

# What are we planning for?

## Community snapshot

### People

- In 2020 Brunswick and Brunswick East contained 23.9% of the Moreland population. The estimated resident population was 44,979 people.
- People aged 25 to 34 years old form the largest age group (32%). This is far higher than the Moreland proportion of 22.9%.

### Community jobs and employment

- In 2016, almost half of Brunswick and Brunswick East adults held a Bachelor's degree or higher (49.3%). This is far higher than for Moreland overall, where around one third (33.6%) of adults hold a Bachelor's degree or higher.
- The most common industry sectors of employed residents living in Brunswick and Brunswick East were Professional, Scientific and Technical Services (15%), Education and Training (14%) and Health Care and Social Assistance (12%).
- In 2016, 43% of employed residents who lived in Brunswick and Brunswick East, worked in City of Melbourne local government area.
- Two thirds (67%) of employed Brunswick and Brunswick East residents were employed full-time and one third (33%) were employed part-time.
- In June 2021, the estimated unemployment rate in Brunswick was 7.0% and in Brunswick East was 7.1% This is well above the pre-Covid-19 baseline of 5.3% in Brunswick and 4.7% in Brunswick East and above the June 2021 Greater Melbourne average of 6.6%.

## Business snapshot

- In 2020 the Brunswick Activity Centre contained 873,814 square metres of employment floor space.
- The Brunswick Activity Centre accounted for 28% of the jobs in Moreland and is the municipality's largest employment precinct. The next largest employment precincts are the Coburg Activity Centre with 10% and Coburg North Industrial area with 6% of the municipality's jobs.
- In 2020 the total number of jobs in the Brunswick Activity Centre was 13,743. Of these, 70% of the jobs were in the commercial areas and 30% of the jobs were in the industrial areas.
- A third (32%) of jobs in the Brunswick Activity Centre were in the Household Services sector. The Industrial sector accounted for 20% of jobs, noting that many industrial jobs, particularly in creative industries, are in the commercial area of this activity centre. Business Services represented 14% of jobs, and Health jobs represented 13%. This highlights the economic diversity of the Brunswick Activity Centre.
- In 2020 the Brunswick Activity Centre generated \$1.3 billion of economic output, equating to 29% of the municipality's output.

## Housing snapshot

### Households

- In 2021 there were 20,134 households living in Brunswick and Brunswick East.
- The dominant household types are small households, with lone person households (30.9%) and couples without children (30%) being the dominant household types. Couples with children make up 16% of households and 15.4% of households are group households.
- This contrasts with Moreland and Greater Melbourne. In Moreland lone person households are 25.5% of households, couples without children are 23.2% of households and couples with children

are 27.1% of households. For Greater Melbourne the figures are 22.0% lone person, couples without children 22.9% and couples with children 33.5%.

## **Housing**

- In 2016 there were 18,073 dwellings in Brunswick and Brunswick East.
- Housing types in Brunswick and Brunswick East are diverse. In 2016 apartments made up 27% of housing, 40% were medium density units and townhouses, and separate dwellings represented 32% of housing.
- This contrasts with Moreland where apartments made up 9.2% of housing, 35.1% were medium density units and townhouses, and separate dwellings represented 54.8% of housing. In Greater Melbourne the figures are 10.1% apartments, 22.9% medium density and 66.1% separate dwellings.
- In 2016, 49.1% of households in Brunswick and Brunswick East rented their homes, highlighting housing unaffordability and preference in this location. This contrasts with 36.1% for Moreland and 28.8% for Greater Melbourne.
- There is less social housing in Brunswick and Brunswick East (2.3%), compared to 2.5% in Moreland and 2.6% in Greater Melbourne.
- In Brunswick and Brunswick East, 43.2% of households own or are buying their homes. This contrasts with 55.8% for Moreland and 63.3% for Greater Melbourne.

## **Community Forecast**

### **People**

- Under a moderate covid recovery scenario the population of Brunswick and Brunswick East is forecast to increase from 44,979 people in 2020 to 58,010 people by 2036.
- Younger adults are forecast to continue to be strongly represented, with 25-34 year olds forecast to be 31.5% of the population of Brunswick and Brunswick East by 2036 and 66.5% of the population forecast to be aged between 20 and 44 years.

## **Business forecast**

- Under a growth scenario, the number of jobs in the Brunswick Activity Centre is forecast to grow from 13,743 in 2020 to 19,126 in 2035; an increase of 5,383 jobs.
- It is forecast that 35% of the jobs in Moreland will be located within the Brunswick Activity Centre in 2035.
- Strategic sectors for growth include:
  - Health Care & Social Assistance
  - Retail & Food Service
  - Education & Training
  - Construction
  - Professional, Scientific & Technical Services
  - Creative and Cultural
  - Manufacturing.
- Associated with this growth, in the Brunswick Activity Centre, the requirement for commercial floorspace is forecast to increase from 352,439 square metres in 2020 to 502,050 square metres in 2035, an increase of 149,611 square metres of commercial floorspace.
- In a knowledge based and service economy there is less distinction between commercial and industrial uses than has traditionally been the case. As provided for by Victoria Planning Provisions Industrial and Commercial Zones, in the Brunswick Activity Centre, some industrial land uses locate in commercial areas and some commercial uses locate in industrial areas.

- It is forecast that there will be a reduced requirement for industrial floorspace of 84,201 square metres, meaning some of the forecast commercial floorspace requirement will be met within industrial areas within the Brunswick Activity Centre. The net requirement for additional commercial floorspace to be accommodated within commercial areas of the Centre, is 65,410 square metres.

## **Housing forecast**

### **Households**

- Under a moderate covid recovery scenario the number of households in Brunswick and Brunswick East is forecast to increase from 20,134 households in 2021 to 27,170 households by 2036, an increase of 7,036 households.
- The largest forecast growth is in lone person households, which by 2036 could represent 27% of households in Brunswick and Brunswick East by 2036. Couples without children are forecast to represent 25% of households. Couples with children are forecast to make up only 12% of households by 2036.

### **Housing**

- Under a moderate covid recovery scenario the number of dwellings in Brunswick and Brunswick East is forecast to increase from 21,020 dwellings in 2020 to 28,036 dwellings in 2036, an increase of 7,016 dwellings.
- It is forecast that 5,779 of these dwellings would be high density (apartments) and 1,233 of these dwellings would be medium density infill.

## **Capacity**

### **Business capacity**

- 2021 employment capacity analysis indicates that under a growth scenario, the Brunswick Activity Centre has the capacity to accommodate an additional 60,700 square metres of commercial floorspace, but without intervention, the market will not supply sufficient commercial floor space for the forecast job growth.

### **Housing capacity**

- Preliminary 2022 housing capacity analysis indicates that the Brunswick Activity Centre has the capacity to accommodate a further 8,774 high density dwellings (apartments). This analysis excludes floorspace allocated for employment growth.

## **Conclusions**

- In 2019 housing supply forecasts were undertaken and compared with the capacity to accommodate housing growth. This research undertaken by SGS Economics & Planning was titled *Supplying Homes in Moreland*. The purpose was to understand whether the planning scheme would constrain housing growth, particularly in the Brunswick Activity Centre where most of Moreland's apartment development has occurred. It utilised Moreland City Council's 2016 Capacity Analysis of Activity and Neighbourhood Centres. It indicated that in the Brunswick Activity Centre there was insufficient capacity to accommodate the forecast supply of high density dwellings.
- This research suggested the need to monitor housing supply and update housing capacity analysis. This has been done in the Charter Keck Cramer *Understanding the Local Impacts of COVID-19 on Population and Housing in Moreland* 2021 report and the Moreland City Council *Moreland Housing Capacity Study* 2022.

- A key driver of population growth in Moreland is overseas migration. The post-COVID population trend is that COVID-19 has interrupted the period of high population growth rate, with the southern suburbs most impacted in terms of fewer persons than previously forecast.
- Moreland's apartment markets are expected to be substantially impacted by COVID-19, with a very different trajectory to pre-COVID forecasts. Post-COVID forecasts predict a drastic decline in new high density dwellings between 2022 and 2025, and recovery predicted from 2025.
- The slowing of population and housing growth as a result of the pandemic means that the Brunswick Activity Centre has the capacity to accommodate forecast employment and housing growth to 2036 within the development capacity of current planning scheme controls, or more specifically, within current preferred building heights.