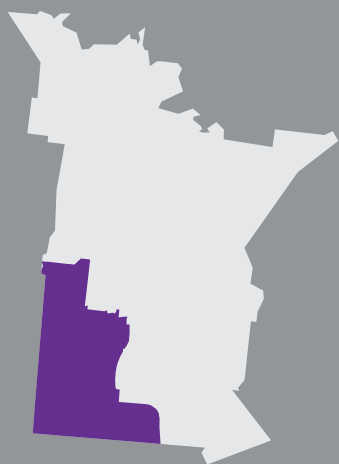
5.10.2. DEMOGRAPHIC & HOUSING PROFILE SUMMARY, KEILOR

Keilor's demographic and housing profile summary:

- Keilor is an established residential district that has experienced a slight decline in population.
- Keilor has an older age profile, with a higher proportion of pre-retirees, retirees, seniors and elderly. These cohorts are projected to grow further over the next 15-20 years.
- The majority of housing stock consists of larger separate houses located in the NRZ.

Implications

- **A lesser population-led requirement to provide additional dwellings, but a need to diversify housing stock in appropriate locations.**
- **Decreasing household sizes and an ageing population will increase demand for smaller dwellings close to activity centres.**
- **An opportunity to provide more aged care facilities.**
- **Consider how to replenish younger cohorts and labour force across established neighbourhoods. Potential for empty nesters to downsize, enabling existing housing stock to be released to the market.**



DEER PARK

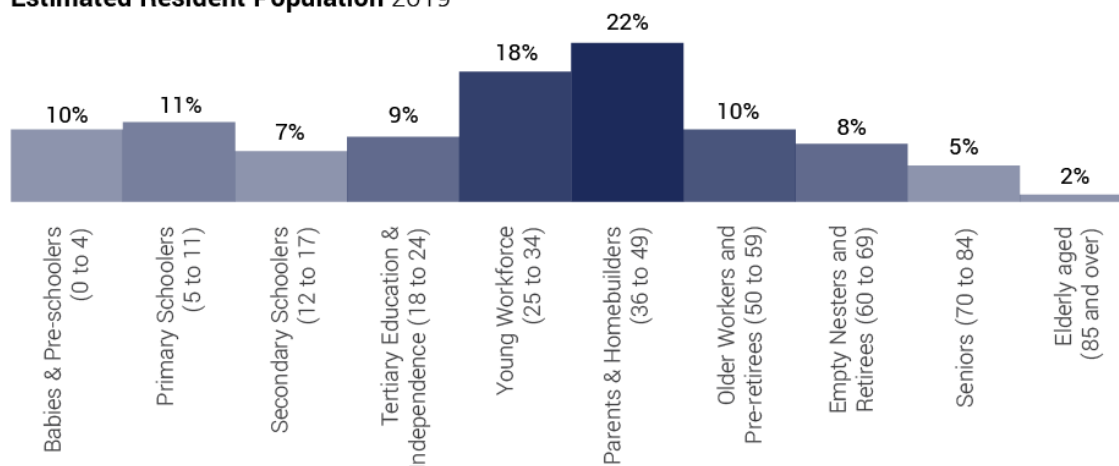


Deer Park; and
Derrimut.

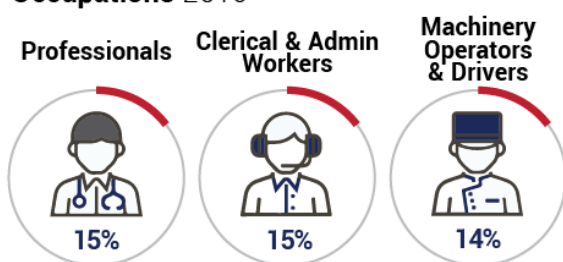
5.11. DEER PARK DEMOGRAPHICS

28,920

Estimated Resident Population 2019



Occupations 2016



14% Labourers
13% Technicians and Trade Workers
11% Community and Personal Service Workers
9% Sales Workers
8% Managers



\$1,403

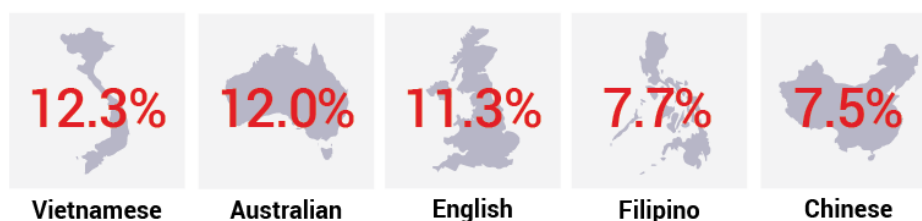
Average Weekly Household Income 2016



10.5%

Unemployment Rate
Dec 2020

Top Ancestries 2016



Source: ABS Census of Population and Housing 2016, Profile Id 20202 – City of Brimbank

5.11.1. DEMOGRAPHIC TRENDS, DEER PARK

HISTORICAL POPULATION GROWTH

As at 2019, Deer Park's population was approximately 29,000 residents. Deer Park has experienced strong growth, with the population increasing by almost 9,500 residents between 2009 and 2019. The average annual growth rate in that time was 4.1%, far exceeding the municipal rate. This is a result of the significant broadacre residential development that was delivered south of the rail line between 2005 and 2015.

Between 2017 and 2019, the population of the Deer Park district increased by over 400 people. This is a much lower rate of growth compared with the decade average, indicating that population growth is slowing in the district.

T31. HISTORICAL POPULATION GROWTH, DEER PARK, 2009 TO 2019

Area	2009	2019	Change 2009 to 2019		AAGR
			No.	%	
Deer Park - Derrimut	19,433	28,920	9,487	+49%	4.1%
City of Brimbank (LGA)	185,397	209,523	24,126	+13%	1.2%

Source: ABS Stat Estimated Resident Population, 2009 to 2019, Year (ending June 30).

T32. COMPONENTS OF POPULATION GROWTH, DEER PARK, 2017 TO 2019

Component	Deer Park - Derrimut	City of Brimbank (LGA)
Total Natural Increase	289	4,910
Net Internal Migration	-147	-9,434
Net Overseas Migration	295	9,789
Total Growth	437	5,265

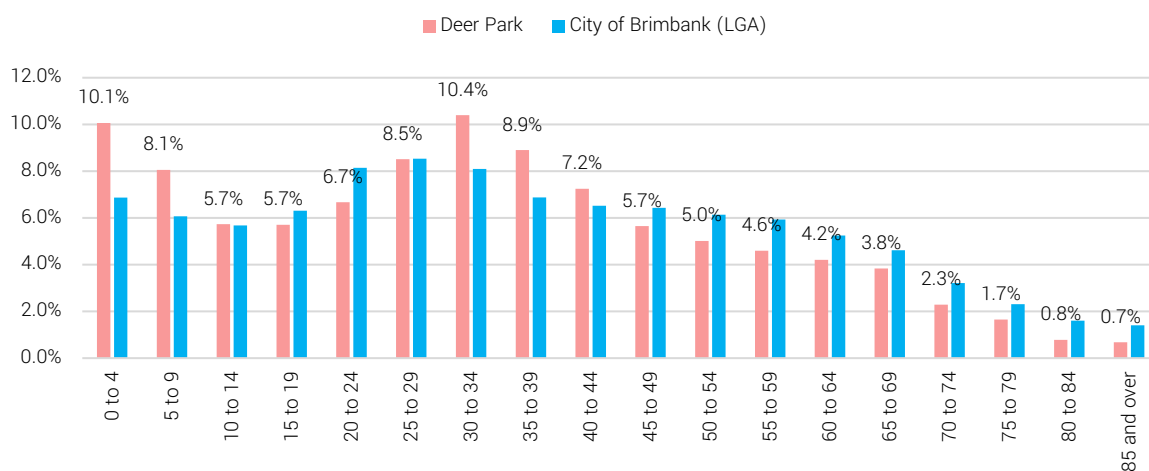
Source: ABS Stat Components of Growth, 2017 to 2019, Year (ending June 30)

AGE STRUCTURE

In the Deer Park district there is:

- A younger age profile, with a higher proportion of young families.
- A lower proportion of older families, pre-retirees, retirees, seniors and elderly.

F35. AGE STRUCTURE, DEER PARK, 2016



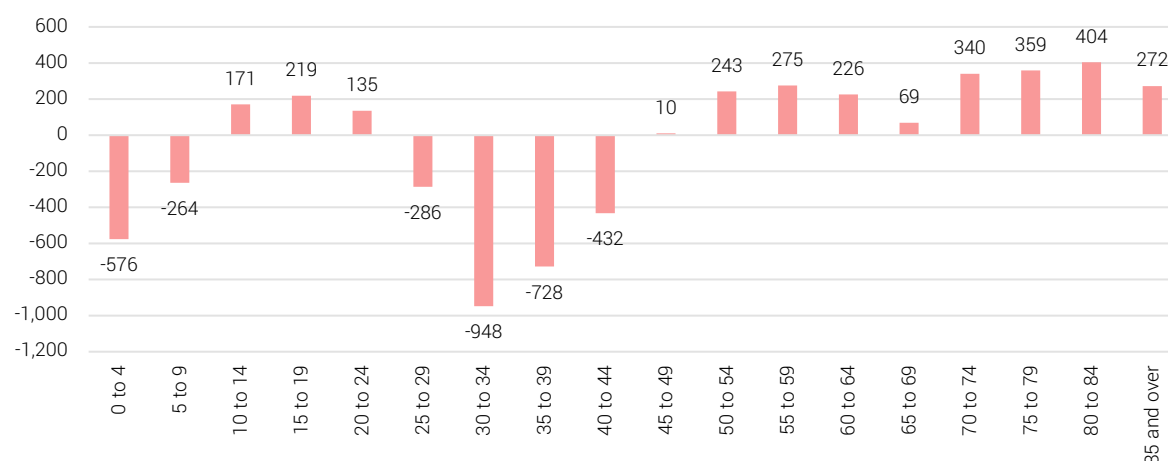
Source: Population and Age Structure Forecasts, Victoria in Future (VIF) 2019

AGE STRUCTURE FORECASTS

Age profile forecasts for Deer Park are shown in Figure 36. Key observations are as follows:

- The key demographic of young families in the district will move into middle age, meaning that there will be a reduction in young children and young workforce, and an increase in pre-retirees, adolescents and tertiary students.
- There will also be an overall increase in retirees, seniors and elderly persons.

F36. AGE STRUCTURE FORECAST BY COHORT, DEER PARK, 2016 TO 2036



Source: Population and household forecasts, 2016 to 2041, prepared by .id (informed decisions), September 2017.

OCCUPATIONS

The most common occupation held by employed residents in Deer Park include clerical and administrative workers (15%), professionals (15%), machinery operators and drivers (14%), labourers (14%), and technicians and trade workers (13%)

Deer Park has a higher proportion of 'blue collar' workers compared with Brimbank.

T33. OCCUPATION TRENDS, DEER PARK, 2011 TO 2016

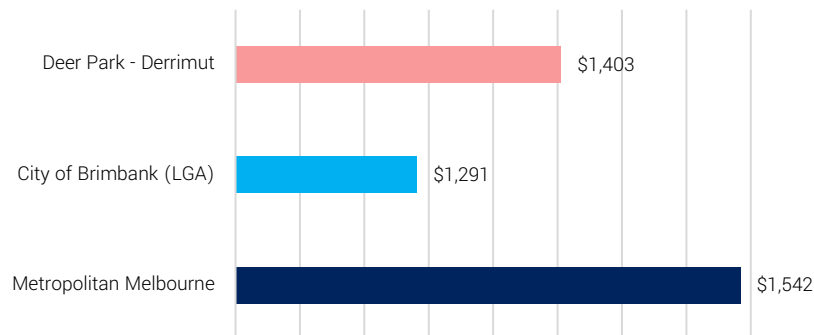
Occupation	2011	2016	2016 %	Change (2011-16)	Change %
Managers	694	860	8%	166	24%
Professionals	1,392	1,604	15%	212	15%
Technicians and Trades Workers	1,376	1,416	13%	40	3%
Community and Personal Service Workers	955	1,212	11%	257	27%
Clerical and Administrative Workers	1,466	1,586	15%	120	8%
Sales Workers	826	925	9%	99	12%
Machinery Operators and Drivers	1,326	1,511	14%	185	14%
Labourers	1,245	1,485	14%	240	19%
Total	22,194	26,252	100%	1,319	6%

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

HOUSEHOLD INCOME

The median weekly household income in Deer Park is \$1,403, which is slightly less than metropolitan Melbourne, but higher compared with Brimbank.

F37. WEEKLY MEDIAN HOUSEHOLD INCOME, DEER PARK, 2011 TO 2016



Source: ABS Census Quickstats, 2011 and 2016


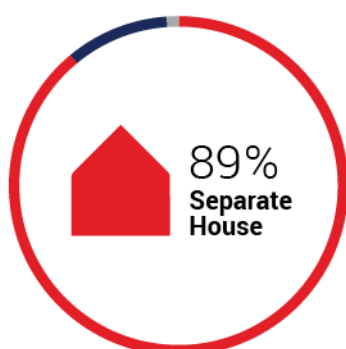

5.12. DEER PARK HOUSING PROFILE

8,789

Total Dwellings 2016

95%

Dwelling Occupancy Rate 2016

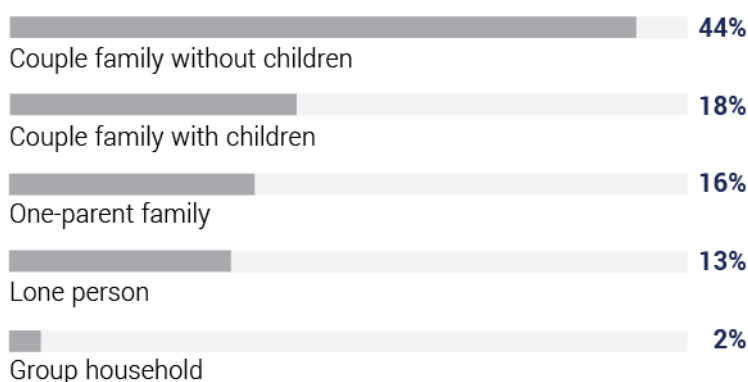
 = 1000**Dwelling Structure 2016** 10%Semi-detached,
townhouse, etc. 1%Apartment or
flat <1%

Other dwelling

9,396

Total Households
2016

3.1

Average Household
Size 2016**Household Composition 2016****Tenure 2016**

23% Fully Owned

42% Mortgage

25% Renting

Source: ABS Census of Population and Housing 2016

5.12.1. HOUSING PROFILE TRENDS

The following key observations relate to Deer Park's housing profile:

- 89% of dwelling stock is made up of separate houses, followed by semi-detached, row, terrace and townhouses (10%), and flats/apartments (0.9%).
- Between 2006 and 2016 the number of dwellings increased by more than 3,650. The majority of new housing stock in that time was separate houses.
- The average household size is 3.1 persons. 44% of households are adult couples, followed by couples with children (18%), single parent families (13%) and singles (13%).
- 92% of dwellings have 3 or more bedrooms.
- 42% of dwellings are owned with a mortgage, followed by renting (25%) and owned outright (23%).

T34. DWELLING STRUCTURE, DEER PARK, 2006 TO 2016

Dwelling Type	2016	2016 %	Change # (2011-16)	Change % (2011-16)
Separate house	7,844	89%	3,714	90%
Semi-detached, row or terrace house, townhouse	840	10%	67	9%
Flat or apartment	81	0.9%	-136	-63%
Other	19	0.2%	15	375%
Not stated	4	0%		
Total	8,792	100%	3,668	72%

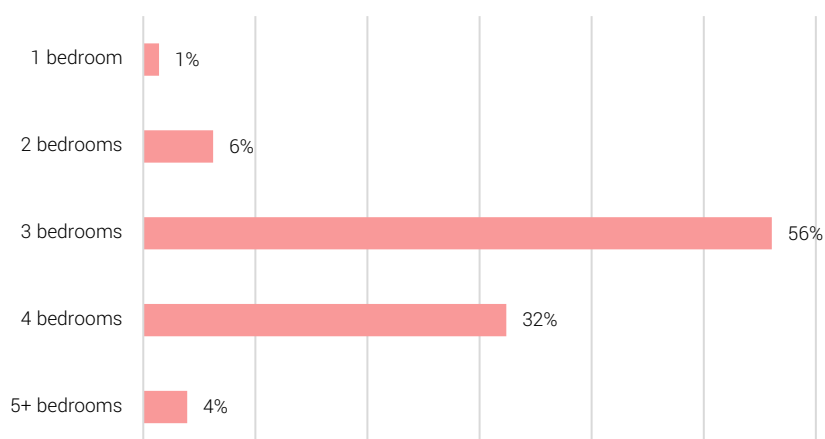
Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016. Counts Occupied Private Dwellings

F38. HOUSEHOLD SIZE & COMPOSITION, DEER PARK, 2011 TO 2016

Indicator	2016	% 2016	Change 2011 to 2016		% of Growth
Average Household Size	3.1		+0.2		
Couples with children	1,724	18%	97	6%	5%
Couples without children	4,089	44%	1,231	43%	66%
One parent families	1,512	16%	438	41%	23%
Other families	161	2%	33	26%	2%
Group household	233	2%	-4	-2%	0%
Lone person	1,227	13%	56	5%	3%
Other not classifiable household	450	5%	18	4%	1%
Total households	9,396	100%	1,869	25%	100%

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

F39. DWELLING SIZE (NO. OF BEDROOMS), DEER PARK, 2016



Sources: ABS Census - Counting Dwellings, No. of Bedrooms, Place of Enumeration (MB), 2016

T35. TENURE, DEER PARK, 2011 TO 2016

	2011	2016		Change 2011 to 2016	
Fully Owned	1,780	1,943	23%	163	9%
Mortgage	3,172	3,497	42%	325	10%
Renting	1,840	2,121	25%	281	15%
Other Tenure Type	84	84	1%	-	0%
Not Stated	640	674	8%	34	5%
Total Households	7,516	8,319	100%	803	11%

Sources: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

5.12.2. DEMOGRAPHIC & HOUSING PROFILE SUMMARY, DEER PARK

Deer Park's demographic and housing profile summary:

- The southern part of Deer Park was the last remaining broadhectare residential development opportunity in the municipality. Since exhaustion, the district is now mostly developed and built-out, with minimal opportunities to accommodate more housing.
- The resident profile is weighted towards younger families. These families will move into middle-aged/older families over the next 15-20 years.
- The majority of housing stock is made up of conventional separate houses.

Implications

- **Limited capacity to accommodate additional housing, except for a small number of vacant single site opportunities (mostly south of the rail line).**
- **Given that the southern part of Deer Park has recently developed, it is unlikely to undergo any notable housing or development changes in the short to medium term.**



ST ALBANS

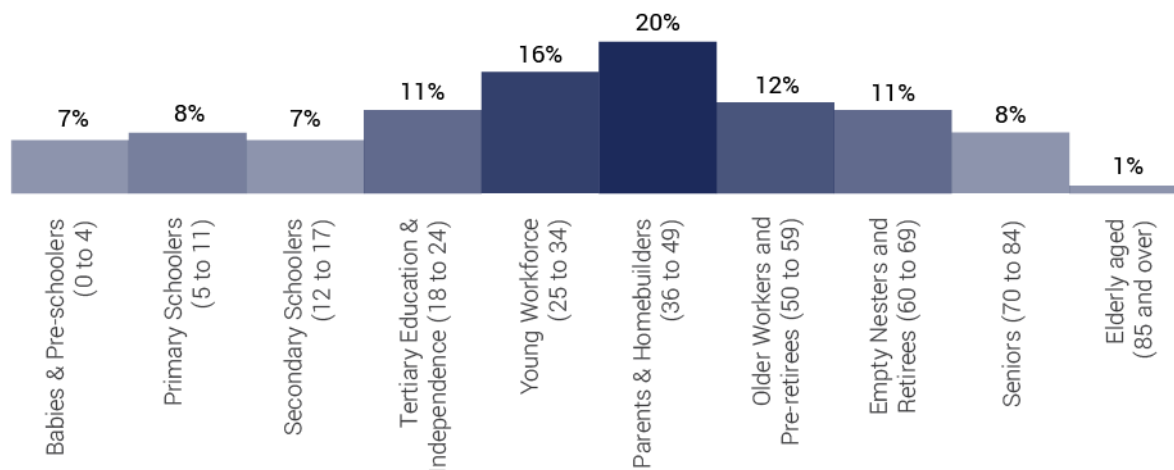


St Albans North and South;
Cairnlea; and
Kings Park.

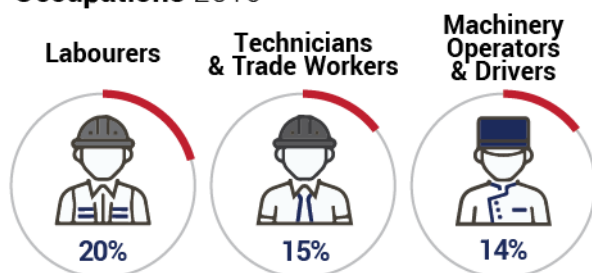
5.13. ST ALBANS DEMOGRAPHICS

65,683

Estimated Resident Population 2019



Occupations 2016



12% Professionals
 12% Clerical and Administrative Workers
 11% Community and Personal Service Workers
 10% Sales Workers
 6% Managers



\$1,123

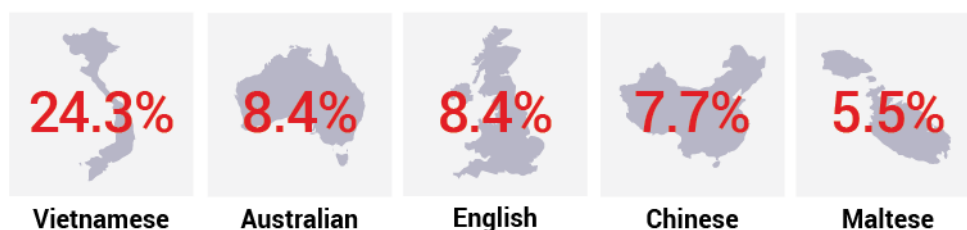
Average Weekly Household Income 2016



14.3%

Unemployment Rate
Dec 2020

Top Ancestries 2016



Source: ABS Census of Population and Housing 2016, Profile Id 20202 – City of Brimbank

5.13.1. DEMOGRAPHIC PROFILE TRENDS

HISTORICAL POPULATION GROWTH

As at 2019, St Albans population was approximately 65,700. The population has experienced moderate growth over the past 10 years, with the population increasing by approximately 6,600 residents at an average rate of 1.1% per annum.

Between 2017 and 2019, the components of population growth indicates that the population increased by more than 1,800 residents in that time. The overwhelming majority of growth was attributed to natural increase, with a small net gain through overseas migration.

T36. HISTORICAL POPULATION GROWTH, ST ALBANS, 2009 TO 2019

	2009	2019	Change 2009 to 2019		AAGR
			No.	%	
St Albans - Kings Park - Cairnlea	59,070	65,683	+6,613	+11%	1.1%
City of Brimbank (LGA)	185,397	209,523	+24,126	+13%	1.2%

Source: ABS Stat Estimated Resident Population, 2009 to 2019, Year (ending June 30)

T37. COMPONENTS OF GROWTH, ST ALBANS, 2017 TO 2019

	St Albans - Kings Park - Cairnlea	City of Brimbank (LGA)
Total Natural Increase	1,690	4,910
Net Internal Migration	-3,815	-9,434
Net Overseas Migration	3,957	9,789
Total Growth	1,832	5,265

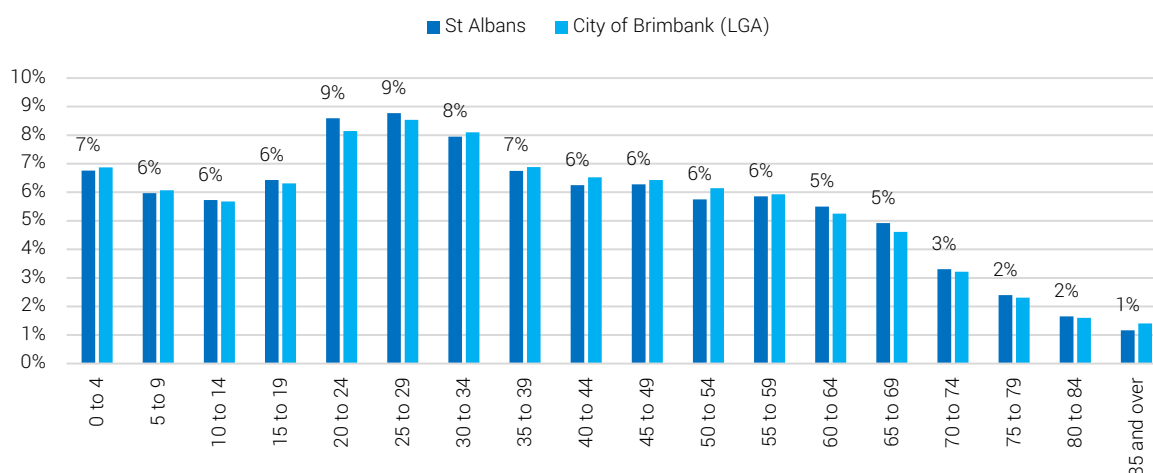
Source: ABS Stat Components of Growth, 2017 to 2019, Year (ending June 30)

AGE STRUCTURE

In the St Albans district, there is:

- A similar age profile to Brimbank.
- A higher proportion of students and young workforce aged between 20 and 30 years.

F40. AGE STRUCTURE, ST ALBANS, 2016



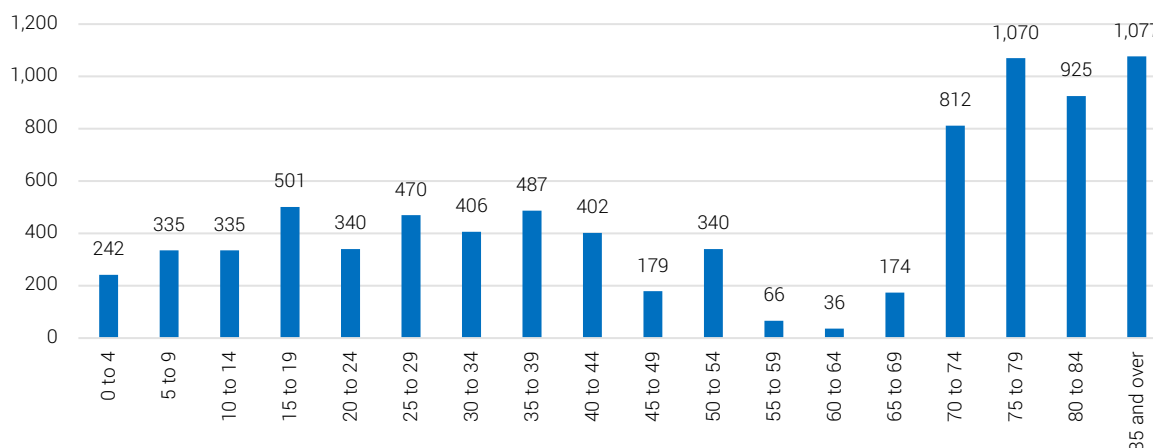
Source: Population and Age Structure Forecasts, Victoria in Future (VIF) 2019

AGE FORECAST

Age profile forecasts for the St Albans district are shown in Figure 41. Key observations are as follows:

- All age cohorts in St Albans are projected to increase over the next 15 years, reflecting the strong population growth forecasts.
- The most notable increases are projected to occur across seniors, elderly.
- A replenishment of younger cohorts is projected to occur, with increases across babies and young children (0-14 years), adolescents and tertiary students (15-24 years), young workforce and parents (25-45 years).

F41. AGE STRUCTURE FORECAST BY COHORT, ST ALBANS, 2016 TO 2036



Source: Population and household forecasts, 2016 to 2041, prepared by .id (informed decisions), September 2017.

OCCUPATIONS

The most common occupation held by employed residents in St Albans include labourers (20%), technicians and trade workers (15%), machinery operators and drivers (14%) and professionals (12%).

St Albans has a higher proportion of 'blue collar' workers compared with Brimbank.

T38. OCCUPATION TRENDS, ST ALBANS, 2011 TO 2016

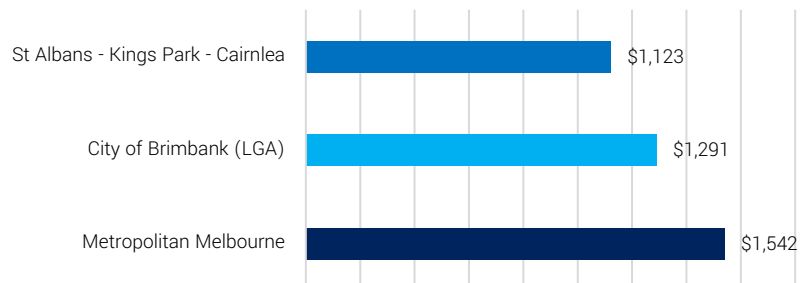
Occupation	2011	2016	%	Change (2011-16)	Proportion of Change
Managers	1,248	1,398	6.4%	150	10%
Professionals	2,448	2,578	11.9%	130	9%
Technicians and Trades Workers	3,126	3,211	14.8%	85	6%
Community and Personal Service Workers	2,010	2,451	11.3%	441	30%
Clerical and Administrative Workers	2,742	2,546	11.7%	-196	-14%
Sales Workers	1,858	2,127	9.8%	269	19%
Machinery Operators and Drivers	3,028	3,124	14.4%	96	7%
Labourers	3,820	4,294	19.8%	474	33%
Total	57,464	60,808	21,732	1,449	100%

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

HOUSEHOLD INCOME

The weekly median household income in St Albans is \$1,123, which is less than Brimbank and much less than metropolitan Melbourne.

F42. WEEKLY MEDIAN HOUSEHOLD INCOME, ST ALBANS, 2011 TO 2016



Source: ABS Census Quickstats, 2011 and 2016

5.14. ST ALBANS HOUSING PROFILE

21,339 94%

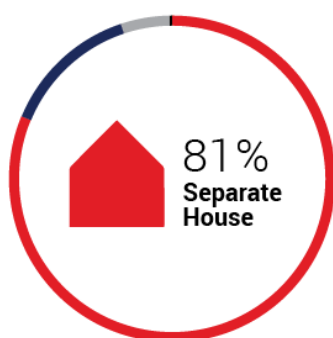
Total Dwellings 2016

Dwelling Occupancy Rate 2016

=1000



Dwelling Structure 2016



12%

Semi-detached,
townhouse, etc.

7%

Apartment or
flat

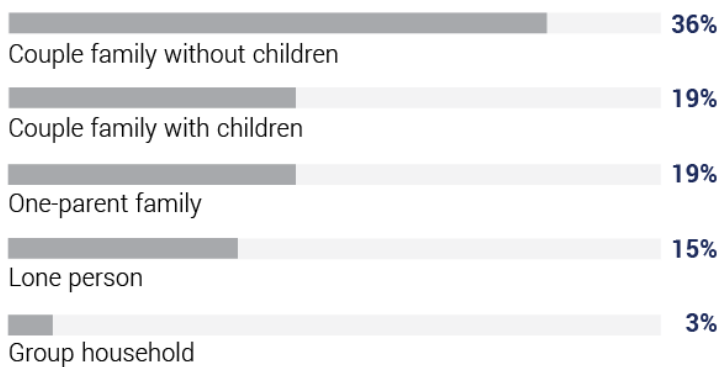
<1%

Other dwelling

22,921

Total Households
2016

3.0

Average Household
Size 2016Household Composition
2016

Tenure 2016

34% Fully Owned

29% Mortgage

26% Renting

Source: ABS Census of Population and Housing 2016

5.14.1. HOUSING PROFILE TRENDS

The following key observations relate to St Albans housing profile:

- 81% of dwelling stock is made up of separate houses, followed by semi-detached, row, terrace and townhouses (12%), and flats/apartments (7%).
- Between 2006 and 2016 the number of dwellings increased by more than 4,000. The majority of new housing stock in that time was separate houses.
- The average household size is 3 persons. 36% of households are adult couples, followed by couples with children (19%) and single parent families (19%).
- 87% of dwelling have 3 or more bedrooms.
- 34% of dwellings are owned outright, followed by owned with a mortgage (29%) and renting (26%).

T39. DWELLING STRUCTURE, ST ALBANS, 2006 TO 2011

Dwelling Type	2006	2016		Change (2011-16)	Change %
Separate house	13,961	17,335	81%	3,374	24%
Semi-detached, row or terrace house, townhouse	1,736	2,457	12%	721	42%
Flat or apartment	1,576	1,409	7%	-167	-11%
Other	47	71	0.30%	24	51%
Not stated	6	44	0.20%	38	633%
Total	17,333	21,358	100%	4,025	23%

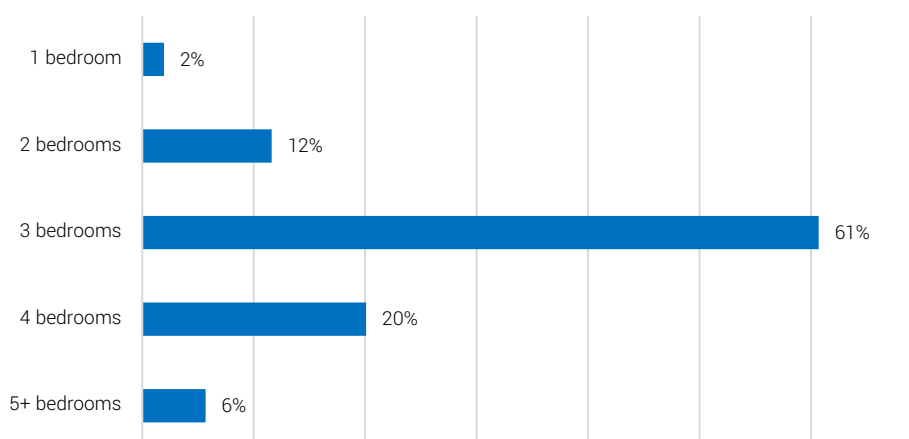
Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

F43. HOUSEHOLD SIZE & COMPOSITION, ST ALBANS, 2011 TO 2016

Indicator	2016		Change 2011 to 2016		% of Growth
Average Household Size	3.0		<0.1		
Couples with children	4,405	19%	+683	+18%	18%
Couples without children	8,326	36%	+1,349	+19%	36%
One parent families	4,273	19%	+1,055	+33%	29%
Other families	534	2%	+149	+39%	4%
Group household	709	3%	+131	+23%	4%
Lone person	3,495	15%	+156	+5%	4%
Other not classifiable household	1,179	5%	+174	+17%	5%
Total households	22,921	100%	+3,697	+19%	100%

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

F44. DWELLING SIZE (NO. OF BEDROOMS), ST ALBANS, 2016



Sources: ABS Census - Counting Dwellings, No. of Bedrooms, Place of Enumeration (MB), 2016

T40. TENURE, ST ALBANS, 2011 TO 2016

	2011	2016	2016 %	Change 2011 to 2016	
Fully Owned	6,646	6,772	34%	126	2%
Mortgage	6,080	5,905	29%	-175	-3%
Renting	4,468	5,202	26%	734	16%
Other Tenure Type	231	307	2%	76	33%
Not Stated	1,806	1,873	9%	67	4%
Total Households	19,231	20,059	100%	828	4%

Sources: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

5.14.2. DEMOGRAPHIC & HOUSING PROFILE SUMMARY, ST ALBANS

St Albans demographic & housing profile summary:

- St Albans is Brimbank's most populous district but is projected to be overtaken by Sunshine around 2040.
- St Albans has experienced moderate, but consistent population growth over time.
- St Albans has a similar age profile to Brimbank, but with a higher proportion of tertiary students and young workforce.
- A highly multi-cultural population. Almost one-quarter of Sunshine residents are of Vietnamese ancestry.
- The labour force is weighted towards 'blue collar' workers.
- The unemployment rate is higher than the municipal average, and the median household income is lower.
- The majority of housing stock is separate houses, but townhouse stock is growing.

Implications

- **A need to ensure development and new housing keeps pace with population growth.**
- **A need to provide affordable housing and rental stock for younger cohorts who are projected to increase further over time.**
- **A need to provide suitable housing and accommodation for students.**
- **The reliance on overseas migration means the housing market is more exposed to international border closures in the short term.**

5.15. DEMOGRAPHIC PROFILE SUMMARY

Indicator	Sunshine	Sydenham & Taylors Lakes	Keilor	Deer Park	St Albans
Population (approx.)	52,000	40,000	23,000	29,000	65,000
Age and lifecycle profile (top 4)	<p>20% parents & homebuilders (36-49 years)</p> <p>19% young workforce (25-34 years)</p> <p>11% older workers & Pre-retirees (50-59 years)</p> <p>10% tertiary education & independence (18-24 years)</p>	<p>21% parents & homebuilders (36-49 years)</p> <p>16% older workers and pre-retirees (60-69 years)</p> <p>13% young workforce (25-34 years)</p> <p>12% tertiary education & independence (18-24 years)</p>	<p>19% parents & homebuilders (36-49 years)</p> <p>14% older workers and pre-retirees (60-69 years)</p> <p>14% Empty nesters and retirees (60-69 years)</p> <p>10% Seniors (70-84 years)</p>	<p>22% parents & homebuilders (36-49 years)</p> <p>18% young workforce (25-34 years)</p> <p>11% primary schoolers (5-11 years)</p> <p>10% babies - pre-schoolers (0-4 years)</p>	<p>20% parents & homebuilders (36-49 years)</p> <p>16% young workforce (25-34 years)</p> <p>12% older workers and pre-retirees (60-69 years)</p> <p>11% Empty nesters and retirees (60-69 years)</p>
Ancestry (top 4)	<p>22% Vietnamese</p> <p>12% Australian</p> <p>11% English</p> <p>8% Italian</p>	<p>16% Australian</p> <p>14% English</p> <p>12% Italian</p> <p>7% Maltese</p>	<p>19% Australian</p> <p>18% English</p> <p>15% Italian</p> <p>6% Greek</p>	<p>12% Vietnamese</p> <p>12% Australian</p> <p>11% English</p> <p>8% Filipino</p>	<p>24% Vietnamese</p> <p>8% Australian</p> <p>8% English</p> <p>8% Chinese</p>
Occupations (top 3)	<p>17% Labourers</p> <p>16% Professionals</p> <p>14% Technicians & trade workers</p>	<p>12% Sales workers</p> <p>11% Labourers</p> <p>11% Managers</p>	<p>12% Managers</p> <p>11% Sales workers</p> <p>10% Community and personal service workers</p>	<p>15% Professionals</p> <p>15% Clerical & admin workers</p> <p>14% Machinery operators & drivers</p>	<p>20% Labourers</p> <p>15% Technicians and trade workers</p> <p>14% Machinery operators & drivers</p>
Weekly household income (median)	\$1,129	\$1,620	\$1,439	\$1,403	\$1,123
Unemployment rate (Dec 2020)	12.2%	7.3%	8.2%	10.5%	14.3%

5.16. HOUSING PROFILE SUMMARY

Indicator	Sunshine	Sydenham & Taylors Lakes	Keilor	Deer Park	St Albans
Dwellings (rounded)	19,000	13,000	8,300	8,800	21,400
Occupancy rate	93%	95%	93%	95%	94%
Dwelling structure	76% separate house 15% semi-detached, townhouse 8% apartment/flat	79% separate house 19% semi-detached, townhouse 2% apartment/flat	86% separate house 12% semi-detached, townhouse 1% apartment/flat	89% separate house 10% semi-detached, townhouse 1% apartment/flat	81% separate house 12% semi-detached, townhouse 7% apartment/flat
Ave household size	2.8	3	2.8	3.1	3
Household composition (top 4)	32% couple without children 20% couple with children 19% lone person 16% one-parent family	47% couple without children 20% couple with children 14% one-parent family 13% lone person	38% couple without children 25% couple with children 16% lone person 15% one-parent family	44% couple without children 18% couple with children 16% one-parent family 13% lone person	36% couple without children 19% couple with children 19% one-parent family 15% lone person
Tenure	33% owned outright 30% renting 27% owned with mortgage	39% owned with mortgage 35% owned outright 18% renting	44% owned outright 33% owned with mortgage 15% renting	42% owned with mortgage 23% owned outright 25% renting	34% owned outright 29% owned with mortgage 26% renting
Median house price	\$650,000	\$625,000	\$735,000	\$600,000	\$615,000
Median unit price	\$435,000	\$410,000	\$465,000	\$460,000	\$430,000

HOUSING & DEVELOPMENT TRENDS



This section assesses housing, development and property market trends in Brimbank, including historical changes in dwelling stock, household composition and sizes.

For development trends, historical dwelling approval data has been assessed across Brimbank to identify the scale, location and type of development activity that has occurred in Brimbank over the past decade.

6. HOUSING AND DEVELOPMENT TRENDS

6.1. HOUSING TRENDS, BRIMBANK

6.1.1. HISTORICAL DWELLING GROWTH

In 2016, there were 69,225 dwellings in Brimbank, with an occupancy rate of 94%. Key observations relevant to dwelling growth in Brimbank are as follows:

- The number of dwellings in Brimbank increased by 14,200 between 2006 and 2016, representing an average annual increase of 1,420 dwellings.
- New separate houses account for more than 80% of dwelling growth (approx. +11,500 dwellings).
- Semi-detached, townhouse dwelling stock increased by almost 3,500 dwellings, representing 13% of growth.

T41. HISTORICAL DWELLING GROWTH, BRIMBANK, 2006 TO 2016

Indicator	2006	2016	Change (2006-16)	AAG	AAGR
Total Dwellings	55,025	69,225	14,200	1,420	2.3%
Occupied Private Dwellings	51,879	64,860	12,981	1,298	2.3%
Unoccupied Private Dwellings	3,146	4,365	1,219	122	3.3%
Occupancy Rate	94%	94%	-0.6%	-0.1%	-0.1%

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2006, 2011 & 2016

T42. DWELLING STRUCTURE, BRIMBANK, 2006 TO 2016

Dwelling type	2006	2016	% 2016	Change (2011 -16)	Change %
Separate house	44,699	56,173	81%	11,474	26%
Semi-detached, row or terrace house, townhouse	5,876	9,309	13%	3,433	58%
Flat or apartment	4,243	3,370	5%	-873	-21%
Other	149	212	0.30%	63	42%
Not stated	16	120	0.20%	104	650%
Total	55,001	69,276	100%	14,275	26%

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2011 & 2016

6.1.2. HOUSEHOLD SIZE AND COMPOSITION TRENDS

Key observations in relation to household composition and size are as follows:

- The most common household type in Brimbank is families (38%), followed by adult couples (20%), singles (17%) and one-parent families (15%).
- The number of households in Brimbank increased by more than 8,200 between 2006 and 2016.
- Approximately one-quarter of household growth was driven by adult couples, followed by singles (19%) and families (15%).
- The average household size in Brimbank remained unchanged between 2006 and 2016. The average household size in Sydenham & Taylors Lakes district and the Keilor district decreased by 0.3 persons in that time.

T43. HOUSEHOLD COMPOSITION, BRIMBANK, 2006 TO 2016

Households by type	2006	2016	Change (2006-16)	
Couples with children	23,159	24,390	1,231	5%
Couples without children	11,099	13,120	2,021	18%
One parent families	8,412	9,463	1,051	12%
Other families	857	1,194	337	39%
Group household	1,287	2,052	765	59%
Lone person	9,421	11,350	1,929	20%
Other	2,401	3,289	888	37%
Total households	56,636	64,858	8,222	15%

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2006, 2016

T44. HOUSEHOLD SIZE, BRIMBANK, 2006 TO 2016

Area	2006	2016	Change (2006-16)
St Albans - Kings Park - Cairnlea	2.9	3.0	+0.1
Sunshine - Ardeer - Albion	2.7	2.8	+0.1
Taylors Lakes - Sydenham	3.3	3.0	-0.3
Keilor - Keilor Downs	3.1	2.8	-0.3
Deer Park - Derrimut	2.8	3.1	+0.3
City of Brimbank (LGA)	2.9	3.0	+0.1
Metropolitan Melbourne	2.6	2.7	+0.1

Source: ABS Census - Counting Dwellings, Place of Enumeration (MB), 2006, 2011 & 2016

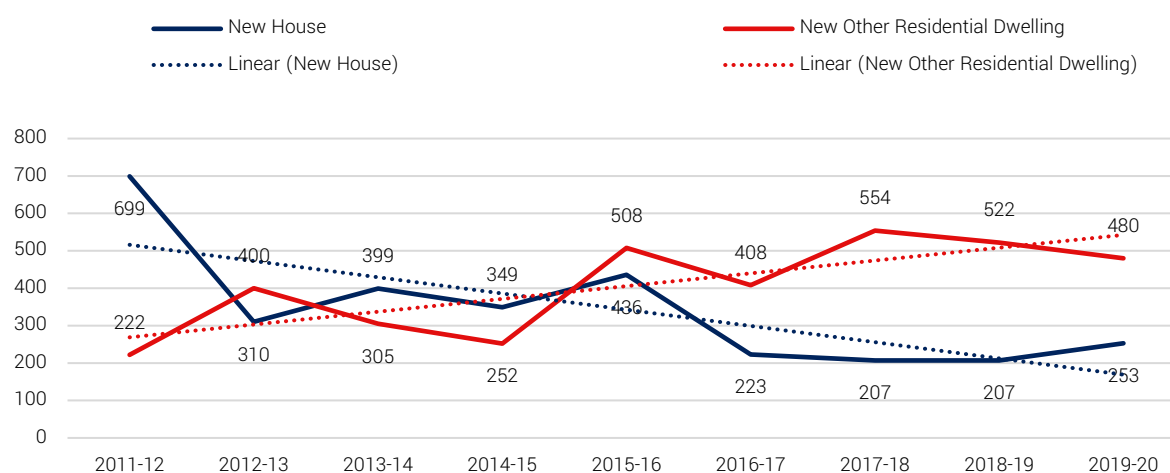
6.2. DWELLING APPROVALS

Dwelling approvals indicate the scale and location of dwelling growth and development activity across Brimbank. Approvals have been assessed annually for the period between 2011-12 and 2019-20 (financial years) using data published by the ABS. Dwelling approvals are categorised as 'new houses' or 'other dwellings', which includes apartments, flats and units.

Key observations are as follows:

- Brimbank averaged 749 dwelling approvals per annum, including 343 houses and 406 other residential dwelling.
- New house approvals have been declining, while other dwellings are increasing.
- Since 2016, other dwelling approvals have made up the majority of annual approvals, reflecting the overall decline in broadacre land supply.
- Since 2012, dwelling approvals in Brimbank only account for 8% of annual approvals in Melbourne's West; 5% of total house approvals, but 16% of other dwelling approvals.

F45. DWELLING APPROVALS, BRIMBANK, 2012 TO 2020



Source: ABS Building Approvals, 2011-2020

T45. DWELLING APPROVALS, BRIMBANK, 2012 TO 2020

Year	New House	New Other Residential Dwelling	Residential Dwellings Total	New Houses (%)	New Other Residential Dwellings (%)
2011-12	699	222	924	76%	24%
2012-13	310	400	713	43%	56%
2013-14	399	305	712	56%	43%
2014-15	349	252	614	57%	41%
2015-16	436	508	950	46%	53%
2016-17	223	408	638	35%	64%
2017-18	207	554	766	27%	72%
2018-19	207	522	729	28%	72%
2019-20	253	480	735	34%	65%
Brimbank LGA Average	343	406	749	45%	54%
Melbourne West SA4 Average	6,516	2,521	9,087	72%	28%

Source: ABS Building Approvals, 2011-2020

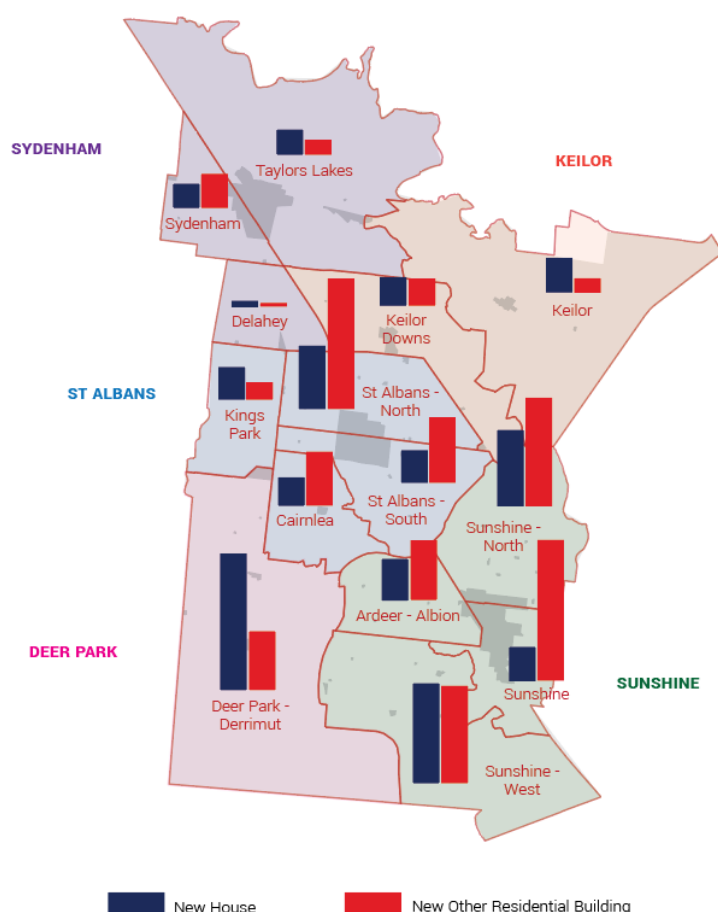
6.3. DWELLING APPROVALS BY DISTRICT

To understand the scale and location of residential activity that has occurred in Brimbank, ABS dwelling approvals data has been collected at a district level between 2012 and 2020. District dwelling approvals are summarised in Figure 46 and Table 46. The following observations are made:

- Almost three quarters (72%) of dwelling approvals occurred in Sunshine (2,930) and St Albans (1,880).
- Deer Park accounted for 13% of approvals; the majority of which are separate houses.
- Sydenham & Taylors Lakes and Keilor averaged in the order of 460 to 470 dwelling approvals over the period and make up a small proportion of new dwellings in Brimbank (approximately 7% per district).

More detailed dwelling approval activity across Brimbank is analysed on the following pages.

F46. DWELLING APPROVALS BY DISTRICT, 2012 TO 2020



Source: ABS Building Approvals, 2011-2020

T46. DWELLING APPROVALS BY DISTRICT, 2012 TO 2020

District	New Houses	Other Dwellings	Total
Sunshine	1,118	1,812	2,930 (44%)
St Albans	692	1,188	1,880 (28%)
Deer Park	609	261	870 (13%)
Sydenham & Taylors Lakes	242	230	472 (7%)
Keilor	279	182	461 (7%)
Total	2,940	3,673	6,613

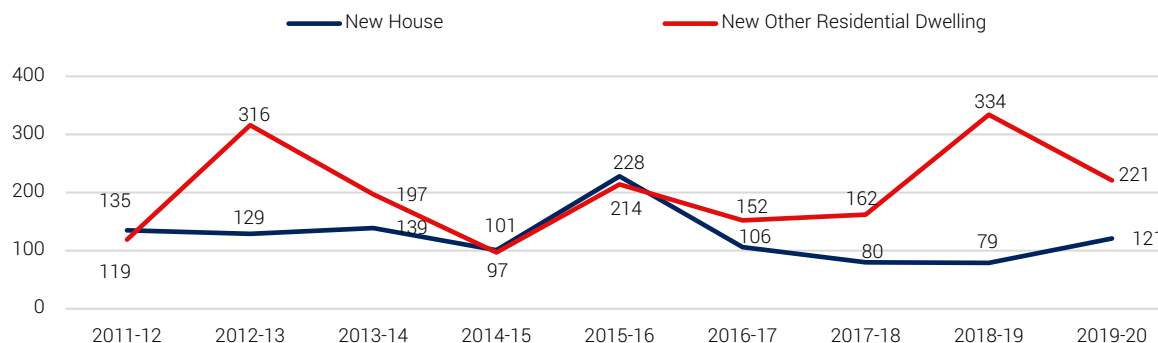
Source: ABS Building Approvals, 2011-2020

6.3.1. SUNSHINE

Since 2012, the Sunshine district averaged 328 dwelling approvals per annum, accounting for 44% of Brimbank's annual dwelling approvals. Of the 328 approvals, 38% were new houses and 61% were 'other dwellings'.

Figure 47 shows that development activity has been variable, however the number of new 'other dwellings' has consistently outpaced new houses over the period.

F47. DWELLING APPROVALS, SUNSHINE, 2012 TO 2020



Source: ABS Building Approvals, 2011-2020

T47. ABS DWELLING APPROVALS, SUNSHINE, 2012 TO 2020

Year	Total dwelling approvals	New Houses (%)	New Other Residential Dwellings (%)
2011-12	254	53%	47%
2012-13	446	29%	71%
2013-14	340	41%	58%
2014-15	204	50%	48%
2015-16	442	52%	48%
2016-17	263	40%	58%
2017-18	244	33%	66%
2018-19	413	19%	81%
2019-20	344	35%	64%
Average	328	38%	61%

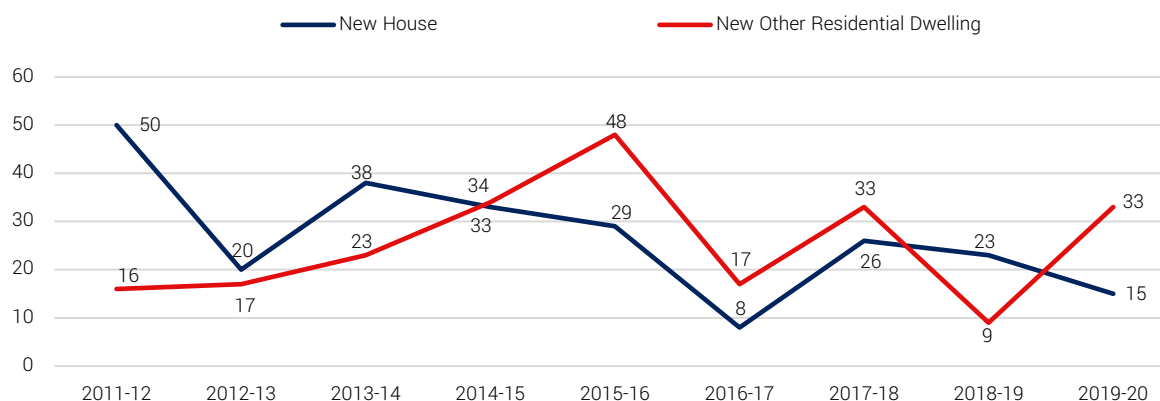
Source: ABS Building Approvals, 2011-2020

6.3.2. SYDENHAM & TAYLORS LAKES

Since 2012, Sydenham and Taylors Lakes District averaged 53 new dwellings per annum, with an almost even split between houses and 'other dwellings'. Dwelling approvals in this district have accounted for only 7% of Brimbank's annual approvals over the period.

There has been a general decline in house approvals since 2012 and have fallen below 10 approvals on two occasions (2017 and 2020). This is reflective of the constrained supply of vacant residential land.

F48. DWELLING APPROVALS, SYDENHAM & TAYLORS LAKES, 2012 TO 2020



Source: ABS Building Approvals, 2012-2020

T48. ABS DWELLING APPROVALS, SYDENHAM & TAYLORS LAKES, 2012 TO 2020

Year	Total dwelling approvals	New Houses (%)	New Other Residential Dwellings (%)
2011-12	66	76%	24%
2012-13	37	54%	46%
2013-14	63	60%	37%
2014-15	70	47%	49%
2015-16	77	38%	62%
2016-17	25	32%	68%
2017-18	59	44%	56%
2018-19	32	72%	28%
2019-20	48	31%	69%
Average	53	51%	48%

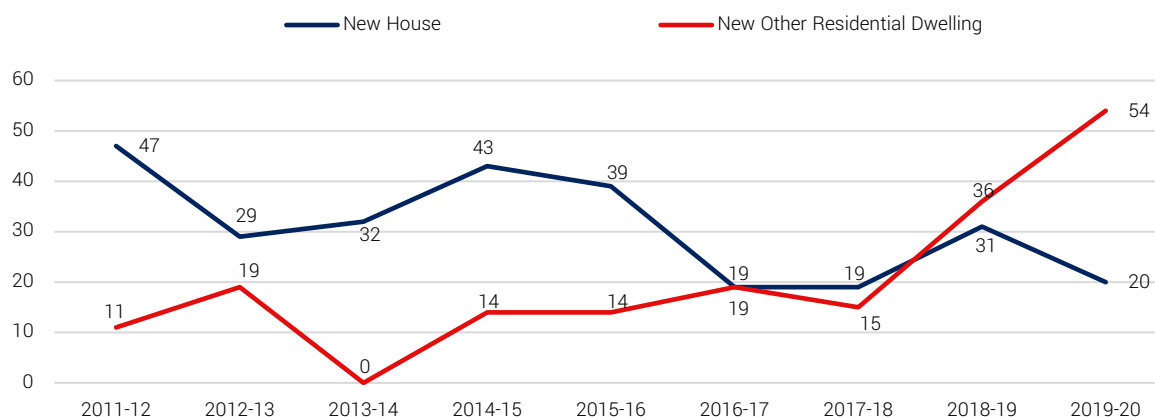
Source: ABS Building Approvals, 2012-2020

6.3.3. KEILOR

Since 2012, the Keilor district averaged 52 new dwellings per annum, accounting for only 7% of Brimbank's annual approvals over the period. The average split of approvals in Keilor has been 60% houses and 40% 'other dwellings'. More recently in 2020, that split was approximately 25% new houses and 75% 'other dwellings', indicating that a development shift has taken place in recent years.

There is a general trend of declining house approvals and increasing 'other dwelling' approvals. This includes a 10-year high of 54 'other dwelling' approvals in 2020.

F49. DWELLING APPROVALS, KEILOR, 2012 TO 2020



Source: ABS Building Approvals, 2012-2020

T49. ABS DWELLING APPROVALS, KEILOR, 2012 TO 2020

Year	Total dwelling approvals	New Houses (%)	New Other Residential Dwellings (%)
2011-12	58	81%	19%
2012-13	48	60%	40%
2013-14	32	100%	0%
2014-15	59	73%	24%
2015-16	54	72%	26%
2016-17	39	49%	49%
2017-18	34	56%	44%
2018-19	67	46%	54%
2019-20	74	27%	73%
Average	52	60%	39%

Source: ABS Building Approvals, 2012-2020

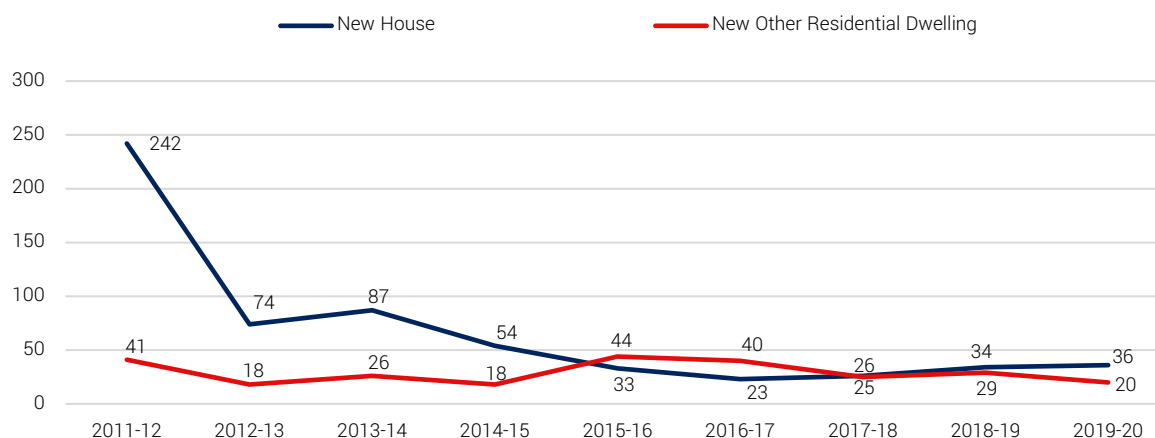
6.3.4. DEER PARK

Since 2012, the Deer Park district averaged 98 new dwellings per annum, accounting for 13% of Brimbank's annual approvals over the period. The average split of approvals in Deer Park has been 70% houses and 30% 'other dwellings'.

Dwelling approvals in Deer Park peaked in 2012, with more than 280 approvals (including 242 new houses). As vacant broadacre opportunities diminished, so did dwelling approvals. As a result, dwelling approvals fell sharply the following year and continued to decline over the period.

Since 2017, dwelling approvals in Deer Park have been in the order of 50 to 60 per annum (on average).

F50. DWELLING APPROVALS, DEER PARK, 2012 TO 2020



Source: ABS Building Approvals, 2012-2020

T50. ABS DWELLING APPROVALS, DEER PARK, 2012 TO 2020

	Total dwelling approvals	New Houses (%)	New Other Residential Dwellings (%)
2011-12	284	85%	14%
2012-13	92	80%	20%
2013-14	115	76%	23%
2014-15	72	75%	25%
2015-16	81	41%	54%
2016-17	64	36%	63%
2017-18	53	49%	47%
2018-19	63	54%	46%
2019-20	56	64%	36%
Average	98	69%	30%

Source: ABS Building Approvals, 2012-2020

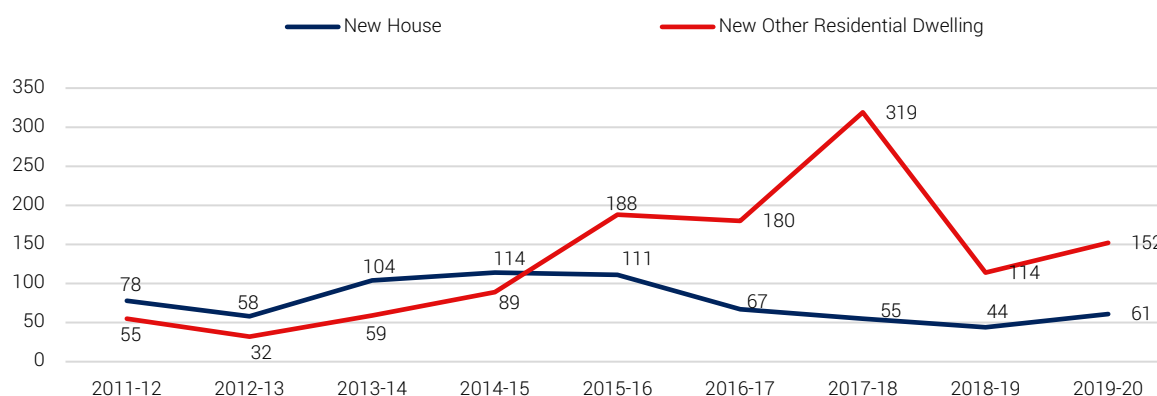
6.3.5. ST ALBANS

Since 2012, St Albans district averaged 98 new dwellings per annum, accounting for 13% of Brimbank's annual approvals over the period. The average split of approvals in St Albans has been 37% houses and 67% 'other dwellings'.

The number of house approvals have been declining since 2016, whilst the number of 'other dwellings' has been increasing; including a peak of 319 dwellings in 2018.

These volumes are relatively low despite St Albans containing large areas within the Residential Growth Zone designated for higher density development (except for 2017-18).

F51. DWELLING APPROVALS, ST ALBANS, 2012 TO 2020



Source: ABS Building Approvals, 2012-2020

T51. ABS DWELLING APPROVALS, ST ALBANS, 2012 TO 2020

Year	Total dwelling approvals	New Houses (%)	New Other Residential Dwellings (%)
2011-12	135	58%	41%
2012-13	92	63%	35%
2013-14	163	64%	36%
2014-15	205	56%	43%
2015-16	300	37%	63%
2016-17	247	27%	73%
2017-18	375	15%	85%
2018-19	158	28%	72%
2019-20	213	29%	71%
Average	210	37%	63%

Source: ABS Building Approvals, 2012-2020

6.4. COUNCIL BUILDING PERMIT DATA

Residential building approvals data (i.e. building permits issued for new dwellings) was provided by Council from 2015 to 2020 (inclusive). The total number of approvals captured in the Council data is materially lower than the approvals published by ABS which was summarised in previous sections. There are two potential reasons for the understated number of building approvals:

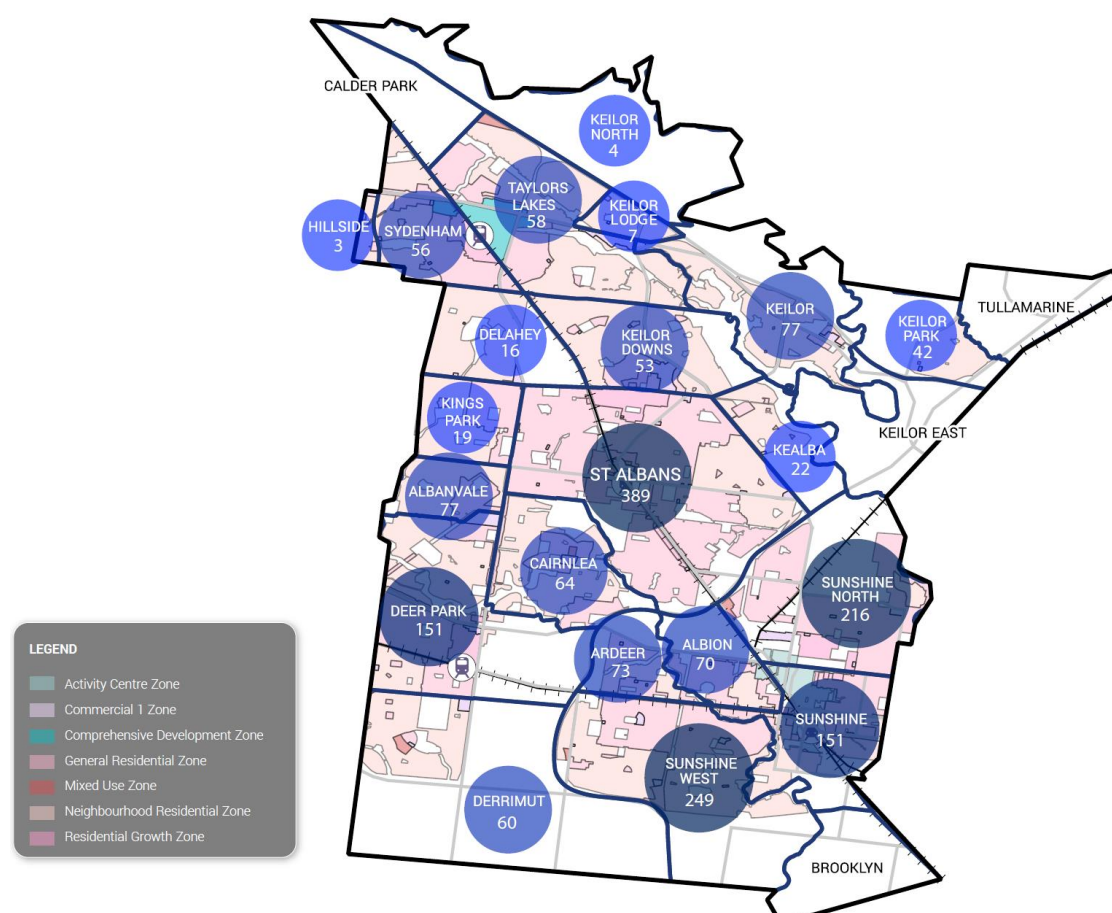
- Multiple unit/dwelling approvals may be reflected as a single entry and as a result; are not fully accounted for; and
- Some building approvals may have been privately issued, and have not been collected by Council.

This data, however, is still useful as it provides an indication of property specific approvals across the municipality. However, given the underrepresentation of total approvals, it is considered a sample only.

Between 2015 and 2020, there was a total of 1,852 residential building approvals at an average of 370 per annum. The location of approvals is summarised in Figure 52, Table 52 and Table 53. Key points are as follows:

- Annual residential building approvals have been consistent over the period, with a slight decline.
- One-third (33%) of approvals occurred in Sunshine and 21% occurred in St Albans.
- 39% of approvals occurred in the NRZ1 and 37% of approvals occurred in the GRZ1, indicating that townhouse and infill development has accounted for the majority of development activity since 2015.
- The number of approvals in the RGZ and ACZ has been negligible, warranting review of the effectiveness of these planning zones in facilitating residential development.

F52. TOTAL BUILDING APPROVALS BY SUBURB, BRIMBANK, 2015 TO 2020



Source: Building Approvals Data, Brimbank City Council, derived by Urban Enterprise, 2021.

Note: This data relates to approvals only. Multi-unit dwellings are not fully accounted for.

T52. BUILDING APPROVALS BY SUBURB, BRIMBANK, 2015 TO 2020

Suburb	2015	2016	2017	2018	2019	2020	Total
Albanvale	29	23	9	5	9	2	77
Albion	14	13	12	9	15	7	70
Ardeer	16	14	10	8	14	6	68
Cairnlea	18	14	18	4	4	6	64
Deer Park	35	25	28	22	26	15	151
Delahey	2	3	3	3	5		16
Derrimut	22	11	7	5	9	6	60
Hillside			1	1	1		3
Kealba	10	2	7	3			22
Keilor	18	6	5	15	17	16	77
Keilor Downs	8	9	10	6	16	4	53
Keilor Lodge	1		4	1		1	7
Keilor North	1		1			2	4
Keilor Park	11	7	4	1	8	11	42
Kings Park	1		6	3	5	4	19
St Albans	95	65	60	56	60	53	389
Sunshine	13	36	29	22	27	24	151
Sunshine North	52	39	29	45	28	23	216
Sunshine West	104	37	37	21	27	23	249
Sydenham	15	8	12	8	8	5	56
Taylors Lakes	10	7	12	8	15	6	58
Total	475	319	304	246	294	214	1,852

Source: Brimbank City Council, Urban Enterprise, 2021.

T53. BUILDING APPROVALS BY ZONE, BRIMBANK, 2015 TO 2020

Zone	2015	2016	2017	2018	2019	2020	Total
ACZ1		1			1	2	4
C1Z	1		1				2
GRZ1	178	108	87	88	128	108	697
MUZ		1					1
NRZ1	191	146	121	75	110	71	714
NRZ2	25	9	13	8	5	4	64
RGZ1	19	14	15	23	10	16	97
Not available	61	40	67	52	40	13	273
Total	475	319	304	246	294	214	1,852

Source: Brimbank City Council, Urban Enterprise, 2021.

6.5. PROPERTY VALUES, BRIMBANK

Demand for housing in an area is reflected by residential property market indicators such as price trends. For Brimbank and districts, median house, unit and vacant block prices have been collected and assessed for the period between 2009 and 2019. Prices are benchmarked where possible.

In 2019, Brimbank's median residential property values were as follows:

- House (\$610,000) compared with \$720,000 in Melbourne;
- Unit (\$435,000) compared with \$565,000 in Melbourne; and
- Vacant house block (\$573,500) compared with \$319,500 in Melbourne.

Although median housing values are lower in Brimbank than metropolitan Melbourne overall, residential property values in Brimbank have experienced strong price growth, with house prices increasing by more than 6% per annum over the period and vacant lot prices are considerably higher in Brimbank than the metropolitan median. Price growth has outpaced metropolitan Melbourne over the past decade, albeit starting from a lower base.

Particularly strong price has occurred since 2013, with the median house price increasing from \$385,000 in 2013 to \$623,000 in 2017 (an average increase of 13% per annum) and the median vacant lot price increasing from \$275,500 in 2015 to \$573,500 in 2019 (20% increase per annum).

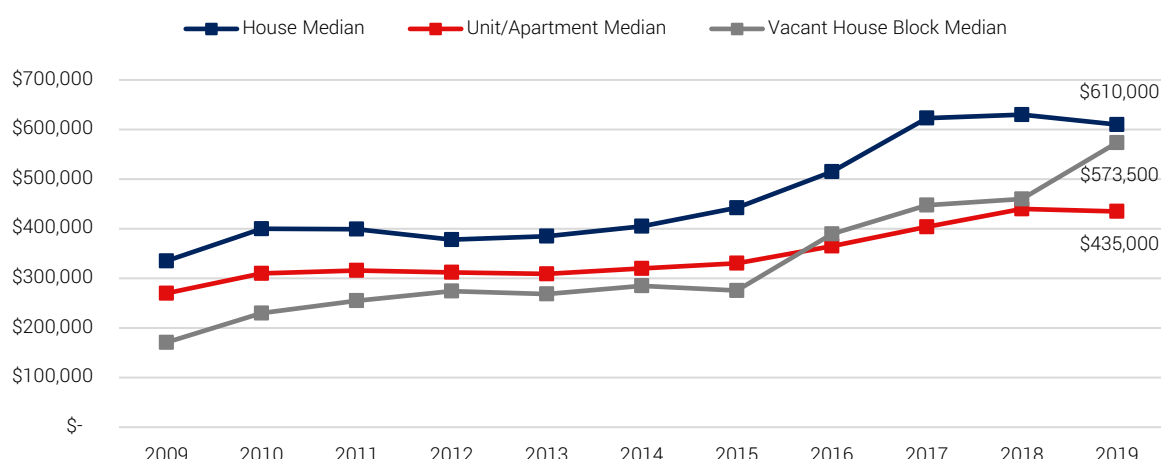
Given that the previous Housing Strategy was prepared in 2014, the implications of the strong price growth in subsequent years should be a focus of the current Strategy.

T54. MEDIAN PROPERTY PRICES, BRIMBANK, 2009 TO 2019

Suburb	Property Type	2009	2019	Change (No.)	AAGR %
City of Brimbank	House	\$335,200	\$610,000	+\$274,800	6.2%
	Unit	\$270,000	\$435,000	+\$165,000	4.9%
	Vacant	\$171,000	\$573,500	+\$402,500	12.9%
Metropolitan Melbourne	House	\$418,250	\$720,000	+\$301,750	5.6%
	Unit	\$385,000	\$565,000	+\$180,000	3.9%
	Vacant	\$166,000	\$319,500	+\$153,500	6.8%

Source: A Guide to Property Values, Valuer General, 2020.

F53. MEDIAN PROPERTY PRICES, BRIMBANK, 2009 TO 2019



Source: A Guide to Property Values, Valuer General, 2020.

6.6. PROPERTY VALUES, DISTRICTS

6.6.1. SUNSHINE

In the Sunshine district, the suburb of Sunshine has the highest median house price (\$720,000), followed by Albion (\$675,000), Sunshine West (\$635,000) and Sunshine North (\$630,000).

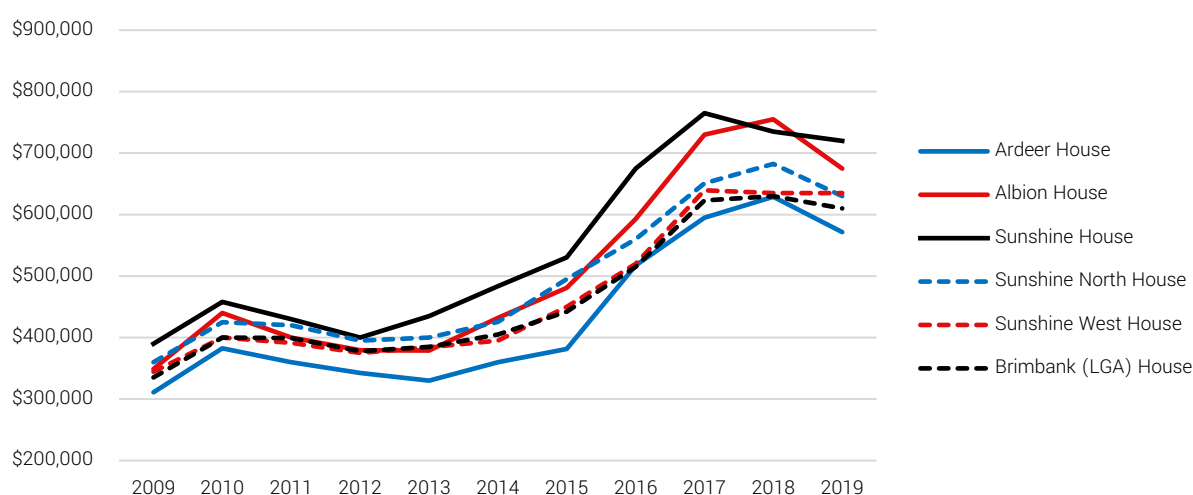
Each suburb within the district has attracted strong house price growth of between 6% and 7% per annum. Generally, house and unit prices in Sunshine are higher compared with Brimbank.

T55. SUNSHINE MEDIAN PROPERTY PRICES, 2009 TO 2019

Suburb	Property Type	2009	2019	Change #	AAGR%
Ardeer	House	\$311,000	\$571,500	\$260,500	6.3%
	Unit	\$305,000	\$531,000	\$226,000	5.7%
Albion	House	\$349,000	\$675,000	\$326,000	6.8%
	Unit	\$214,000	\$261,000	\$47,000	2.0%
Sunshine	House	\$390,000	\$720,000	\$330,000	6.3%
	Unit	\$260,000	\$390,000	\$130,000	4.1%
Sunshine North	House	\$360,000	\$630,000	\$270,000	5.8%
	Unit	\$250,000	\$512,000	\$262,000	7.4%
	Vacant	\$235,000	\$434,000	\$199,000	6.3%
Sunshine West	House	\$344,500	\$635,000	\$290,500	6.3%
	Unit	\$292,500	\$480,000	\$187,500	5.1%
City of Brimbank	House	\$335,200	\$610,000	\$274,800	6.2%
	Unit	\$270,000	\$435,000	\$165,000	4.9%
	Vacant	\$171,000	\$573,500	\$402,500	12.9%

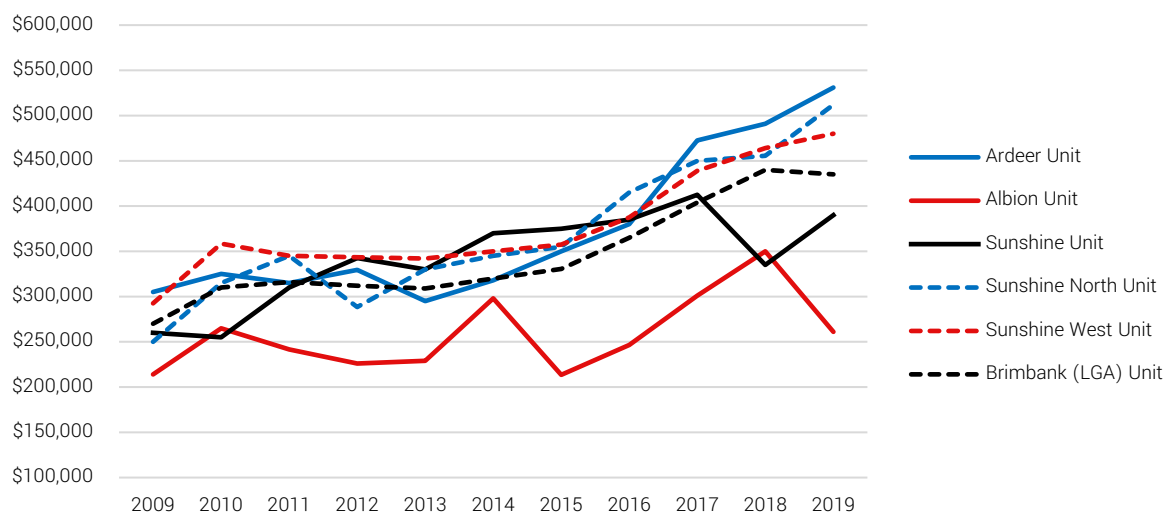
Source: A Guide to Property Values, Valuer General, 2020.

F54. MEDIAN HOUSE PRICES, SUNSHINE, 2009 TO 2019



Source: A Guide to Property Values, Valuer General, 2020.

F55. MEDIAN UNIT/APARTMENT PRICES, SUNSHINE, 2009 TO 2019



Source: A Guide to Property Values, Valuer General, 2020.

6.6.2. SYDENHAM & TAYLORS LAKES

In the Sydenham & Taylors Lakes district, the suburb of Taylors Lakes has the highest median house price (\$748,000), followed by Sydenham (\$599,000) and Delahey (\$530,000). Each suburb within the district has experienced house price growth of between 5% and 6% per annum.

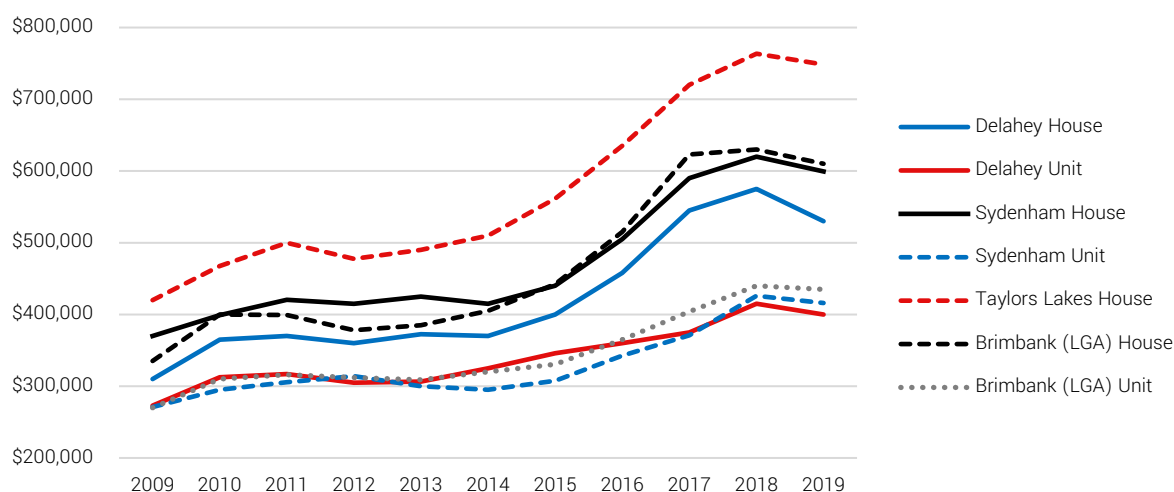
Unit prices in Delahey and Sydenham are slightly lower compared with Brimbank.

T56. MEDIAN PROPERTY PRICES, SYDENHAM, 2009 TO 2019

Suburb	Property Type	2009	2019	Change (#)	AAGR %
Delahey	House	\$310,000	\$530,000	\$220,000	5.5%
	Unit	\$273,000	\$400,000	\$127,000	3.9%
Sydenham	House	\$370,000	\$599,500	\$229,500	4.9%
	Unit	\$271,000	\$416,000	\$145,000	4.4%
Taylors Lakes	House	\$420,000	\$748,500	\$328,500	5.9%
City of Brimbank	House	\$335,200	\$610,000	\$274,800	6.2%
	Unit	\$270,000	\$435,000	\$165,000	4.9%
	Vacant	\$171,000	\$573,500	\$402,500	12.9%

Source: A Guide to Property Values, Valuer General, 2020.

F56. MEDIAN PROPERTY PRICES, SYDENHAM, 2009 TO 2019



Source: A Guide to Property Values, Valuer General, 2020.

6.6.3. KEILOR

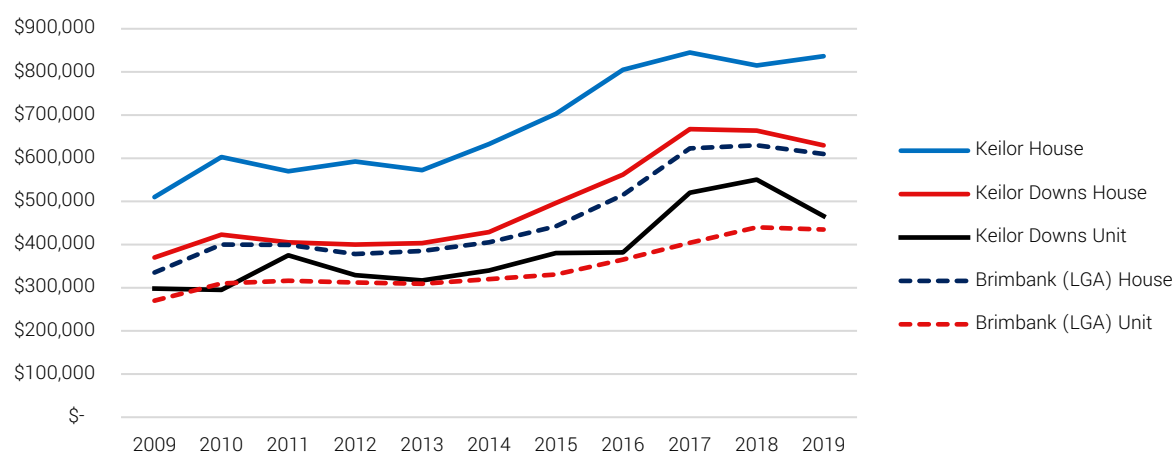
The suburb of Keilor has the highest median house price (\$836,000) in Brimbank and is more than one-third (+\$200,000) higher than the Brimbank median.

T57. MEDIAN PROPERTY PRICES, KEILOR, 2009 TO 2019

Suburb	Property Type	2009	2019	Change (No.)	AAGR%
Keilor	House	\$510,000	\$836,500	+\$326,500	+5.1%
Keilor Downs	House	\$370,000	\$630,000	+\$260,000	+5.5%
	Unit	\$298,000	\$466,000	+\$168,000	+4.6%
City of Brimbank	House	\$335,200	\$610,000	+\$274,800	+6.2%
	Unit	\$270,000	\$435,000	+\$165,000	+4.9%
	Vacant	\$171,000	\$573,500	+\$402,500	+12.9%

Source: A Guide to Property Values, Valuer General, 2020.

F57. MEDIAN PROPERTY PRICES, KEILOR, 2009 TO 2019



Source: A Guide to Property Values, Valuer General, 2020.

6.6.4. DEER PARK

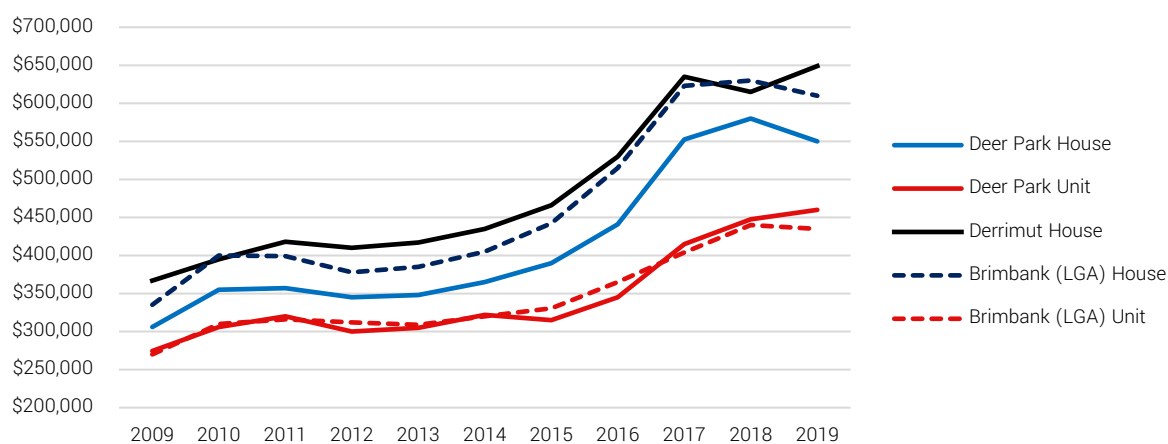
In the Deer Park district, the suburb of Derrimut has a higher median house price (\$649,000) than Deer Park (\$550,000). Both suburbs in the district have experienced house price growth in the order of 6% per annum.

T58. MEDIAN PROPERTY PRICES, DEER PARK, 2009 TO 2019

Suburb	Property Type	2009	2019	Change (No.)	AAGR%
Deer Park	House	\$306,000	\$550,000	+\$244,000	6.0%
	Unit	\$274,500	\$460,000	+\$185,500	5.3%
Derrimut	House	\$367,000	\$649,000	+\$282,000	5.9%
City of Brimbank	House	\$335,200	\$610,000	+\$274,800	6.2%
	Unit	\$270,000	\$435,000	+\$165,000	4.9%
	Vacant	\$171,000	\$573,500	+\$402,500	12.9%

Source: A Guide to Property Values, Valuer General, 2020.

F58. MEDIAN PROPERTY PRICES, DEER PARK, 2009 TO 2019



Source: A Guide to Property Values, Valuer General, 2020.

6.6.5. ST ALBANS

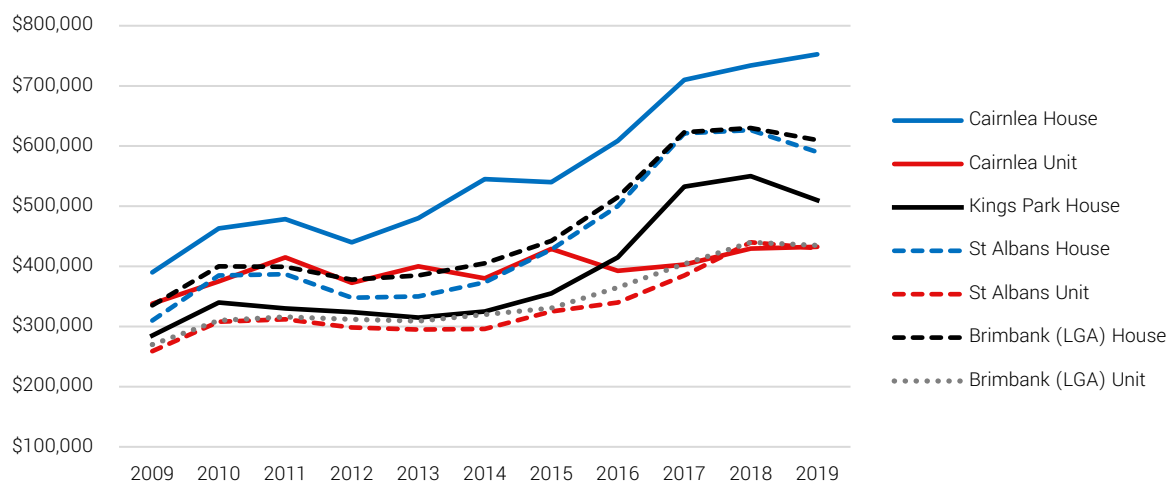
In the St Albans district, the suburb of Cairnlea has the highest median house price (\$752,000), followed by St Albans (\$590,000) and Kings Park (\$510,000). Each suburb in the district has experienced house price growth above 6% per annum.

T59. MEDIAN PROPERTY PRICES, ST ALBANS, 2009 TO 2019

Suburb	Property Type	2009	2019	Change (No.)	AAGR%
Cairnlea	House	\$390,000	\$752,500	\$362,500	6.8%
	Unit	\$338,000	\$432,500	\$94,500	2.5%
Kings Park	House	\$285,000	\$510,000	\$225,000	6.0%
St Albans	House	\$310,000	\$590,000	\$280,000	6.6%
	Unit	\$259,000	\$430,000	\$171,000	5.2%
	Vacant	\$178,000	\$468,500	\$290,500	10.2%
City of Brimbank	House	\$335,200	\$610,000	\$274,800	6.2%
	Unit	\$270,000	\$435,000	\$165,000	4.9%
	Vacant	\$171,000	\$573,500	\$402,500	12.9%

Source: A Guide to Property Values, Valuer General, 2020.

F59. MEDIAN PROPERTY PRICES, ST ALBANS, 2009 TO 2019



Source: A Guide to Property Values, Valuer General, 2020.

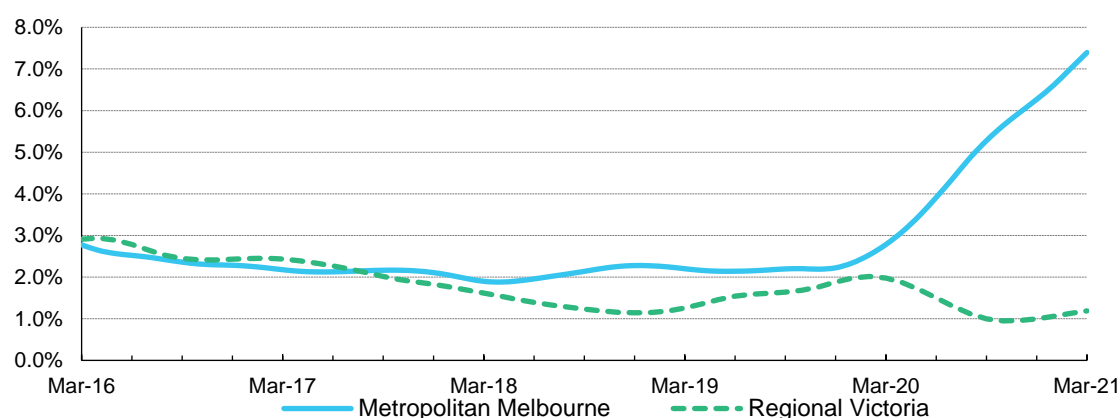
6.7. RENTAL REPORT

The Victorian Rental Report is published by the Department of Health and Human Services on a quarterly basis. The Report provides key statistics on the private rental market in Victoria.

6.7.1. VACANCY RATE

Figure 60 shows the trend vacancy rate over the past five years for metropolitan Melbourne and regional Victoria. Following a period of very low rental vacancies of less than 3% from 2016 to 2020, the vacancy rate for metropolitan Melbourne increased to 7.4% in March 2021, the highest rate since the series began in 1999. This is likely a result of the COVID-19 pandemic impacting population growth and subsequent demand for rental properties, especially from international students in inner areas of Melbourne.

F60. RENTAL VACANCY RATE, METROPOLITAN MELBOURNE – REGIONAL VICTORIA



Source: Victorian Rental Report, Department of Health and Human Services, March 2021.

6.7.2. MEDIAN RENT

Median rent price data for Brimbank is captured within the western Melbourne region. As at March 2021:

- The median rent was \$380 per week, slightly lower than the metropolitan average (\$400 pw);
- The median rent price in western Melbourne did not change over the previous year, along with northern Melbourne and outer eastern Melbourne.
- Median rents across inner Melbourne declined over the previous 12 months, with inner Melbourne declining by 19%, indicating that the western region rental market has been less impacted by the COVID pandemic than the inner areas of Melbourne.

T60. MEDIAN RENTS, METROPOLITAN MELBOURNE, MARCH 2021

Region	Median Rent	Annual Change
Inner Melbourne	\$395	-19.4%
Inner Eastern Melbourne	\$440	-6.4%
Southern Melbourne	\$450	-6.3%
Western Melbourne	\$380	0%
North Western Melbourne	\$400	0%
North Eastern Melbourne	\$400	0%
Outer Eastern Melbourne	\$420	0%
South Eastern Melbourne	\$380	0%
Mornington Peninsula	\$410	3.8%

Source: Victorian Rental Report, Department of Health and Human Services, March 2021

In Brimbank, the median rent for a flat/unit ranges from \$240 to \$330 per week and between \$350 and \$370 per week for a house.

Median flat/unit rents have declined over the past 12 months, with median house rents unchanged. This is a further indication that rental demand across the local apartment market is relatively weak compared with demand for separate houses.

T61. MEDIAN RENTS BY PROPERTY TYPE, BRIMBANK, MARCH 2021

Area	1 Bed Flat			2 Bed Flat			2 Bed House			3 Bed House		
	Count	Median	Annual % change	Count	Median	Annual % change	Count	Median	Annual % change	Count	Median	Annual % change
Brimbank	54	\$240	-4.0%	172	\$330	-2.9%	138	\$370	0.0%	51	\$350	0.0%

Source: Victorian Rental Report, Department of Health and Human Services, March 2021.

6.7.3. NEW LETTINGS

The number of new lettings indicates of the overall availability of rental housing for a specific period. A new letting can result from two main sources: turnover in existing rental housing or new additions to the stock of rental housing. The total number of new lettings as at March 2021 across metropolitan Melbourne is summarised in Table 62. Western Melbourne experienced a 2.7% decline in new lettings between March 2020 and 2021; down to 7,456. This shows that the availability of rental stock in Brimbank has fallen.

The downward trend is consistent with other metropolitan areas, except for Inner Melbourne, which saw a 21% increase in lettings.

T62. NEW LETTINGS, METROPOLITAN MELBOURNE, MARCH 2021

Region	March 2020	March 2021	Change
Inner Melbourne	20,525	16,973	20.9%
Inner Eastern Melbourne	7,485	7,845	-4.6%
Southern Melbourne	4,831	4,978	-3.0%
Western Melbourne	7,251	7,456	-2.7%
North Western Melbourne	5,218	5,321	-1.9%
North Eastern Melbourne	4,737	5,082	-6.8%
Outer Eastern Melbourne	1,897	2,215	-14.4%
South Eastern Melbourne	3,742	4,654	-19.6%
Mornington Peninsula	1,572	2,109	-25.5%

Source: Victorian Rental Report, Department of Health and Human Services, March 2021

6.7.4. RENTAL BONDS

As at March 2021, the total number of active rental bonds in Brimbank was around 16,000. Although the rental market contracted over the past 12 months due to COVID pandemic, the longer 5-year trend shows that active bonds are up by 8%, indicating moderate growth in the number of renting households since 2016.

T63. RENTAL BONDS, BRIMBANK, 5 YEAR CHANGE

LGA	March 2021	% change	
		1 year	5 years
Brimbank	16,008	-3.6%	8.1%

Source: Victorian Rental Report, Department of Health and Human Services, March 2021.

6.8. HOUSING AFFORDABILITY

Housing affordability generally refers to the relationship between the cost of housing (prices, mortgage payments or rents) and household incomes. Many factors impact the supply, demand and cost of housing, including economic conditions, interest rates, population growth, demographic changes, construction/development costs and wage growth.

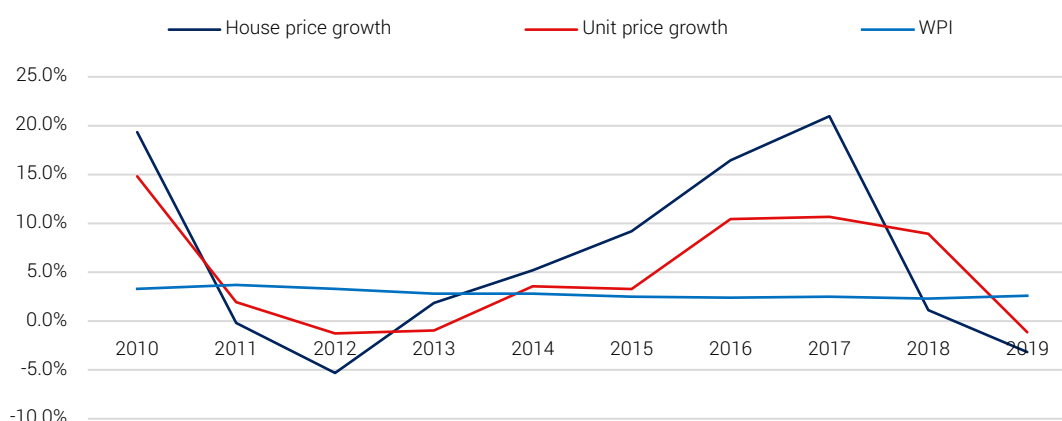
This section assesses housing affordability in Brimbank, with a specific focus on house/unit price and rental trends, and the cost of housing in Brimbank relative to household incomes.

6.8.1. HOUSE & UNIT PRICE GROWTH RELATIVE TO WAGE GROWTH

Figure 61 shows annual house and unit price growth in Brimbank compared with the Wage Price Index (WPI) between 2010 and 2019. Over the period, Brimbank's house prices have increased at an average of 6.5% per annum and unit prices have increased at an average of 5% per annum. This is notably higher compared with the average annual WPI of 2.8% per annum, demonstrating that income growth is not increasing in proportion with residential property prices, impacting the capacity of households to afford the cost of housing (rent or purchase) as a result.

It is noted that the WPI is an average across Victoria and the wage trend for Brimbank residents may differ.

F61. HOUSE & UNIT PRICE GROWTH COMPARED WITH WAGE GROWTH



Source: A Guide to Property Values, Valuer General, 2010-2019 / Wage Price Index, ABS 2010-2019

6.8.2. HOUSING AFFORDABILITY RELATIVE TO INCOME

Whilst Brimbank is a more affordable place to purchase and rent a house and unit compared with many other parts of metropolitan Melbourne, it is useful to evaluate housing affordability relative to local household income. A commonly applied measure to assess housing affordability is the 30% rule, a measure which is commonly applied as part of lending criteria for housing loans.

This benchmark for affordability assumes that if a household is dedicating less than 30% of its income towards housing payments, then the housing is considered affordable.

To understand the extent to which Brimbank households meet the 30% rule, household income data has been collected to estimate the overall borrowing capacity across income deciles. The results provide an overall estimate for a loan and deposit value that is deemed affordable across each income decile.

Table 64 summarises the income deciles in Brimbank and estimates the capacity to borrow finance based on an 80% loan to value ratio (LVR). Table 65 compares the income deciles with the median house and unit price (buy and rent) in Brimbank to assess the financial capacity of Brimbank residents to purchase or rent a dwelling.

Key observations are as follows:

- Based on the 2019 median house price, households in the top 40% of income earners in Brimbank (i.e., 6th decile and above) would have housing repayments of less than 30% of their income, while a median house would be classified as unaffordable for the bottom 50% of household incomes.
- Households in the top 50% of income earners could purchase a median unit (at the 2019 median price) within 30% of household income, with all households on lower incomes not able to purchase a unit based on the affordability benchmark.
- Households in the top 50% of income earners can afford the median rent at 30% of income, while for the bottom 50% of earners, the median rent is unaffordable.

It is important to note that these results are based on 2019 indicators and current interest rates which are at record lows. House prices are increasing strongly in 2021 and are projected to continue to rise, interest rates are expected to increase in the medium term and wage growth is weak – the combination of these factors is likely to result in an ongoing deterioration in housing affordability across Brimbank over the coming years. This is discussed further in section 6.9.4.

T64. BRIMBANK HOUSEHOLD INCOME DECILES & RESIDENTIAL BORROWING/SPENDING CAPACITY

Income Decile	Weekly Household Income (average)*	Annual net Income (after tax)	30% of net Income (annual)	Weekly Housing Spend available at 30% of income	House price attainable with repayments at 30% of income
1 st	\$209	\$10,845	\$3,253	\$63	\$91,243
2 nd	\$536	\$26,047	\$7,814	\$150	\$219,153
3 rd	\$780	\$36,987	\$11,096	\$213	\$311,198
4 th	\$968	\$42,439	\$12,732	\$245	\$357,066
5 th	\$1,210	\$50,935	\$15,281	\$294	\$428,553
6 th	\$1,479	\$60,376	\$18,113	\$348	\$507,982
7 th	\$1,877	\$74,322	\$22,297	\$429	\$625,324
8 th	\$2,421	\$91,803	\$27,541	\$530	\$772,402
9 th	\$2,959	\$109,425	\$32,828	\$631	\$920,670
10 th	\$4,376	\$227,552	\$45,617	\$877	\$1,279,357

Source: Urban Enterprise 2021, derived from weekly median income, ABS 2016, interest rate RBA 2021

* income sourced from 2016 Census, ABS (indexed to 2019 dollars via WPI)

T65. HOUSING (HOUSE, UNIT) AFFORDABILITY RELATIVE TO INCOME DECILES, BRIMBANK

Brimbank	Median price (2019)	Loan value (80% loan to value ratio)	Weekly Payment Required*	Weekly Household Income Required @ 30% spend	Estimated Income Decile Required
House, buy	\$610,000	\$488,000	\$416	\$1,387	7 th +
Unit, buy	\$435,000	\$348,000	\$297	\$990	6 th +
House/unit, rent	\$380 per week		\$380	\$1,267	6 th +

Source: Urban Enterprise 2021

* calculated using an 80% loan to value ratio and adopting bank interest rates as at June 2021, Westpac.

6.8.3. RENTAL MARKET AFFORDABILITY

DHHS collects data on the proportion of rentals across Victoria which are considered 'affordable' based on the benchmark of 30% of gross income spent on rent.

Table 66 shows the current proportion of rentals classified as affordable in Brimbank, Western Melbourne and metropolitan Melbourne. Overall, only 15% of rentals in Brimbank are classified as affordable. Although this is considerably higher than the metropolitan average of 6%, this level of rental affordability is very low and cause for concern given the importance of the rental market in the municipality and the low incomes and high disadvantage across many parts of Brimbank.

Rental affordability is greater for larger dwellings in Brimbank (especially houses with 4 or more bedrooms), however affordability is particularly low for smaller dwellings with 1 or 2 bedrooms.

Figure 62 shows that the overall proportion of rental dwellings in Brimbank classified as affordable has declined considerably, from 80% in 2006 to just 15% in 2021. Rental affordability has decreased even since the previous housing strategy was prepared in 2014, at which point approximately 30% of rentals were classified as affordable.

T66. AFFORDABLE LETTINGS BY DWELLING SIZE, METROPOLITAN MELBOURNE, MARCH 2021

Region	1 bed	2 bed	3 bed	4+ bed	Total
Brimbank	1.8%	6.7%	17.9%	23.6%	15.4%
Western Melbourne	2.2%	3.7%	20.5%	52.9%	26.6%
Metropolitan Melbourne	0.5%	1.5%	7.2%	24.8%	5.9%

Source: Victorian Rental Report, Department of Health and Human Services, March 2021.

F62. PROPORTION OF RENTALS CATEGORISED AS AFFORDABLE, BRIMBANK, 2000 - 2021



Source: Victorian Rental Report, Department of Health and Human Services, March 2021.

6.8.4. DISCUSSION

House and unit prices in Brimbank are more affordable compared with neighbouring municipalities within the inner metropolitan region (e.g., Moonee Valley, Maribyrnong, Moreland), a factor which is likely to continue to attract certain market segments to the municipality's housing offer.

It is important to note that, similar to most established parts of Melbourne, housing in Brimbank is unaffordable to purchase for low to middle income earners in the area and only 15% of rental housing is classified as affordable. The affordability of both purchase prices and rents is decreasing over time. This is a challenge that the housing strategy should closely consider, in particular as it relates to districts with lower household incomes and higher levels of socio-economic disadvantage such as Sunshine and St Albans.

Melbourne has experienced strong house and unit price growth throughout 2021 and is expected to continue in 2022. If housing prices continue to increase at a higher rate than wages (and interest rates increase as predicted), housing affordability will decline further, and home ownership is likely to fall as a result.

6.9. KEY POINTS

- **Over the medium term, an average of 749 dwellings have been approved for construction in Brimbank per annum. 'House' approvals are declining, and 'other dwelling' approvals are increasing, reflecting the lack of large sites and increasing urban intensification.**
- **Sunshine and St Albans are the primarily locations of dwelling growth, and the majority of approvals have occurred in NRZ and GRZ, not in the zones designed to accommodate higher density development such as the ACZ and RGZ.**
- **Although housing prices in Brimbank are generally lower than in neighbouring areas, affordability relative to incomes is decreasing and those on lower and middle incomes are expected to experience affordability challenges when seeking to purchase property in the area.**
- **Rental affordability has decreased dramatically in Brimbank over recent years – only 15% of the municipal rental stock is now classified as 'affordable'. Given the increasing importance of the rental market as the fastest growing tenure of households, coupled with relatively low incomes and high levels disadvantage, addressing rental affordability is a critical issue for the housing strategy.**
- **Housing affordability is expected to decline further over the planning period of the Strategy, with projected increased in housing values, low wage growth and increasing interest rates.**
- **There are substantial variations in housing prices across the municipality – prices in Keilor, Taylors Lakes, Cairnlea and Sunshine are considerably higher than St Albans, Deer Park, Ardeer, Delahey and Kings Park.**

HOUSING NEED



The main driver of housing demand is population growth. To broadly understand the scale and location of housing requirements in Brimbank, population and dwelling growth scenarios have been assessed in this section.

7. HOUSING NEED

7.1. POPULATION & DWELLING PROJECTION SCENARIOS

Housing need is driven by a range of factors, including household formation, migration and population growth. Each of these factors can be assessed by reference to population, dwelling and demographic projections.

The following two sources of population and dwelling projection scenarios have been assessed:

1. **Victorian in Future (VIF)** – VIF is the official State Government population projection. The VIF model is based on a 'top down' approach that estimates the future size, distribution and composition of the population, which has regard to historical and projected demographic trends.
2. **Forecast Id** - The Forecast Id model for small areas is based on a 'bottom-up' approach. The components of the model are derived exclusively from housing and demographic assumptions. The drivers of the forecasts are based on new residential development and demographic assumptions, such as in and out migration rates.

VIF projections were published in July 2019 and Forecast Id projections were published in May 2021, meaning that Forecast Id's were prepared after the impacts of the Covid-19 pandemic became known. This section considers the findings of each projection, along with further analysis of potential population growth and housing implications based on the Annual Population Statement prepared by the Federal Government.

7.2. IMPACT OF COVID-19 ON NATIONAL AND STATE POPULATION GROWTH RATES

Federal population projections are regularly prepared at the Federal level for various purposes. The Annual Population Statement 2020, published by the Australian Government Centre for Population, provides recently prepared estimates which have regard to the implications of Covid-19 on national population growth rates.

Three population scenarios were considered by Statement:

1. **Central Case** - Nationally consistent population projections that take account of COVID-19. It sets out the best estimates of Australia's future population, projected out to 2031. This is known as the 'central case'.
2. **'Pre-COVID-19'** - Estimates what the future population may have been in the absence of COVID-19. This approach allows separation of the likely effects of COVID-19 on the future population from trends that were apparent irrespective of the pandemic.
3. **Extended Restrictions Scenario** - Projects what the future population might look like if some of the restrictions to manage the pandemic are extended beyond those in the central case by a further 12 months. This approach shows how a change to the assumptions in the central case could affect the national population.

Key observations are as follows:

- Australia's population growth is projected to slow to its lowest rate in over 100 years, falling from 1.2% in 2019-20 to 0.2% in 2020-21 and 0.4% in 2021-22 (see Table 67).
- Annual growth is projected to increase to around 1.3% by 2023-24 and then slow to around 1.2% by the end of the projection period.
- The slower growth is a result of existing trends combined with the effects of the COVID-19 pandemic, although the latter dominates in the near term.

T67. SUMMARY OF POPULATION PROJECTIONS, AUSTRALIA, 2019 TO 2031

Scenario	Components	2019 to 2020	2020 to 2021	2021 to 2022	2022 to 2023	2023 to 2024	2030 to 2031
Central Case	Population at Start of Year (M)	25.4	25.7	25.7	25.8	26.0	28.4
	Population at End of Year (M)	25.7	25.7	25.8	26.0	26.4	28.8
	Natural Increase ('000)	139	128	120	124	129	112
	Net Overseas Migration ('000)	154	-72	-22	96	201	235
	Population Growth (%)	1.2%	0.2%	0.4%	0.9%	1.3%	1.2%
Pre-COVID-19 Scenario	Population at end of year (M)	25.7	25.7	25.8	26.0	26.4	28.8
	Population Growth	1.5%	1.5%	1.5%	1.4%	1.4%	1.3%
Extended Restrictions Scenario	Population at end of year (M)	25.7	25.7	25.8	25.9	26.1	28.5
	Population Growth (%)	1.1%	0.2%	0.3%	0.4%	1.1%	1.2%

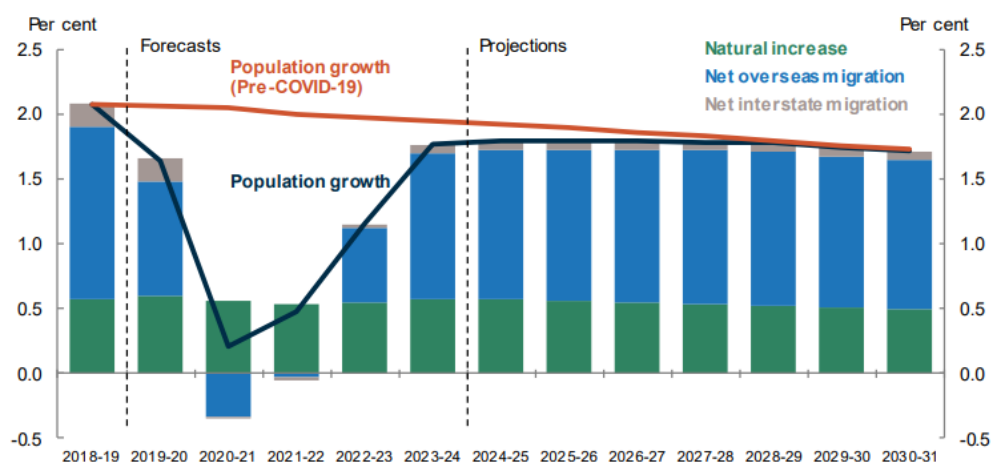
Source: Annual Population Statement 2020, Australian Government Centre for Population, December 2020, Page 51 and 52

STATE PROJECTIONS

Victoria has experienced the highest net loss of overseas and interstate migration during the pandemic. However, population growth is projected to rebound strongly, and is predicted to achieve its highest growth rate by 2022-23. The following indicators and projections are relevant:

- Population growth in Victoria is projected to drop from 2.1% in 2019 to 0.2% in 2021 (Figure 63).
- As travel restrictions ease and the economy recovers, Victoria's population growth is projected to recover to 0.5% in 2021-22 and then to 1.8% in 2023-24.
- Net overseas migration is projected to be negative in 2020-21 and 2021-22, impacted by the departure of international students and temporary migrants. However, the trend is forecast to reverse from 2022-23, with a sharp increase in net overseas migration driven by students and permanent migrants forecast to lift Victoria's population growth significantly.
- Victoria's population is projected to increase from 6.6 million in June 2019 to reach 7.9 million by 30 June 2031. The state's population growth rate in a pre-COVID-19 scenario is projected to have been around 2% until 2023-24 before gradually declining. As a result, Victoria's population is expected to be 5% lower by 2031, compared to pre-COVID-19 projections.

F63. FUTURE POPULATION GROWTH AND COMPONENTS – VICTORIA – 2019 TO 2031



Source: Australian Bureau of Statistics, National, State and Territory Population, March 2020) Centre for Population Projections

7.3. POPULATION PROJECTIONS, BRIMBANK

VIF and Forecast Id's population projections for Brimbank are summarised in Table 68 and Figure 64. The following observations are made:

- According to **VIF**, Brimbank's population is projected to increase from approximately 213,000 in 2021 to 244,500 by 2036. This represents an increase of approximately 30,000 residents, adding an average of 2,000 residents per annum.
- According to **Forecast Id**, Brimbank's population is projected to increase from 210,000 in 2021 to approximately 234,000 by 2036. This represents an increase of approximately 24,000 residents, adding an average of 1,600 residents per annum.
- Forecast Id's population projections for Brimbank are lower compared with VIF. This is to be expected, given that Forecast Id's population projections were prepared in May 2021, and therefore have regard to the Covid-19 impact on growth rates; in particular, overseas migration.

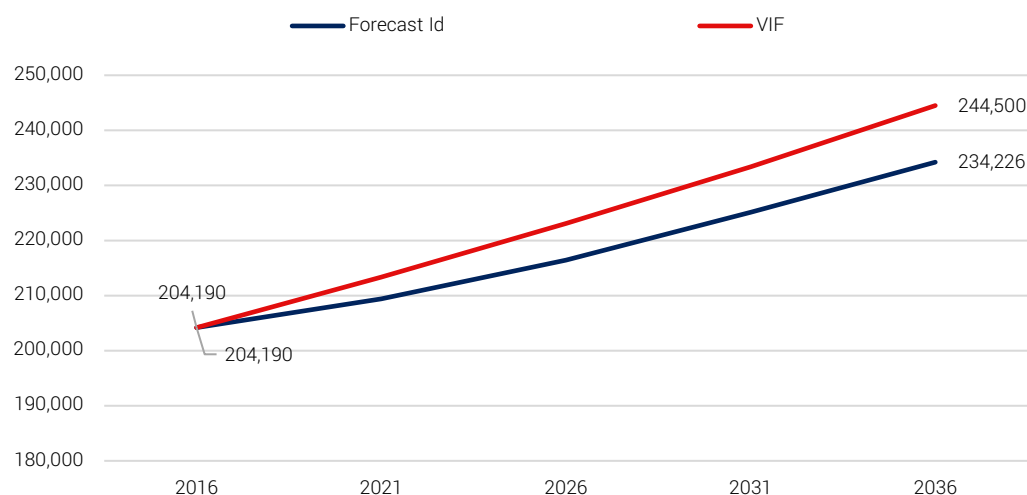
T68. POPULATION FORECAST, BRIMBANK, 2016 TO 2036

Source	Region	2016	2021	2026	2031	2036	2041*	Change (2016-36)	Change % (2016-36)	AAGR
VIF 2019	Brimbank LGA	204,190	213,357	223,102	233,388	244,500		+40,310	20%	0.9%
	Melbourne West SA4	762,558	901,059	1,036,122	1,173,143	1,311,809		+549,251	72%	2.7%
Forecast Id 2021	Brimbank LGA	204,190	209,422	216,448	225,142	234,226	243,386	+30,036	15%	0.7%

Source: Population Forecasts, Victoria in Future (VIF) 2019 & Forecast Id, City of Brimbank, 2021

* VIF population projections unavailable for 2041.

F64. POPULATION FORECAST, BRIMBANK, 2016 TO 2036



Source: Population Forecasts, Victoria in Future (VIF) 2019 & Forecast Id, City of Brimbank, prepared in September 2017

7.3.1. COMPONENTS OF CHANGE

The following tables provide an insight into VIF and Forecast Id's projections regarding the components of population change.

Key observations in respect of the VIF and Forecast Id projections are as follows:

- Both VIF and Forecast Id project that Brimbank will experience declining rates of natural increase.
- Forecast Id projects that Brimbank will experience a notable net loss of migrants in the period between 2016 and 2021.
- Forecast Id expects migration to rebound in the following period (2021-2026) but is still expected to experience a net loss.
- VIF projects a negligible net gain in migration between 2016 and 2021, followed by a long term period of increasing migration growth.

T69. COMPONENTS OF POPULATION CHANGE, BRIMBANK, 2016 TO 2036, VIF

Component	2016 to 2021	2021 to 2026	2026 to 2031	2031 to 2036	Total (2016-36)
Natural Increase	9,110	8,820	8,080	7,130	33,140
Net Migration	60	930	2,210	3,980	7,180
Total population Change	9,170	9,740	10,290	11,110	40,310

Source: Victoria in Future 2019, LGA Profiles 2019

T70. COMPONENTS OF CHANGE, BRIMBANK, 2017 TO 2041, FORECAST ID

Component	2016 to 2021	2021 to 2026	2026 to 2031	2031 to 2036	2036 to 2041	Total (2017-41)
Natural increase	8,663	7,889	7,405	7,058	6,883	37,898
Net migration	-3,731	-1,163	989	1,726	1,977	-202
Total population change	4,932	6,726	8,394	8,784	8,860	37,696

Source: Population and household forecasts, 2016 to 2041, prepared by .id (informed decisions), September 2017.

7.4. DWELLING PROJECTIONS, BRIMBANK

VIF and Forecast Id's dwelling projections for Brimbank are summarised in Table 71. The following observations are made:

- According to VIF, dwellings in Brimbank are projected to increase from approximately 75,000 in 2021 to 88,500 by 2036. This represents an increase of approximately 13,500 dwellings, adding an average of 900 dwellings per annum.
- According to Forecast Id, dwellings in Brimbank are projected to increase from 73,500 in 2021 to approximately 81,500 by 2036. This represents an increase of approximately 8,000 dwellings, adding an average of 530 dwellings per annum.
- Forecast Id dwelling projections are much lower compared with VIF.

T71. DWELLING PROJECTIONS, BRIMBANK, 2021 TO 2036

Source	Region	2016	2021	2026	2031	2036	2041*	Change (2016-36)	Change % (2016-36)	AAGR
VIF 2019	Brimbank LGA	70,493	75,240	79,799	83,972	88,458		+17,965	25%	1.1%
	Melbourne West SA4	270,999	320,681	372,244	425,245	481,637		+210,638	78%	2.9%
Forecast Id	Brimbank LGA	69,760	73,520	77,057	79,693	81,578	86,222	+11,818	17%	0.8%

Source: Dwelling Forecasts, Victoria in Future (VIF) 2019 & Forecast Id, City of Brimbank, 2021

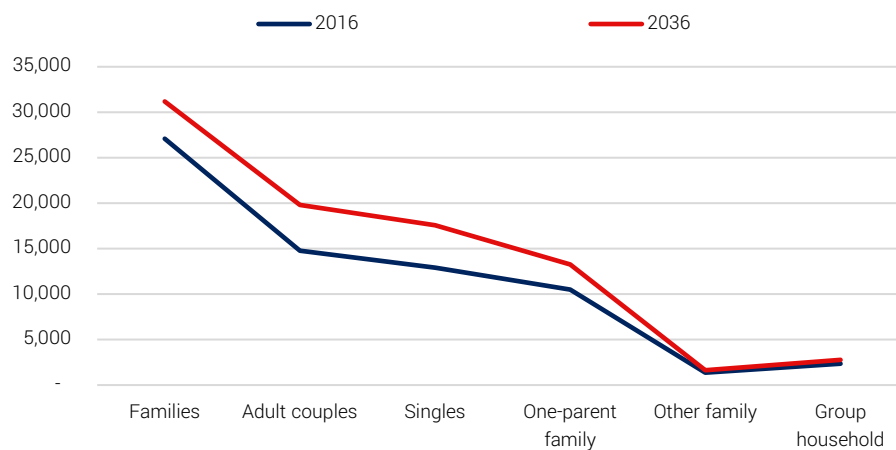
* VIF population projections unavailable for 2041.

7.5. HOUSEHOLD COMPOSITION PROJECTIONS

VIF and Forecast Id household composition projections for Brimbank are shown in the below figures. Key observations are as follows:

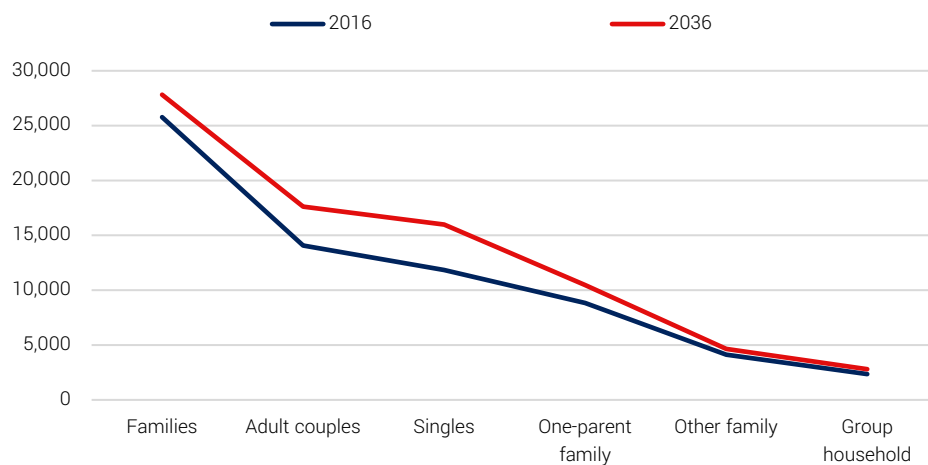
- The household types expected to experience the greatest increase are adult couples and singles.
- Families and one-parent families are each projected to increase over the period, albeit at lower percentage increases compared with smaller household types of couples and singles.

F65. HOUSEHOLD COMPOSITION FORECAST, BRIMBANK, 2016 TO 2036, VIF



Source: Household Composition Forecasts, Victoria in Future (VIF) 2019

F66. HOUSEHOLD COMPOSITION FORECAST, BRIMBANK, 2016 TO 2036, FORECAST ID



Source: Household Composition Forecasts, Forecast Id, 2021

7.6. POPULATION PROJECTIONS, DISTRICTS

7.6.1. VICTORIAN IN FUTURE

For Brimbank's districts, VIF projects that:

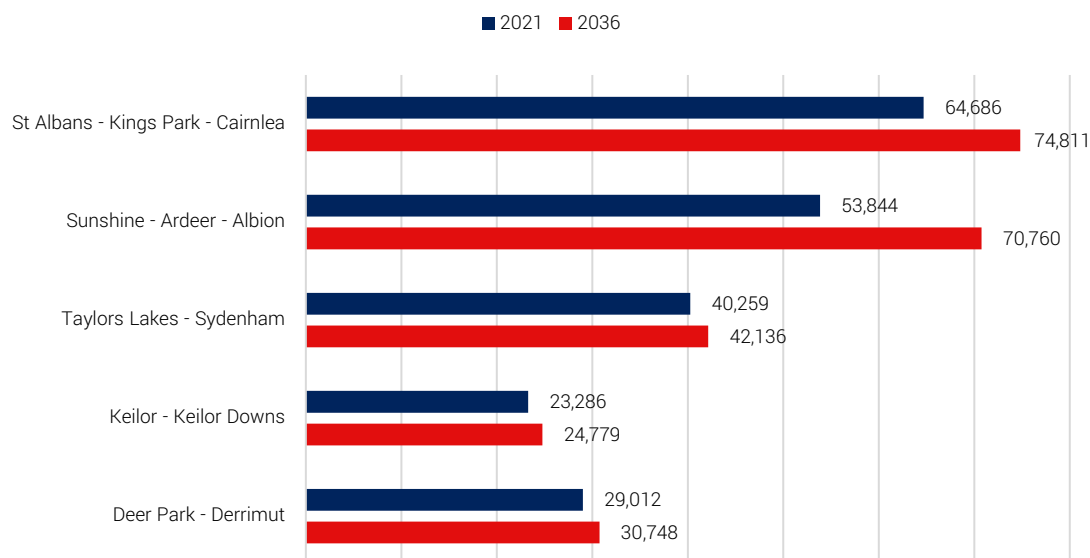
- Sunshine's population will increase by almost 17,000 residents between 2021 and 2036, and account for more than 50% of Brimbank's growth.
- St Albans population will increase by over 10,000 residents over the same period, and account for almost one-third of Brimbank's growth.
- The remaining districts will accommodate between 1,500 and 1,900 residents each to 2036 (5%-6% each).

T72. POPULATION PROJECTIONS, DISTRICTS, VIF, 2016 TO 2036

District	2021	2026	2031	2036	Change #	Change %	AAGR %	% of Brimbank's growth
St Albans	64,686	67,717	71,074	74,811	10,125	16%	1.0%	31%
Sunshine	53,844	59,144	64,818	70,760	16,916	31%	1.8%	53%
Sydenham & Taylors Lakes	40,259	40,693	41,295	42,136	1,877	5%	0.3%	6%
Keilor	23,286	23,704	24,185	24,779	1,492	6%	0.4%	5%
Deer Park	29,012	29,707	30,253	30,748	1,736	6%	0.4%	5%
Total	211,088	220,964	231,625	243,233	32,145	15%	0.9%	100%

Source: Population projections, Victoria in Future 2019

F67. POPULATION PROJECTIONS, DISTRICTS, VIF, 2016 TO 2036



Source: Population projections, Victoria in Future 2019

7.6.2. FORECAST ID

For Brimbank's districts, Forecast Id projects that:

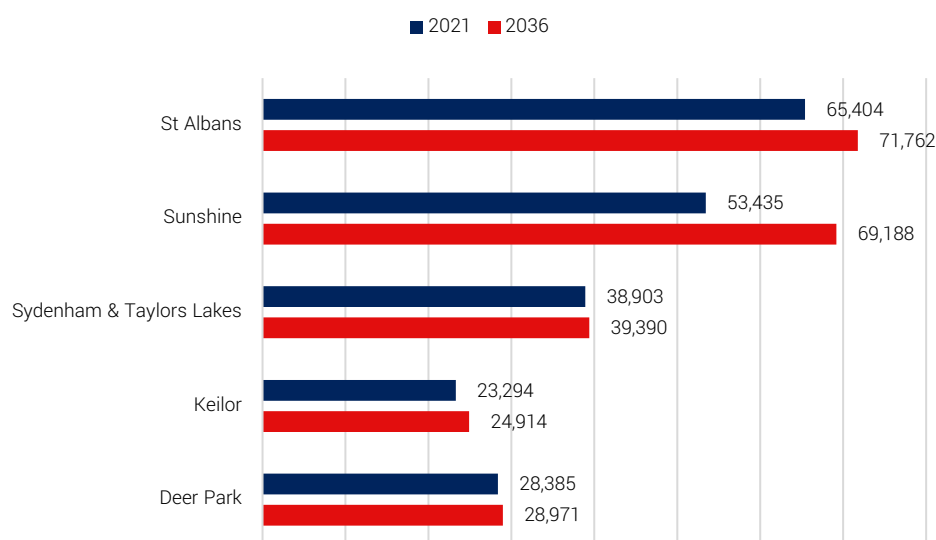
- Sunshine's population will increase by more than 21,000 residents between 2021 and 2041, and account for more than 60% of Brimbank's growth.
- St Albans population will increase by approximately 8,500 residents over the same period, and account for one-quarter of Brimbank's growth.
- The remaining districts will accommodate approximately 4,000 additional residents (in aggregate), with Keilor accommodating the majority of growth across these districts.

T73. POPULATION PROJECTIONS, DISTRICTS, FORECAST ID, 2021 TO 2041

District	2021	2026	2031	2036	2041	Change #	Change %	AAGR	% of Brimbank's growth
St Albans	65,404	67,100	69,459	71,762	73,942	8,538	13%	0.6%	25%
Sunshine	53,435	58,129	63,478	69,188	74,807	21,372	40%	1.7%	63%
Sydenham & Taylors Lakes	38,903	38,843	39,188	39,390	39,767	864	2%	0.1%	3%
Keilor	23,294	23,907	24,389	24,914	25,472	2,178	9%	0.4%	6%
Deer Park	28,385	28,469	28,626	28,971	29,398	1,013	4%	0.2%	3%
Total	209,421	216,448	225,140	234,225	243,386	33,965	16%		

Source: Population projections, Forecast Id, projections prepared in 2017

F68. POPULATION PROJECTIONS, DISTRICTS, FORECAST ID, 2021 TO 2041



Source: Population projections, Forecast Id, projections prepared in 2017

7.7. DWELLING PROJECTIONS, DISTRICTS

7.7.1. VICTORIA IN FUTURE

For Brimbank's districts, VIF projects that:

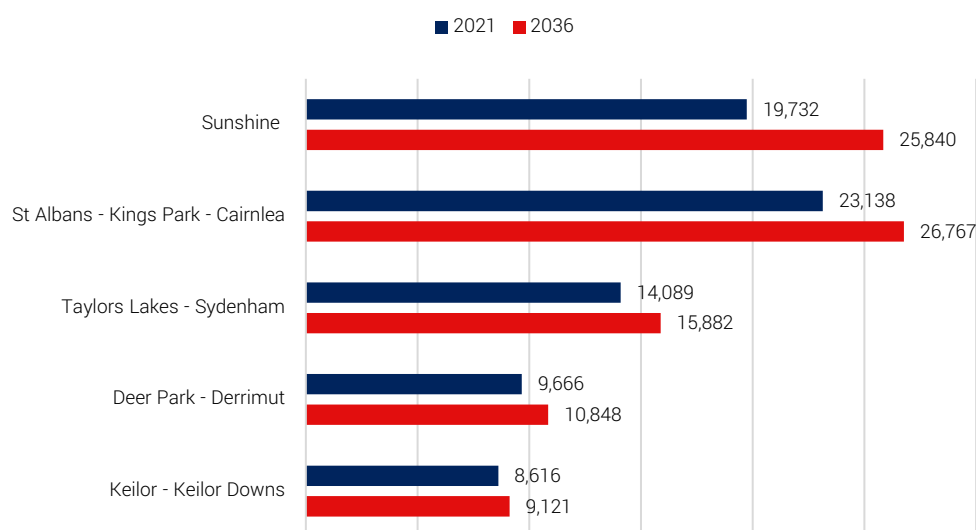
- Dwellings in Sunshine will increase by more than 6,000 between 2021 and 2036 (approx. 400 p.a.).
- Dwellings in St Albans will increase by approximately 3,600 over the same period (approx. 250 p.a.).
- Dwellings in Sydenham & Taylors Lakes will increase by almost 1,800 (approx. 120 p.a.).

T74. DWELLING PROJECTIONS, DISTRICTS, 2021 TO 2036

District	2021	2026	2031	2036	Change	AAG	AAGR	% of Total Catchment Growth
Sunshine	19,732	21,705	23,655	25,840	6,109	407	1.8%	46%
St Albans	23,138	24,436	25,551	26,767	3,630	242	1%	27%
Sydenham & Taylors Lakes	14,089	14,804	15,402	15,882	1,793	120	0.8%	14%
Keilor	9,666	10,052	10,410	10,848	1,182	79	0.8%	9%
Deer Park	8,616	8,801	8,953	9,121	505	34	0.4%	4%
Total	75,241	79,798	83,971	88,458	13,219	881	1.1%	

Source: Dwelling projections, Victoria in Future 2019

F69. DWELLING PROJECTIONS, DISTRICTS, VIF, 2021 TO 2036



Source: Dwelling projections, Victoria in Future 2019

7.7.2. FORECAST ID

For Brimbank's districts, Forecast Id projects that:

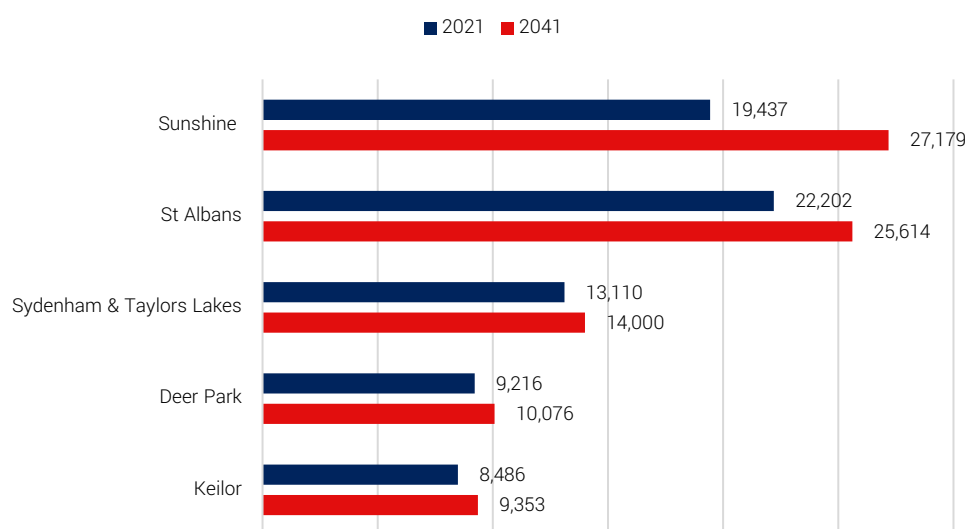
- Dwellings in Sunshine will increase by approximately 7,700 between 2021 and 2041 (approx. 390 p.a.).
- Dwellings in St Albans will increase by approximately 3,400 over the same period (approx. 170 p.a.).
- Dwellings in the remaining districts will increase by between 800 and 900 each (approx. 40-45 p.a.).

T75. DWELLING PROJECTIONS, DISTRICTS, FORECAST ID, 2021 TO 2041

District	2021	2026	2031	2036	2041	Change #	AAG	AAGR	% of Total Catchment Growth
Sunshine	19,437	20,904	22,829	24,989	27,179	7,742	387	1.7%	56%
St Albans	22,202	22,968	23,905	24,789	25,614	3,412	170	0.7%	25%
Sydenham & Taylors Lakes	13,110	13,355	13,655	13,830	14,000	890	44	0.3%	6%
Deer Park	9,216	9,431	9,646	9,861	10,076	860	43	0.4%	6%
Keilor	8,486	8,735	8,953	9,153	9,353	867	43	0.5%	6%
Total	72,451	75,393	78,988	82,622	86,222	13,771	689	0.9%	100%

Source: Dwelling projections, Forecast Id, projections prepared in 2017

F70. DWELLING PROJECTIONS, DISTRICTS, FORECAST ID, 2021 TO 2036



Source: Dwelling projections, Forecast Id, projections prepared in 2017

7.8. ESTIMATED DWELLING REQUIREMENTS

The variation in projection results in this section highlights the difficulty in estimating the scale, type and location of housing needs over long periods. A range of factors will influence housing needs across Brimbank over the planning period – initially, the economic and migration disruptions caused by the COVID-19 pandemic will be substantial but difficult to predict, and other unforeseen factors could impact demand over the medium to long term.

It is important that the housing strategy seeks to facilitate the provision of sufficient and appropriate housing based on current estimates. Given the substantial impacts of the COVID pandemic on migration and population growth, it is considered that the Forecast ID projections prepared for Council present the best current estimate of likely housing need over the foreseeable future.

Table 76 summarises the annual dwelling requirements according to the Forecast ID projection scenarios. Based on this projection scenario, an additional 12,700 dwellings will be required across Brimbank over the period 2021 – 2041, equating to 635 new dwellings per annum over the period.

The projections should be considered alongside other indicators such as development activity (e.g., dwelling approvals) and property market conditions (e.g., price trends), and should be monitored and adjusted as required.

T76. POPULATION AND DWELLING PROJECTIONS

Brimbank	Forecast ID Scenario
Additional population (2021 to 2041)	33,964
Annual increase (ave)	1,698
Additional dwellings (2021 to 2041)	12,702
Annual increase (ave)	635
Ave household size	2.4

Source: Urban Enterprise 2021, derived from Forecast ID 2021.

7.9. KEY POINTS

- **Brimbank's population is projected to increase by approximately 34,000 residents (2021-41).**
- **In the short term, population growth is expected to be limited by a lack of net overseas migration, however population growth is projected to revert to pre-pandemic rates in the medium term.**
- **The housing strategy should plan to facilitate the provision of an additional 12,700 dwellings by 2041.**
- **Projections show that Sunshine is expected to accommodate more than half of Brimbank's population and dwelling growth, with substantial growth also projected for St Albans. Other parts of the municipality, such as Sydenham, Deer Park and Keilor, are projected to experience only limited population growth, however this is influenced by the relative lack of new housing supply proposed in these areas.**
- **As a result of an ageing population and declining household sizes, household types with 1 or 2 members (single persons and adult couples) are expected to experience the greatest growth over the planning period. Families (including single parent families) are also expected to increase.**

HOUSING CAPACITY



This section provides an assessment of housing capacity in Brimbank. The assessment estimates the theoretical housing capacity, including infill development opportunities, major redevelopment sites and zones that permit residential development activity such as the ACZ, C1Z and MUZ.

8. HOUSING CAPACITY

8.1. INTRODUCTION

This section assesses the capacity of existing zoned land in Brimbank to accommodate additional housing over the Strategy period.

8.2. METHOD

To estimate the residential housing capacity in Brimbank, the following approach was adopted:

1. **Broadhectare land supply and major redevelopment sites (UDP)** - Identify broadhectare land supply and major redevelopment sites in Brimbank using the Urban Development Program (UDP). Identify the location and total dwelling yield across these sites;
2. **Additional development sites** - In consultation with Council, identify development sites that were not included in the UDP (prepared in 2019) or have since changed in terms of expected yield. Adopt the expected dwelling yield for these sites in place of any other modelled or UDP estimate (based on Council's information, including approved permits).
3. **Activity Centre Zone** - Council has prepared built form modelling for the Sunshine Metropolitan Activity Centre to estimate the net additional floorspace capacity of the centre. Urban Enterprise adapted the outcomes to sites with development potential based on a sub-precinct analysis. The result is an estimate of dwelling capacity across the Activity Centre Zone (ACZ) in the Sunshine MAC.
4. **Comprehensive Development Zone (CDZ)** - The CDZ applies to land around the Watergardens Shopping Centre. A site specific approach to estimated potential yield in this area was undertaken based on existing land uses, vacancies and policy objectives.
5. **Commercial 1 Zone (C1Z)** - The potential capacity of C1Z land was estimated based on an analysis of each site / precinct in the zone, taking into consideration existing land uses, vacancies, known proposals and planning controls.
6. **Infill dwelling capacity (GRZ, NRZ, RGZ, MUZ)** - Using Council's property rates database and a series of assumptions, the potential capacity of these residential zones to accommodate additional dwellings through re-subdivision was modelled. Any known yields of major developments captured in the UDP, or Council's major sites list replace the modelled results.
7. **Total dwelling capacity** - Combine the findings of the above steps to estimate total dwelling capacity.

The method and assumptions that have been adopted for the above steps are outlined throughout this section.

EXCLUSIONS

The estimates of housing capacity relate only to land that is currently zoned for residential purposes.

Various sites and precincts are currently under consideration for potential future residential zoning, such as the Sunshine Health, Wellbeing and Employment Precinct (SHWEP) and the Ginifer Station Precinct. These precincts require further planning and policy support before residential development can be contemplated and any potential yields estimated, and as such are not included in capacity estimates.

LIMITATIONS

This analysis has regard to current planning controls, policy settings and likely development outcomes, providing the most up to date and suitable estimates of potential dwelling capacity available for the purposes of strategic planning. These estimates rely to a great extent on the assumptions that are applied to the capacity modelling exercise, and the extent to which they are realised through development will depend greatly on the individual decisions taken by thousands of landowners and developers.

In particular, the estimate of potential additional capacity within the NRZ and GRZ relies on the quality and accuracy of Council's rates database. Although mostly suitable, some instances have been identified where rating classifications do not appear to align with existing conditions. In most cases, it appears likely that the potential capacity of existing zoned land is overstated as a result.

It is also relevant that the potential capacity estimates of these zones are a theoretical estimate in any case, and only a proportion of the lots are going to be delivered over the planning period. This is because:

- The majority of properties are occupied by existing houses which owners may have no intention of selling or subdividing;
- Many landowners will have limited financial capacity or expertise to develop land; and
- Fragmented ownership in established areas requires consolidation of sites or development coordination which can be difficult to achieve, even in zones where higher density development is encouraged.

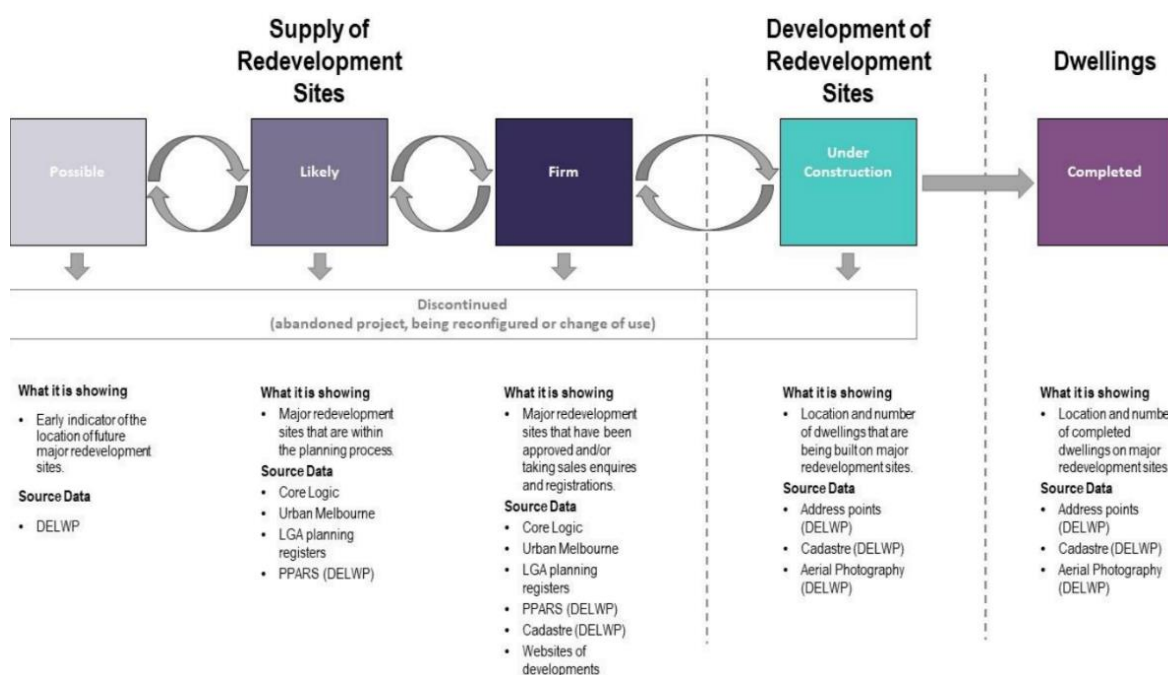
8.3. URBAN DEVELOPMENT PROGRAM

The Urban Development Program monitors and reports on broadhectare land supply and major residential redevelopment projects across metropolitan Melbourne. Data is collected through analysis of aerial imagery, planning permits and commercial data sources.

For established parts of Melbourne, major redevelopment sites with 10 or more dwellings in a project are captured.

Figure 71 provides an overview of the redevelopment pipeline. Projects within the pipeline can move between stages (forward or backward) or can be abandoned. This assessment excludes sites and projects that have been completed or are under construction as they will not form part of Brimbank's future dwelling capacity.

F71. MAJOR REDEVELOPMENT SITES PIPELINE



Source: UDP, Department of Environment, Land, Water and Planning 2019.

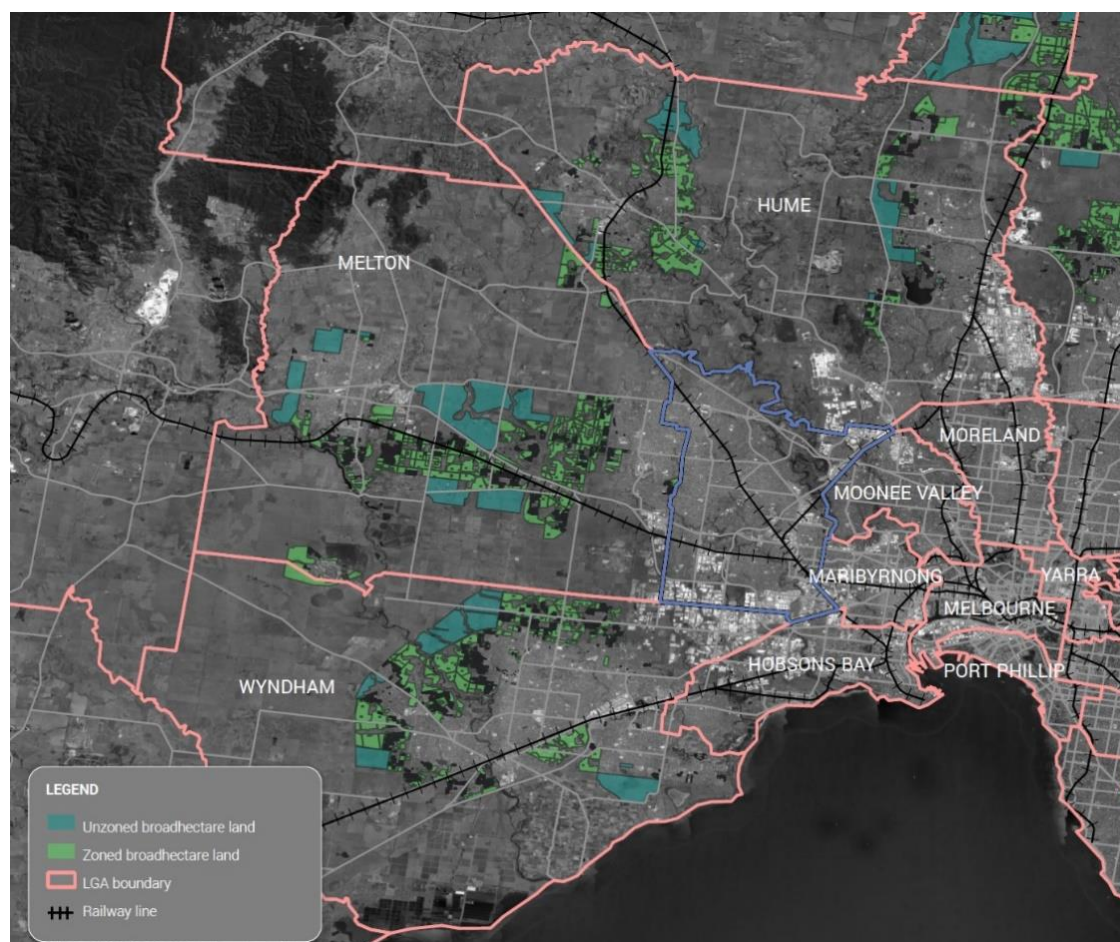
8.3.1. BROADHECTARE LAND SUPPLY (UDP)

The UDP estimates the supply of broadhectare land across metropolitan Melbourne and includes englobo land (land held in large parcels for future subdivision to residential lots) and retail lots (lots subdivided and ready for residential development).

Based on the UDP (2019), Brimbank has no broadhectare land supply available. There is, however, substantial land supply located in greenfield growth areas in the adjoining municipalities of Melton (6,383 hectares), Wyndham (4,911 hectares) and Hume (3,714 hectares), as shown in Figure 72.

Given the unavailability of vacant broadhectare land in Brimbank, the opportunity to deliver greenfield developments is exhausted unless large urban renewal sites are rezoned in the future. Future housing supply can only be delivered through urban renewal areas, infill development and redevelopment, and major redevelopment sites.

F72. BROADHECTARE LAND, WESTERN MELBOURNE



Source: UDP, 2019 and Urban Enterprise, 2021.

8.3.2. MAJOR REDEVELOPMENT SITES

NUMBER, LOCATION & STATUS

The UDP defines major redevelopment sites as “sites that have previously been utilised for commercial, industrial, educational or residential uses that have been identified through the planning process of being able to accommodate 10 or more dwellings” (p. 2).

Overall, the UDP identifies 42 major redevelopment sites in Brimbank, with the majority of sites considered ‘firm’ (25 sites). 31% (13 sites) are in Sunshine and 26% (11 sites) located in St Albans; the majority of which are concentrated to the Activity Centres along the rail corridor.

The 42 major redevelopment sites identified in the UDP are estimated to have potential to deliver 2,809 dwellings. The majority are concentrated in Sunshine (36% of dwellings) and Sunshine North (32% of dwellings), followed by St Albans (12% of dwellings).

Major redevelopment sites are shown in Figure 73 and summarised in Tables 77 and 78.

T77. NUMBER OF MAJOR REDEVELOPMENT SITES

Suburb	Firm	Likely	Possible	Total
Albanvale			1	1
Albion	3	1		4
Ardeer	1			1
Cairnlea	1			1
Deer Park		1		1
St Albans	6	1	4	11
Sunshine	9	3	1	13
Sunshine North	2	3	1	6
Sydenham	3	1		4
Total	25	10	7	42

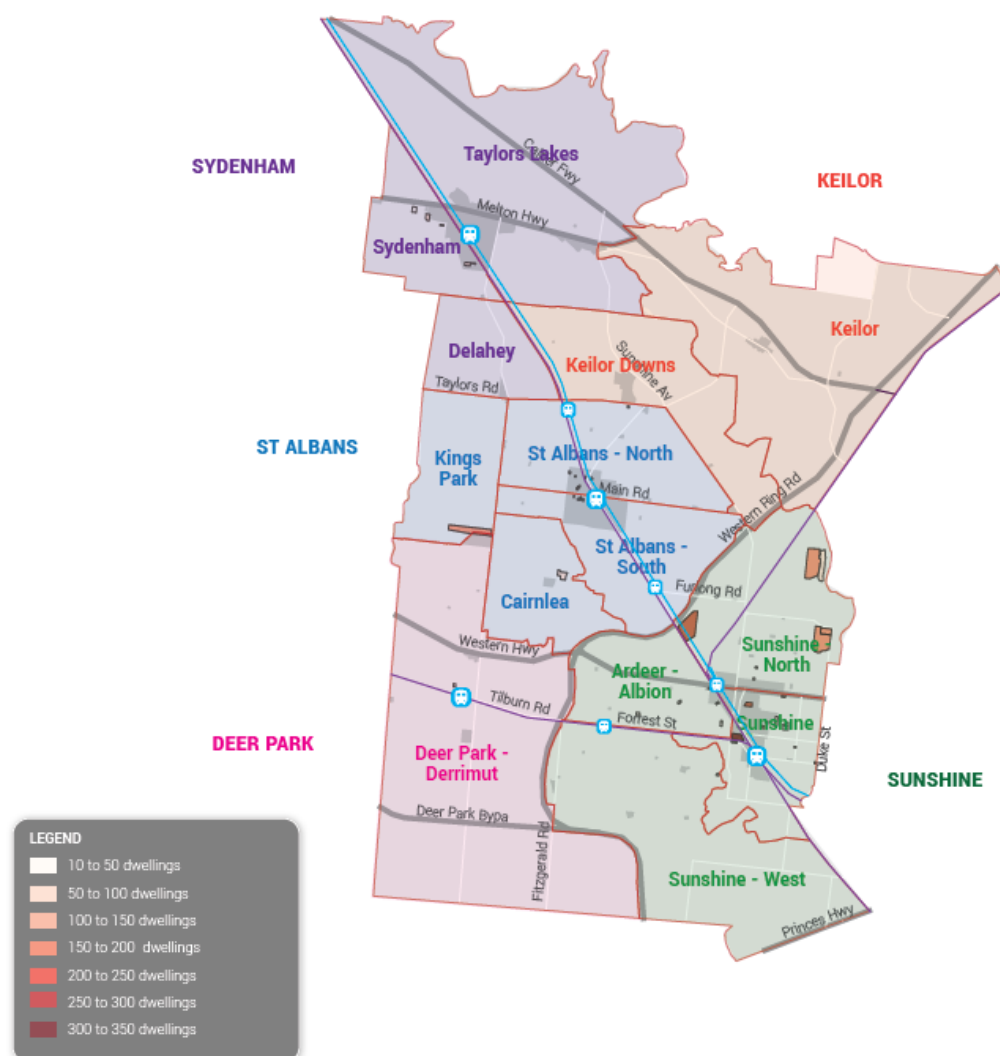
Source: UDP, 2019.

T78. DWELLING YIELD, MAJOR REDEVELOPMENT SITES, UDP, 2019

Suburb	Detached Dwellings	Townhouses	Apartments	Unknown Dwelling Type	Total Dwellings
Albanvale	188	-	-	-	188
Albion	-	31	61	-	92
Ardeer	-	14	-	-	14
Cairnlea	-	70	-	-	70
Deer Park	-	29	-	-	29
St Albans	-	21	290	-	311
Sunshine	13	119	533	350	1,015
Sunshine North	249	300	186	182	917
Sydenham	-	52	121	-	173
Total	450	636	1,191	532	2,809

Source: UDP, 2019.

F73. DWELLING YIELD, MAJOR REDEVELOPMENT SITES, UDP, 2019



Source: UDP, 2019 and Urban Enterprise, 2021.

8.4. OTHER DEVELOPMENT SITES

Additional major sites were identified through consultation Council officers. A further 9 development sites in addition to those in the UDP were identified with a yield in the order of 1,145 as summarised in Table 79.

Information for these sites is provided in **Appendix A**.

T79. BRIMBANK DEVELOPMENT SITES (EXCLUDING UDP SITES)

Suburb	Number of Sites	Number of Dwellings
Deer Park	1	200
Kealba	1	194
St Albans	3	287
Sunshine	2	64
Sunshine North	1	200
Taylors Lakes	1	200
Total	9	1,145

Source: Urban Enterprise, 2021.

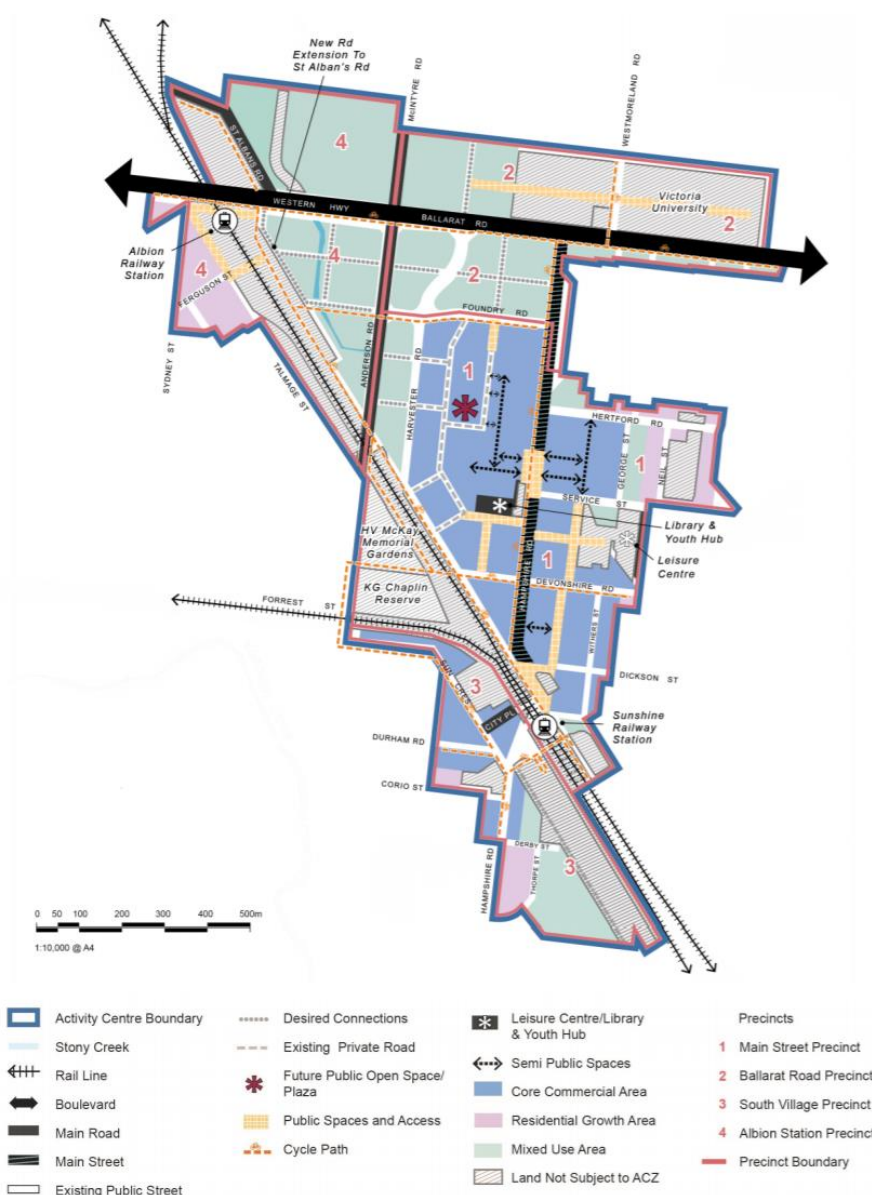
8.5. ACTIVITY CENTRE ZONE (SUNSHINE MAC)

The Activity Centre Zone applies to land within the Sunshine MAC. To understand the potential future development of the MAC, the strategic and policy objectives of the ACZ have been considered. The purpose of the ACZ is:

- To encourage a mixture of uses and the intensive development of the activity centre:
 - As a focus for business, shopping, working, housing, leisure, transport and community facilities.
 - To support sustainable urban outcomes that maximise the use of infrastructure and public transport.
- To deliver a diversity of housing at higher densities to make optimum use of the facilities and services.
- To create through good urban design an attractive, pleasant, walkable, safe and stimulating environment.
- To facilitate use and development of land in accordance with the Development Framework for the activity centre.

The Sunshine Town Centre Structure Plan is shown in Figure 74. The Centre is divided into four precincts. The land use vision and development objectives of these precinct indicate the nature of land uses and scale of development.

F74. ACTIVITY CENTRE STRUCTURE PLAN



Source: Sunshine Town Centre Structure Plan, Brimbank Planning Scheme, 2018

8.5.1. ACZ PRECINCTS: LAND USE & DEVELOPMENT OBJECTIVES

The Sunshine Town Centre is divided into four precincts:

1. Main Street;
2. Ballarat Road Precinct;
3. South Village Precinct; and
4. Albion Precinct.

As per the Brimbank Planning Scheme (2018), the key objectives for activities and land use are:

- To establish higher-density mixed-use development along Ballarat Road, around the Sunshine Railway Station and in the Albion Station precinct.
- To consolidate large-format, restricted retail premises in the Ballarat Road Precinct.
- To concentrate retail, community and entertainment uses within the Main Street Precinct, particularly around the Sunshine Railway Station.
- To support the rehabilitation and redevelopment of former industrial land.
- To establish higher-density housing above ground floor commercial uses.

Table 80 summarises relevant land use objectives and guidelines, as well as the development guidelines for each major precinct. Structure Plan maps for each precinct are also provided in **Appendix B**.

Importantly, the information in the table provides general guidance for residential uses and development across the Sunshine MAC over time. This has been used to inform residential capacity considerations.

T80. LAND USE AND DEVELOPMENT OBJECTIVES/GUIDELINES, SUNSHINE PRECINCTS

Precinct	Use Objectives	Use Guidelines	Development Guidelines
Main Street	Develop and maintain Main Street as a focal point for retail, civic, business and community activities.	Support consolidation of retail, commercial, community and entertainment uses. Residential uses above ground floor are encouraged. Mixed-use along railway corridor, southeast of Sunshine Railway Station is encouraged (including residential uses at the ground floor).	Large format buildings with a frontage to Hampshire Road should provide high quality landmark built form frontages and entrances to Hampshire Road.
Ballarat Road	Integrate the Ballarat Road frontages with the Main Street precinct. Encourage a mix of land uses complementary to existing education and legal uses.	Support the core functions of the Main Street precinct. Support a mix of education, civic, residential and bulky goods retail land uses at ground floor level are encouraged. Provision of higher density housing above podium levels is encouraged.	Taller buildings with significant landscaping along Ballarat Road.
South Village	Reinforce Sun Crescent and City Place as the Village centre. Provide for a range of residential and commercial uses that capitalise on the proximity to Sunshine Railway Station.	Residential uses should be located above ground floor level. The extension of the Village commercial area through increased local retail, service and entertainment uses along Hampshire Road to Derby Road is encouraged. Community and cultural uses are encouraged. The transition of existing industrial areas to commercial or residential uses is encouraged.	Development that enhances the existing character of the precinct through well-articulated, human-scaled, built form is encouraged.
Albion	Provide for a range of residential and commercial uses that will capitalise on the proximity to the Albion Railway Station.	The provision of higher density housing within and adjacent to Ferguson Street and along the rail corridor is encouraged. Local convenience retailers service the surrounding residential community are encouraged. Community and cultural uses are encouraged. Small-scaled industrial uses may be permitted on the Darling Flour Mill site.	The setback of buildings located on the east side of Talmage Street should have regard to the location of the existing trees and the setback of the Albion substation.

Source: Sunshine Town Centre Plan, Brimbank Planning Scheme 2018, derived by Urban Enterprise 2021.

8.5.2. RESIDENTIAL CAPACITY OF THE ACZ

Council recently completed a floorspace capacity analysis for the Sunshine Metropolitan Activity Centre (March 2021) to understand the maximum floorspace capacity across the Centre. The analysis has regard to the planning controls of the ACZ and estimates the theoretical maximum floorspace that could be delivered across the ACZ. This work has been used to inform the residential capacity and is summarised in **Appendix C**.

The floorspace capacity analysis assumes that all land within the ACZ is redeveloped to the maximum scale that is permissible (i.e., building heights) in the zone schedule. It should be noted that this development scenario is highly unlikely to materialise, given the scale of redevelopment that would need to take place across areas with high value uses that are currently in operation across the Centre. Further, this assumes that once fully developed, the Centre will be built-out to its maximum capacity, which is also unlikely to occur.

BUILDING CONCEPT PLAN

The floorspace capacity modelling is based on the theoretical building concept plan shown in Figure 75. The Activity Centre was divided into precincts and block maps prepared for each precinct. Individual precinct block maps are also detailed in **Appendix C**.

F75. SUNSHINE ACTIVITY CENTRE PRECINCTS, BLOCK MAP



Source: Sunshine AC Block Map, Brimbank City Council, March 2021

Table 81 summarises each precinct within the Sunshine AC, including the general location and an indication of the current land use/occupants. The table also identifies whether the precinct has been included in the capacity modelling.

Several precincts were excluded from the Council modelling exercise due to the nature of existing land uses. These and some additional precincts have been excluded from this assessment of housing capacity if occupied by institutional anchors such as Victoria University, civic uses (e.g., Police Station) or higher value commercial and retail uses (e.g., Sunshine Marketplace). In some cases, precincts are included in the modelling, but specific sites within that precinct have been excluded (e.g., City West Plaza in Precinct A).

Although there is some possibility that excluded precincts may be redeveloped in future, this prospect is considered unlikely within the 20-year planning horizon for the Housing Strategy based on current land uses.

T81. PRECINCT SUMMARY, SUNSHINE AC

Precinct	Current Use (indicative)	Included in modelling	Comments
Precinct A	City West Plaza: Ballarat Rd/Anderson Rd	Yes	Partially occupied by City West Plaza (excluded) Some vacant/underutilised land and older industrial uses with redevelopment potential.
Precinct B	Victoria University, Bunnings Sunshine: Ballarat Rd	No	Currently occupied by bulky goods retail & car parking. Unlikely to be redeveloped over planning horizon.
Precinct C	Victoria University	No	Victoria University site excluded in modelling (as per BCC capacity modelling)
Precinct D	Flour Mill Site	No	Flour Mill Site excluded in modelling (as per BCC capacity modelling)
Precinct E	Albion Station: Ballarat Rd, Anderson Rd	Yes	Redevelopment potential.
Precinct F	Civic Precinct: Ballarat Rd	Yes	Some redevelopment potential. Police Station & Magistrates Court sites excluded.
Precinct G	Bulky Goods/Large format office: Harvester Rd, Anderson Rd	No	Currently occupied by bulky goods retail & car parking. Unlikely to be redeveloped over planning horizon.
Precinct H	Sunshine Marketplace: Harvester Rd	Yes	Partially occupied by Sunshine Marketplace (excluded). Several sites on the western and southern boundaries that are candidates for redevelopment.
Precinct I (A+B)	Ballarat Rd Commercial strip & Hertford Rd commercial/residential strip	No	Excluded in modelling (as per BCC capacity modelling)
Precinct J	Sunshine Plaza	Yes	Partially occupied by Sunshine Plaza (excluded). Redevelopment potential on two State Government sites.
Precinct K	Residential, commercial: Herford Rd/Service St	No	Excluded in modelling (as per BCC capacity modelling)
Precinct L	Sunshine Skate Park	No	Excluded in modelling (as per BCC capacity modelling)
Precinct M	Residential, community: Alexandra Ave/Hertford Rd	No	Excluded in modelling (as per BCC capacity modelling)
Precinct N	Central Sunshine: Devonshire Rd/Hampshire Rd	No	Currently occupied by retail/commercial strip. Unlikely to be redeveloped over planning horizon.
Precinct O	Central Sunshine: Hampshire Rd/Dawson St	No	Currently occupied by retail/commercial strip. Unlikely to be redeveloped over planning horizon.
Precinct P	Sunshine Leisure Centre	No	Excluded in modelling (as per BCC capacity modelling)
Precinct Q	VicRoads	No	Excluded in modelling (as per BCC capacity modelling)
Precinct R	Sunshine Station North	No	Excluded in modelling (as per BCC capacity modelling)
Precinct S	Sunshine Station South	Yes	Vacant/underutilised land with redevelopment potential.

Source: Sunshine AC Precinct Building Envelope, Brimbank City Council 2021, derived by Urban Enterprise 2021

PRECINCT FLOORSACE CAPACITY

Based on the audit of existing uses, a total of six precincts are identified as holding redevelopment potential within the planning horizon. To estimate the potential scale of residential floorspace and dwellings that could be delivered in these precincts, the following assumptions were adopted:

- The first 2 levels (i.e., ground floor and first floor) of new buildings are likely to accommodate non-residential uses (e.g., retail or commercial) based on the ACZ controls and objectives;
- All levels above the first floor to contain residential apartments;
- 80% building efficiency and average apartment size of 75 sqm to convert Gross Floor Area to dwellings.

Based on the above, the Sunshine MAC has an estimated capacity to accommodate approximately 850,000 sqm of residential floorspace across six precincts with capacity for approximately 9,100 dwellings.

T82. FLOORSACE CAPACITY ANALYSIS, SUNSHINE MAC

Precinct	Total levels	Non-residential levels	Non-residential floorspace (sqm)	Residential levels	Residential floorspace (sqm)	Estimated dwelling capacity (rounded)
Precinct A: City West Plaza	9	2	88,593	7	310,075	3,300
Precinct E: Albion Triangle	9	2	60,733	7	212,564	2,300
Precinct F: Civic Precinct	9	2	52,152	7	182,530	1,900
Precinct H: Sunshine Marketplace	9	2	37,080	7	129,782	1,400
Precinct J: Sunshine Plaza	5	2	4,815	3	7,223	80
Precinct S: Sunshine Station South	5	2	7,751	3	11,626	120
Total			251,124		853,800	9,100

Source: Sunshine AC Precinct Building Envelope, Brimbank City Council 2021, derived by Urban Enterprise 2021.

8.6. COMPREHENSIVE DEVELOPMENT ZONE

The Comprehensive Development Zone 1 (CDZ1 & CDZ2) applies to the Watergardens Town Centre and some peripheral areas. These areas are shown in Figure 76.

Currently no development plan exists for this precinct. Therefore, the scale and nature of uses that will be developed and delivered is currently unknown. The zone schedule identifies the following key objectives.

- For Sydenham (CDZ1), one of the key objectives identified in the schedule is to:
"Provide for medium density housing to best utilise the proximity to the regional centre."
- For Watergardens (CDZ2), a Framework Plan was prepared and adopted in 2009, and is shown in Figure 74. One of the key objectives identified in the schedule is to:
"Create a town centre as a central component of the Sydenham Principal Activity Centre by broadening the mix of activity to include residential, commercial, retail, community, entertainment and civic linked to public transport infrastructure."

There is strategic and policy support a mix of uses in these areas, including medium to higher density residential uses at the periphery of the shopping centre.

F76. COMPREHENSIVE DEVELOPMENT ZONE



Source: VicPlan, 2021

F77. WATERGARDENS TOWN CENTRE FRAMEWORK PLAN, 2009



Source: Watergardens Town Centre Vision, Brimbank Planning Scheme 2020.

It is not possible to estimate the residential capacity of the CDZ with any certainty in the absence of a development plan and associated overlays. There are limited examples of residential development activity that has taken place across the CDZ, meaning that the type and scale of residential development that may occur is difficult to predict.

To provide a broad indication of the general scale of residential capacity that may be possible in the CDZ in the short to medium term (without wholesale redevelopment of existing uses), a review of existing uses was undertaken to identify land that are currently vacant or underutilised. These areas are shown in Figure 78 and have a combined total area of 12.5 ha.

F78. DEVELOPMENT OPPORTUNITIES, VACANT & UNDERUTILISED LAND, CDZ (MAY 2021)



Source: Urban Enterprise 2021

To provide an indication of the dwelling capacity of these areas, the following assumptions have been applied:

- 60% site coverage;
- 6 storeys (including ground floor non-residential); and
- 80% building efficiency;
- An average apartment size of 75 sqm.

Based on the above assumptions, the estimated dwelling capacity of short to medium term development sites in the CDZ is 4,000 dwellings. The ultimate dwelling capacity of the CDZ is likely to be somewhat higher if existing uses are redeveloped and planning controls permit, however this will not be known until a development plan is prepared and adopted.

8.7. COMMERCIAL 1 ZONE (C1Z)

Several Activity Centres across Brimbank include land within the Commercial 1 Zone. **Appendix C** shows details of each location of land in the C1Z, showing the Activity Centre classification, policy direction for residential development (if relevant) and whether there is vacant land with development potential.

The C1Z primarily applies to Local and Neighbourhood Activity Centres that are occupied and do not include vacant sites with development potential. These precincts are dedicated local and neighbourhood activity centres with the primary role of serving nearby residents for convenience retail, speciality retail, hospitality and other population-led commercial activities. Although some centres contain limited small vacant sites, these are more likely to be developed for single storey retail/commercial than any substantial residential use.

As a result of the review of C1Z sites, all Centres have been excluded from the residential capacity assessment except for those identified as holding realistic residential development capacity including:

- St Albans Major Activity Centre; and
- Keilor Downs Major Activity Centre.

RESIDENTIAL CAPACITY OF ST ALBANS AND KEILOR DOWNS

Similar to the ACZ in Sunshine, Council commissioned a floorspace capacity model for the **St Albans Major Activity Centre**. As with the Sunshine MAC, the model estimates the maximum floorspace that could be delivered across the C1Z based on a theoretical building footprint.

The model assumes the maximum building height permissible (3 storeys), with non-residential uses (e.g., retail or office) on the ground floor and residential floorspace above ground-floor (apartments). A theoretical building footprint is shown in Figure 79 (in orange).

The dwelling capacity results are summarised in Table 83. The capacity modelling estimates that the C1Z in St Albans has the capacity to accommodate 1,590 dwellings (mix of 1, 2 and 3 bedroom dwellings).

F79. ST ALBANS AC BOUNDARY WITH HYPOTHETICAL BUILDING FOOTPRINT (ORANGE)



Source: St Albans AC Precinct Building Envelope, Brimbank City Council 2021.

T83. ESTIMATED DWELLING YIELD, ST ALBANS C1Z

	1-bed dwellings	2-bed dwellings	3-bed dwellings	Total dwellings
C1Z, St Albans	257	1,042	292	1,590

Source: St Albans AC Precinct Building Envelope, Brimbank City Council 2021.

In **Keilor Downs Village**, there is a large area of vacant Commercial 1 Zoned land (on Copernicus Way) with an area of 3.2 ha. To determine the potential development yield of this land, the residential estate that has recently been delivered on the adjacent site provides a guide. Aspect Residences is being constructed on a 1.5 ha site, and when completed, will include 70 townhouses (a mix of 2, 3 and 4 bedroom dwellings). To estimate the dwelling capacity of this site, the following set of assumptions have been adopted:

- 60% site coverage (to allow for internal roads, public open space);
- An average townhouse footprint of 80 sqm (reflective of Aspect Residences).

Based on the above assumptions, the estimated remaining dwelling capacity of vacant land in the C1Z in Keilor Downs is 260 dwellings.

8.8. INFILL DWELLING CAPACITY

To estimate the residential dwelling capacity (infill) across the remaining residential zones, the following approach was adopted:

1. Based on Council's rates database, all properties in residential zones in Brimbank were identified, including the Residential Growth Zone, General Residential Zone, Neighbourhood Residential Zone and Mixed Use Zone.
2. A series of assumptions were applied to each zone to:
 - a. Remove sites unlikely to be developed;
 - b. Apply likely built form outcomes of sites likely to be developed based on planning zone and overlay controls; and
 - c. Calculate the potential yield of these sites based on expected dwelling types and sizes.

CAPACITY MODEL ASSUMPTIONS

The assumptions applied to estimate the dwelling capacity of residential zones in Brimbank (NRZ, GRZ, RGZ and MUZ) are set out in Table 84 and Table 85.

T84. RESIDENTIAL CAPACITY MODEL – SITES NOT LIKELY TO BE DEVELOPED

Assumption	Details
Recently Developed	Buildings constructed after 2000.
CIP to SV ratio	CIV to SV ratio higher than 1.5, indicating limited financial incentive to change the existing use.
Heritage controls	Heritage controls apply to the site which may prevent or limit development.
Strata titled lots, Half Pair / Duplex	Strata titled lots and Half Pair / Duplex as defined in Council rates database.
MAEO1	Land within MAEO1 is not developable
MAEO2	Lots within MAEO2 must be at least 300 sqm.

Source: Urban Enterprise, 2021

Zone specific assumptions have been formulated to estimate the capacity of sites with development potential. Table 85 summarises the adopted assumptions for each zone. Assumptions have regard to:

- Current planning controls in the Brimbank Planning Scheme (e.g., minimum lot sizes, site coverage etc.);
- Historical development trends in Brimbank; and
- Industry benchmarks (e.g., site coverage, building efficiency).

T85. ZONE SPECIFIC CAPACITY ASSUMPTIONS

Zone Code	GRZ1	GRZ2	NRZ1	NRZ2	MUZ	RGZ1
Housing type	Unit / Townhouse / House				Apartment	
Minimum Parent Lot Size	500	500	600	600	400	300
Building Height (metres)	11	13.5	9	12	9	13.5
Storeys					6 (apartments) 2 (townhouses)	4 (apartments)
Site Coverage	60%	60%	50%	50%	60%	70%
Minimum Child Lot Size	250	250	300	300	None	None

Source: Urban Enterprise, 2021.

8.8.1. INFILL CAPACITY RESULTS

The results of the capacity modelling for the relevant zones are summarised in Table 86. In total, Brimbank has an estimated capacity to accommodate a net additional 44,560 dwellings through infill development.

Key findings are as follows:

- 44% of infill capacity is in the GRZ1, with the majority located in St Albans (6,900), Sunshine West (2,900), Sunshine West (2,500) and Sunshine (1,000).
- 28% of infill capacity is in the NRZ1. There is notable dwelling capacity in the suburbs of Keilor Downs (1,600), Taylors Lakes (1,600), Sunshine West (1,600) and Keilor (1,500).
- In the RGZ, dwelling capacity is estimated at approximately 11,900 dwellings, the majority of which is in St Albans (5,300) Sydenham (2,400).

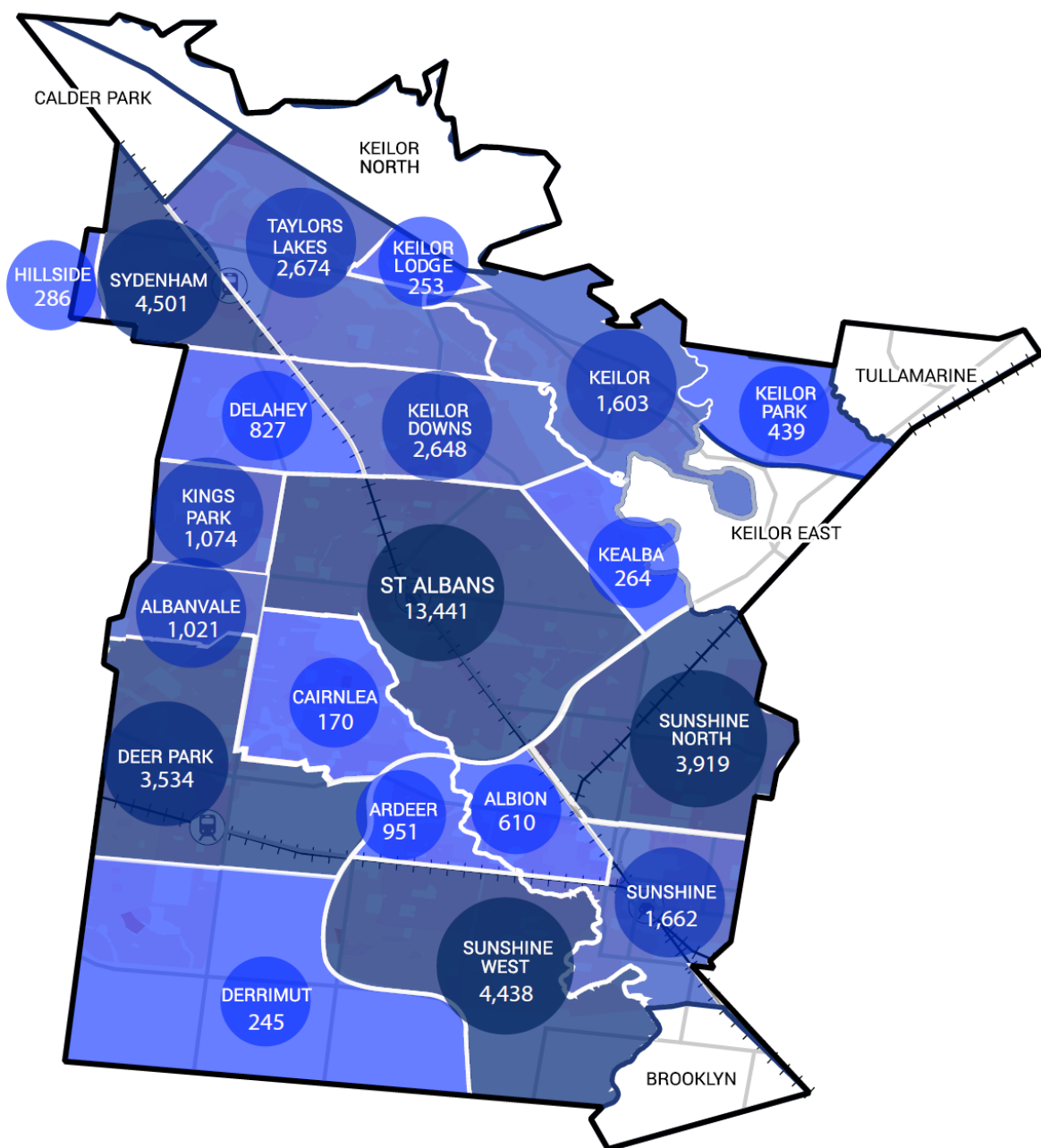
The location of capacity across the relevant zones is shown in Figure 80.

T86. INFILL DWELLING CAPACITY RESULTS

Suburb	GRZ1	NRZ1	NRZ2	MUZ	RGZ (Apartment)	RGZ (Townhouse)	Total
Albanvale	723	298	-	-	-	0	1,021
Albion	505	26	-	-	-	79	610
Ardeer	525	426	-	-	-	0	951
Cairnlea	105	65	-	-	-	0	170
Deer Park	860	861	-	6	749	1,058	3,534
Delahey	7	820	-	-	-	0	827
Derrimut	1	44	-	200	-	0	245
Hillside	104	182	-	-	-	0	286
Kealba	43	221	-	-	-	0	264
Keilor	95	1,508	-	-	-	0	1,603
Keilor Downs	557	1,615	-	-	327	149	2,648
Keilor Lodge	30	223	-	-	-	0	253
Keilor Park	-	439	-	-	-	0	439
Kings Park	846	228	-	-	-	0	1,074
St Albans	6,876	1,212	-	57	1,148	4,148	13,441
Sunshine	958	229	-	19	32	424	1,662
Sunshine North	2,531	-	4	-	-	1,384	3,919
Sunshine West	2,865	1,573	-	-	-	0	4,438
Sydenham	1,037	1,058	-	-	2,315	91	4,501
Taylors Lakes	1,038	1,636	-	-	-	0	2,674
Tullamarine	0	0	0	-	-	0	-
Total	19,706	12,664	4	282	4,571	7,333	44,560

Source: Urban Enterprise, 2021

F80. INFILL DWELLING CAPACITY BY SUBURB, BRIMBANK



Source: Urban Enterprise, 2021.

8.9. SUMMARY OF DWELLING CAPACITY

When each component of capacity is combined, the total dwelling capacity is estimated at 63,466 dwellings. The breakdown by zone and suburb is provided in Tables 87 and 88.

T87. DWELLING CAPACITY BY ZONE

Suburb	GRZ	NRZ	RGZ	ACZ1	CDZ	C1Z	MUZ	TOTAL
Total	19,706	12,668	11,904	9,100	4,000	1,853	282	63,466
% of total	31%	20%	19%	14%	6%	3%	0%	100%

Source: Urban Enterprise.

T88. TOTAL DWELLING CAPACITY BY SUBURB

Suburb	TOTAL	% of total
Albanvale	1,209	2%
Albion	702	1%
Ardeer	965	2%
Cairnlea	240	0%
Deer Park	3,763	6%
Delahey	827	1%
Derrimut	245	0%
Hillside	286	0%
Kealba	458	1%
Keilor	1,603	3%
Keilor Downs	2,911	5%
Keilor Lodge	253	0%
Keilor Park	439	1%
Kings Park	1,074	2%
St Albans	15,629	25%
Sunshine	11,841	19%
Sunshine North	5,036	8%
Sunshine West	4,438	7%
Sydenham	5,174	8%
Taylors Lakes	6,374	10%
Tullamarine	-	-
Total	63,466	100%

Source: Urban Enterprise, 2021.

8.10. SUITABILITY OF HOUSING CAPACITY

Whilst the results indicate that the municipality has substantial capacity (more than 60,000 dwelling capacity in theory) to meet projected dwelling requirements (approximately 13,000 dwellings over the next 20 years), it is important that the locations and types of dwellings align with market demand and housing preferences.

As summarised in Table 89, the following housing could result from development:

Dwelling types:

- 65% of capacity is in the form of townhouses, mostly through the re-subdivision of existing single dwellings;
- 32% of capacity is in the form of apartments;
- 1% of capacity is in the form of separate houses; and
- 2% of capacity is unknown in terms of likely dwelling type.

Locations:

- Capacity is primarily concentrated in Sunshine and St Albans, with 65% of townhouse capacity and 63% of apartment capacity in these districts.
- There is limited capacity in Keilor (approx. 5,664 dwellings), most of which is townhouses (91%).
- There is relatively limited capacity in Deer Park (approx. 4,000 dwellings).

T89. ESTIMATED CAPACITY BY DWELLING TYPE

District	Separate Houses		Apartments		Townhouses		Unknown		Total
Sunshine	526	2%	9,712	43%	12,012	53%	532	2%	22,782
Sydenham & Taylors Lakes	0	0%	6,436	52%	6,025	48%	0	0%	12,461
Keilor	0	0%	327	6%	5,143	91%	194	3%	5,664
Deer Park	0	0%	749	19%	3,059	76%	200	5%	4,008
St Albans	188	1%	3,028	16%	14,736	80%	400	2%	18,352
Total	714	1%	20,252	32%	40,974	65%	1,326	2%	63,266

Source: Urban Enterprise, 2021.

Table 90 shows the projected increase in households across each main household type and provides comments on the extent to which the proposed future supply aligns with the needs of these household types.

T90. SUITABILITY OF HOUSING CAPACITY

Market segments	Current market size (2016 census)	Growth Projections (2021 - 2041)	Most common housing preference	Alignment with capacity
Families	38%	2,000 - 4,000	Separate Houses Townhouses	Low
Adult Couples	20%	3,500 - 5,000	Separate Houses Townhouses Apartments	Moderate
Singles	17%	4,000	Separate Houses Townhouses Apartments	Moderate
One-parent Family	15%	1,600 to 2,700	Separate Houses Townhouses	Low - moderate
Other family	2%	Limited growth	Separate Houses Townhouses	Moderate
Group Household	3%	Limited growth	Separate Houses Townhouses	Moderate

Source: Urban Enterprise 2021.

This analysis brings into focus several issues that the housing strategy should consider:

- Market segments:
 - At present, the strongest demand for housing in Brimbank is for separate dwellings. The future supply of separate dwellings is very limited, meaning that there is unlikely to be a material increase in the number of separate houses available over the strategy period to accommodate the projected increase in families (up to 7,000 additional households). This will manifest in higher house prices and less housing available for rental purposes.
 - The greatest increase in households is projected in the adult couples and singles groups. These groups are likely to be reasonably well supplied with smaller dwellings over the planning period, however it is noted that many older residents avoid townhouses and other dwelling types with stairs, increasing the importance of a variety of housing types for these residents including apartments, units, retirement villages and aged care facilities.
 - At present demand for apartments is limited, however apartments comprise almost one third of future housing capacity. The extent to which apartments meet demand for housing in Brimbank is relatively untested. There are likely to be some limitations on demand for apartments in the short term, such as an absence of overseas migration and international students and the substantial stock available in other parts of Melbourne.
- Deliverability of supply:
 - Larger developments comprise a relatively small proportion of overall future capacity. Larger projects, especially strategic redevelopment sites, present the opportunity to deliver larger volumes of housing that can be masterplanned to meet a variety of housing needs. Opportunities for larger development sites should be identified, especially those which could provide larger dwellings suitable for the family market.
 - The extent and speed at which housing capacity is converted into housing supply will depend on the decisions of very many individuals across the municipality. The vast majority of housing capacity requires the redevelopment of occupied land and therefore is likely to be relatively slow to develop, especially in the GRZ and NRZ.
 - Fragmented landownership is likely to be an ongoing issue in Brimbank, with many areas identified for housing growth requiring consolidation of parcels to create viable development sites (such as the RGZ).
- Location:
 - Most future supply is concentrated in the southern and central sections of the municipality. If there are limited opportunities for new housing to be provided in the northern sections of Brimbank, this limits the extent to which the housing stock 'turns over' in this area, particularly if smaller dwellings are not available for older residents to downsize or move to retirement living alternatives.

CONSIDERATIONS FOR THE HOUSING STRATEGY



This section summarises findings from the research and analysis, and outlines key housing, development, residential land supply and demand considerations that will inform a new Housing Strategy for the municipality.

9. STRATEGY CONSIDERATIONS

The following key issues have been identified from the analysis for consideration as part of the Housing Strategy.

ECONOMY AND DEMOGRAPHY

1. Although the Victorian economy is recovering from the initial impacts of the COVID pandemic, Brimbank is experiencing high rates of unemployment. Maintaining **housing affordability** will be important given these circumstances.
2. Major public sector investment is planned for the Sunshine Metropolitan Activity Centre, including the Melbourne Airport Rail Link, which could increase the attractiveness of this area to future residents and improve the **viability of higher density development** in the medium term.
3. Brimbank is the second most disadvantaged municipality in metropolitan Melbourne, with disadvantage concentrated more in the southern and central districts of St Albans and Sunshine. The availability of **affordable rental and social housing** in these areas will be critical to supporting the social and economic well-being of communities in these areas.
4. An increasing proportion of the Brimbank community is living in rental housing, as opposed to owner-occupied stock. There is both the need to ensure a suitable supply and housing mix of affordable rental accommodation in the municipality, and the need to investigate ways to support **home ownership**.
5. Families account for the majority of households, but adult couple and lone person households are projected to make up the greatest share of growth, meaning that **a variety of housing types will be required** over the planning period to meet needs. This is particularly important in the context of a relatively homogenous housing stock at present.
6. The ageing population in the northern district (e.g., Keilor, Sydenham & Taylors Lakes) will result in increased **demand for retirement living, aged care and multi-generational households** in these areas.
7. The significant and increasing incidence of residents with **south-east Asian ethnicity** should be considered when planning for housing needs in the southern and central parts of the municipality.

EXISTING HOUSING ISSUES

8. The housing stock in Brimbank is still relatively homogenous, especially compared with neighbouring areas. As housing needs change, a **greater diversity of housing** is required.
9. Most recent housing development has occurred in the GRZ and NRZ, with only limited growth occurring in zones where higher density is encouraged. Measures to **identify and address constraints** to development in the RGZ should be considered by the Strategy.
10. Housing affordability relative to incomes is decreasing, along with home ownership. In particular, rental affordability has decreased dramatically. **Addressing rental affordability is a critical issue** for the housing strategy.

FUTURE HOUSING NEEDS

11. The housing strategy should plan to **facilitate ongoing increases to the housing stock** so that in the order of 13,000 additional dwellings are provided over the period 2021 – 2041.
12. Current and recent demand for housing is primarily for separate houses, especially families and adult couples originating from within Brimbank and neighbouring municipalities. Given that opportunities for separate houses are almost exhausted, the Strategy should seek **new opportunities** where a variety of housing types can be provided to meet family needs.
13. There is a need for a greater supply of smaller dwellings encouraging **downsizing and retirement** moves across the municipality, especially in the northern areas, as well as aged care and retirement village opportunities.

14. Although there is sufficient 'capacity' to accommodate dwelling needs over the planning horizon, there is a strong reliance on intensification of existing residential areas and apartment development to convert capacity into supply. Ongoing **large development opportunities** will be important in the short to medium term, especially in the northern district.
15. Sunshine, St Albans and Watergardens present significant opportunities for **apartment development** in locations of high transport accessibility and activity. The realisation of high density housing supply in these areas is likely to be a relatively long term proposition reliant on increases in apartment market demand, normalisation of migration rates, increases in overall housing prices and land values and completion of major public transport and community projects. The Strategy should encourage supporting investment in these locations to underpin their attractiveness to future residents and developers whilst acknowledging the long term nature of their delivery.

APPENDICES

APPENDIX A MAJOR RESIDENTIAL DEVELOPMENT SITES

MAJOR REDEVELOPMENT SITES, UDP

Address	Suburb	Status	Detached	Townhouses	Apartments	Unknown	Total Dwellings
112-116 Anderson Rd	Sunshine	Likely	0	0	0	350	350
247 St Albans Rd	Sunshine North	Firm	0	300	0	0	300
21A Foundry St	Sunshine	Firm	0	0	229	0	229
4B Winged Foot Dr	Sunshine North	Likely	191	0	0	0	191
80 Oakwood Rd	Albanvale	Possible	188	0	0	0	188
Duke Rd	Sunshine North	Possible	0	0	0	182	182
265 Duke Rd	Sunshine North	Likely	0	0	176	0	176
15-19 Service St	Sunshine	Likely	0	0	120	0	120
439-443 Ballarat Rd	Sunshine	Firm	0	0	75	0	75
342 Sydenham Rd	Sydenham	Firm	0	0	74	0	74
99a Furlong Rd	Cairnlea	Firm	0	70	0	0	70
71 Penna Av	Sunshine North	Firm	58	0	0	0	58
8A Service St	Sunshine	Firm	0	57	0	0	57
13 West Esplanade	St Albans	Firm	0	0	55	0	55
19 Albert Crescent	St Albans	Possible	0	0	53	0	53
31-51 Trickey Av	Sydenham	Likely	0	52	0	0	52
22-24 Talmage St	Albion	Firm	0	0	46	0	46
32-36 Sun Crescent	Sunshine	Likely	0	0	44	0	44
13 Marsden Crescent	St Albans	Possible	0	0	43	0	43
7 McCracken St	Sunshine	Firm	0	37	0	0	37
541-547 Melton Hwy	Sydenham	Firm	0	0	36	0	36
40-42 Glendenning St	St Albans	Possible	0	0	33	0	33
64-66 Station Pl	Sunshine	Firm	0	0	29	0	29
4-8 Vincent St	Deer Park	Likely	0	29	0	0	29
23 Victoria Crescent	St Albans	Firm	0	0	27	0	27
36 East Rd	St Albans	Firm	0	0	25	0	25
20 Alexandria Ave	Sunshine	Firm	0	25	0	0	25
11-13 King Edward Ave	Albion	Likely	0	20	0	0	20
87-91 Main Road West	St Albans	Firm	0	0	19	0	19
21 Albert Crescent	St Albans	Firm	0	0	19	0	19
115 Main Rd	St Albans	Possible	0	0	16	0	16
507 Ballarat Rd	Albion	Firm	0	0	15	0	15
10-14 North St	Ardeer	Firm	0	14	0	0	14
22 Station St	Sunshine	Firm	0	0	14	0	14
2-6 Monash St	Sunshine	Possible	13	0	0	0	13
12-14 George St	Sunshine	Firm	0	0	12	0	12
4-6 Dubbo St	Albion	Firm	0	11	0	0	11
16 Kate St	St Albans	Firm	0	11	0	0	11
9 Pecks Rd	Sydenham	Firm	0	0	11	0	11
104-106 Phoenix St	Sunshine North	Likely	0	0	10	0	10
67-69 Cornwall Rd	Sunshine	Firm	0	0	10	0	10
80-82 Walter St	St Albans	Likely	0	10	0	0	10

Source: UDP, Department of Environment, Land, Water and Planning.

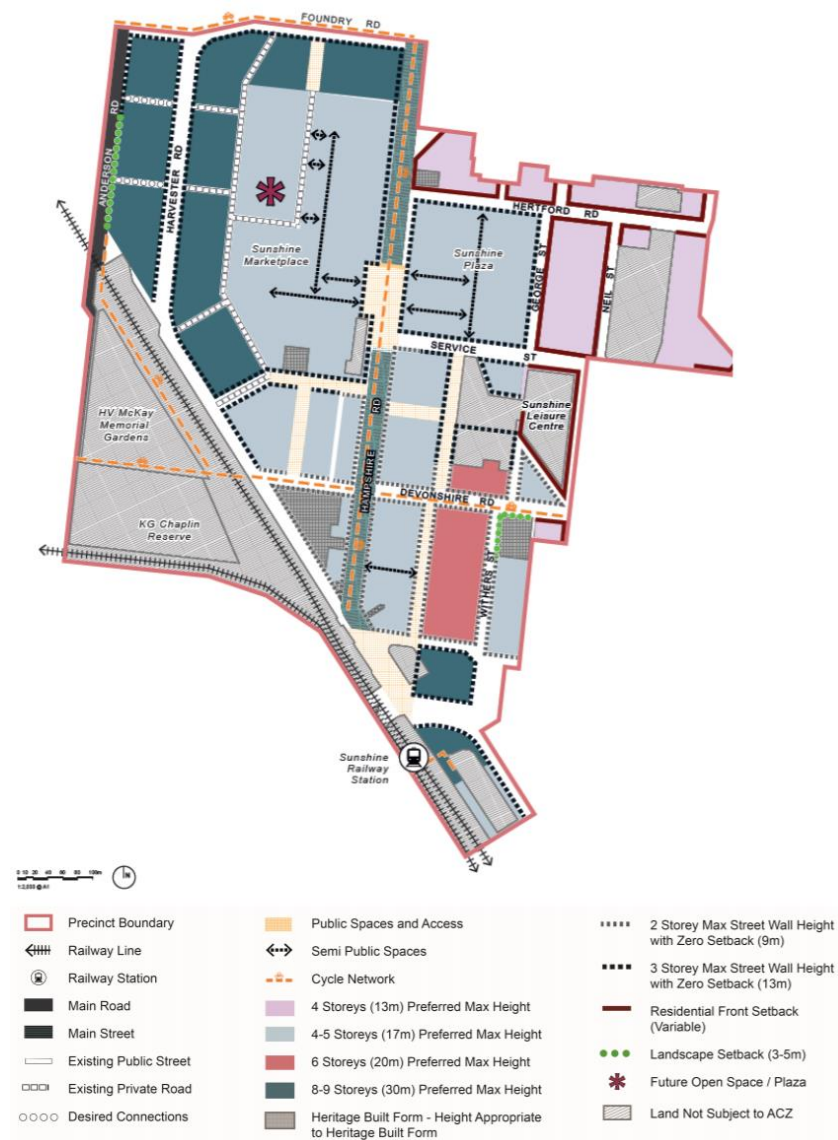
OTHER MAJOR REDEVELOPMENT SITES

Address	Suburb	Name	Number of Dwellings	Indicative timing
99 Furlong Road	Cairnlea	99 Furlong Road	74	2018-2023
814 Ballarat Road	Deer Park	Former Deer Park Primary School	200	2020-2021
27 Driscolls Road	Kealba	27 Driscolls Road (Former Kealba Secondary School)	194	
197 Taylors Road	St Albans	197 Taylors Road	65	
48 Pennell Avenue	St Albans	48 Pennell Avenue	22	
51 Regan Street	St Albans	51 Regan Street (TIC Group Site)	200	2021-2026
254 Hampshire Road	Sunshine	254 Hampshire Road	37	2022
20 Watt Street	Sunshine	Watt Street Mixed Use Development	27	2022
Rivervalley Blvd	Sunshine North	River Valley Estate Stage 7	240	2019-2029
Rivervalley Blvd	Sunshine North	River Valley Estate Stages 8 and 9	200	2026-2035
18 - 24, Robertsons Road	Taylors Lakes	Robertsons Road Dwellings	200	2022-2026

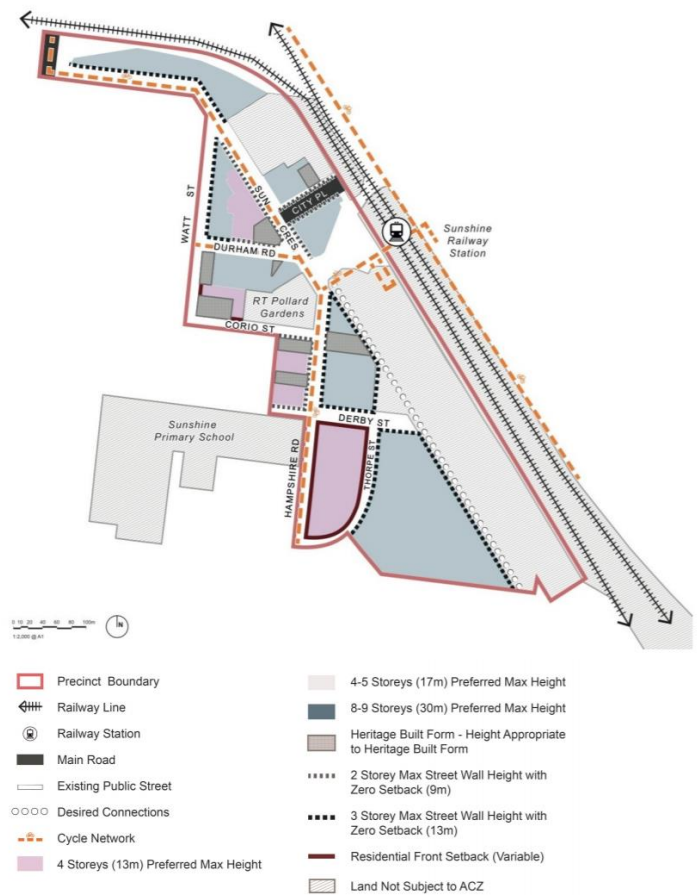
Source: Urban Enterprise, 2021.

APPENDIX B SUNSHINE MAC PRECINCTS

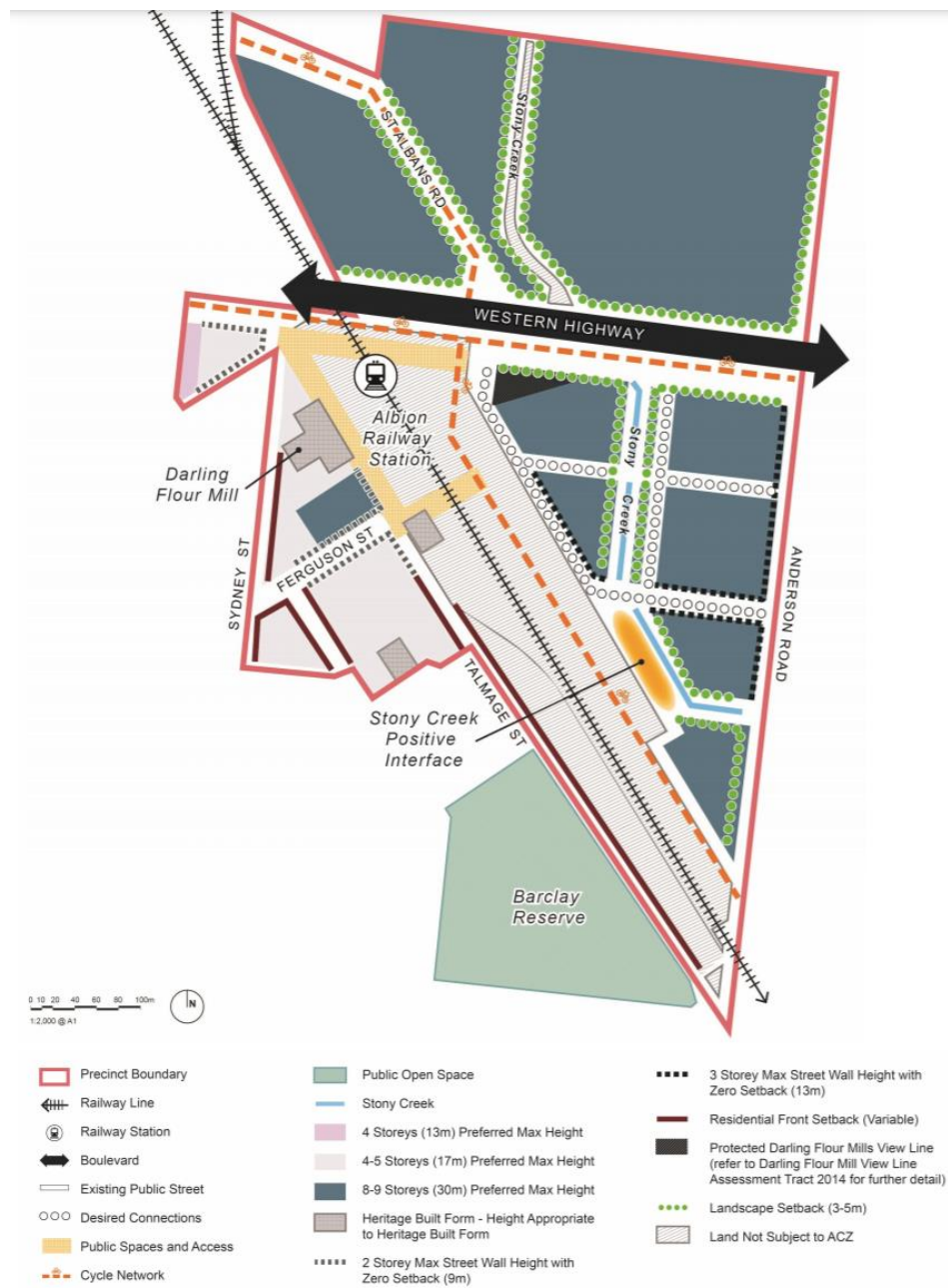
Precinct 1: Main Street



Precinct 3: South Village



Precinct 4: Albion



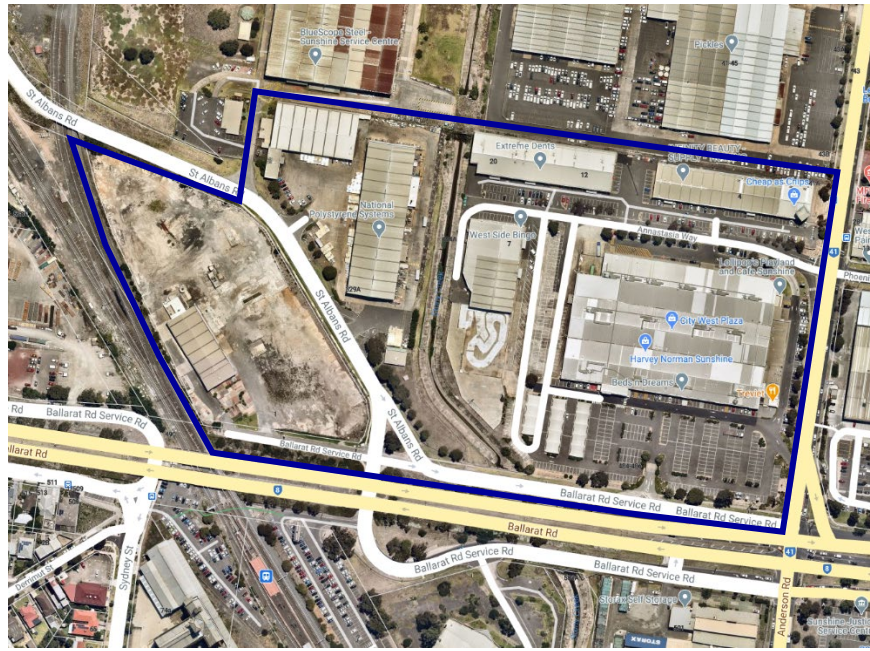
APPENDIX C SUNSHINE AC FLOORSPEACE CAPACITY MODELLING

Sunshine Precinct Capacity Modelling

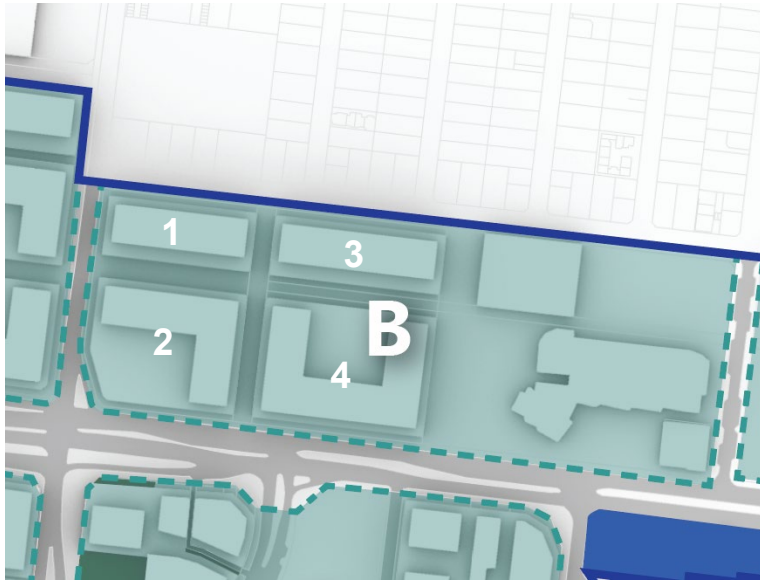
Maximum building envelopes

March 2021

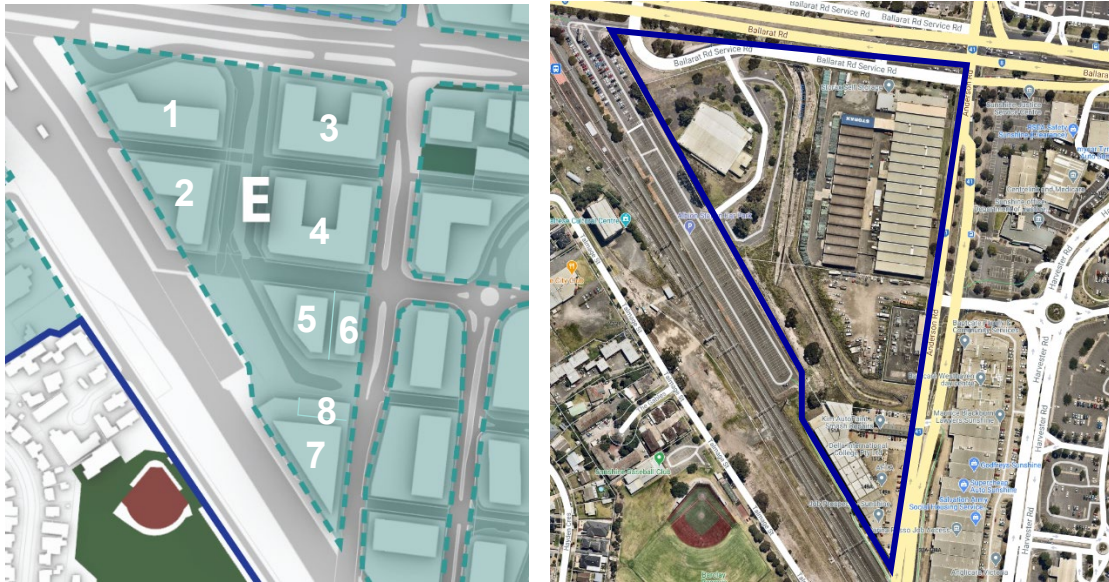
Attachment 12.4.4



		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
A	1	8303.5 m2	4 stories	33214.0 m2	13 m	4593.6 m2	5 stories	22968.0 m2	9 stories	9 stories	56182.0 m2
A	2	9812.0 m2	4 stories	39248.0 m2	13 m	5257.7 m2	5 stories	26288.5 m2	9 stories	9 stories	65536.5 m2
A	3	12606.0 m2	4 stories	50424.0 m2	13 m	5924.4 m2	5 stories	29622.0 m2	9 stories	9 stories	80046.0 m2
A	4	5991.9 m2	4 stories	23967.6 m2	13 m	3273.7 m2	5 stories	16368.5 m2	9 stories	9 stories	40336.1 m2
A	5	5772.2 m2	4 stories	23088.8 m2	13 m	3143.7 m2	5 stories	15718.5 m2	9 stories	9 stories	38807.3 m2
A	6	9615.7 m2	4 stories	38462.8 m2	13 m	5513.2 m2	5 stories	27566.0 m2	9 stories	9 stories	66028.8 m2
A	7	9288.5 m2	4 stories	37154.0 m2	13 m	5393.7 m2	5 stories	26968.5 m2	9 stories	9 stories	64122.5 m2
A	8	7848.9 m2	4 stories	31395.6 m2	13 m	4068.0 m2	5 stories	20340.0 m2	9 stories	9 stories	51735.6 m2
A	9	7807.5 m2	4 stories	31230.0 m2	13 m	5679.7 m2	5 stories	28398.5 m2	9 stories	9 stories	59628.5 m2



		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
B	1	5485.8 m2	4 stories	21943.0 m2	13 m	3150.9 m2	5 stories	15754.5 m2	9 stories	9 stories	37697.5 m2
B	2	10899.8 m2	4 stories	25500.8 m2	13 m	4750.6 m2	5 stories	18403.5 m2	9 stories	9 stories	43904.3 m2
B	3	6375.2 m2	4 stories	43599.2 m2	13 m	3680.7 m2	5 stories	23752.8 m2	9 stories	9 stories	67352.0 m2
B	4	13763.9 m2	4 stories	55055.6 m2	13 m	6852.9 m2	5 stories	34264.4 m2	9 stories	9 stories	89320.0 m2



		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
E	1	8075.4 m ²	4 stories	32301.6 m²	13 m	3443.8 m ²	5 stories	17219.0 m²	9 stories	9 stories	49520.6 m²
E	2	5055.7 m ²	4 stories	20222.8 m²	13 m	2997.4	5 stories	14987.0 m²	9 stories	9 stories	35209.8 m²
E	3	7832.7 m ²	4 stories	31330.8 m²	13 m	4735.0 m ²	5 stories	23675.0 m²	9 stories	9 stories	55005.8 m²
E	4	9026.4 m ²	4 stories	36105.6 m²	13 m	5398.5 m ²	5 stories	26992.5 m²	9 stories	9 stories	63098.1 m²
E	5	3077.5 m ²	4 stories	12310.1 m²	13 m	1414.8 m ²	5 stories	7074.0 m²	9 stories	9 stories	19384.1 m²
E	6	1964.0 m ²	4 stories	7856.0 m²	13 m	973.0 m ²	5 stories	4865.0 m²	9 stories	9 stories	12721.0 m²
E	7	5132.9 m ²	4 stories	20531.6 m²	13 m	2861.4 m ²	5 stories	14307.0 m²	9 stories	9 stories	34838.6 m²
E	8	880.9 m ²	4 stories	3523.4 m²	13 m	0.0 m ²	NA	0.0 m²	4 stories	9 stories	3523.4 m²



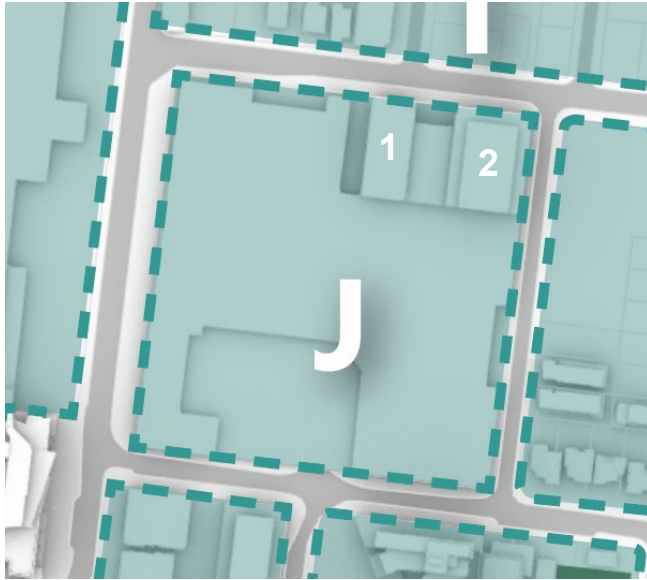
		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
F	1	2847.6 m2	4 stories	11390.4 m2	13 m	1228.4 m2	5 stories	6142.2 m2	9 stories	9 stories	17532.6 m2
F	2	3087.5 m2	4 stories	12350.0 m2	13 m	2106.6 m2	5 stories	10533.0 m2	9 stories	9 stories	22883.0 m2
F	3	2228.7 m2	4 stories	8914.8 m2	13 m	1180.2 m2	5 stories	5901.0 m2	9 stories	9 stories	14815.8 m2
F	4	6575.0 m2	4 stories	26300.0 m2	13 m	3122.9 m2	5 stories	15614.5 m2	9 stories	9 stories	41914.5 m2
F	5										
F	6	4618.9 m2	4 stories	18475.6 m2	13 m	2170.7 m2	5 stories	10853.3 m2	9 stories	9 stories	29328.9 m2
F	7	1975.7 m2	4 stories	7902.8 m2	13 m	940.5 m2	5 stories	4702.5 m2	9 stories	9 stories	12605.3 m2
F	8	4724.0 m2	4 stories	18896.0 m2	13 m	2301.3 m2	5 stories	11506.5 m2	9 stories	9 stories	30402.5 m2
F	9										
F	10	9552.4 m2	4 stories	38209.6 m2	13 m	5399.0 m2	5 stories	26995.0 m2	9 stories	9 stories	65204.6 m2



		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
G	1	5167.8	4 stories	20671.2 m2	13 m	2182.0 m2	5 stories	10910.0 m2	9 stories	9 stories	31581.2 m2
G	2	6279.8	4 stories	25119.2 m2	13 m	2322.5 m2	5 stories	11612.5 m2	9 stories	9 stories	36731.7 m2
G	3	7383.9	4 stories	29535.6 m2	13 m	1844.0 m2	5 stories	9220.0 m2	9 stories	9 stories	38755.6 m2



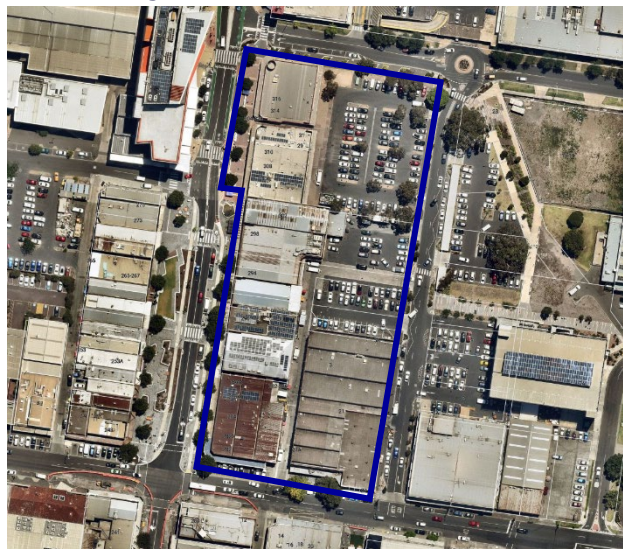
		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
H	1	6011.7 m ²	4 stories	24046.8 m²	13 m	3665.0 m ²	5 stories	18325.0 m²	9 stories	9 stories	42371.8 m²
H	2	4788.6 m ²	4 stories	19154.4 m²	13 m	2748.0 m ²	5 stories	13740.0 m²	9 stories	9 stories	32894.4 m²
H	4	3576.5 m ²	4 stories	14306.0 m²	13 m	1793.0 m ²	5 stories	8965.0 m²	9 stories	9 stories	23271.0 m²
H	5	7807.0 m ²	4 stories	31228.0 m²	13 m	3525.0 m ²	5 stories	17625.0 m²	9 stories	9 stories	48853.0 m²
H	6	9578.5 m ²	4 stories	38314.0 m²	13 m	2810.7 m ²	5 stories	14053.5 m²	9 stories	9 stories	52367.5 m²



		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
J	1	1006.8 m2	4 stories	4027.0 m2	13 m	NOT FEASIBLE	NA	NA	4 stories	5 stories	4027.0 m2
J	2	1746.5 m2	4 stories	6986.0 m2	13 m	1025.1 m2	1 stories	1025.1 m2	5 stories	5 stories	8011.1 m2

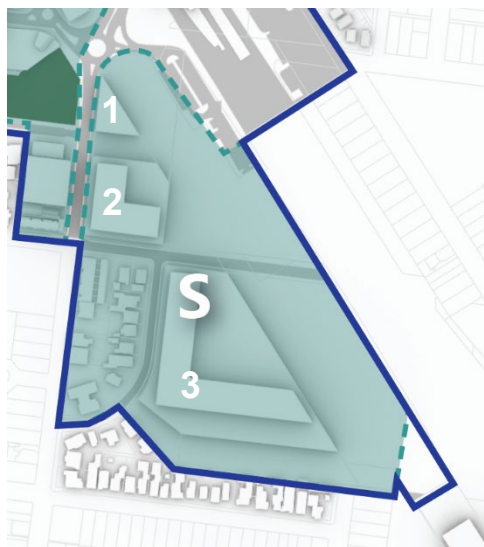


		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
N	1	3230.6 m2	4 stories	12922.4 m2	13 m	1974.0 m2	1 stories	1974.0 m2	5 stories	5 stories	14896.4 m2
N	2	2138.8 m2	4 stories	8555.2 m2	13 m	1345.2 m2	1 stories	1345.2 m2	5 stories	5 stories	9900.4 m2
N	3	3344.7 m2	2 stories	6689.4 m2	9 m	Varies	3 stories	6611.7 m2	5 stories	5 stories	13301.1 m2
N	4	2635.9 m2	2 stories	5271.8 m2	9 m	1179.0 m2	3 stories	3537.0 m2	5 stories	5 stories	8808.8 m2
N	5	910.0 m2	3 stories	2730.0 m2	9 m	NOT FEASIBLE	NA	NA	3 stories	5 stories	2730.0 m2
N	6	3717.0 m2	3 stories	11151.0 m2	9 m	379.6 m2	2 stories	759.2 m2	3 stories	5 stories	11910.2 m2
N	7	1763.6 m2	2 stories	3527.2 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	3527.2 m2
N	8	2012.3 m2	3 stories	6036.8 m2	9 m	NOT FEASIBLE	NA	NA	3 stories	5 stories	6036.8 m2



		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
O	1	238.5 m2	2 stories	477.1 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	477.1 m2
O	2	180.1 m2	2 stories	360.3 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	360.3 m2
O	3	180.0 m2	2 stories	359.9 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	359.9 m2
O	4	182.7 m2	2 stories	365.4 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	365.4 m2
O	5	211.4 m2	2 stories	422.8 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	422.8 m2
O	6	150.0 m2	2 stories	300.0 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	300.0 m2
O	7	300.0 m2	2 stories	600.0 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	600.0 m2
O	8	150.4 m2	2 stories	300.8 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	300.8 m2
O	9	2115.0 m2	2 stories	4230.0 m2	13 m	899.4 m2	3 stories	2698.2 m2	5 stories	5 stories	6928.2 m2
O	10	1877.3 m2	varies	7218.6 m2	13 m	1196.0 m2	1 stories	1196.0 m2	5 stories	5 stories	8414.6 m2
O	11	185.9 m2	2 stories	371.8 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	371.8 m2
O	12	374.7 m2	3 stories	1124.0 m2	9 m	228.0 m2	2 stories	456.0 m2	5 stories	5 stories	1580.0 m2
O	13	954.7 m2	2 stories	1909.4 m2	13 m	663.2 m2	3 stories	1989.6 m2	5 stories	5 stories	3899.0 m2
O	14	372.7 m2	3 stories	1118.1 m2	9 m	226.8 m2	2 stories	453.6 m2	5 stories	5 stories	1571.7 m2
O	15	561.0 m2	3 stories	1683.0 m2	9 m	341.3	2 stories	682.6 m2	5 stories	5 stories	2365.6 m2
O	16	296.0 m2	3 stories	888.0 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	888.0 m2
O	17	374.9 m2	3 stories	1124.7 m2	9 m	216.2 m2	2 stories	432.4 m2	5 stories	5 stories	1557.1 m2

O	18	201.0 m2	2 stories	402.0 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	402.0 m2
O	19	189.9 m2	2 stories	379.8 m2	9 m	NOT FEASIBLE	NA	NA	2 stories	5 stories	379.8 m2
O	20	2706.8 m2	2 stories	5413.6 m2	9 m	1557.5 m2	3 stories	4672.5 m2	5 stories	5 stories	10086.1 m2



		Footprint surface	Podium levels	Podium floor area	Podium Height (m)	Above podium floor area	above podium levels	Above podium floor area	Total Height (stories)	Max Allowed height (stories)	Total GFA
S	1	1509.9 m2	2 stories	3019.8 m2	9 m	878.0 m2	4 stories	3512.0 m2	6 stories	6 stories	6531.8 m2
S	2	1579.8 m2	2 stories	3159.6 m2	9 m	897.7 m2	4 stories	3590.7 m2	6 stories	6 stories	6750.3 m2
S	3	1925.6 m2	2 stories	3851.2 m2	9 m	748.9 m2	3 stories	2246.7 m2	5 stories	5 stories	6097.9 m2

APPENDIX D COMMERCIAL 1 ZONE SITES

LIST OF C1Z SITES & PRECINCTS

Activity Centre	Type	Policy Direction (Clause 21.08)	Overlays	Land Vacancy	Current uses
St Albans	Major Activity Centre	Encourage medium density development within and adjacent to the centre	DD09	Some vacant sites	Mixed retail, some residential
Keilor Downs	Major Activity Centre	Encourage higher density residential development located in and around the centre.	DPO2	Large vacant site on Copernicus Way	Kmart, Supermarket, Post Office, Retail, Food retailers
Brimbank Central	Major Activity Centre	Encourage higher density residential development within and around the centre		No	Shopping centre
Deer Park Village	Major Activity Centre	Encourage higher density development consistent with the Deer Park Village Shopping Centre UDF.		Some vacant sites	Bank, supermarket, food retailers, retail, Post Office
Caimlea	Large Neighbourhood Activity Centre	Encourage shop top housing	DP06 (EAO on one site)	No	Childcare centre, gym, food retailers, retail
Delahey Village	Large Neighbourhood Activity Centre	Encourage shop top housing	DP05	No	Supermarket, auto services, food retailers
Taylors Lakes	Large Neighbourhood Activity Centre	Encourage shop top housing	N/A (EAO on one site)	No	Supermarket, food retailers, building and garden supplies, bulky goods
Derrimut Village	Large Neighbourhood Activity Centre	Encourage shop top housing		No	Supermarket, medical centre, food retailers
Brimbank Gardens	Small Neighbourhood Activity Centre	Encourage shop top housing		Vacant	No existing uses
Fitzgerald Rd	Small Neighbourhood Activity Centre	Encourage shop top housing		No	Pharmacy, food retailer
Fosters Rd	Small Neighbourhood Activity Centre	Encourage shop top housing	MAE01	No	Convenience retail, food retailers
Furlong Rd	Small Neighbourhood Activity Centre	Encourage shop top housing		No	Food retailers
Glengala Village	Small Neighbourhood Activity Centre	Encourage shop top housing	EAO on one site	No	Post office, takeaway food retailers, butcher, milk bar
Keilor Village	Small Neighbourhood Activity Centre	Encourage shop top housing	DD010, MEAO2, SL01	No	Hotel, food retailers, Private Hospital, Motor Inn, retail, residential
River Valley (proposed)	Small Neighbourhood Activity Centre	Encourage shop top housing	DPO3	Vacant	No existing uses
Robinsons Rd	Small Neighbourhood Activity Centre	Encourage shop top housing	EAO	No	Supermarket, takeaway food retailer
Talintyre Rd	Small Neighbourhood Activity Centre	Encourage shop top housing		No	Supermarket, takeaway food retailer
5-23 Northumberland Rd	Local Activity Centre	Encourage shop top housing	SBO	No	Grocer, butcher, retail
202 Main Rd East	Local Activity Centre	Encourage shop top housing	SBO	No	Takeaway food retailer
287 Glengala Rd	Local Activity Centre	Encourage shop top housing	SBO	No	Bottle shop, takeaway food retailer
350 Taylors Rd	Local Activity Centre	Encourage shop top housing		No	Vet, food retailer
Berkshire Rd	Local Activity Centre	Encourage shop top housing		No	Takeaway food retailers, hairdresser
Conrad St	Local Activity Centre	Encourage shop top housing		No	Convenience retail, food retailers
Dumfries St	Local Activity Centre	Encourage shop top housing		No	Takeaway food retailers
Hume Dr	Local Activity Centre	Encourage shop top housing		No	Takeaway food retailers

Activity Centre	Type	Policy Direction (Clause 21.08)	Overlays	Land Vacancy	Current uses
Kings Rd	Local Activity Centre	Encourage shop top housing	EAO on one site	No	Food retailers
Leslie St	Local Activity Centre	Encourage shop top housing		No	Food retailers
Overton Lea Blvd	Local Activity Centre	Encourage shop top housing		No	Takeaway food retailer, grocery, petrol station
McIntyre Rd	Local Activity Centre	Encourage shop top housing	DDO6	No	Post Office, Retail
Monash St	Local Activity Centre	Encourage shop top housing	SBO	No	Café, Milkbar
St Albans Rd	Local Activity Centre	Encourage shop top housing		No	Food retailer
Stradbroke Dr	Local Activity Centre	Encourage shop top housing	SBO	No	Takeaway food retailer
Stenson Rd	Local Activity Centre	Encourage shop top housing		No	Food retailer
Sydenham Community Hub	Local Activity Centre	Encourage shop top housing		No	Takeaway food retailer
Warwick Rd	Local Activity Centre	Encourage shop top housing	SBO	No	Food retailers
Willaton St	Local Activity Centre	Encourage shop top housing		No	Food retailer, bottle shop, residential
55-63 Northumberland Rd	Local Activity Centre		SBO	No	Supermarket, takeaway food retailer, retail
Melton Hwy Shopping Centre	Local Activity Centre			No	Supermarket, Petrol Station, takeaway food retailer
Bell St	Local Activity Centre			No	Takeaway food retailer
Holt St	Local Activity Centre			No	Post Office, food retailer
Suffolk Rd	Local Activity Centre			No	Real estate agent, food retailer
Perth Ave	Local Activity Centre			No	Café, deli, bakery, grocery
Disraeli St	Local Activity Centre			No	Medical
38 Main Rd East	Local Activity Centre			No	Hotel, medical centre, takeaway food, hotel
Maxwell St	Local Activity Centre			No	Hairdresser
Ardeer Shopping Centre	Local Activity Centre			No	Supermarket, takeaway food retailer
216-218 Main Rd East	Local Activity Centre			No	Retail, offices
John St	Local Activity Centre			No	Retail
129 Copernicus Way	Local Activity Centre			No	Takeaway food retailer
Porter Crt Shopping Centre	Local Activity Centre			No	Grocery
110 - 112 Main Rd East	Local Activity Centre		SBO	1 vacant Site	Commercial including convenience retail

Source: Urban Enterprise 2021.

