

Economics and Land Use Report

in support of the
Camberwell Junction
Structure and Place Plan





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1 Introduction

1.1 Purpose

The Camberwell Junction Activity Centre (the centre) is one of three Major Activity Centres within the City of Boroondara alongside Kew Junction and Hawthorn-Glenferrie.

The Camberwell Junction Structure and Place Plan (the Plan) focuses on the following two aspects:

- Place Planning: public realm revitalisation and place enhancement projects and initiatives leading to economic development and uplifts in community and place activation.
- Structure Planning: land use and built form framework for development on private land within the Camberwell Junction Activity Centre.

To support the preparation of the Plan, Council engaged:

- .id consultants to develop a report describing the demographic and socioeconomic characteristics of the Camberwell Junction Activity Centre, and
- HillPDA consultants to undertake an economic and land use analysis. The aim of this analysis was to get a detailed understanding of the economic role of the centre now and into the future and to determine future demand for commercial, retail and residential floor space.

The purpose of this report is to:

- Summarise background research, analysis and recommendations that inform land uses supporting the centre's primary economic role, and
- Outline the rationale for proposed floorspace and preferred development in support of a planning scheme amendment to implement relevant policy and controls.

1.2 Study area

The study area, as shown in Figure 1, extends from the intersection of Burke Road and Victoria Road in the north to Inglesby Road and Camberwell Sports Ground in the south; Fritsch Holzer Park in the north west, and Fairholm Grove and Read Gardens in the east and north east.

It is largely consistent with the 2011 Structure Plan and includes the commercial core of the activity centre as well as residential land within and adjoining the commercial core.

The study area includes a highly diverse range of cultural and social institutions, commercial, retail and entertainment venues and key public infrastructure assets.

This includes major public open spaces, schools, the Rivoli Cinema, Camberwell Fresh Food Market, Camberwell Civic Precinct, Camberwell Community Centre, the Camberwell Tram Depot, Camberwell train station and nearby tram routes.

The centre has a diverse range of retail, entertainment and other commercial uses supported by cultural and social institutions (e.g. schools, civic centre, community services).



Figure 1: Camberwell Junction study area

2 Economic Analysis

2.1 Economic role of the Junction

Major Activity Centre

Camberwell Junction is a Major Activity Centre that is designated to serve a local and sub-regional catchment for goods and services. Major Activity Centres are defined by Plan Melbourne 2050 as suburban centres providing access to a wide range of services and amenities. These centres have different attributes, functions and are considered within a hierarchy servicing a range of catchments from local to regional (Figure 2). The main land use and business sectors of relevance to Camberwell Junction are:

- Local retail services
- Sub-regional retail services
- Hospitality and entertainment
- Commercial office
- Civic and community
- Residential.

Council will need to look at ways to accommodate demand for retail and commercial floorspace growth whilst balancing competing demands for residential apartment growth and meeting policy objectives relating to heritage, design excellence and supporting local businesses.

Night time economy

Night life is an important part of any centre's culture and liveability. While dining and hotel venues form a prominent component of a night life, a night time economy can include a broad range of activities typically under four core areas: entertainment, food, drink and accommodation. Making better use of the evening and night time to stimulate economic activity increases productivity, stimulates investment, increases employment opportunities, and enhances liveability. A successful and vibrant night time economy can improve social cohesion, raise a centre's profile for increased investment and reduce anti-social behaviour through increased passive surveillance.

Camberwell Junction hosts a mix of retail and entertainment uses. The range of retail, restaurant and bars in Camberwell Junction along with the cinema complex are key assets that support the local night time economy. The Rivoli Cinema is a drawcard for night time activity in the precinct. Placemaking efforts around this area support street activation. The cinema precinct in particular hosts several restaurant venues with on-street dining. Burke Road north of the train station is also host to several restaurants and the Palace Hotel. Other restaurants are scattered across the precinct.

At this time Camberwell Junction has a limited range of hotel accommodation options to support additional night time activities. Local government is able to influence the night time economy through:

- Planning controls
- Strategic planning and policy
- Regulation and compliance
- Funding or delivering events
- Availability and quality of public space
- Providing cultural and recreational venues – community centres, libraries, pools, art galleries, theatres
- Marketing and promotion
- Advocating, collaborating and partnerships.

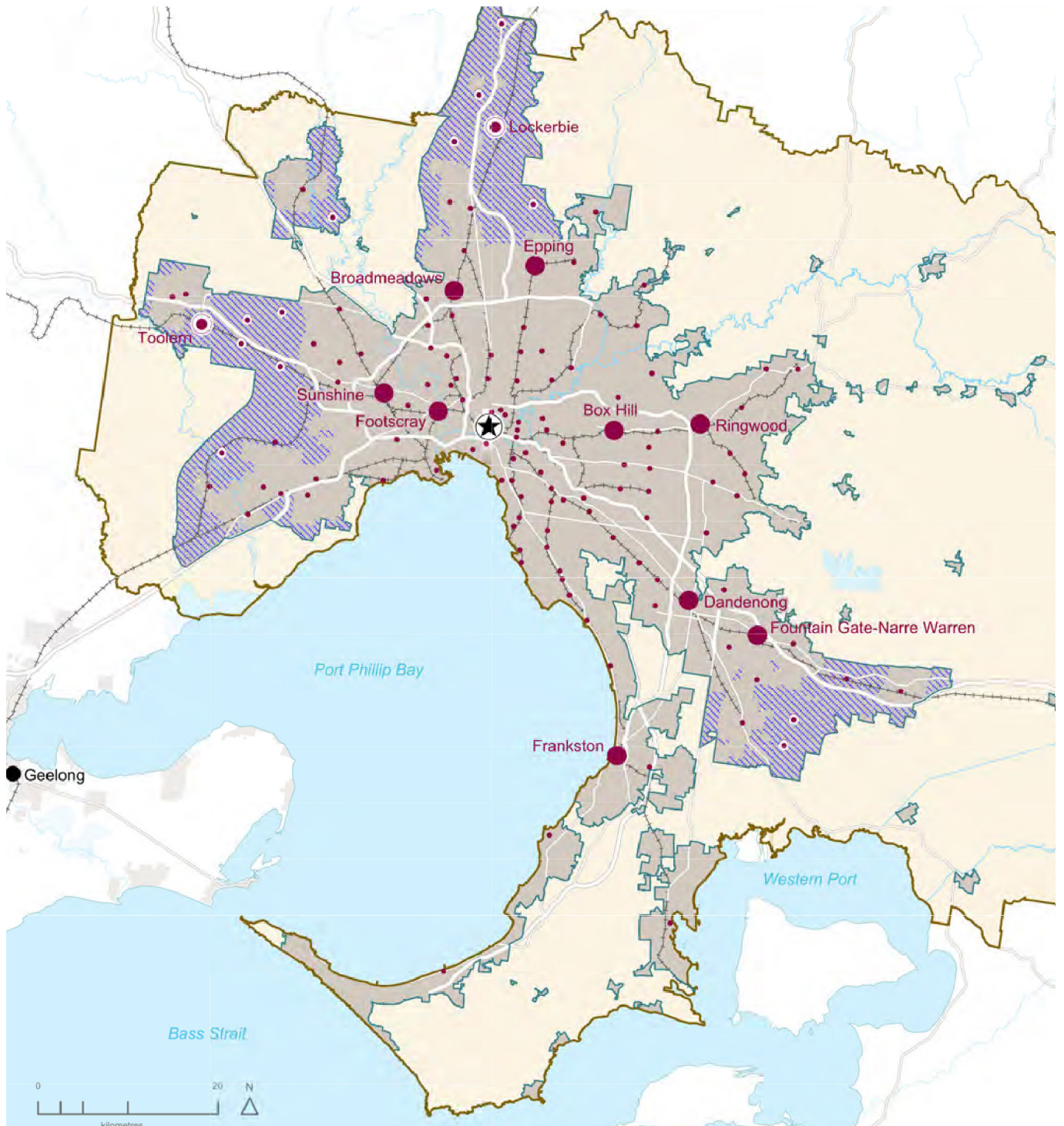


Figure 2: Metropolitan and Major Activity Centres

Source: Department of Environment, Land, Water and Planning (2017)

2 Economic Analysis

2.2 Employment and industry specialisation

Camberwell Junction accommodated approximately 10,500 jobs at the time of the 2021 ABS Census. The centre's total jobs grew by 2.4 per cent per annum over the period from 2011 to 2021 (Table 1). The largest industries present in the centre at this time were:

- Healthcare and Social Assistance (1,565 jobs),
- Professional, Scientific and Technical Services (1,507 jobs),
- Retail Trade (1,388),
- Financial and Insurance Services (1,152 jobs),
- Public Administration and Safety (787 jobs),
- Accommodation and Food Services (755 jobs), and
- Education and Training (755 jobs).

From 2011 to 2021 several industries experienced positive growth in jobs (Figure 3 and Table 1). This includes growth of:

- Education and Training by 8.5 per cent,
- Healthcare and Social Assistance by 5.6 per cent, and
- Public Administration and Safety by 4.9 per cent.

This could be attributed to the prominence of existing uses within the centre such as council offices, primary schools and early learning centres.

Retail trade saw a decrease in jobs by 1.2 per cent over this same time period. While this industry is still one of the largest within Camberwell Junction, the data could indicate shifting retail trends, and may also be linked to pandemic vacancy rates as demonstrated in the following section.

Industries with the most significant decrease in jobs between 2011 and 2021 were already poorly represented in Camberwell Junction. This includes:

- Information media and telecommunications decreasing from 386 to 93 jobs, and
- Transport, postal and warehousing decreasing from 577 to 222.

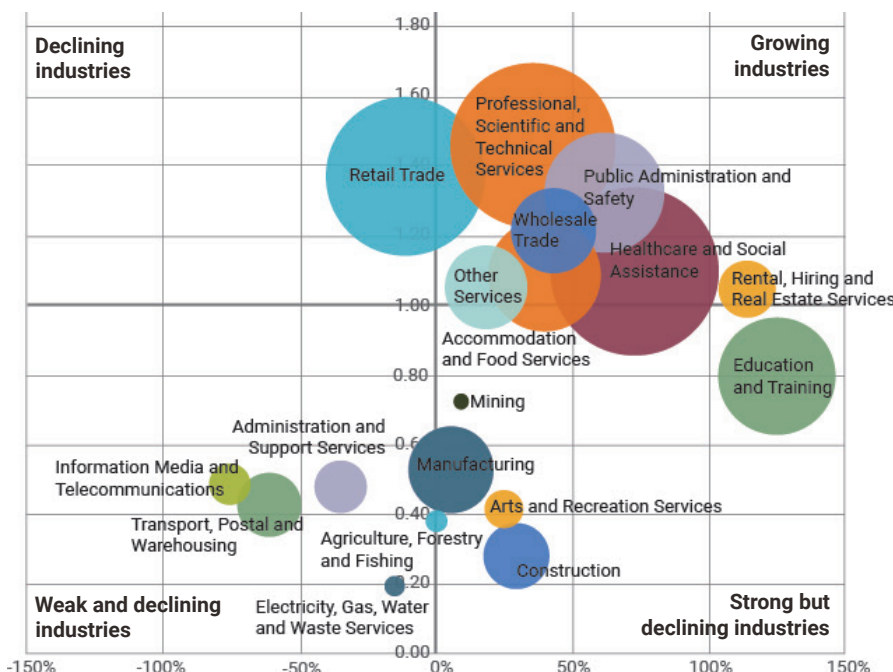


Figure 3: Key sectors - growth share matrix. Source: HillPDA (2022)

Table 1: Jobs in Camberwell Junction Data Area, 2011-2021¹

Industry sector	2011 jobs	2016 jobs	2021 jobs	2021 share	Change 2011-21	Change (%)
Health care and social assistance	904	1,379	1,565	14.9%	661	5.6%
Professional, scientific and technical services	1,112	1,627	1,507	14.4%	395	3.1%
Retail trade	1,564	1,498	1,388	13.2%	-176	-1.2%
Financial and insurance services	781	1,094	1,152	11.0%	371	4.0%
Public administration and safety	486	772	787	7.5%	301	4.9%
Education and training	335	450	755	7.2%	420	8.5%
Accommodation and food services	506	703	708	6.8%	202	3.4%
Wholesale trade	279	303	400	3.8%	121	3.7%
Manufacturing	377	347	397	3.8%	20	0.5%
Other services	324	409	383	3.7%	59	1.7%
Construction	183	208	237	2.3%	54	2.6%
Transport, postal and warehousing	577	224	222	2.1%	-355	-9.1%
Rental, hiring and real estate services	84	195	180	1.7%	96	7.9%
Administrative and support services	233	248	151	1.4%	-82	-4.2%
Information media and telecommunications	386	198	93	0.9%	-293	-13.3%
Arts and recreation services	64	48	80	0.8%	16	2.3%
Agriculture, forestry and fishing	0	25	25	0.2%	25	-
Electricity, gas, water and waste services	26	40	22	0.2%	-4	-1.7%
Mining	11	5	12	0.1%	1	0.9%
Inadequately described/not stated	101	382	413	3.9%	312	15.1%
Total	8,232	10,155	10,477	100%	2,245	2.4%

Source: HillPDA (2022)

1. This data relates to an amalgamation of ABS data areas that best fit the study area and is not an exact match to the study area boundary. Moreover, ABS data areas changed between 2011 and 2016. As such, the jobs data shown here is indicative only.

2 Economic Analysis

2.3 Trade area and expenditure

Trade area

The trade area of the Camberwell Junction Major Activity Centre identifies the area from which the centre draws its customers. It comprises a primary and a secondary trade area.

- The primary trade area takes in a significant portion of the municipality. It extends to Doncaster Road in the north, High Street Ashburton and Tooronga Village in the south, Warrigal Road in the East and Glenferrie Road/Kew to the west.
- The secondary trade area extends further beyond the municipal boundaries as far as Middleborough Road in the East, Princess Highway/Dandenong Road in the south, Punt Road in the east and the Eastern Freeway in the north.

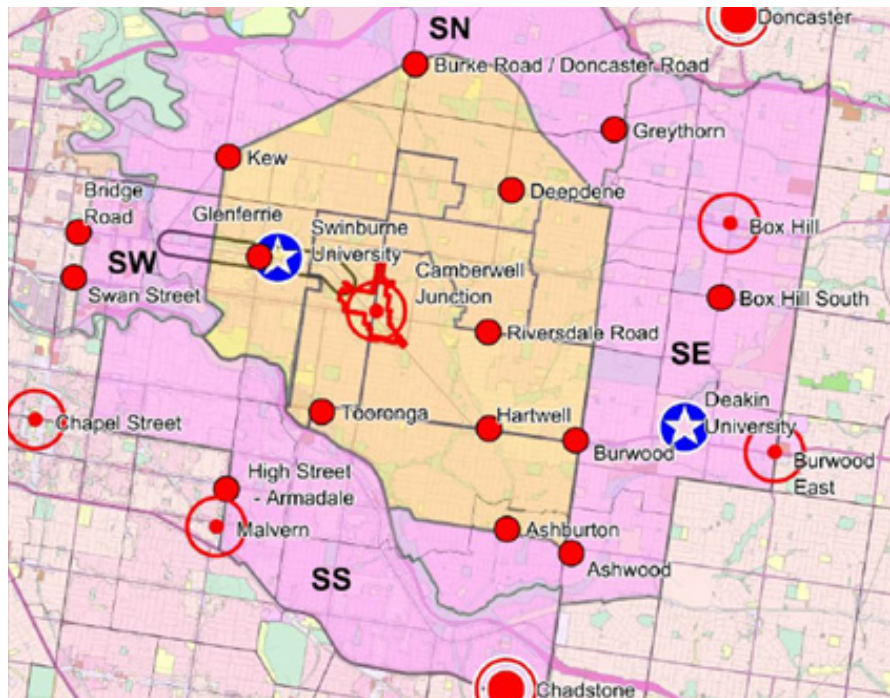


Figure 4: Camberwell Junction Trade Areas

Population projections

Population projections (Table 2) for the trade area show that the population will continue to increase significantly until 2051.

- The primary trade area was estimated to have around 127,700 residents at 2021. The population in the area is forecast to grow to approximately 136,000 by 2031 and 157,000 by 2051.
- The secondary trade area's population is expected to increase from 235,100 in 2021 to 263,000 in 2026 and 307,500 in 2051. Projections for the various secondary trade area sectors are shown in table 2.

The secondary east trade area will experience the biggest population increase by 2051, with the population mostly living outside of Boroondara. This area is also projected to accommodate almost double the population compared to the primary trade area by 2051.

Table 2: Population Projections by Trade Area Sector, Camberwell Junction

Population	2016	2021	2031	2051	2016-2031	2031-2051
Primary Trade Area	120,784	126,850	136,269	157,096	15,485 (13%)	20,826 (15%)
Secondary North Trade Area	39,426	40,653	42,415	46,591	2,989 (8%)	4,176 (10%)
Secondary East Trade Area	95,447	104,299	117,870	135,802	22,423 (23%)	17,932 (15%)
Secondary West Trade Area	25,276	28,531	34,817	44,332	9,541 (38%)	9,515 (27%)
Secondary South Trade Area	58,038	61,796	68,338	80,710	10,300 (18%)	12,372 (18%)
Secondary Trade Area	218,187	235,099	263,440	307,434	45,253 (21%)	43,994 (17%)
Total Trade Area	338,971	361,949	399,710	464,530	60,739 (18%)	64,820 (16%)

Source: HillPDA (2022)

Expenditure forecast

Retail expenditure data was used to identify spending patterns from the trade area sectors. This takes into account the demographic and spending profile of the population at a small area level. Demographic surveys show that individuals in the Camberwell Junction centre are better off in terms of income.

The level of per capita retail spending by trade area is shown in Table 3.

The higher income profile of the study area translates into higher spending per person on retail goods and services compared to the national or state average, which is around \$13,000 per person per annum.

The model includes an assumption for 0.5% real growth in retail spending in the future (HillPDA, 2022).

Table 3: Trade Area Expenditure Forecast by Commodity Type

Commodity type	2021	2031	2051
Food and groceries	\$4,994	\$5,250	\$5,800
Liquor take-away	\$813	\$854	\$944
Take-away food	\$912	\$960	\$1,061
Apparel	\$2,132	\$2,241	\$2,476
Homewares and manchester	\$474	\$498	\$550
Bulky goods	\$2,928	\$3,077	\$3,400
Other goods	\$2,377	\$2,499	\$2,761
Selected personal services	\$585	\$615	\$680
Liquor consumed on premises	\$356	\$374	\$413
Meals in pubs, clubs and restaurants	\$1,417	\$1,490	\$1,646
Total	\$16,989	\$17,858	\$19,731

Source: HillPDA (2022)

2 Economic Analysis

2.4 COVID-19 impacts

The preparation of the Plan falls within the context of post-pandemic growth and recovery. In Melbourne, a rapid recovery of spending has been reported as business restrictions have been removed or eased.

COVID-19 restrictions have led to an increase in online retail expenditure, although this trend was already underway before the pandemic.

Some retail sectors benefited from the business and travel restrictions during the peak of COVID-19, such as food and groceries and household goods (including furniture and electronics).

Table 4 (pages 12 and 13) outlines COVID impact and growth outlook of different land use sectors in Camberwell Junction.

Table 4 (continues in page 12): Estimated Floorspace Demand in Camberwell Junction, 2031-2051

Land use sector	Definition	COVID Impact Findings
Local retail services	<ul style="list-style-type: none">• Convenience retail serving a local catchment.• Supermarkets, grocers, fresh food, pharmacies, medical and beauty services.• Local business services including banking and postal services.	<p>Recent performance during the COVID-19 pandemic has remained strong, and remains the foundational element for Camberwell Junction.</p> <p>Future growth of resident population will see ongoing support of these services within Camberwell Junction.</p>
Sub-regional retail services	<ul style="list-style-type: none">• Clothing and fashion.• Other specialist retail stores.	<p>Recent performance during the COVID-19 pandemic has been poor for this sector, with incidental purchases trending down.</p> <p>There is significant competition from expanded and improved sub-regional centres, including Eastland, Box Hill, Chadstone, Doncaster Shoppingtown and The Glen.</p> <p>Future growth will provide an opportunity for specialised retailers to improve performance. This will likely rely on amenity and access improvements.</p>
Civic and community	<ul style="list-style-type: none">• Civic, educational, healthcare and community services.	<p>This sector has performed consistently and strongly through the pandemic, due the sector's more essential nature.</p> <p>A growing and ageing population will create more demand for healthcare facilities, and improvements to civic facilities will also be needed accordingly.</p>

During this time consumer expenditure shifted from holidays and in-person retailing to spending on the home.

Convenience retail has performed well through the COVID-19 pandemic, and continues to form the foundation of Camberwell Junction.

While sub-regional retail (particularly clothing and fashion) and hospitality have performed poorly in recent times, there is strong potential for future improvement (HillPDA, 2022).

Commercial office sectors have remained fairly static over the last two years, but with increased desire for offices closer to homes and a decentralisation of the metropolitan region, there is strong potential for Camberwell Junction to perform stronger in future years (HillPDA, 2022).

Table 4 (continues from page 12): Estimated Floorspace Demand in Camberwell Junction, 2031-2051

Land use sector	Definition	COVID Impact Findings
Hospitality and entertainment	<ul style="list-style-type: none"> • Cafés, restaurants, bars. • Cinemas and other entertainment services. 	<p>Recent performance during the COVID-19 pandemic has been poor for this sector, with significant limitations placed on the operation of food and entertainment venues.</p> <p>Post pandemic, this sector is seeing strong signs of improvement, with the hospitality and entertainment industries playing a larger role in suburban activity centres going forward. This will be largely underpinned in Camberwell Junction by increased resident and worker populations.</p>
Commercial office	<ul style="list-style-type: none"> • Offices for local, regional and metropolitan serving firms. • Light industrial uses serving a sub-regional catchment. 	<p>Recent performance during the COVID-19 pandemic has been moderate for this sector, with an uptake in demand for more suburbanised office spaces, a departure from the traditionally concentrated CBD.</p> <p>Future growth in the sector is likely to be strong, as more workers return to hybrid working roles and require office spaces in areas located closer to home</p>
Residential	<ul style="list-style-type: none"> • Residential dwellings providing medium and high density housing. 	<p>Recent performance during the COVID-19 pandemic was initially hampered, with a temporary reduction in the number of international students and workers.</p> <p>The post COVID economy has seen a return towards rising demands for apartment living as restrictions ease, and housing affordability concerns will see more and more people choose to live and raise families in apartments. There is strong scope for residential growth in Camberwell Junction.</p>

Source: HillPDA (2002)

2 Economic Analysis

2.5 Vacancy rates

Maintaining relative attractiveness of the centre and being clear on its role and function will be important in the centre's retail recovery and ongoing performance.

A list of retail shopping strips and their associated vacancy rates is provided below (Figure 5).

The data shows a relatively high vacancy rate of almost 15 percent in Burke Road, Camberwell at the time of the COVID-19 pandemic. Prior to the pandemic the vacancy rate was fluctuating around 7 percent.

Commercial vacancies in the study area were estimated at approximately 15 percent in 2021/2022 (HillPDA, 2022).

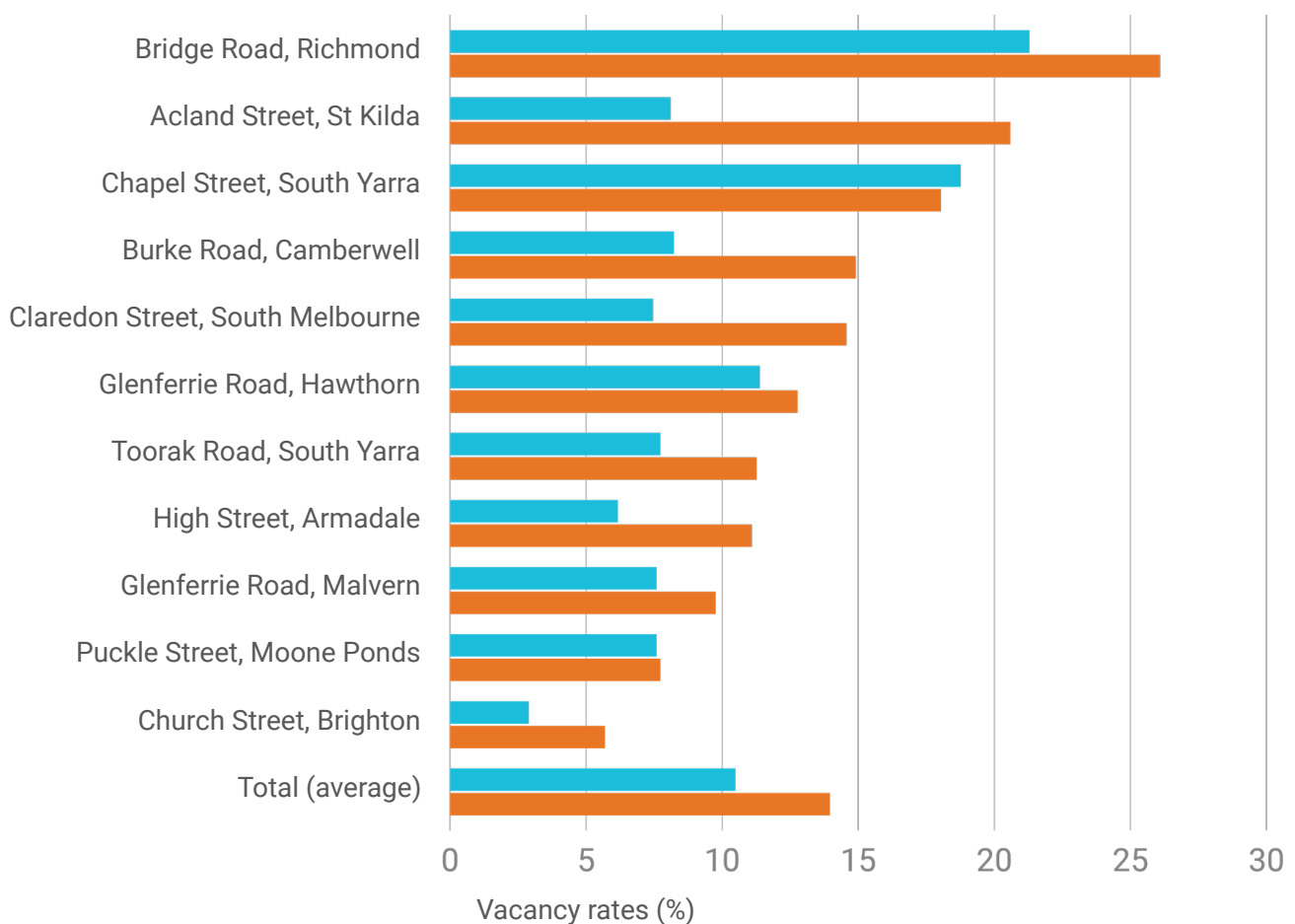


Figure 5: Comparable Vacancy Rates in Retail Strips
Source: HillPDA (2022)



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3 Land use analysis

3.1 Current planning zones

The majority of land in the centre falls under the Commercial 1 Zone, followed by public land within the Public Park and Recreation Zone (PPRZ), and Public Use Zone (PUZ) (Table 5 and Figure 6). Approximately 10 per cent of the study area is within a residential zone.

It is noted that whilst the Camberwell Civic Centre is within the PUZ6 - Local Government, not all land within this zone is employment generating, given several sites across the centre are Council-owned car parks.

It is also noted the Transport Zone has been introduced into the Victorian planning system since the preparation of this report.

Table 5: Land Area in Camberwell Junction, 2021

Zone	Land area (sqm)	Share of total
Employment		
C1Z - Commercial 1 Zone	260,481	46.4%
PUZ6 - Local Government	41,259	7.3%
PUZ2 - Education	32,260	5.7%
Employment sub-total	334,000	59.5%
Residential		
GRZ4 - General Residential Zone 4	23,898	4.3%
NRZ3 - Neighbourhood Residential Zone 3	24,184	4.3%
GRZ3 - General Residential Zone 3	4,798	0.9%
RGZ1 - Residential Growth Zone 1	2,094	0.4%
GRZ5 - General Residential Zone 5	1,146	0.2%
Residential sub-total	56,120	10.0%
Other		
PPRZ - Public Park And Recreation Zone	114,558	20.4%
PUZ4 - Transport	56,763	10.1%
Other sub-total	171,321	30.5%
Total		
Total land area (excluding roads)	561,441	100.0%

Source: HillPDAs (2022)

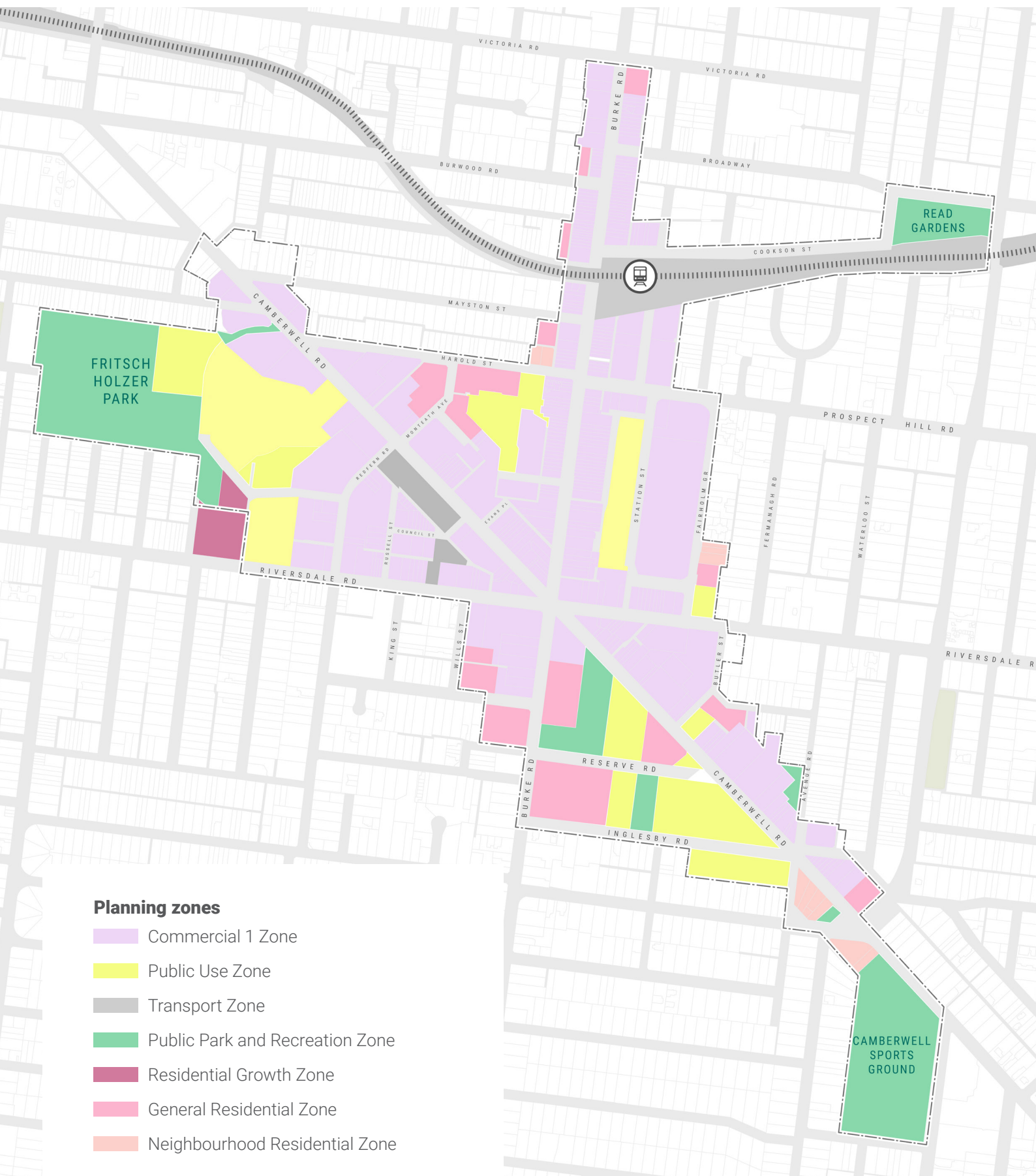


Figure 6: Camberwell Junction Zoning map

3 Land use analysis

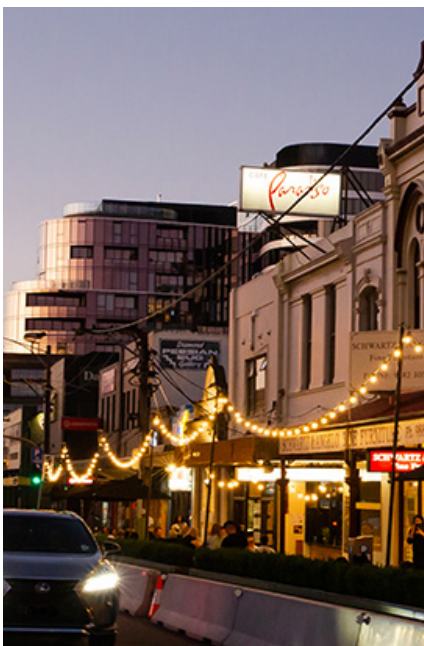
3.2 Existing land use

The following conclusions can be extracted from detailed land use analysis:

- clustering of retail and commercial uses along the major road corridors of the centre with a focus along the length of Burke Road, as well as on an east-west axis across Burke Road.
- Peripheral uses include a mix of residential, commercial/medical and civic, community and education.
- The study area has very little remaining industrial or manufacturing base, consistent with wider trends towards these uses moving to larger outer suburban locations with more readily available infrastructure and skills.
- There is a concentration of civic, community and education uses in the south-east of the precinct around the Camberwell Civic Centre and Camberwell Primary School. Camberwell Community Centre is a new facility although the service has been part of the Boroondara community for over 40 years.
- Beyond the study area, Camberwell and Hawthorn East's residential areas have experienced a significant transformation in recent years, with examples of larger apartment development replacing single and two storey developments in traditionally low-scale streets. Within the precinct, there has also been substantial mixed-use developments over 6 storeys.

This analysis highlights that:

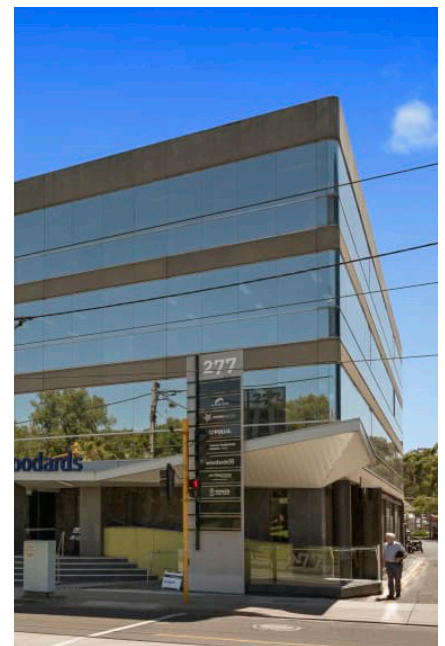
- The only strong land use pattern is the retail focus of Burke Road and the central Junction area.
- There is a high degree of land use mix throughout the rest of the centre in fragmented patterns.
- There are potential compatibility issues that may arise through interfacing of diverse uses, which could negatively affect amenity. This is particularly prevalent west of Burke Road.
- The spread of residential uses throughout the centre presents a potential issue for mitigating off side impacts of new development. These areas can absorb change, and amenity impacts within the centre are secondary to the broader residential zones across Boroondara, for example the General Residential Zone.



Retail and residential uses



Community uses



Commercial office use

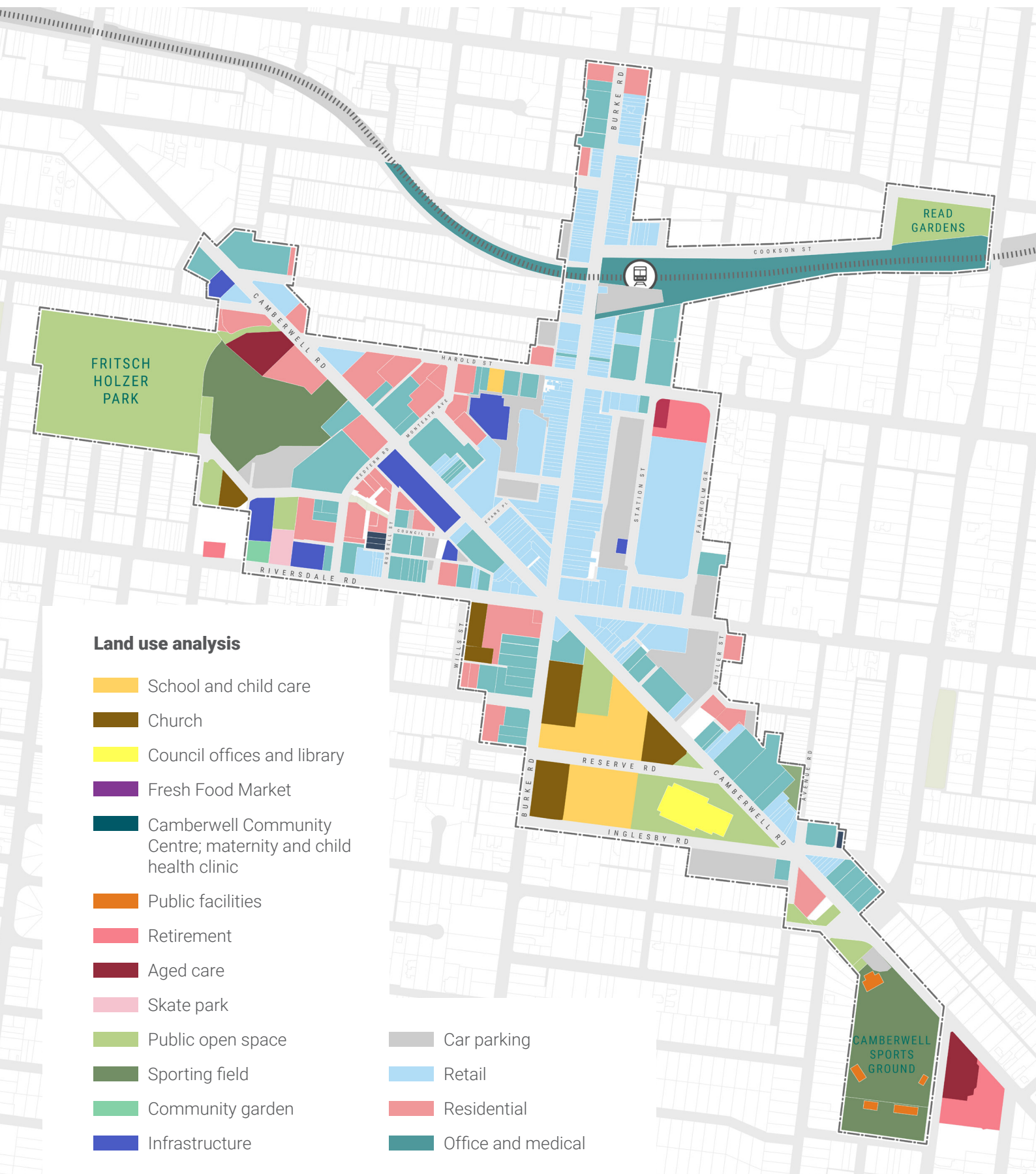


Figure 7: Land use map

3 Land use analysis

3.3 Existing floorspace

Camberwell Junction has approximately 362,800 sqm of total gross floorspace (Table 6). Approximately 71 per cent of the floorspace (258,000 sqm) is dedicated to employment uses and approximately 27 per cent is dedicated to residential uses (99,000 sqm).

Of the employment floorspace, the main land use sectors are:

- Commercial: 117,700 sqm
- Retail: 101,600 sqm
- Community and Health: 22,000 sqm

Table 6: Land Area in Camberwell Junction, 2021

Land Use	Gross Floorspace (sqm)	Share of total
Employment		
Retail	101,608	28.0%
Entertainment	4,971	1.4%
Commerical	117,660	32.4%
Community and health	21,965	6.1%
Education	6,564	1.8%
Industrial	5,143	1.4%
Employment sub-total	257,911	71.1%
Residential		
Residential sub-total	98,971	27.3%
Other		
Utilities and transport	5,509	1.5%
Parking	319	0.1%
Other sub-total	5,828	1.6%
Total		
Gross Floorspace	362,710	100.0%

Source: HillPDA (2022)

3.4 Existing dwellings

Camberwell Junction contained approximately 1,200 dwellings in 2021, utilising approximately 99,000 sqm of floorspace (at an average gross size of 84 sqm across all dwelling formats) (Table 7).

Table 7: Dwellings in Camberwell Junction, 2021

Dwelling type	Number	Share
Apartment	937	79.9%
Retirement Village Unit / Special Accommodation	157	13.4%
Townhouse	63	5.4%
Detached Dwelling	16	1.4%
Total Dwellings	1,173	100.0%
Gross Floorspace (sqm)	98,971	3,416
Average Gross Floorspace (sqm)	84	3,249

Source: Derived from City of Boroondara Property (Rates) Data

Residential development trend

Much of the apartment development has been developed over the past two decades at a gross rate around 450 dwellings per decade (HillPDA, 2022). From 2005 to 2016, 553 new residential dwellings were developed within the centre (Table 8). A similar number, 562, were developed within 400m of the centre.

A closer look at future projects (Table 8) shows that there are more projects in the pipeline within the peripheral areas rather than in the centre itself.

Table 8: Number of dwellings completed or in the pipeline across Major Activity Centres in Boroondara

Activity Centre	Completed 2005-2016* - In Centre	Completed 2005-2016* - Within 400m of Centre	Completed 2017-2018* - In Centre	Completed 2017-2018* - Within 400m of Centre	Pipeline - In Centre	Pipeline - Within 400m of Centre
Camberwell Junction	533	562	240	117	194	475
Hawthorn, Glenferrie Rd	798	1,365	0	353	93	569
Kew Junction	110	341	36	38	420	101

*Major development is defined as developments with over 10 dwellings

Note: Dwelling numbers are calculated based on constructed not net additions dwellings.

Note: Pipeline refers to projects that are: under construction, have a planning permit, have had pre-application meetings, or being sold off the plan.

Source: Inner South East Metro Land Use Framework Plan (Draft): Housing Development Data 2016, Urban Development Program - Redevelopment 2018, Urban Development Program - Redevelopment 2019

4 Floorspace projections

4.1 Overall demand

The projection based on the trade area analysis indicates a reduced commercial floorspace demand (+59,800), compared with the Melbourne Industrial and Commercial Land Use Plan (+75,000).

A primary recommendation is to support and grow the retail sector, focused along and around the core retail spine of Burke Road. This could include investments to upgrade consumer experiences and amenity.

One of the key ways to facilitate this investment through placemaking initiatives is to improve the overall amenity of the centres. This would improve the overall consumer experience and attractiveness of the centre.

HillPDA note a key structure plan management challenge is to make best use of scarce Commercial 1 zoned land and carefully balance commercial floorspace growth aspirations (for retail, office and community uses) and to help deliver municipal housing demand.

It is likely to be challenging for Camberwell Junction to significantly increase housing stock at existing building heights without compromising its ability to significantly increase commercial floorspace and related jobs and services in the centre.

Refer to the full *Economic and Land Use Analysis Report* prepared by HillPDA (2022) for further details.

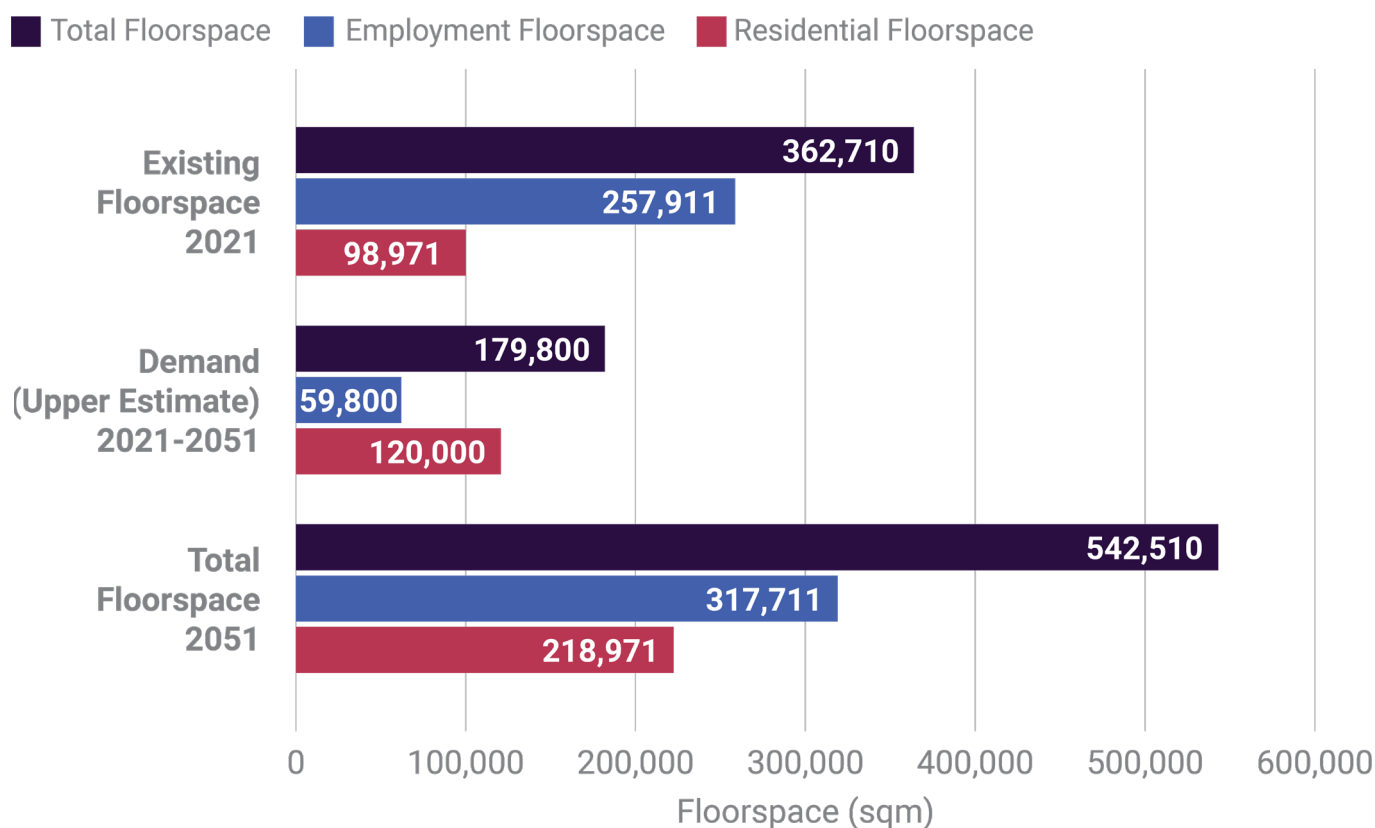


Figure 8: Floorspace projections, Camberwell Junction, 2021-2051
Source: HillPDA (2022)

4.2 Commercial floorspace projections

Commercial floorspace includes a range of office, retail, entertainment, food and accommodation uses.

The Melbourne Industrial and Commercial Land Use Plan (Department of Environment, Land, Water and Planning, 2020) provides data suggesting that Boroondara had 993,100 sqm of commercial floorspace in 2018, and an estimated additional projection of:

- 243,000sqm commercial floorspace to 2031 (approximately 16,200sqm of additional commercial floorspace per year to 2031).

The plan notes approximately 30.6 per cent (303,750 sqm) is located within the two largest centres of Camberwell Junction and Hawthorn.

This information can be used to extrapolate a 15.3 per cent 'fair share' allocation of forecast commercial floorspace growth in Boroondara to Camberwell Junction. That is, half of the 30.6 per cent share of Camberwell Junction and Hawthorn. It is noted this estimate pre-dates the impact of the COVID-19 pandemic on the economy and commercial property market.

Applying this share (15.3 per cent) to the 16,200 sqm average annual growth estimate for the municipality implies a fair share of approximately 2,500 sqm of annual commercial floorspace growth for Camberwell Junction. This indicates:

- an additional 25,000 sqm over a ten year period from 2021 to 2031
- an additional 75,000 sqm over a 30 year period from 2021 to 2051.

These extrapolations provide an upper end pre-COVID-19 guide to commercial floorspace growth needs according to the Melbourne Industrial and Commercial Land Use Plan.

Table 9: Commercial Floorspace Supply and Projection, Inner South East Region

Council	Existing commercial floorspace 2018 (sqm)	Estimated additional commercial floorspace 2016 to 2031 (sqm)	Average annual rate over 15 year period (2016 to 2031)
Bayside	322,100	99,000	6,600
Boroondara	993,100	243,000	16,200
Glen Eira	529,450	113,000	7,533
Stonnington	1,146,550	328,000	21,867
Total	2,991,200	784,000	52,267

Source: HillPDAs (2022)

4 Floorspace projections

4.2 Commercial floorspace projections

Commercial sector floorspace breakdown

Demand projections for additional local retail services, sub-regional retail services and hospitality and entertainment floorspace show that short-term demand is relatively low (Table 10).

This may be an impact related to the COVID-19 pandemic. However, demand is expected to increase significantly between 2031 and 2051, particularly in the sub-regional retail services sector.

The floorspace projections for each category are as follows:

Local Retail Services

- 3,100 sqm in the period 2021 to 2031
- 12,400 sqm in the period 2021 to 2051

Sub-Regional Retail Services

- 0 sqm to 4,400 sqm in the period 2021 to 2031
- 8,200 sqm to 17,600 sqm in the period 2021 to 2051

Hospitality and Entertainment

- 1,300 sqm in the period 2021 to 2031
- 5,300 sqm in the period 2021 to 2051.

Table 10: Estimated Floorspace Demand in Camberwell Junction, 2031-2051

Sector	2021-2031	2031-2051
Supermarkets and grocery stores	1,624	6,599
Speciality food stores	403	1,636
Fast food stores	412	1,676
Restaurants, hotels and clubs	1,290	5,243
Department stores	992	4,029
Clothing stores	841	3,416
Bulky goods stores	800	3,249
Other personal and household goods retailing	1,686	6,851
Selected personal services	609	2,473
Total (sqm)	8,655	35,172

Source: HillPDA (2022)

4.3 Residential floorspace projections

Detailed population projections based on the latest census data demonstrate that the centre’s population will more than double by 2051, from approximately 2,500 to 5,792 (Figure 9).

Accordingly there will be an increased need for housing within the centre, with dwelling numbers projected to increase by approximately 1,500 additional dwellings.

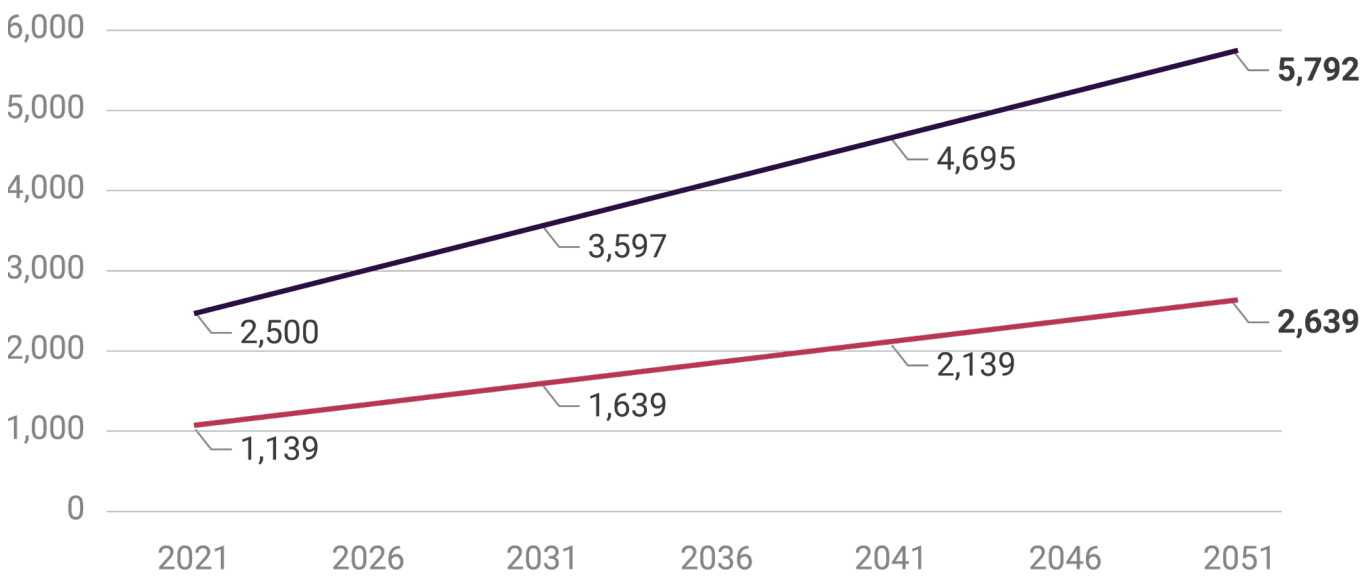


Figure 9: Population (back line) and dwelling projections (red line), Camberwell Junction, 2021-2051
Source: HillPDA (2022)

Dwelling demand

Long-term trends show sustained growth in residential population and incremental diversity in demographics and household types, including smaller household sizes and an ageing population.

This evidence supports increasing demand for smaller dwelling types including residential apartments and townhouses. Single house rebuilds will also occur but these will not add to a net increase to dwelling stock.

In terms of floorspace, assuming 80 sqm gross floorspace per average dwelling unit constructed in the future, the estimate for Camberwell Junction is:

- additional 40,000 sqm in the period 2021 to 2031
- additional 120,000 sqm in the period 2021 to 2051.

5 Summary

The following recommendations for future economic related land use in Camberwell Junction have been formed through in-depth background analysis.

There is careful consideration for respecting the character and identity of Camberwell Junction while balancing future dwelling, employment and economic needs to ensure it can fulfil its role as a Major Activity Centre within the Inner South East Metropolitan Region.

Key land use and economic issues to be addressed in the Structure and Place Plan are:

- The limitations in managing land use mix in the Commercial 1 Zone and loss of valued employment land to residential intensification.
- Competition with other major centres in the east of Melbourne, including Eastland, Box Hill Central , Doncaster Shopping Centre, The Glen and Chadstone (all within a twenty minute drive).

A key structure plan management challenge is to make best use of scarce Commercial 1 zoned land in Camberwell Junction.

There is a need to carefully balance the potential for Camberwell Junction to accommodate commercial floorspace growth aspirations (for retail, office and community uses) and to help deliver municipal housing demand. It is likely to be challenging for Camberwell Junction to significantly increase housing stock without compromising its ability to significantly increase commercial floorspace and related jobs and services in the centre.

Housing and floorspace projections will form the basis for future built form modelling to accommodate these future demands.



