

WoMEDA Economic Briefing

2025.1

August 14, 2025

Centre of Policy Studies, Victoria University

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WoMEDA
WEST OF MELBOURNE ECONOMIC
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The West of Melbourne Economic Development Alliance Incorporated, (WoMEDA), is an alliance of significant institutions operating across the West of Melbourne, working in tandem with local government and engaging with industry.

WoMEDA aims to develop and champion strategies that foster regional collaboration, sustainable economic development, greater local job opportunities and increased wellbeing for community members, and to promote synergistic and innovative employment precincts.

A priority for WoMEDA is to produce a strong evidence base drawn from high quality analysis and reports which focus on sustainable economic development, employment growth, and the wellbeing of those that live and work in the region.

These bi-annual briefs on the economy of the West of Melbourne, produced by the Centre of Policy Studies (a Centre at Victoria University, one of our foundation members), are integral to this mission.

Professor Peter Dawkins, Chair

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This paper is the second in a series of bi-annual briefs on the economy of the West of Melbourne prepared by the Centre of Policy Studies at Victoria University.

Executive Summary

This report by the Centre of Policy Studies presents new forecasts of employment for Melbourne's West and its LGAs.

The rapidly growing population of the West presents many opportunities and challenges. In this report we focus on commuting for employment.

An increase in the numbers of workers commuting long distances is almost inevitable, as population growth, particularly in Wyndham and Melton, is so high.

If current trends towards strong growth in CBD-based industries continue, we find that a growing *proportion* of this rapidly growing population will be commuting to jobs outside the West. This exacerbates the overall commuting burden on both individuals and transport infrastructure.

Commuting may be alleviated by increased strategic emphasis on employment precincts close to residential areas. This paper considers four precincts with jobs distributed across Sunshine, Werribee, Footscray and Melton. The first three are already designated as priority precincts by the Victorian Government.

Increased emphasis on growing employment in precincts will change the overall distribution of jobs in the West, the CBD, and the rest of Melbourne, but will not have a large impact on overall commuting unless accompanied by measures to improve transport infrastructure.

All four precincts are projected to have significant benefits in curtailing commuting with those in Wyndham and Melton having particularly strong benefits for residents in their own rapidly growing population areas. We find that a precinct in Sunshine would be particularly effective in reducing commuting times across the region as a whole, as it is reasonably accessible from both Werribee and Melton.

The analysis in this report is based on current journey times. To have an even greater impact, development of an employment precinct needs to be coordinated with improvements to transport infrastructure to reduce these journey times.

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The analysis of commuting is based on census data and Computable General Equilibrium (CGE) modelling and covers the LGAs of Hobsons Bay, Wyndham, Maribyrnong, Brimbank, and Melton, and includes the commuter destinations of Melbourne CBD, Moonee Valley, Hume and Greater Geelong, among others.

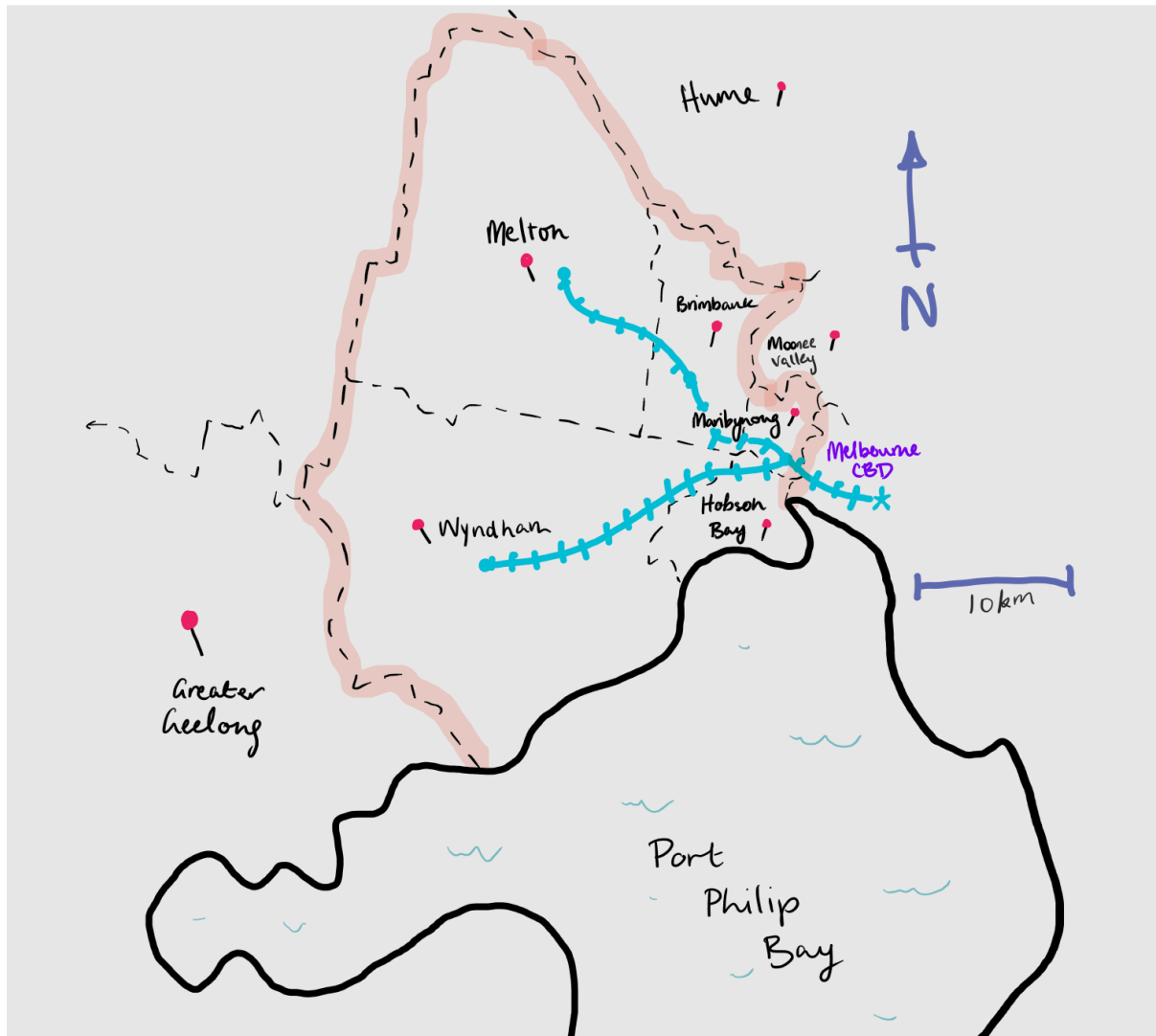


Figure 1: The Local Government Areas of WoMEDA and surrounds (artwork by Avelyn Reynolds)

This paper presents new forecasts of employment for Melbourne's West and its LGAs. The rapidly growing population of the West presents many opportunities and challenges. The focus of this report is commuting for employment, under a no-action base case, and under three scenarios in which employment precincts are strategically developed in locations across the West. There are currently three priority precincts in the West of Melbourne designated by the Victorian Government. These are in Footscray, Sunshine and Werribee¹. This report focuses on their potential to reduce commuting, with the possible addition of another precinct in Melton.

Employment of residents of the West will grow by almost 147,000 over the next decade. However, a large proportion of employment growth will not be local, with strong growth in CBD-based industries including professional services and finance. Over the same period, jobs located in the West will grow by just 66,000 in our no-action base case. The shortfall in local jobs underpins a growing commuting burden, which is forecast to grow from 48% of employed residents in 2024 to over 50% in 2034.

The commuting burden is exacerbated by very strong growth in population and employment forecasts for Wyndham and Melton, as these regions are further from the CBD and have longer average commute times.

While an increase in the numbers of workers commuting is almost inevitable, as population growth in the outer areas is so high, an increase in the *proportion* of workers commuting out of the region exacerbates the overall commuting burden on both individuals and transport infrastructure. The no-action base case represents growth in the wrong direction, in which trends towards employment in traditionally CBD-based sectors such as professional services draw more workers into long commutes from the outer West to the CBD.

To alleviate this we analyse the potential benefit of strategically utilising employment precincts close to residential areas to further grow local employment. This report presents model simulations of three precincts of 20,000 jobs distributed across Sunshine, Werribee, Footscray and Melton.

These employment precincts will change the overall distribution of jobs in the West, the CBD, and the rest of Melbourne, but will need to be accompanied by measures to improve transport infrastructure due to the sheer size of the growing population in the West.

While the residents of any LGA in the West benefit from an employment precinct in their home LGA, we find that a larger precinct in Sunshine offers the most widely distributed benefits due to its accessibility from both Werribee and Melton, the areas with the fastest-growing populations and the longest commutes to the CBD.

¹ The official priority Werribee Precinct is East Werribee

2 EMPLOYMENT AND COMMUTING OVER THE NEXT DECADE

Economic modelling used to build detailed employment forecasts for the West of Melbourne finds that the main growth industries are Health Care and Social Assistance, Business Services and Other Services. The modelling forecasts an increase in workers commuting out of the West for employment, as job opportunities in the region struggle to keep pace with strong population growth. This is exacerbated by particularly strong growth in employment in Professional Services, a high-commuting industry, and weak growth in Retail and Transport, industries with relatively low commuting.

In this section we present business-as-usual forecasts for the West of Melbourne from 2024 to 2034, and three alternative scenarios which reimagine the West with employment precincts to alleviate the commuting burden.

2.1 EMPLOYMENT AND COMMUTING FORECASTS: BUSINESS-AS-USUAL

2.1.1 OVERVIEW

Employment of residents of the West will grow by almost 147,000 over the next decade, growth of almost 30%. Over the same period, jobs located in the West will grow by 66,000. The shortfall in local jobs indicates a growing commuting² burden. With almost 59% of growth in employment of residents located outside the West, commuting is forecast to grow from 48% of employed residents in 2024 to over 50% in 2034.

What is behind the increase in commuting for residents of the West? Broadly, it can be explained by two factors. The first is changes in commuting patterns within each industry, that is, changes to commuting that would occur even if employment growth was evenly distributed across industries. The second is the concentration of employment growth in high-commuting industries. Both factors play a role in increasing commuting for residents of the West.

Table 1: Employment and commuting in 2024 and 2034 (forecast), Melbourne's West, '000 persons. Source: ABS and VUEF model.

		Job location			% Commuting
		The West	Other	Total	
2024	Residents of the West	254.6	234.4	488.9	47.9%
	Non-residents working in the West	93.3			
	Total	347.9			
2034	Residents of the West	315.0	320.6	635.6	50.4%
	Non-residents working in the West	99.2			
	Total	414.1			
Growth	Residents of the West	60.4	86.3	146.7	58.8%
	Non-residents working in the West	5.8			
	Total	66.2			

² The term “commuting” as used here refers to people who live in one region and work in another, according to the address of their usual residence and the address of their employer. All people who fit this definition are counted as commuters even if they usually work remotely from home.

2.1.2 EMPLOYMENT LOCATED IN THE WEST

Jobs located in Melbourne’s West are primarily service-oriented, with more than 6 in 10 jobs in Business Services, Public Administration, Education, Health and Other Services (Table 2). Manufacturing and Logistics are relatively large employers in the West, accounting for 1 in 5 jobs compared to the national average of 1 in 9.

Employment in the West is forecast to grow by 66,000 jobs, or 19 per cent between 2024 and 2034, increasing by 66,000 jobs. This is well short of the 30 per cent growth in employment of residents of the West, meaning that more residents must travel outside the West for employment.

Employment growth of residents will be strongest in Maribyrnong, Melton and Wyndham, with growth in Brimbank and Hobsons Bay constrained by slower population growth. Wyndham will account for 1 in 3 new employees in the region over the next decade.

Table 2: Employment located in the West, 2024 and 2034 (forecast) by industry³ and LGA, ‘000 persons. Source: ABS and VUEF Model.

	2024	2034	Change	Growth	Share (2024)	Share in growth
	‘000	‘000	‘000	%	%	%
<u>Employment by industry</u>						
Manufacturing	29.0	30.4	1.4	4.7	8.3	2.1
Other Industries	7.1	8.0	0.9	12.9	2.0	1.4
Construction	43.1	48.7	5.6	13.0	12.4	8.4
Logistics	40.9	45.6	4.7	11.6	11.7	7.2
Business Services	40.7	46.9	6.2	15.3	11.7	9.4
Public Administration	15.0	18.2	3.2	21.4	4.3	4.8
Education and Training	33.0	42.8	9.8	29.7	9.5	14.8
Health Care & Social Assistance	47.7	67.3	19.7	41.3	13.7	29.7
Other Services	91.5	106.2	14.7	16.0	26.3	22.1
<u>Employment by Region of Work</u>						
Brimbank	93.3	108.0	14.7	15.8	26.8	22.2
Hobsons Bay	44.6	51.5	6.9	15.6	12.8	10.5
Maribyrnong	51.7	63.1	11.4	22.0	14.9	17.2
Melton	48.6	59.8	11.2	23.1	14.0	17.0
Wyndham	109.7	131.7	22.0	20.0	31.5	33.2
Total	347.9	414.1	66.2	19.0	100.0	100.0

³ Definitions in Appendix

2.1.3 RESIDENTS OF THE WEST: EMPLOYMENT AND COMMUTING BY INDUSTRY

Employment of the West’s residents is forecast to grow by 147,000 persons between 2024 and 2034. Two-thirds of this employment is forecast to be in three sectors: Health Care and Social Assistance, Business Services, and Other Services (Table 3). Business Services is particularly commuting-intensive and will grow strongly, with Business Services jobs outside the West the largest category of employment growth (see Figure 3).

Table 3: Employment and commuting in 2024 and 2034 (forecast) by industry, Residents of Melbourne's West, '000 persons. Source: ABS and VUEF model

	2024 jobs by location				2034 jobs by location				Growth
	The West	Other	Total	Com-mutes	The West	Other	Total	Com-mutes	Total
Health Care and Social Assistance	35.6	29.3	64.9	45.2%	52.0	48.2	100.2	48.1%	35.3
Business Services	32.1	74.5	106.6	69.9%	38.0	99.7	137.7	72.4%	31.1
Other Services	70.6	44.7	115.4	38.8%	84.6	59.3	143.9	41.2%	28.5
Education and Training	24.0	12.2	36.2	33.7%	32.5	17.0	49.5	34.4%	13.4
Construction	28.9	16.5	45.4	36.3%	34.3	21.9	56.2	39.0%	10.8
Logistics	30.3	18.8	49.0	38.3%	35.1	23.9	58.9	40.5%	9.9
Public Administration	9.6	16.8	26.4	63.5%	12.4	23.3	35.7	65.3%	9.3
Manufacturing	18.8	15.4	34.2	45.0%	20.7	19.0	39.7	47.9%	5.4
Other Industries	4.6	6.2	10.8	57.6%	5.5	8.3	13.8	60.1%	3.0
Total	254.6	234.4	488.9	47.9%	315.0	320.6	635.6	50.4%	146.7

Within industries, commuting is set to increase, with the share of commuting increasing by around 2.5 percentage points in most industries (Figure 2). This is a consequence of strong forecast population growth in the West, which outstrips the state-wide employment growth rate. For industries such as manufacturing and business services, growth in employment is mainly determined by

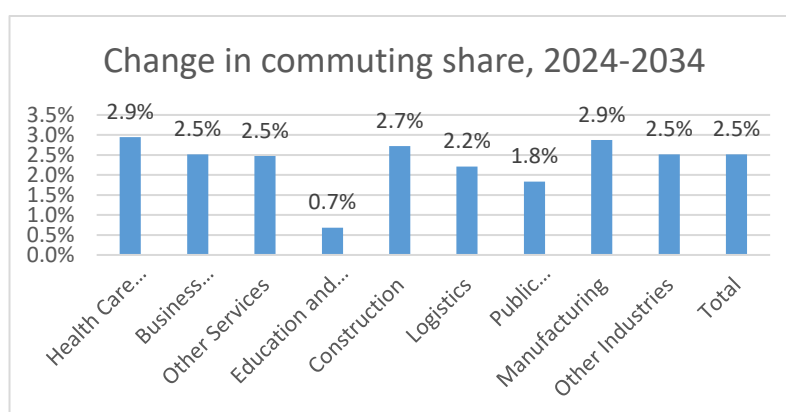


Figure 2: Change in commuting share by industry for residents of the West, 2024-34. Source: VUEF model.

macroeconomic conditions and not closely linked to local population growth. The regional distribution of these industries does not respond strongly to regional populations. As such, an increasing proportion of residents of the West must look to other regions for employment.

This is less pronounced in sectors that serve local populations, notably Education and Public Administration and Safety, which includes emergency services. In these sectors, a fast-growing local population creates local jobs. While these sectors also see an increase in commuting, it is well below the region average.

By this argument, the increase in commuting in Health Care and Social Assistance is an anomaly, as a growing population also creates jobs in this sector. However, the population of the West is far younger than the population of Melbourne more broadly. Older residents create more demand for Health Care and Social Assistance (which includes aged care) and consequently strong demand from outside the West creates an increase in commuting for workers in this sector.

The concentration of employment growth in three sectors – Health, Business Services and Other Services – means that any policy to address the growing commuting issue must target these sectors. However, even without growth there is scope to relocate existing jobs in large sectors, such as the public service. Business services stands out as a high-commuting, high-growth sector (Figure 3). Growth in this sector is underpinned by strong growth in educational attainment, with an increasing proportion of the workforce forecast to hold a Bachelor Degree or higher qualification. Jobs in this sector are generally well-paid and strong growth in the sector will lift incomes in the West. However, fewer than one in five new jobs will be located locally. While some jobs in the sector may be done remotely from home, the lack of growth forecast for local jobs in the sector is an important factor in the overall increase forecast for commuting.

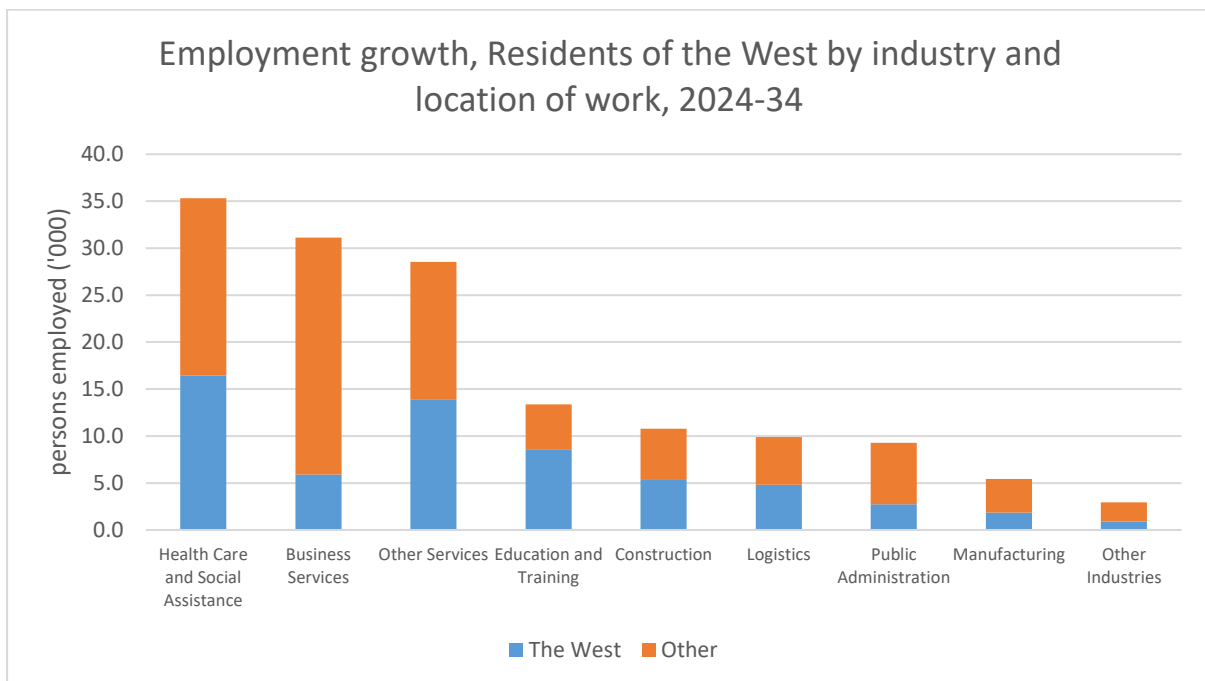


Figure 3: Employment growth, residents of the West, by industry and location of work, 2024-34. Source: VUEF model.

2.1.4 SHIFT OR SHARE?

An overall increase in commuting is a combination of an increase in commuting within industries, and changes in the overall composition of employment towards high commuting industries or away from low commuting industries.

In the VUEF forecasts, the majority of growth in commuting by residents of the West is due to an increase in commuting within industries, due to mainly to very strong population growth, which outpaces local employment growth in most industries. This accounts for an increase in overall commuting of almost 2.1%, out of a total increase in commuting of 2.5%. This includes increases in commuting in large industries including Cafes and Restaurants, Hospitals, Other Social Assistance, and Computer System Design.

The remaining increase in commuting can be explained by industry growth that is skewed towards industries with relatively high commuting and against industries with low commuting. The largest contribution to higher commuting is from Computer System Design, an industry with relatively high commuting (79%) and high growth. The second highest contribution is from Road Freight, an industry with relatively low commuting (29%) and relatively low growth. While “commuting” in the sense of comparing a workers residential address with their employer’s address is increasing overall, neither of these industries necessarily underpin an increase in physical commuting or traffic. Computer System Design work is suitable to be done remotely so an increase in jobs in this industry does not necessarily lead to a commensurate increase in trips. Workers in the Road Freight industry might be employed at a local freight company in the West, so they are not defined as “commuting”, yet their work involves driving trucks on roads all over Melbourne and beyond. A reduction in employment in Road Freight might reduce local employment, but may also alleviate freight traffic.

2.1.5 COMMUTING

We report two measures of commuting, based on average origin-to-destination travel times from the VISTA database⁴ (see Appendix). *Average minutes* are the estimated average daily morning commute times for all employed residents of the region. This is an indicator of commuting pressures on individuals. *Person hours* measures the total time spent on an average daily morning commute by all residents of the region. This is an indicator of commuting pressures on transport infrastructure as it accounts for both the length of journeys and the numbers of commuters.

For both measures, the same travel times per journey from origin to destination are used throughout the forecasts, even though it may be argued that travel times will increase due to congestion as the number of journeys increases. This means that the only source of change in average minutes commuting per person is changes in location of work. Average commute times increase as more people work in the Melbourne CBD rather than their home LGA even though

⁴ Victorian Integrated Survey of Travel and Activity (VISTA) Journey to Work 2023-24, <https://discover.data.vic.gov.au/dataset/victorian-integrated-survey-of-travel-and-activity-vista> accessed July 6, 2025

origin-to-destination commute times do not change, simply because commute times to the Melbourne CBD are greater.

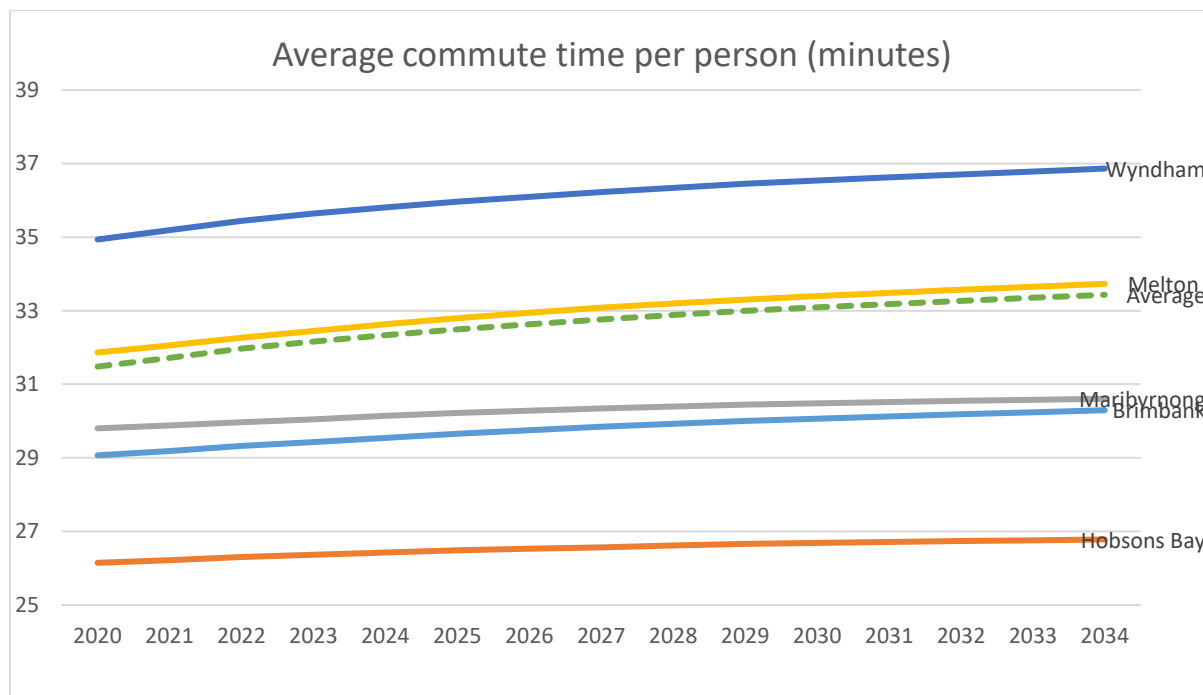


Figure 4: Average morning commute time per person by place of residence. Source: VUEF model.

Average commute times per person are set to gradually increase in all LGAs through the forecast period (Figure 4), driven by an increase in the proportion of employment outside the West. Wyndham and Melton, already regions with the highest average commute times, will also see the largest increases in commute times.

Despite being adjacent to the CBD, Maribyrnong has higher average commute times than Brimbank, which is not adjacent to the CBD. Maribyrnong has a much higher proportion of its workforce employed in the CBD (33%, compared to 18% of Brimbank’s workforce), indicating that Maribyrnong is probably a region of choice for CBD workers, particularly those in business services. Brimbank’s workforce is more likely to work locally, with relatively high proportions of the workforce in manufacturing and logistics.

Aggregate commuting takes into account both journey times and the total number of commuters and is an indicator of pressure on commuting infrastructure. Figure 5 below shows the total commuting hours in a single daily morning commute, accounting for the number of persons commuting and the average commute time. Total commuting is forecast to increase for all regions, by an average of 34%, but the increases in Wyndham and Melton are much greater, accounting for more than 80 per cent of all growth in commuting hours.

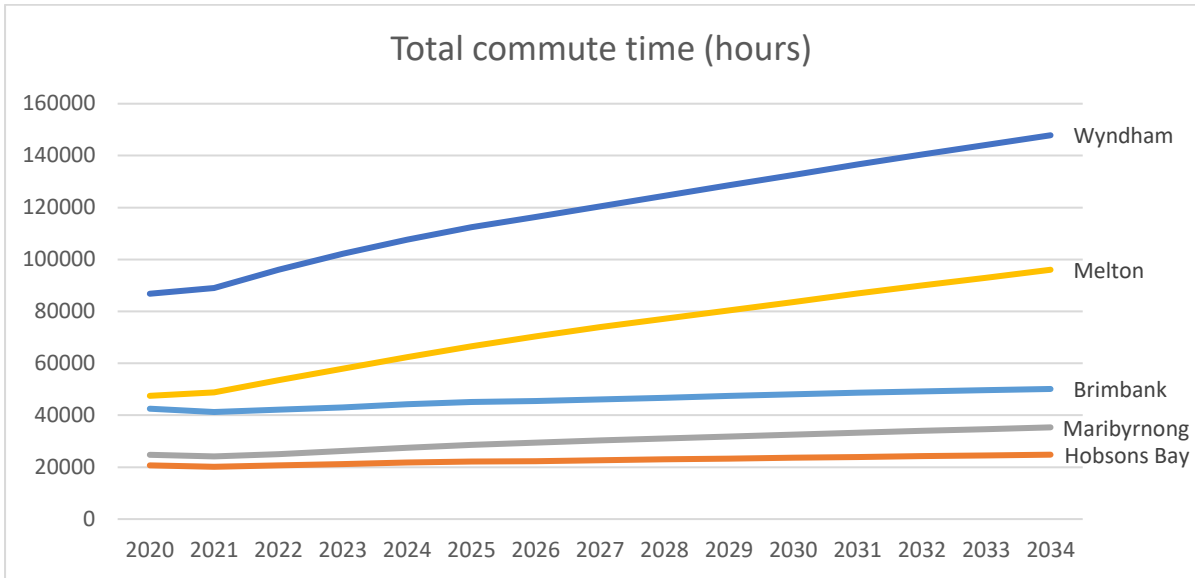


Figure 5: Total commuting time (person-hours), single day morning commute. Source: VUEF model.

2.1.6 EMPLOYMENT AND COMMUTING BY LGA

This section contains forecasts for each individual LGA in the West. The data in each section refers to residents of the LGA, rather than jobs located in the LGA.

2.1.6.1 BRIMBANK

Brimbank will add 18,000 residents to its current population of 200,000 over the next decade. Employment will grow to just under 100,000 employed residents, a small reduction in the overall employment rate. The majority of growth will occur in Health Care and Social Assistance, Business Services and Other Services. Employment in Manufacturing and Logistics, which together employed over 20 per cent of residents in 2024, will stagnate as these sectors adopt technologies to drive jobless growth.

While aggregate employment will grow by over 10%, employment located in Brimbank and the Rest of the West will grow by only 5%, indicating an increasing commuting burden. Average commute times will increase by 2.5% as commuters travel further afield to the CBD and beyond. Combined with the increase in employment, total commuting from Brimbank will increase by 13%. This is the lowest increase in commuting of all LGAs in the West.

Table 4: Population and Employment of Residents of Brimbank, 2024 and 2034, by industry and region of work. Source: VUEF model and Victoria in Future Population Forecasts.

	2024	2034	Change	Growth	Share in 2024	Share in growth
	'000	'000	'000	%	%	%
Employment by Industry						
Manufacturing	8.8	8.8	0.0	-0.5	9.8	-0.4
Other Industries	1.7	1.8	0.2	9.0	1.9	1.6
Construction	8.8	9.3	0.6	6.5	9.7	6.1
Logistics	9.5	9.7	0.2	1.9	10.6	1.9
Business Services	16.2	18.0	1.8	11.1	18.0	19.2
Public Administration	4.2	4.9	0.7	16.0	4.7	7.2
Education and Training	5.8	6.6	0.9	15.2	6.4	9.3
Health Care & Social Assistance	11.4	14.8	3.4	30.0	12.6	36.3
Other Services	23.5	25.3	1.8	7.5	26.2	18.8
Employment by Region of Work						
Brimbank	27.9	29.3	1.5	5.2	31.0	15.5
Rest of West	18.5	19.4	0.9	5.1	20.5	10.0
Melbourne CBD	16.3	18.9	2.6	15.8	18.1	27.4
North Melbourne	10.0	10.9	0.9	9.1	11.1	9.7
Other	17.3	20.8	3.5	20.3	19.3	37.4
Total	89.9	99.3	9.4	10.5	100.0	100.0
	2024	2034	Change	Growth (%)		
<i>Population ('000)</i>	200.7	218.2	17.5	8.7		
<i>Working age population ('000)</i>	167.3	186.1	18.8	11.3		
<i>Employment rate (%)</i>	53.7	53.3	-0.4			
<i>Commuting (average minutes)</i>	29.5	30.3	0.8	2.5		
<i>Commuting (person hours, '000)</i>	44.2	50.1	5.9	13.3		

2.1.6.2 HOBSONS BAY

Hobsons Bay is one of the smaller LGAs in the West with a population of 95,000. With relatively low population growth of 11% forecast, prospects for Hobsons Bay are fairly stable. Like other regions, Health Care and Social Assistance will be the fastest growing sector for employment. However, Business Services will remain the largest employer of Hobsons Bay residents, employing a steady one-in-four workers throughout the forecast period.

Hobsons Bay is conveniently located to the city, with 27% of residents employed in the Melbourne CBD. City employment is well-established in Hobsons Bay, and while it is set to increase, the overall increase in average commuting time is only 1.3%. Combined with the increase in employment, total commuting from Hobsons Bay will increase by 14%.

Table 5: Population and Employment of Residents of Hobsons Bay, 2024 and 2034, by industry and region of work. Source: VUEF model and Victoria in Future Population Forecasts.

	2024	2034	Change	Growth	Share in 2024	Share in growth
	'000	'000	'000	%	%	%
Employment by Industry						
Manufacturing	3.0	3.1	0.0	0.6	6.1	0.3
Other Industries	1.0	1.1	0.1	9.9	2.0	1.6
Construction	4.8	5.1	0.3	7.0	9.7	5.4
Logistics	3.4	3.5	0.1	2.3	6.9	1.3
Business Services	12.6	14.1	1.6	12.5	25.5	25.3
Public Administration	3.3	3.8	0.5	16.2	6.7	8.7
Education and Training	4.6	5.4	0.8	17.1	9.3	12.7
Health Care & Social Assistance	5.8	7.7	1.8	31.5	11.8	29.8
Other Services	10.9	11.8	0.9	8.6	22.0	15.1
Employment by Region of Work						
Hobsons Bay	14.1	15.4	1.3	9.1	28.6	20.9
Rest of West	10.4	11.1	0.7	6.6	21.0	11.1
Melbourne CBD	13.2	15.2	2.0	15.4	26.7	32.9
North Melbourne	1.6	1.7	0.2	10.0	3.1	2.5
Other	10.1	12.2	2.0	19.9	20.5	32.6
Total	49.4	55.6	6.2	12.5	100.0	100.0
	2024	2034	Change	Growth (%)		
<i>Population ('000)</i>	94.9	105.5	10.6	11.1		
<i>Working age population ('000)</i>	77.5	88.1	10.5	13.6		
<i>Employment rate (%)</i>	63.7	63.1	-0.6			
<i>Commuting (average minutes)</i>	26.4	26.8	0.4	1.3		
<i>Commuting (person hours, '000)</i>	21.8	24.8	3.1	14.0		

2.1.6.3 MARIBYRNONG

Like Hobsons Bay, Maribyrnong is a relatively small LGA with 95,000 residents in 2024. However, growth in high-density housing underpins relatively strong population growth, with an increase of over 26% forecast for the next decade. Like Hobsons Bay, Maribyrnong has a relatively large share of its population working in Business Services, with a large proportion (33%) of the population commuting to the city for employment.

Average commuting times for Maribyrnong residents will increase only slightly over the forecast period, but with strong population growth and employment forecast to grow by almost 27%, the challenge for Maribyrnong will be to manage an increase in aggregate commuting of 29%.

Table 6: Population and Employment of Residents of Maribyrnong, 2024 and 2034, by industry and region of work. Source: VUEF model and Victoria in Future Population Forecasts.

	2024	2034	Change	Growth	Share in 2024	Share in growth
	'000	'000	'000	%	%	%
<u>Employment by Industry</u>						
Manufacturing	3.0	3.4	0.4	14.0	5.5	2.9
Other Industries	1.0	1.2	0.2	23.7	1.7	1.5
Construction	3.4	4.1	0.7	20.7	6.3	4.9
Logistics	3.1	3.5	0.4	14.2	5.7	3.0
Business Services	15.0	18.5	3.6	23.7	27.4	24.3
Public Administration	3.8	5.0	1.2	30.2	7.0	7.9
Education and Training	4.9	6.4	1.5	30.8	9.0	10.3
Health Care & Social Assistance	7.5	11.2	3.7	49.4	13.7	25.3
Other Services	13.0	15.9	2.9	22.4	23.8	19.9
<u>Employment by Region of Work</u>						
Maribyrnong	12.9	15.9	3.0	23.0	23.6	20.3
Rest of West	7.4	8.7	1.3	17.6	13.5	8.9
Melbourne CBD	17.9	23.0	5.1	28.6	32.8	35.0
North Melbourne	3.0	3.7	0.7	23.7	5.5	4.9
Other	13.5	18.0	4.5	33.5	24.7	30.9
Total	54.7	69.3	14.6	26.7	100.0	100.0
	<i>2024</i>	<i>2034</i>	<i>Change</i>	<i>Growth (%)</i>		
<i>Population ('000)</i>	95.0	119.9	24.9	26.2		
<i>Working age population ('000)</i>	81.1	104.4	23.3	28.7		
<i>Employment rate (%)</i>	67.4	66.4	-1.0			
<i>Commuting (average minutes)</i>	30.1	30.6	0.5	1.6		
<i>Commuting (person hours, '000)</i>	27.5	35.3	7.9	28.7		

2.1.6.4 MELTON

Along with Wyndham, Melton is a populous and fast-growing region, with significant greenfield housing developments supporting population growth of almost 110,000 over the next decade. Employment will grow by over 56,000, with most growth occurring in Health Care and Social Assistance. The largest sector of employment is Other Services, which will lose ground but remain the largest employer in 2034. Overall, employment growth of Melton’s residents is strong across all industries, including Manufacturing and Logistics.

As an outer urban area, Melton has a relatively low proportion of employment in the CBD at just below 17%. CBD employment is set to increase by almost 60%, underpinning an increase in average commute times of over 3%. Combined with the high growth in employment and population, the aggregate commuting burden of Melton’s residence will increase by 54%.

Table 7: Population and Employment of Residents of Melton, 2024 and 2034, by industry and region of work. Source: VUEF model and Victoria in Future Population Forecasts.

	2024	2034	Change	Growth	Share in 2024	Share in growth
	'000	'000	'000	%	%	%
<u>Industry</u>						
Manufacturing	8.3	11.2	2.9	35.0	7.2	5.2
Other Industries	2.4	3.5	1.1	45.8	2.1	1.9
Construction	13.1	18.2	5.1	39.1	11.4	9.1
Logistics	13.2	18.1	4.9	37.4	11.5	8.8
Business Services	19.9	29.4	9.5	47.9	17.3	16.9
Public Administration	6.0	9.3	3.4	56.5	5.2	6.0
Education and Training	8.6	13.5	5.0	58.2	7.5	8.9
Health Care & Social Assistance	16.0	28.5	12.5	78.4	13.9	22.3
Other Services	27.4	39.2	11.7	42.7	23.9	20.9
<u>Region of work</u>						
Melton	29.8	40.0	10.2	34.2	26.0	18.2
Rest of West	33.5	48.6	15.0	44.8	29.2	26.8
Melbourne CBD	19.4	30.9	11.5	59.3	16.9	20.5
North Melbourne	11.1	16.7	5.6	50.1	9.7	9.9
Other	20.9	34.7	13.8	66.3	18.2	24.6
Total	114.7	170.8	56.1	48.9	100.0	100.0
	2024	2034	Change	Growth (%)		
Population ('000)	218.3	327.9	109.7	50.3		
Working age population ('000)	167.0	256.3	89.3	53.5		
Employment rate (%)	68.7	66.7	-2.0			
Commuting (average minutes)	32.6	33.7	1.1	3.4		
Commuting (person hours, '000)	62.4	96.0	33.7	53.9		

2.1.6.5 WYNDHAM

Wyndham is the largest population centre in the West, with a population of 335,000 in 2024 set to grow to 450,000 over the next decade. Employment will grow by over 60,000 with Business Services accounting for the largest share of this. Business Services, along with Health Care and Social Assistance and Other Services, will account for two in three new jobs over the next decade.

Despite being a relatively long distance from the city, almost one in four of Wyndham’s residents are employed in the CBD, in contrast to just 18% of Brimbank’s residents. This reflects Wyndham’s greater share of employment in Business Services. As the population grows, average commute times will increase by almost 3%, while the aggregate commuting load from Wyndham will grow by over 37%.

Table 8: Population and Employment of Residents of Wyndham, 2024 and 2034, by industry and region of work. Source: VUEF model and Victoria in Future Population Forecasts.

	2024	2034	Change	Growth	Share in 2024	Share in growth
	'000	'000	'000	%	%	%
<u>Industry</u>						
Manufacturing	11.1	13.2	2.1	19.2	6.2	3.5
Other Industries	4.8	6.2	1.4	28.8	2.7	2.3
Construction	15.3	19.4	4.0	26.3	8.5	6.7
Logistics	19.9	24.2	4.3	21.5	11.0	7.1
Business Services	43.0	57.6	14.7	34.2	23.8	24.3
Public Administration	9.1	12.6	3.5	38.9	5.0	5.9
Education and Training	12.3	17.6	5.2	42.3	6.8	8.6
Health Care & Social Assistance	24.3	38.1	13.9	57.1	13.5	23.0
Other Services	40.5	51.7	11.2	27.7	22.5	18.6
<u>Region of work</u>						
Wyndham	68.2	85.6	17.4	25.5	37.8	28.8
Rest of West	31.9	41.1	9.2	28.7	17.7	15.2
Melbourne CBD	41.4	58.0	16.6	40.1	23.0	27.5
North Melbourne	6.3	8.3	2.0	32.1	3.5	3.4
Other	32.5	47.6	15.2	46.8	18.0	25.1
Total	180.3	240.6	60.3	33.5	100.0	100.0
	2024	2034	Change	Growth (%)		
<i>Population ('000)</i>	334.8	449.9	115.1	34.4		
<i>Working age population ('000)</i>	249.6	343.5	93.9	37.6		
<i>Employment rate (%)</i>	72.2	70.1	-2.2			
<i>Commuting (average minutes)</i>	35.8	36.9	1.1	2.9		
<i>Commuting (person hours, '000)</i>	107.6	147.8	40.2	37.4		

2.1.6.6 ALL LGAS

There are common threads running through all of the LGAs of the West, including high employment and strong growth in Health Care and Social Assistance, Business Services, and Other Services.

The outer urban areas of Wyndham and Melton, with their strong population growth forecast to continue, account for almost 80% of overall employment growth in the region. This outward shift in the centre of gravity, combined with a gradual shift towards employment in traditionally CBD-located industries, leads to increases in average commute times per person of between 1 and 3 per cent. The much larger challenge for commuting infrastructure is the sheer growth in population, leading to many more trips and an overall increase of over 33% over the next decade.

Over 80% of the increase in aggregate commuting comes from Melton and Wyndham. While Wyndham accounts for a larger share of commuting in 2024, Melton will experience faster population growth, with the two regions contributing a similar amount to the overall increase in commuting.

Table 9: Aggregate commuting (person hours, single morning commute), 2024 and 2034. Source: VUEF model.

	2024	2034	Change	Growth	Share in 2024	Share in growth
	'000	'000	'000	%	%	%
Brimbank	49.8	56.1	6.4	12.8	17.8	6.8
Hobsons Bay	26.6	30.4	3.8	14.1	9.5	4.0
Maribyrnong	25.7	32.9	7.2	28.0	9.2	7.7
Melton	68.4	104.9	36.4	53.2	24.4	38.8
Wyndham	109.5	149.8	40.3	36.8	39.1	42.8
Total	280.0	374.1	94.0	33.6	100.0	100.0

2.2 SOLVING THE COMMUTING PROBLEM: THREE SCENARIOS

There are three methods to reducing the commuting burden on populations: improving and increasing transport infrastructure, bringing the residents closer to the employment centres, and establishing employment precincts in residential areas.

While all methods must play a role in reducing commuting, in this report, we concentrate on the third method, exploring three scenarios in which an extra 20,000 jobs are created in the West. We do not examine the policy levers that would be required to create these jobs. The analysis in this section takes this as given, and focuses on the impact of these extra jobs on employment and commuting in the West.

Scenarios 1 and 2 focus on the precincts in Footscray, Sunshine and Werribee, with greater emphasis on Sunshine in Scenario 1 and Werribee in Scenario 2. Scenario 3 is a more distributed plan with equal numbers of jobs established in Footscray, Sunshine, Werribee and additional present in Melton. No additional jobs are modelled in Hobsons Bay.

In the modelling, the precincts are established over a seven-year period from 2025-26 to 2031-32.

Table 10: Extra jobs in employment precincts by 2034 in three scenarios

Extra jobs by 2032	Scenario 1: Sunshine focused	Scenario 2: Werribee focused	Scenario 3: Four Precincts
Footscray (Maribyrnong)	5,000	5,000	5,000
Sunshine (Brimbank)	10,000	5,000	5,000
Werribee (Wyndham)	5,000	10,000	5,000
Melton	-	-	5,000
Total	20,000	20,000	20,000

For the modelling, industries were chosen as a focus for each precinct. These are listed in Table 11 below. If this strategic approach to precincts is to be adopted to substantially grow local employment, it will be important for the region, in collaboration with government, to be careful and strategic in its thinking about industry sectors, with the idea of fostering specialised industry clusters to achieve synergy and thriving industry ecosystems. This should be the subject for further work.

For the purposes of this study, for each precinct, industries were chosen to reflect the current local structure of employment, with some allowances made for possible future developments, such as a major arts and cultural facility in Sunshine. As work progresses on industry strategy for the region these simulations could be modified. The broad story about the benefits in reducing commuting are unlikely to be greatly impacted.

Modelling results described in this section indicate that the strategic development of precincts will have clear impacts on employment by place of work and place of residence, with workers diverted into the West from jobs in the CBD and the rest of Melbourne. However, commuting remains an issue, with the precincts having only a small impact on overall commute times. This is because

commute times within the West, both within and between LGAs, are also long, and in some cases no better than commute times into the city. This result suggests that precinct development can divert jobs and change commuting patterns, but to have an impact on commuting times, precinct development needs to be accompanied by suitable transport infrastructure.

Table 11: Precinct industries

Footscray (Maribyrnong)	<ul style="list-style-type: none"> • Finance • Insurance and Superannuation • Auxiliary Finance and Insurance • Professional, Scientific and Technical Services • Computer Services • Government Administration • Technical, vocational and tertiary education • Health Services
Sunshine (Brimbank)	<ul style="list-style-type: none"> • Government Administration • Technical, vocational and tertiary education • Health Services • Sports and Recreation
Werribee (Wyndham)	<ul style="list-style-type: none"> • Food and beverage manufacturing • Wholesale trade • Road Transport • Rail Transport • Water Transport • Postal services • Transport services • Technical, vocational and tertiary education
Melton	<ul style="list-style-type: none"> • Finance • Insurance and Superannuation • Auxiliary Finance and Insurance • Professional, Scientific and Technical Services • Computer Services • Government Administration • Technical, vocational and tertiary education • Health Services

2.2.1 JOBS LOCATED IN THE WEST

Additional jobs located in the west by 2034 relative to business-as-usual are summarized in Table 12 below. In all three scenarios, policy action to bring 20,000 jobs to the region results in at least an additional 20,000 jobs in the region by 2034. Diversion of jobs is minor, with very small falls in employment in Hobsons Bay and Melton in Scenarios 1 and 2. Employment increases in all industries, including those not targeted for precinct development. Employment gains are largest in industries which are included in precinct development, particularly in Health and Public Administration in all scenarios, and Logistics in Scenario 2.

Table 12: Additional jobs located in Melbourne's West relative to business-as-usual, 2034 (forecast). Source: VUEF model.

	S1: Sunshine focused		S2: Werribee focused		S3: Four Precincts	
	Jobs	%	Jobs	%	Jobs	%
<u>Employment by Industry</u>						
Manufacturing	431	1.4	860	2.8	431	1.4
Other Industries	68	0.9	65	0.8	61	0.8
Construction	918	1.9	932	1.9	964	2.0
Logistics	3569	7.8	7089	15.5	3571	7.8
Business Services	1466	3.1	1500	3.2	2935	6.3
Public Administration	2366	13.0	1417	7.8	2210	12.2
Education and Training	1189	2.8	1114	2.6	969	2.3
Health Care and Social Assistance	9804	14.6	6074	9.0	7942	11.8
Other Services	3362	3.2	4147	3.9	3111	2.9
<u>Employment by Region of Work</u>						
Brimbank	11928	11.0	5895	5.5	5936	5.5
Hobsons Bay	-57	-0.1	-73	-0.1	-50	-0.1
Maribyrnong	5393	8.5	5423	8.6	5428	8.6
Melton	-49	-0.1	-36	-0.1	4897	8.2
Wyndham	5958	4.5	11988	9.1	5982	4.5
Total	23173	5.6	23197	5.6	22194	5.4
	<i>difference</i>	<i>%</i>	<i>difference</i>	<i>%</i>	<i>difference</i>	<i>%</i>
<i>Commuting (average minutes)</i>	-0.5	-1.4	-0.5	-1.5	-0.5	-1.4
<i>Commuting (total hours, '000)</i>	-3.0	-0.8	-2.7	-0.8	-2.9	-0.8

All three scenarios lead to a reduction relative to the base case in commuting for residents of the West. Average commuting minutes per person in 2034 are lower for residents of all targeted regions in all scenarios (Figure 6), by an average of 1.5 per cent relative to the base case. The peak impact of the scenarios is reached in 2031-32, with commuting reverting to base case growth rates after the precincts are established. This suggests that over a longer period, continued precinct development may be needed to maintain these improvements.

Average commute times for residents of Maribyrnong are fall from 2024 levels in all three scenarios by a similar amount. All three scenarios simulate a precinct of 5000 jobs added to Maribyrnong, so

the similarity in the outcomes is not surprising. Average commute times for residents of Brimbank fall from 2024 levels under the Sunshine precinct scenario, and for residents of Wyndham, commute times fall under the Werribee precinct scenario. Brimbank and Werribee both see a small increase in commute times under the other scenarios, albeit a clear improvement relative to the base case.

The best outcome for Melton is achieved under Scenario 3, where a new employment precinct is established in Melton, and additional jobs are developed equally in all four precincts. Under this scenario, commute times for residents of Melton stabilize at 2024 levels. Under the other scenarios, commute times for Melton residents increase but to a lesser extent than in the base case.

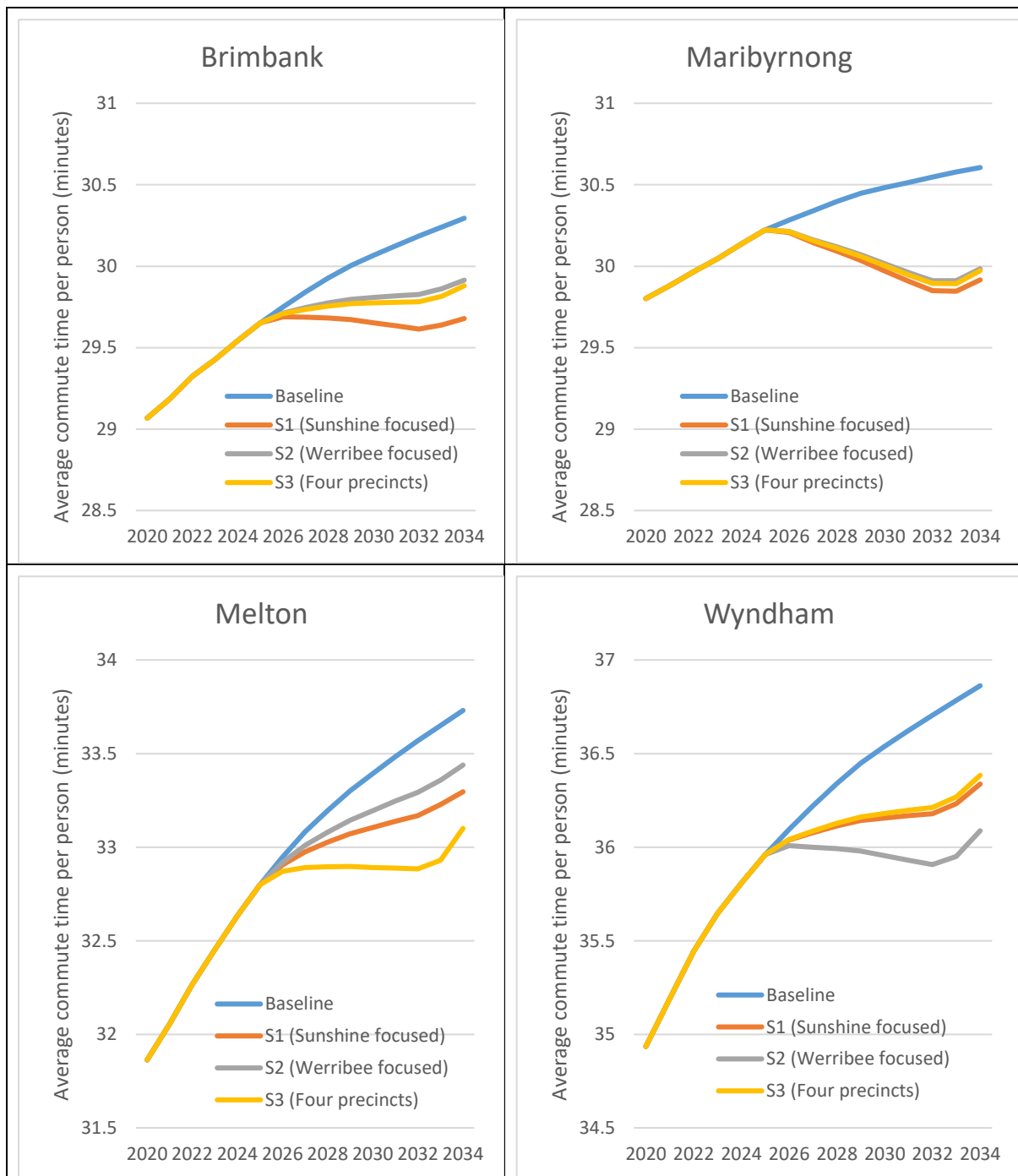


Figure 6: Average commute times per person by place of residence. Source: VUEF model.

The reduction in total commuting hours is less than one per cent overall. This is smaller than the impact on average commute times, because more residents of the West are employed and making trips. While the increase in employment is a positive development, it carries negative implications for pressures on commuting infrastructure. Against a baseline where total commuting hours increase by 34%, this reduction makes barely any inroads.

The impact on total commuting hours for residents of each region is greatest where commuting hours are already high, that is, in Wyndham and Melton. Under Scenario 3, where all four precincts have 5000 jobs, residents of Melton and Werribee save an aggregate of around 1000 hours per single morning commute, while residents of Maribyrnong and Brimbank save an aggregate of around 500 hours.

Scenarios 1 and 2 both consider a larger precinct in one region. While both scenarios deliver larger savings for their targeted regions (Brimbank for Scenario 1 and Wyndham for Scenario 2), the Sunshine precinct is clearly superior from the point of view of Melton. The Wyndham precinct delivers clear and substantial savings for residents of Wyndham, but is the least beneficial precinct for residents of Melton because of long commuting times between Melton and Werribee, and the least beneficial for residents of Brimbank and Maribyrnong as well.

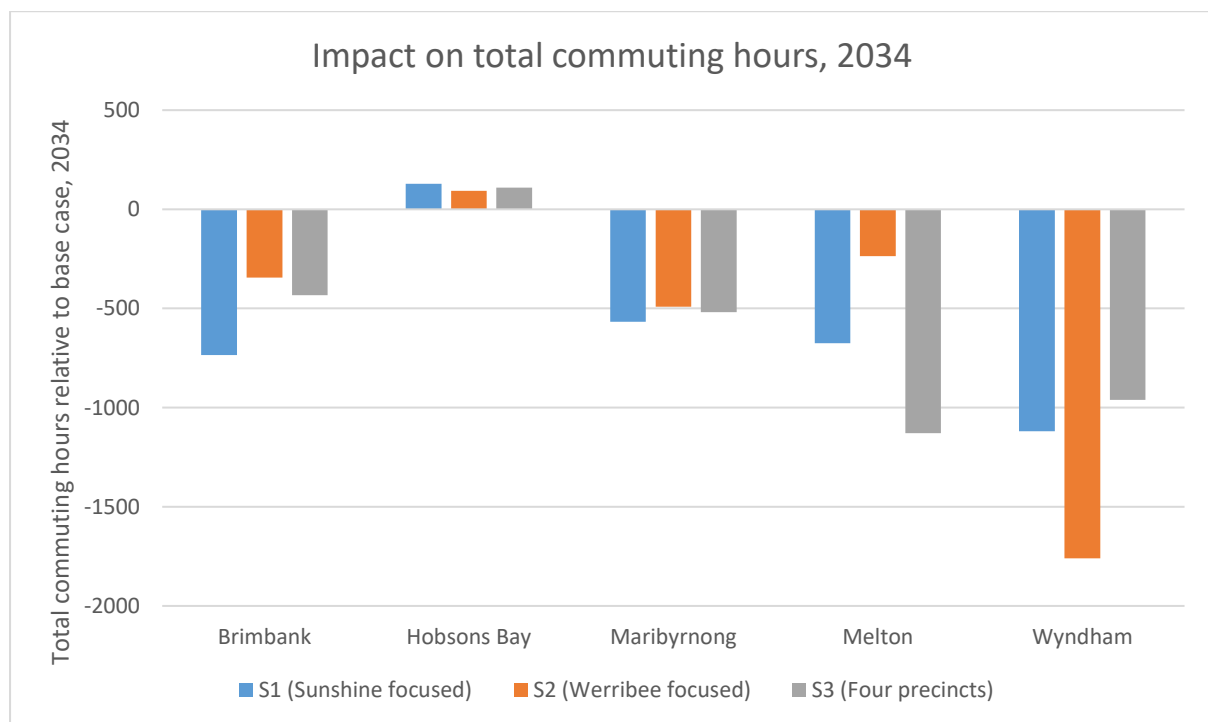


Figure 7: Total commuting hours by scenario relative to base case, 2034. Source: VUEF model.

While the development of precincts can make an appreciable impact on average commute times per person, the sheer scale of population growth in Melton and Wyndham will create pressure on commuting infrastructure that cannot be addressed by precinct development alone.

More detail about each scenario is given in the following sections.

2.2.2 SCENARIO 1: SERVICES IN SUNSHINE

In Scenario 1, 20,000 jobs are attracted to the West, with half of these located in the Sunshine precinct in the LGA of Brimbank. In this simulation the Sunshine precinct focusses especially on government administration, health services, tertiary education, and a major new arts and cultural facility.

By 2034, jobs located in Brimbank are almost 12,000 above the baseline, with the 10,000 precinct jobs attracting almost 2,000 further jobs due to higher incomes and consumer activity in the region. Only 2,000 of the extra jobs are filled by residents of Brimbank, with larger shares filled by residents of Melton and the rest of Melbourne.

This scenario also includes smaller precinct developments in Footscray (Maribyrnong) and Werribee (Wyndham). Jobs in these precincts are mainly filled by residents of the West.

While aggregate employment in Melbourne's CBD changes very little, there are clear changes in the composition of workers in the CBD, with fewer workers commuting from all LGAs in the West, especially Melton and Wyndham, and more workers commuting from other parts of Melbourne. Employment in the rest of Melbourne declines, with fewer workers from all parts of Melbourne.

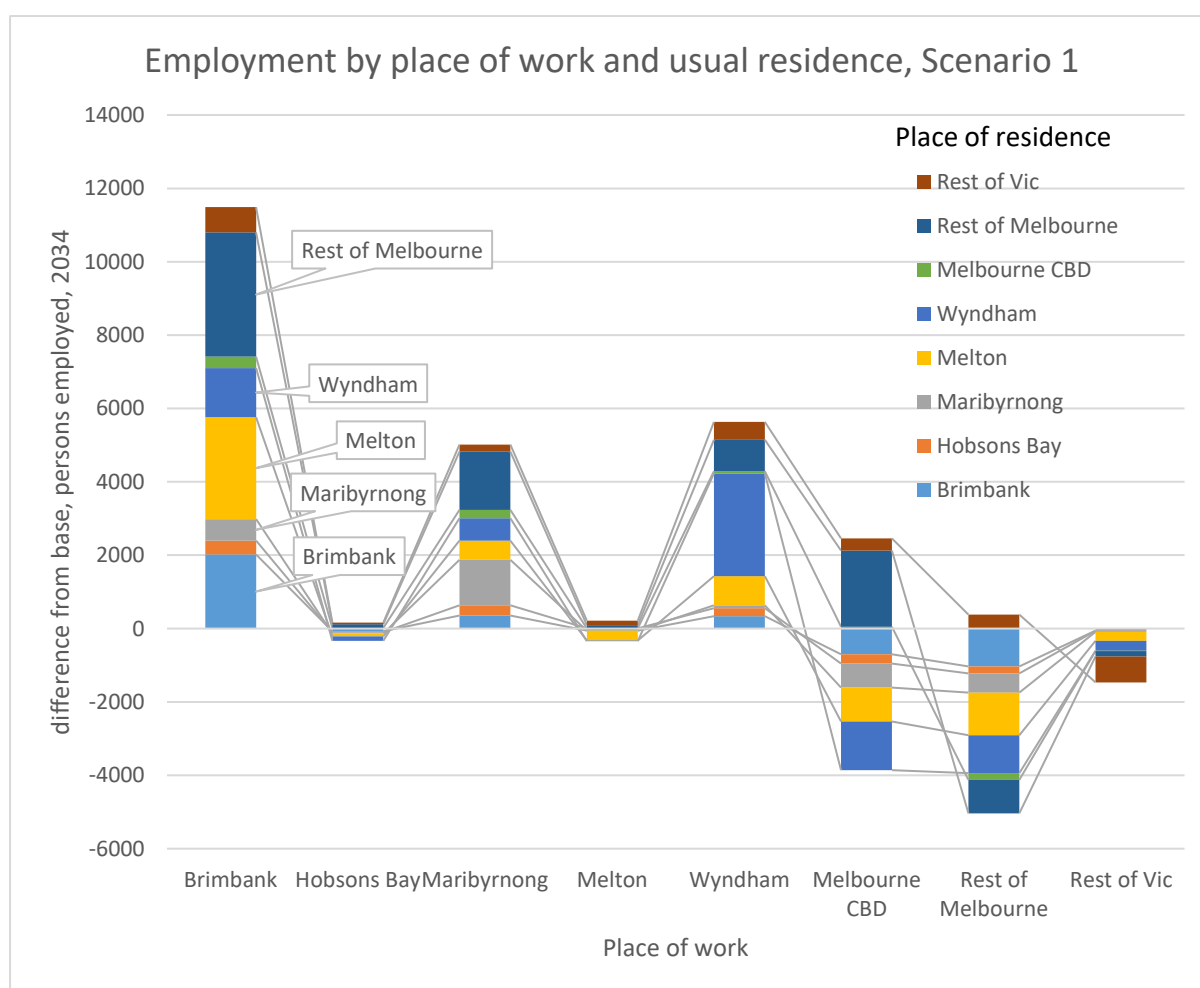


Figure 8: Employment by place of work and usual residence, Scenario 1 difference from baseline, 2034. Source: VUEF model.

2.2.3 SCENARIO 2: MANUFACTURING, LOGISTICS AND EDUCATION IN WERRIBEE

In Scenario 2, the major precinct is located in Werribee. This precinct is assumed to make use of available land in Werribee to further develop food and beverage manufacturing, wholesale, transport and logistics, along with tertiary education.

As with Brimbank in Scenario 1, the major precinct in Werribee with 10,000 jobs leads to a total increase in employment in the Wyndham LGA of almost 12,000 jobs. The majority of these jobs are filled by residents of Wyndham, along with smaller increases in employment of residents of Melton and the rest of Melbourne.

In this scenario, fewer residents of Wyndham are employed in the Melbourne CBD or the rest of Melbourne. Residents of Wyndham make only a small contribution to employment in Brimbank and Maribyrnong, despite the development of smaller precincts in these regions. The development of the manufacturing precinct in Wyndham reduces commuting for residents of Wyndham who would otherwise have been working in Brimbank, Hume or other parts of Melbourne.

Residents of Melton, Maribyrnong and Brimbank follow a similar pattern, with fewer working in the CBD and rest of Melbourne and more working in the West.

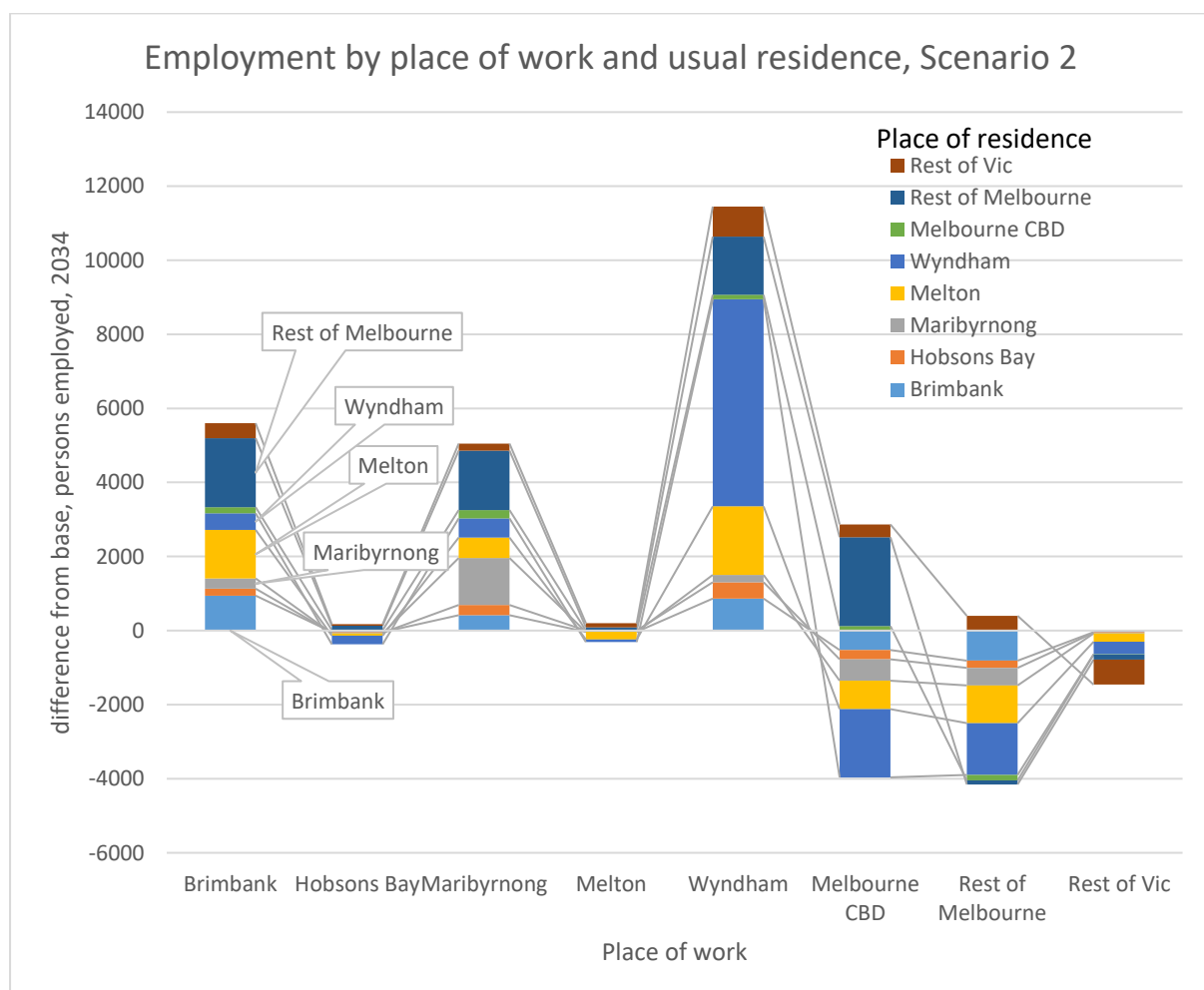


Figure 9: Employment by place of work and usual residence, Scenario 2 difference from baseline, 2034. Source: VUEF model.

2.2.4 SCENARIO 3: FOUR PRECINCTS IN THE WEST

Under Scenario 3, four equally-sized precincts are developed in the LGAs of Brimbank, Maribyrnong, Melton and Wyndham, each with 5,000 jobs. With the exception of Melton, the LGAs all gain more than 5,000 jobs.

In this scenario, a clear pattern emerges for the outer urban areas, with both Melton and Wyndham filling most of their additional jobs with local residents. The precincts in Maribyrnong and Brimbank are filled by workers from all parts of the West and the rest of Melbourne, with smaller proportions of jobs filled by local workers. This reflects the slower population growth in these areas and the role of the inner LGAs in providing employment to workers from the outer LGAs.

As this is the only scenario that considers a precinct in Melton, the diversion of residents of Melton from jobs in the CBD and the rest of Melbourne is more significant in this scenario. As a result of this and the similar result for Wyndham, this scenario has the greatest impact on reducing commuting times.

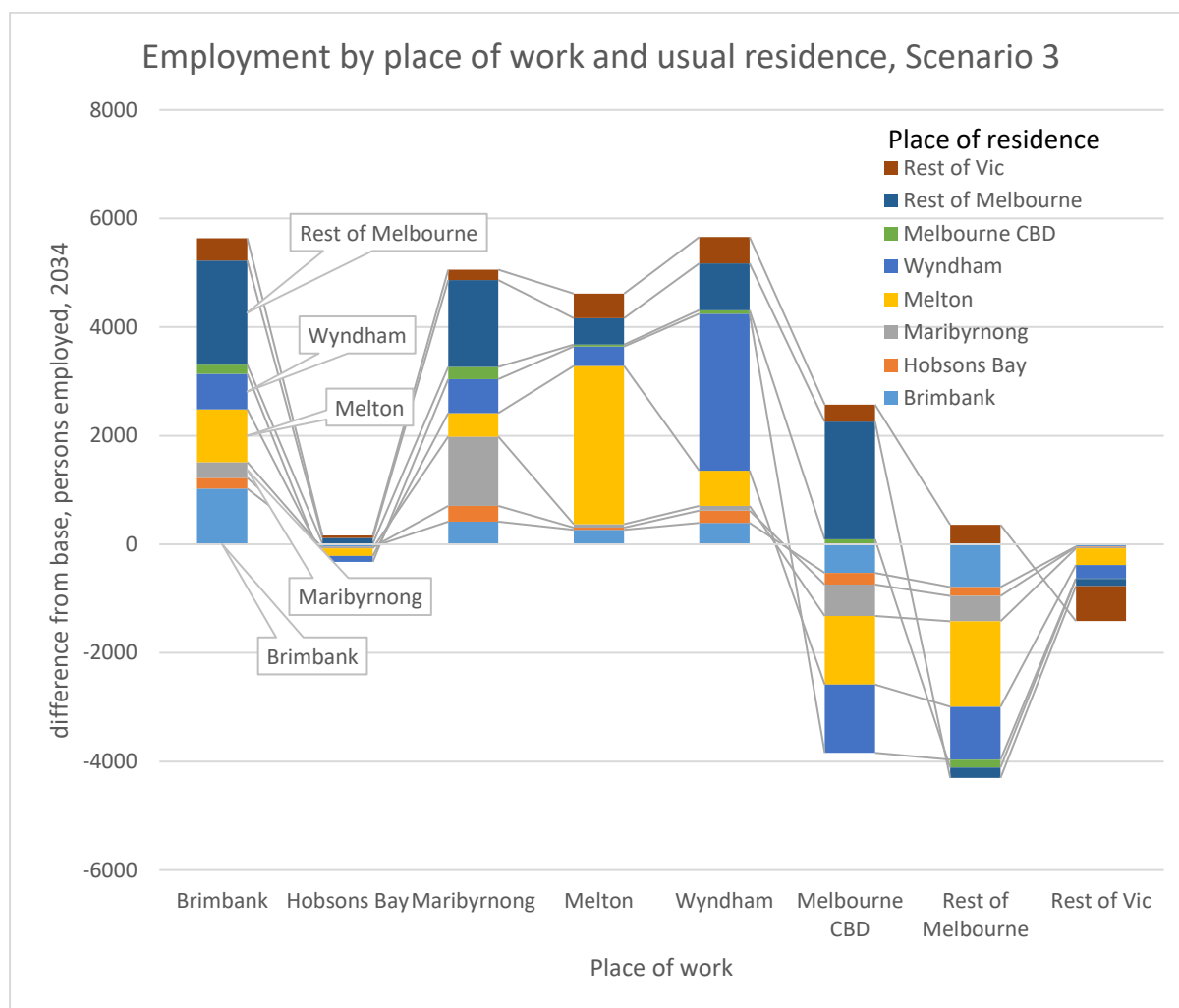


Figure 10: Employment by place of work and usual residence, Scenario 2 difference from baseline, 2034. Source: VUEF model.

3 CONCLUSIONS

Melbourne's West is now home to almost half a million employed residents, with continued rapid population growth to underpin further growth in employment of almost 150,000 jobs over the next ten years.

Commuting for employment is significant for residents of the West, with 48% of its residents now working outside the West. Without clear and targeted policy intervention, this is set to increase to over 50% over the next decade, with the number of residents employed outside the region forecast to increase from 234,000 to 320,000.

These 86,000 extra commuters will add pressure to already crowded road and rail transport infrastructure.

In this report we examine three scenarios in which employment precincts are strategically developed in the West, in strategic industries and locations. We find that 20,000 additional jobs located in the West will lessen the commuting burden on individuals, and find that commuting times will stabilise at 2024 levels in some cases, or change slightly, but in all cases, will be clearly less than in the base case.

Perhaps obviously, the most effective scenario for Wyndham is the Werribee precinct, the most effective for Brimbank is the Sunshine precinct and the most effective for Melton is the "Four precincts", the only scenario in which a precinct is developed in Melton. In terms of the West as a whole, the precinct with the most even distribution of benefits to residents is the Sunshine precinct. Sunshine is accessible to both Werribee and Melton, making it an ideal focal point for a significant employment precinct for the West. A precinct in Sunshine would be even more effective with improvement of public transport infrastructure between Melton and Sunshine.

Our analysis is confined to the next decade, with the precincts introduced over a 7-year period. The precincts, adding 20,000 jobs to the region, are large enough to keep commuting at or close to 2024 levels over ten years. Growth in local employment would need to continue beyond this horizon to prevent a large increase in commuting, such as occurs in the no-action base case, in future years.

Certain assumptions have been made about the industries in which these jobs will be created. These assumptions could be changed in future analysis as the precinct strategies become more developed. It is unlikely that changing the assumptions about the industries will have a great impact on the broad impact on commuting.

The sheer size of the population growth in Melton and Wyndham will increase the burden on transport infrastructure to an extent that is not addressed by the precincts modelled in this report. While average commute times for individuals are improved by diverting some commuters to local jobs, transport infrastructure will come under significant pressure.

The distribution of benefits of the three scenarios modelled differ across the West. The modelling presented in this report provides some illustrative guidance on the impacts of local employment precincts. While the relative merits of the precincts differ and will be debated, there is one clear message. All three scenarios are superior to the no-action base case in addressing the growing commuting burden on residents of the West.

4.1 INDUSTRY DEFINITIONS

Industry definitions are based on ANZSIC, with detailed definitions available at <https://www.abs.gov.au/statistics/classifications/australian-and-new-zealand-standard-industrial-classification-anzsic/latest-release>

Industries used in this report are defined in Table 13 below.

Table 13: Industry definitions

Industry	ANZSIC definition
Manufacturing	C Manufacturing
Logistics	I Transport, Postal and Warehousing
Construction	E Construction
Other Industries	A Agriculture, Forestry and Fishing B Mining D Electricity, Gas, Water and Waste Services
Business Services	J Information Media and Telecommunications K Financial and Insurance Services L Rental, Hiring and Real Estate Services M Professional, Scientific and Technical Services N Administrative and Support Services
Public Administration	O Public Administration and Safety
Education and Training	P Education and Training
Health Care and Social Assistance	Q Health Care and Social Assistance
Other Services	F Wholesale Trade G Retail Trade H Accommodation and Food Services R Arts and Recreation Services S Other Services

4.2 COMMUTING TIMES

Commuting times are calculated from the Victorian Integrated Survey of Travel and Activity (VISTA) Journey to Work data for 2023-24. Average commute times for vehicle and train trips are calculated (Table 14).

For some origin-to-destination pairs, there are no observations in the VISTA 2023-24 survey. For these trips we instead use averages from the VISTA 2012-20 database. These trips are not heavily weighted in our calculations of average or total travel times as there are relatively few trips on these routes, so results are not sensitive to these assumptions.

Commute times to the Rest of Victoria and the Rest of Melbourne are assumed to be 20 minutes longer than commutes to the Melbourne CBD. There are very few commutes to these regions, so results are not sensitive to the commute times assumed.

The most important values in Table 14 are the commute times to the city, and the commute times within the home region (bold font). In all cases, commute times within the home region are less than commute times to the city, indicating that increases in city commutes at the expense of home commutes will increase average commute times. Commute times from Brimbank, Maribyrnong, Melton and Wyndham to Brimbank and Maribyrnong are all shorter than commutes to the city from the same destinations, which underpin the success of local precincts in these regions in alleviating commuting.

Table 14: Single morning commute times from origin to destination (minutes). Source: VISTA 2023-24 Journey to Work

To region...	From region...				
	Brimbank	Hobsons Bay	Maribyrnong	Melton	Wyndham
Brimbank	12.8	31.7	19.8	18.1	21.7
Greater Geelong	80.0	89.3	56.7	65.0	61.0
Hobsons Bay	20.0	12.4	18.0	35.5	52.2
Hume	30.0	30.0	33.8	30.7	39.0
Maribyrnong	22.6	36.7	6.3	32.3	30.5
Melbourne CBD	43.7	30.3	40.8	49.2	55.9
Melton	23.0	27.5	32.0	17.7	36.8
Moonee Valley	25.5	40.8	16.0	40.5	52.3
Port Phillip	60.0	61.0	61.5	56.3	29.0
Wyndham	29.7	18.8	35.0	31.0	16.2
Yarra	44.0	44.5	44.0	58.8	60.0
Rest of Melbourne	63.7	50.3	60.8	69.2	75.9
Rest of Victoria	63.7	50.3	60.8	69.2	75.9