

Wonthaggi Commercial Land Assessment

Bass Coast Shire Council

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Independent
insight.



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Glossary

Term	Definition
Australian New Zealand Standard Industry Classifications (ANZSIC)	A standardised framework for organising jobs and industries into comparable categories.
Bulky goods	Large items not suited to conventional retail formats, such as furniture and washing machines.
Business Serving Industries	Industries that generally use commercial land. The specific industries are listed in Table 5.
Commercial 1 Zone (C1Z)	A commercial zone intended for mixed use, including retail, office, business, entertainment and community uses. Village hubs and convenience retail within a PSP are counted as C1Z.
Commercial 2 Zone (C2Z)	A commercial zone for offices, appropriate manufacturing and industries, bulky goods retailing, other retail uses, and associated business and commercial services.
Commercial 3 Zone (C3Z)	A commercial zone that is intended to support mixed use functions between industrial, commercial, office, and other employment generating land uses. The zone provides the option for limited residential uses that do not undermine the primary employment and economic development focus of the zone. Residential development (dwelling) is required to meet floor area and frontage conditions.
Demand	The area of C1Z and/or C2Z land that would adequately meet the needs of business serving industries, having regard to local demographics and context.
Features of employment interest	Places with a high concentration of employees, such as council offices and shopping centres.
Gap	The difference between supply and demand (gap = supply – demand). A negative gap may indicate a need for rezoning or other planning changes to increase potential supply.
Net Developable Area (NDA)	The land area available for development, excluding areas that cannot be developed (e.g. roads, footpaths).
Occupied Private Dwellings (OPDs)	Dwellings that are currently occupied by residents.
Small Area Land Use Projection Model (SALUP)	A model created by SGS Economics and Planning that forecasts population, dwelling numbers, demographics, employment and educational enrolments by small areas across Victoria.
Small Area Model (SAM)	A model created by SGS Economics and Planning to forecast likely population in a given area, including population count, household composition and age group composition.
Statistical Areas (SA1, SA2, SA3, SA4)	Geographic areas at different scales defined by the Australian Bureau of Statistics. SA1 is the smallest and SA4 is the largest.
Supply	The total area of land zoned C1Z and/or C2Z. The effective capacity of supply depends on how the land is used.
Structural Private Dwellings (SPDs)	All dwellings occupied and not currently occupied (e.g. holiday houses, vacant rentals, dwellings for sale, renovated/redeveloped).
Victoria in Future (VIF)	The Victorian Government’s official population forecast dataset.

Executive summary

Purpose of the study

Bass Coast Shire Council commissioned SGS Economics and Planning to undertake an economic assessment of commercial land in the town of Wonthaggi to assist Council in the long-term strategic planning of the township. The work has four primary components: an overview of economic trends and drivers; a demographic assessment; a demand and supply assessment, and an assessment of three strategic sites with potential for commercial land expansion.

The role of commercially zoned land

Commercially zoned land underpins the delivery of retail, health, hospitality and personal services to the community. Maintaining an appropriate supply is a core function of municipal strategic planning: an undersupply constrains business growth and limits access to services, while an oversupply — particularly of Commercial 1 Zone (C1Z) land — can fragment activity centres, generate persistent vacant floorspace and/or lots that have negative impacts on streetscapes and vibrancy. Therefore, having good information about the current supply and the future demand for commercially zoned land is important for municipal strategic planning.

Commercially zoned land in Wonthaggi

Wonthaggi's commercially zoned land is broadly sufficient to meet the needs of its resident population at current levels. However, as the primary commercial centre for Bass Coast, Wonthaggi must meet demand from a catchment that extends beyond its urban boundary to smaller settlements, dispersed rural populations and visiting tourist trade. The assessment of future commercial land requirements must account for this broader demand, alongside the projected population growth in Wonthaggi and across the wider region.

Approach

This assessment uses population forecasts and a commercial land model to provide an estimate for how much commercial land will be needed out to 2061. The analysis draws on projected population growth and demographic change across Wonthaggi and the Bass Coast region, alongside industry trend data and contextual analysis, to identify the goods and services sectors most likely to drive commercial land demand over the coming decades.

Key findings

Comparing demand and supply for commercial land uses in Wonthaggi suggests that there is likely to be sufficient Commercial 1 and 2 zoned land through to 2051. There is likely to be a slight shortage of Commercial 1 Zoned land by 2061. There is therefore no immediate need for Council to rezone land for commercial land uses in the short to medium term.

In the long-term Council may look to slightly expand the C1Z core of Wonthaggi (up to 5ha). This could be achieved through rezoning the entire C2Z area at the centre of town (rather than creating a new area of C1Z detached from the town centre which would then compete for foot traffic). Given the relatively long-time horizon, it would be prudent to revisit this issue in the future using more contemporary information on local land regional employment trends and drivers that will affect demand and supply.

1. Introduction

Bass Coast Shire Council has commissioned SGS Economics and Planning to undertake an economic assessment of commercial land in the town of Wonthaggi.

The work is intended to assist Council in the long-term strategic planning of the township. The work has four primary components, and is structured as follows:

- Economic trends and drivers – an overview of the major economic opportunities in the region of Gippsland, including macroeconomic forces that impact demand for commercial land.
- Demographic assessment – a close look at the emerging demographic changes for Wonthaggi as well as the opportunities that could present.
- Demand and supply assessment – a quantitative forecast of commercial land needs in Wonthaggi and alignment with existing and proposed land supply.
- Assessment of strategic sites – Assessment of three sites selected by Council for potential commercial land expansion.

The scope of this commercial land assessment includes all C1Z and C2Z lands in and around the township, as well as demand generated from population growth in this area, including the Wonthaggi Northeast PSP area.

2. Economic Context

2.1 Wonthaggi & Bass Coast

Wonthaggi is a growing regional centre. It is Bass Coast's largest town by population, and this relates to the economic opportunities that exist in Wonthaggi. Compared to Cowes and Inverloch, Wonthaggi is less tourist focused and has more industrial and commercial land and activity. Of the estimated \$4.843 billion economic output that Bass Coast generated in 2024, approximately 30% was generated in Wonthaggi¹. Population growth is currently a key driver of Bass Coast's economy, with construction being the largest output generating sector at the LGA (\$1.077 billion²) and township levels (including Wonthaggi, North Wonthaggi and South Dudley)³.

The Australian Bureau of Statistics divides areas into statistical geography boundaries at different scales, from mesh blocks (30-60 dwellings) at the smallest scale, and then progressing in size from Statistical Areas 1-4 (SA1-SA4). At the SA2 level, we can see that Wonthaggi (shown as Wonthaggi-Inverloch) is a hub for businesses for the surrounding area, with the highest number of businesses, the largest growth in absolute terms (Figure 1), and the second highest rate of growth between financial years 2024-2025 out of the neighbouring SA2s. In 2025, there were 2,470 businesses in the Wonthaggi-Inverloch SA2, with most being small businesses with 1-4 employees (Table 1).

Table 1: Businesses in Wonthaggi-Inverloch and adjoining SA2s

SA2	# businesses June 2024	# businesses June 2025	Change June 2024- June 2025	% change 2024- 2025
Wonthaggi-Inverloch	2,432	2,470	38	1.6%
Phillip Island	1,246	1,238	-8	-0.6%
Korumburra	1,212	1,220	8	0.7%
Leongatha	1,561	1,562	1	0.1%
Koo Wee Rup	1,209	1,236	27	2.2%
Foster	1,362	1,316	-46	-3.4%

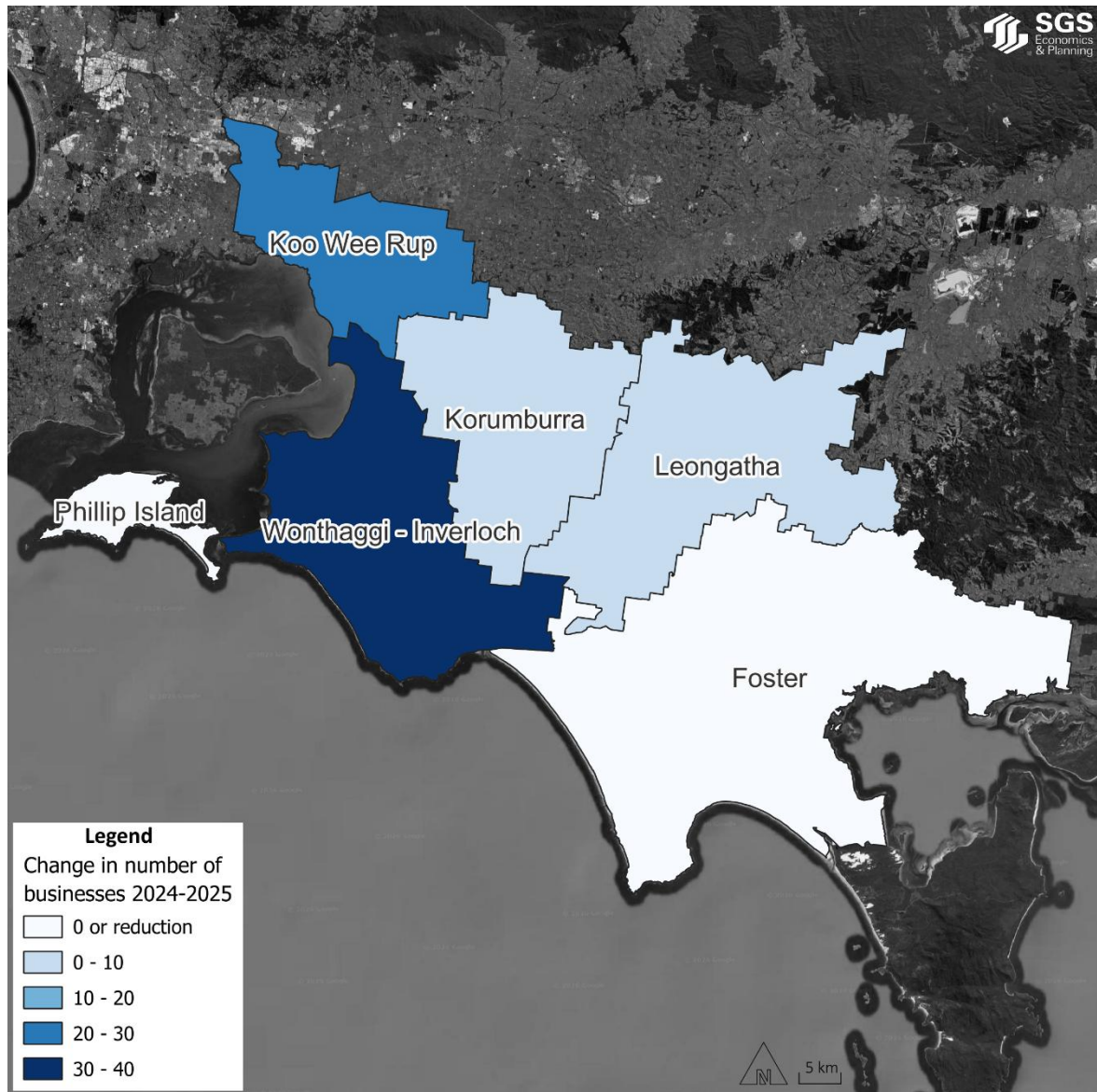
Source: ABS. 2025. Counts of Australian Businesses, Entries and Exits, 2024-2025.
<https://statmaps.abs.gov.au/portal/apps/storymaps/stories/dc4ab01f7e64454caf4077eae94ff66a>

¹ REMPLAN. 2024. Bass Coast LGA. Accessed on 2 December 2025. <https://app.remplan.com.au/bass-coast/economy/industries/output?locality=phillip-island>

² REMPLAN. 2024. Bass Coast LGA. Accessed on 2 December 2025. <https://app.remplan.com.au/bass-coast/economy/industries/output?locality=phillip-island>

³ REMPLAN. 2024. Bass Coast LGA. Accessed on 2 December 2025. <https://app.remplan.com.au/bass-coast/economy/industries/output?locality=phillip-island>

Figure 1: Growth in number of businesses 2024-2025



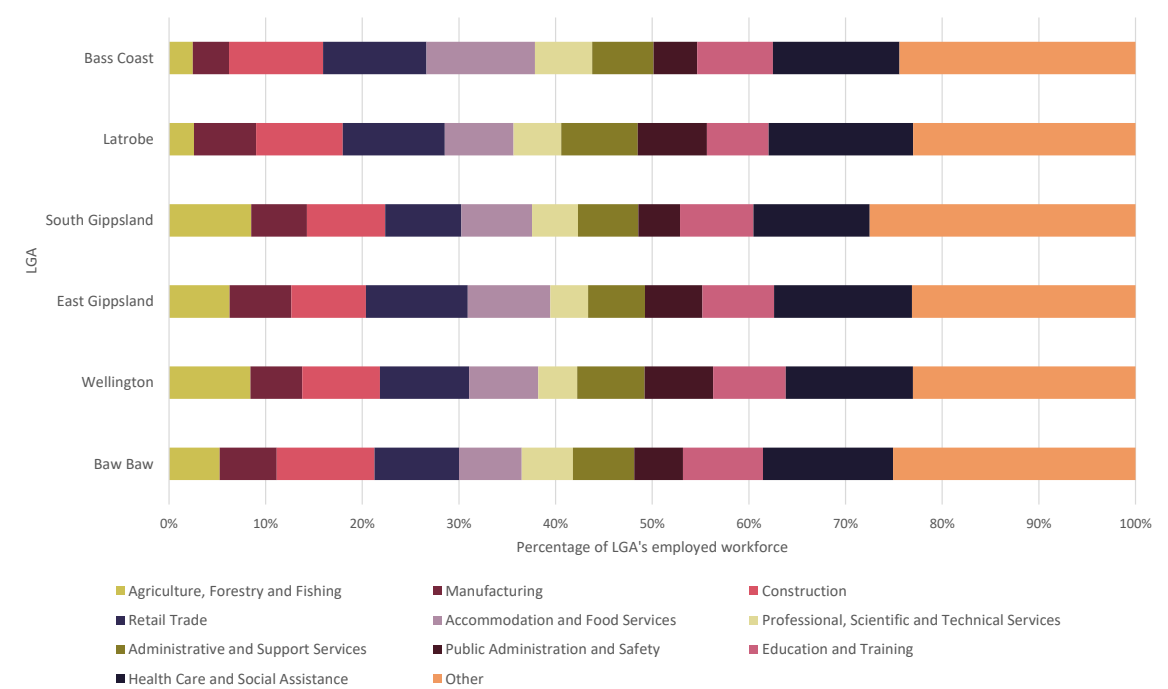
Source: ABS. 2022. Counts of Australian Businesses, including Entries and Exits, Jun 2018 to Jun 2022.

<https://www.abs.gov.au/statistics/economy/business-indicators/counts-australian-businesses-including-entries-and-exits/jul2018-jun2022>

Healthcare and social assistance is the leading industry of employment in Bass Coast among the broad industry classifications (13.1% of workers in employment), followed by construction (10.7%). Bass Coast has a similar distribution of workers among the 20 broad industry categories as the other five LGAs in the Gippsland Region, though a slightly larger share of workers in the Accommodation and Food Services industry (11.2% compared to an average 7.3% for the other LGAs) and slightly less in Agriculture (2.5% compared to an average 6.2% for the other five LGAs) and Manufacturing (3.7% compared to an average 6.0% for the other five LGAs). Another ten industries each employed over 500 people at the 2021 census in Bass Coast, illustrating a level of employment diversity (Figure 2).

In 2021, the unemployment rate for Bass Coast Shire was 3.8%, which was slightly below the regional Victoria average of 4.1%⁴. The low unemployment rate is linked to there being multiple growing industries across the Gippsland Region, as shown in Figure 3. It is most appropriate to consider employment at the regional scale, as people will travel across LGAs to reach employment opportunities. The five industries that grew the most in the Gippsland Region from 2006 to 2021 were Health Care and Social Assistance, Construction, Accommodation and Food Services, Public Administration and Safety, and Education and Training (See Figure 3).

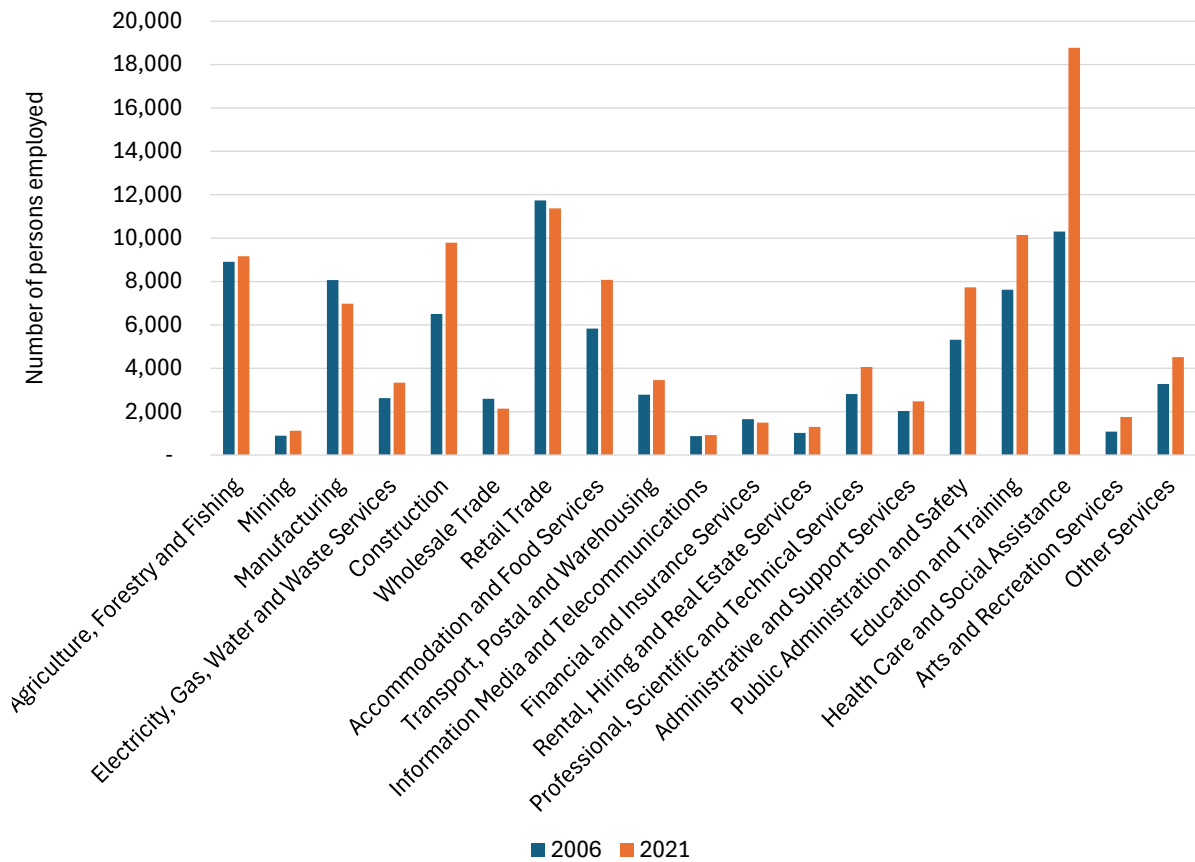
Figure 2: Broad industry employment of Gippsland workers, by LGA



Source: Australian Bureau of Statistics. 2021. TableBuilder Dataset: Jobs and Income of Employed Persons, 2021-22. Accessed 10 December 2025.

⁴ Profile ID. 2021. Bass Coast Shire Employment Status. Accessed on 10 December 2025. <https://profile.id.com.au/bass-coast/employment-status>

Figure 3: Gippsland Employment by Industry



Source: ABS, with industries collapsed into broad categories by SGS

2.2 Plans and strategies

Key regional strategies that intend to direct economic activity for the Gippsland region point to population growth as a current economic driver, highlight the importance of environmental services for the region, and emphasize the opportunities of the green transition for the region to diversify its economy. These strategies are:

- The Gippsland Regional Economic Development Strategy 2022.

Produced by the Victorian Department of Jobs, Precincts and Regions, this Strategy provides medium-long term directions to activate economic development opportunities. It describes how the region will see a continued transition away from an economy tied to coal power energy generation, and towards new energy, food and fiber, and expanding areas of emerging specialization (value add manufacturing, health care, circular economy, nature-based tourism).
- The Victoria Economic Growth Statement 2024

With an intention to set Victoria up as a leader in innovation and as an attractive place to invest in, this Statement provides a high-level overview of what the State Government is prepared to do to support this growth. Relevant to Wonthaggi, the Statement highlights regional Victoria's role as the powerhouse of the circular economy, and highlights agribusiness (as well as the circular economy) as one of the Government's five priority sectors.

- The Bass Coast 2030 Economic Development Framework
The Framework presents four pillars critical for economic success on the Bass Coast; Living + Working, Natural world + Visitor economy, Industry diversification + Innovation, and lastly, Place shaping. The plan intends to increase opportunities for business activity and investment. Many of the associated actions can relate to demand for commercial land in Wonthaggi, such as promotion of the local scale circular economy or investigating opportunities to build the wellness destination brand of Wonthaggi.
- The Bass Coast Council Plan 2025-2029
This plan presents four strategic objectives to deliver on the community vision; Naturally beautiful, Thriving places, Vibrant community, and Visionary leadership. It also outlines how progress of these objectives will be tracked against strategic indicators, with the most relevant indicator being; Number of business permit applications received through the Council's Business Concierge Program.

Over recent decades, economic, social and technological influences have significantly changed the way commercial sectors operate, with flow on impacts to demand for land uses in commercial and industrial areas in Bass Coast.

Six key economic issues and the opportunities they offer for Wonthaggi are discussed below.

Population growth

The first two decades of the twenty-first century have seen Wonthaggi grown by a modest amount of approximately 2,500 people⁵. As detailed in the following Section, the population of Bass Coast and Wonthaggi is expected to grow more substantially over the next few decades. Population growth has been a driving force behind the growth of the health care and social assistance sector, which since 2009 has been Gippsland's largest employer⁶. The growth of this sector, along with other population serving sectors, such as school education, will be expected to continue along with population growth, even if recessions do occur.

One key challenge of population growth in Wonthaggi is that job growth may not keep pace with the increase in local people available to work. As a consequence there may be an increase in the number of people who have to commute beyond Bass Coast or beyond Gippsland for employment opportunities, or an increase in the unemployment rate or ongoing under employment. If new and existing residents find that they need to commute large distances for employment opportunities, there may be flow on negative effects to work-life balance, relationships and self-care⁷. Furthermore, dependence on cars to

⁵ Australian Bureau of Statistics. 2021. All Persons QuickStats – Wonthaggi. <https://abs.gov.au/census/find-census-data/quickstats/2001/UCL257400>

⁶ Victoria State Government. 2022. Gippsland Regional Economic Development Strategy, Accessed 3 December 2025. https://www.rdv.vic.gov.au/__data/assets/pdf_file/0011/2063909/Gippsland-REDS-2022.pdf

⁷ Australian Urban Observatory. 2025. Employment – Indicator rationale. Accessed on 4 December 2025. <https://auo.org.au/portal/metadata/employment/#::~text=Additionally%2C%20long%20commute%20times%20can,as%20an%20individual's%20physical%20activity>

commute to non-local workplaces can mean a larger portion of household expenditure goes towards running a vehicle (fuel, maintenance, road tolls, parking) rather than on local purchases⁸.

Population growth may also mean a greater demand is placed on the town's existing community infrastructure, such as the Wonthaggi Library and the Bass Coast Aquatic and Leisure Centre. However, mechanisms, such as the Community Infrastructure Levy and Development Contributions Plans, as well as state community infrastructure grants, also provide opportunities for economic activity and infrastructure improvement related to these challenges.

Overall, population growth drives demand for population serving businesses, many of which are either essential or a relatively stable/reliable source of employment for the local population. Other opportunities related to population growth will be more specific to the demographics of the larger population. For example, if there is a greater population of seniors this may be relevant to commercial floorspace demand for volunteer-based businesses, such as op-shops or Repair Cafes. Economic opportunities related to demographic trends will be explored further in Section 3.

Changing demand for skills

Skilled and unskilled labor will continue to be important to business success in Wonthaggi. However, disruptions influenced by evolving themes such as automation, artificial intelligence (AI) and the green transition will mean that changes should be expected in the sets of skills demanded by businesses and the public sector⁹. At the 2021 census, the three major broad industry categories for employment in the Wonthaggi-Inverloch statistical area were Health Care and Social Assistance (2,850), Retail trade (2,223), Construction (1,981), and Accommodation and Food (1,879)¹⁰. While these industries may remain major employers in the decades ahead, there are expected to be changes in some of the skills required for workers in these jobs.

The challenges posed by changes in demanded skills are not unique to Wonthaggi. For example, automated customer service in the retail trade industry reduces demand for retail employees across the entire retail economy. Additionally, larger businesses have been shown to be more advantaged in utilizing technology, such as AI agents, compared to smaller businesses due to cost barriers¹¹. These kinds of disruptions may lead to shifts in which types of businesses (larger chains ahead of smaller businesses) are able to get ahead, and lead to changes to the demand for commercial floor space.

For Wonthaggi, there is an opportunity to plan and consider how the benefits of technological advancements can flow through the community. For example, AI can be used to reduce food waste by optimizing demand forecasts for certain products, which may support Wonthaggi's surrounding agricultural businesses and food storage within Wonthaggi. Additionally, Wonthaggi has the only TAFE (Chisholm Wonthaggi) in the Bass Coast Shire. As the population grows and as people are faced with a

⁸ Australian Urban Observatory. 2025. Employment – Indicator rationale. Accessed on 4 December 2025. <https://auo.org.au/portal/metadata/employment/#~:text=Additionally%2C%20long%20commute%20times%20can,as%20an%20individual's%20physical%20activity>

⁹ SGS Economics and Planning. 2025. Gippsland Regional Economic Impacts.

¹⁰ Australian Bureau of Statistics. 2021. TableBuilder – Jobs and Income of Employed Persons. Accessed on 4 December 2025. <https://tablebuilder.abs.gov.au/webapi/jsf/dataCatalogueExplorer.xhtml>

¹¹ Dynamic Businesses. 2025. Australia's retail AI boom has a problem: It's leaving small businesses behind. Accessed on 10 December 2025. <https://dynamicbusiness.com/topics/news/australias-retail-ai-boom-has-a-problem-its-leaving-small-businesses-behind.html>

need to re-skill/add skills, this existing infrastructure and knowledge capital offers opportunities for expansions in education, work experience and the supporting services.

The Gippsland Regional Economic Development Plan identifies that Gippsland has a highly specialized engineering workforce who have been active in mining and coal burning industries. As these industries transition out, these workers will stand as a regional pool of skilled labor with opportunities to offer to other industries.

Environmental limitations

Bass Coast is an LGA where the economic output of multiple industries depends on environmental services, and this is captured in principle one of the Bass Coast Economic Development Framework 2030, “Environment is our Economy”. How environmental services will be able to continue to support economic activity in the decades ahead poses challenges from multiple perspectives.

- Tourism industry
 - Challenges: Extreme weather may make holidaying harder for tourists. Sea level rise may impact tourism infrastructure. Higher bushfire risk may impact summer events¹².
 - Opportunities: compared to NSW and QLD coastal destinations, the Wonthaggi climate is milder so relatively fewer extreme heat days are expected, likely appealing to some tourists.
- Agricultural industry
 - Challenges: Extreme weather events, droughts, bushfires and changes to seasons may impact outputs and worker productivity.
 - Opportunities: the local workforce can be drawn on to develop innovative methods to address these challenges and build knowledge capacity.
- Fishing industry
 - Challenges: Climate change, pollution and invasive species each have the potential to impact the productivity of fishing in the ocean waters off Bass Coast¹³. While data on the number of people working in the fishing industry is not available, 570 people were employed in the Agriculture, forestry and fishing industries in Bass Coast in 2021¹⁴. In Bass Coast, fishing makes an important contribution to tourism as well as for the value of the landed catch¹⁵.

¹² Victorian State Government. 2024. Victoria’s Climate Science Report 2024.

<https://www.climatechange.vic.gov.au/victorias-climate-science>

¹³ Victoria State Government. 2022. Marine and Coastal Strategy.

https://www.marineandcoasts.vic.gov.au/__data/assets/pdf_file/0029/571817/Marine-and-Coastal-Strategy_May-2022.pdf

¹⁴ Australian Bureau of Statistics. 2021. TableBuilder – Jobs and Income of Employed Persons. Accessed on 4 December 2025. <https://tablebuilder.abs.gov.au/webapi/jsf/dataCatalogueExplorer.xhtml>

¹⁵ University of Technology Sydney. 2020. Valuing Victoria’s professional fishing: measuring economic and social contributions in Near East Victoria. Accessed on 4 December 2025.

<https://www.frdc.com.au/sites/default/files/products/2017-092%20Victoria%27s%20Neareast%20Fisheries%20Factsheet.pdf>

- Opportunities: Research into the local industry identifies that “industry led engagement activities with coastal communities could improve awareness of the fishing industry”¹⁶. Such engagement may also open opportunities for more local consumption of landed catch and open the conversation for improvements to regulations relevant to marine life.
- Retail and food sales:
 - Challenges: There are multiple ways that local consumption patterns may be impacted by environmental influences, such as changes to the cost and availability of different goods, or the impacts of environmental regulations changing product chains.
 - Opportunities: Opportunities related to increased local consumption and the proximity of Bass Coast to green energy projects in Gippsland could be explored.

Remote work

While many LGAs within Greater Melbourne saw a decrease in population between 2016-2021, Bass Coast Shire saw the population grow. One identified reason for this is the lifestyle attraction compared to Melbourne.

Challenges posed to economic development in Wonthaggi by an increase in remote work are relevant in both directions.

- Increased local foot traffic and local expenditure from work from home residents during the working week and work hours for cafes, restaurants and office supplies.
- Wonthaggi based businesses with employees connecting online:
 - Decrease in demand for commercial floor space.
 - Decrease in activity at the physical frontage of commercial areas.
- Wonthaggi based employees connected to businesses online:
 - If remote workers come to Wonthaggi for the environment and lifestyle only during, e.g. warm months or for periods when their employees allow, this could lead to a more transient population with flow on effects, such as fluctuations in local spending between summer and winter seasons.
 - Home based workers and businesses generate demand for a range of retail and commercial businesses, including increase in micro home-based businesses or side hustle ventures such as cakes, flowers, massage etc.

Opportunities that remote work offers Wonthaggi relate to how people can stay within or come to Wonthaggi. For example, WFH flexibility can mean that local families can more easily stay in Wonthaggi even if they begin employment in Melbourne or another LGA. Meanwhile, WFH flexibility can make it easier for people from other parts of Australia with jobs based elsewhere to come to Wonthaggi if the lifestyle, place and community appeal to them. While the Australian Government does not currently

¹⁶ University of Technology Sydney. 2020. Valuing Victoria’s professional fishing: measuring economic and social contributions in Near East Victoria. Accessed on 4 December 2025.

<https://www.frdc.com.au/sites/default/files/products/2017-092%20Victoria%27s%20Neareast%20Fisheries%20Factsheet.pdf>

issue digital nomad visas, this could change in the future. Furthermore, there are still ways that foreigners are working digitally in Australia using other visas¹⁷.

Other cities that have invested in attracting digital workers to their towns advertise four key attributes; information to navigate life and remote work in the new town; community; co-working spaces with high-speed internet; and services¹⁸.

Commercial and Industrial land sales

At the local scale, there is wide variation between the characteristics and value of commercial lots. Data from the Valuer General (2024) shows that commercial land prices in Bass Coast varied from \$304/sqm for single occupancy retail (unspecified) to \$3,735/sqm for office premises (unspecified). There was a total of 37 sales of commercially zoned land and 12 sales of industrially zoned land in Bass Coast Shire in 2024. The mean/average lot area of industrial land sales was 639sqm. This is a relatively small lot area for industrial land uses. The Bass Coast Industrial Land Use Strategy (BILUS) found that Wonthaggi requires more industrial land to support long-term economic growth and rapidly growing population.

Planning Scheme amendment C172basc Wonthaggi North East Precinct Structure Plan (WNEPSP), which was gazetted 14 November 2025, will add “over 60 hectares of commercial and industrial land creating 2,940 jobs over the life of the plan”¹⁹. An opportunity exists for Wonthaggi to benefit from research informed decision making on the characteristics of the incoming industrial land.

Healthcare

In addition to being the largest employer in the Wonthaggi-Inverloch statistical area, the health care and social assistance industry is also the largest employer in the wider Gippsland Region²⁰. The health care and social assistance industry has shown the most growth in gross value added in the 30 years 1992-2023,²¹ see Figure 3. While fossil fuels continue to transition out, health care is forecast to continue growing in the region²².

The Wonthaggi Hospital will continue to be an anchor of the local health services. Opportunities exist for multiple allied health, specialists, medical imaging and herbal medicine.

¹⁷ Nomads Embassy. 2025. Is there an Australian Digital Nomad Visa? Accessed 5 December 2025.

<https://nomadsembassy.com/australia-digital-nomad-visa-options-2024/>

¹⁸ Start Working Pontremoli. 2025. Come work remotely in a place you can call home. Accessed 5 December 2025. <https://start-working.it/en/>

¹⁹ Victorian Planning Authority. 2025. Wonthaggi North East PSP. Accessed 5 December 2025. <https://vpa.vic.gov.au/project/wonthaggi-north-east/>

²⁰ Australian Bureau of Statistics. 2021. TableBuilder – Jobs and Income of Employed Persons. Accessed on 4 December 2025. <https://tablebuilder.abs.gov.au/webapi/jsf/dataCatalogueExplorer.xhtml>

²¹ RDV Dashboard, initial source NIEIR.

²² SGS Economics and Planning. 2025. Land Use Projections.

3. Demographic Forecasts

3.1 Introduction

The following section outlines characteristics of Wonthaggi's current and future population that are likely to have the greatest bearing on local retail, service and consumption demand.

3.2 Population

The state government intends to see Wonthaggi continue to be a strong rural service centre with the implementation of the Wonthaggi North East Precinct Structure Plan (WNEPSP), among other strategic planning at the state and local government level. The PSP states that: "Based on a residential development yield average of 11 dwellings per Net Developable Area (NDA), the Wonthaggi North East precinct will generate approximately 5,000 dwellings to accommodate approximately 12,000 new local residents" (Page 10, WNEPSP). The PSP states that Wonthaggi will grow from 8,000 to 20,000 people, though when the population will reach 20,000 is not specified²³.

The state government's "Victoria in Future" (VIF) and the SGS population forecasts for Bass Coast are very similar, differing by only 115 people by 2036, which is as far as the VIF forecasts extends. Figure 4 below shows these differences. Distribution of the additional population throughout Wonthaggi will be influenced significantly by the progress of the WNEPSP.

The age composition of the Wonthaggi population is expected to see some change from 2021 to 2061, according to the SGS SAM24 Population Model and outlined in Figure 4 and Figure 5 below:

- Youths (0-17 years) will decrease by 0.3% as a proportion of the population, from 18.9% in 2026 to 18.6% in 2061.
- Working age (18-64 years) will decrease by 1.4% as a proportion of the population, from 49.4% in 2026 to 48.0% in 2061.
- Seniors (65 years +) will increase by 1.7% as a proportion of the population, from 31.7% in 2026 to 33.4% in 2061.

Compared to other parts of Victoria, the magnitude of the aging population trend is relatively smaller in Wonthaggi. For comparison, the wider Gippsland Region of six LGAs is forecast to change as follows:

- Youths (0-17 years) will decrease by 2.9% as a proportion of the population, from 19.5% in 2026 to 16.6% in 2061.
- Working age (18-64 years) will decrease by 3.2% as a proportion of the population, from 52.5% in 2026 to 49.3% in 2061.

²³Victorian Planning Authority. 2025. Wonthaggi North East Structure Plan. Accessed 11 November 2025. <https://vpa-web.s3.ap-southeast-2.amazonaws.com/wp-content/uploads/2025/11/Wonthaggi-North-East-Precinct-Structure-Plan-VPA-March-2025-.pdf>

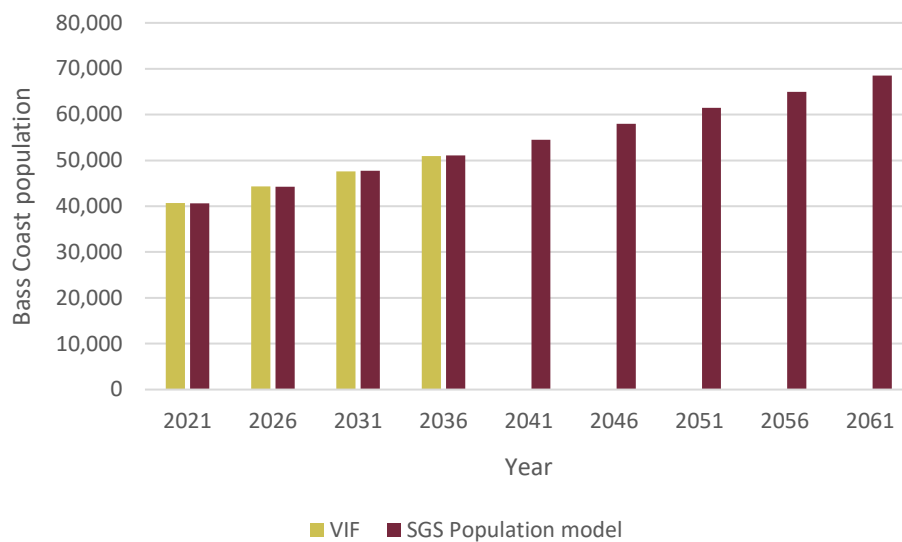
- Seniors (65 years +) will increase by 6.1% as a proportion of the population, from 28.0% in 2026 to 34.1% in 2061.

While Wonthaggi's population is aging alike most parts of Australia, expected growth in the number of young families moving into the area will keep up population within the youth and working age groups.

Table 2: Population estimates for Bass Coast

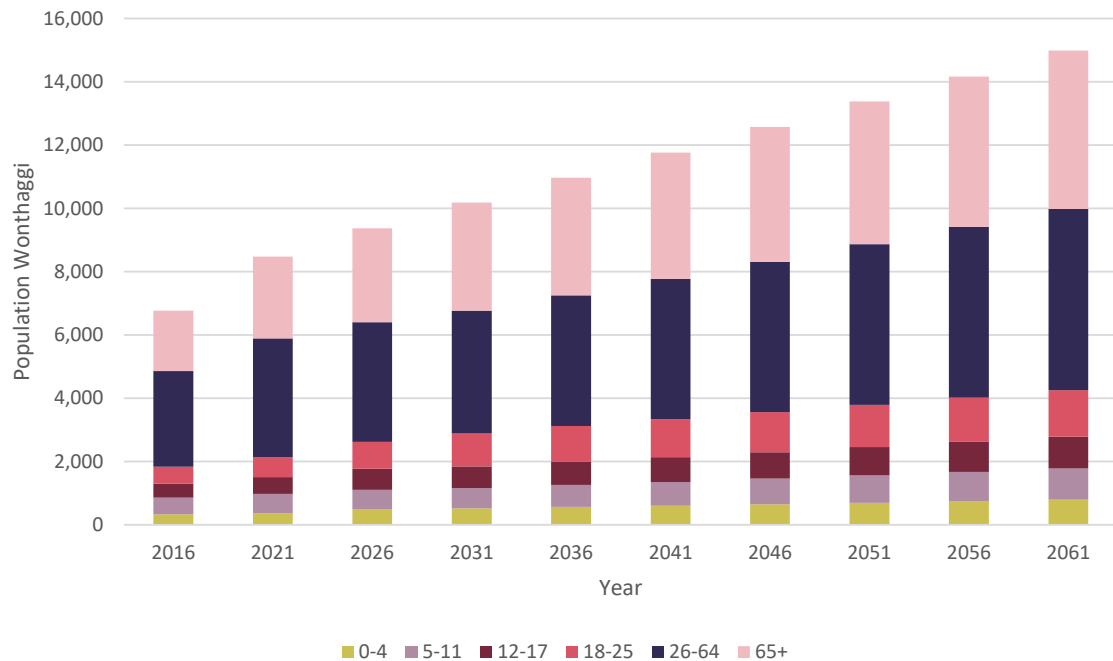
Model	2021	2026	2031	2036
VIF23	40,675	44,291	47,611	50,961
SAM24 model by SGS	40,634	44,220	47,758	51,076

Figure 4: Population forecasts by the Victoria in Future model and the SGS model



Source: SGS. 2026. SAM24 Population and Dwelling Forecast Model, for Wonthaggi, Wonthaggi North and South Dudley.

Figure 5: Past and forecast population by age group for Wonthaggi



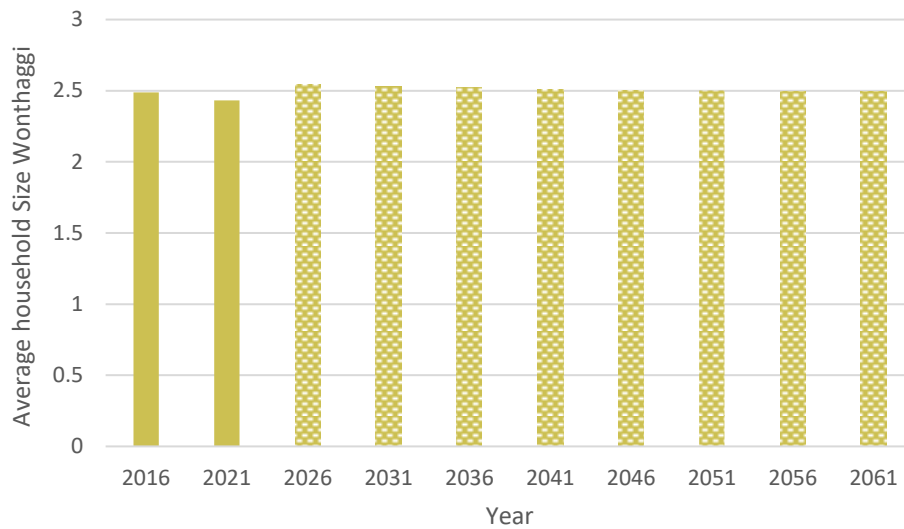
Age group	2016	2021	2026	2031	2036	2041	2046	2051	2056	2061
0 – 4	331	365	484	516	565	605	650	697	745	796
5 – 11	523	611	620	643	698	750	807	866	926	988
12 – 17	440	532	668	689	733	785	839	894	948	1,004
18 – 25	537	626	851	1,039	1,124	1,192	1,262	1,331	1,398	1,468
26 – 64	3,023	3,757	3,776	3,884	4,131	4,439	4,758	5,078	5,397	5,728
65+	1,914	2,588	2,971	3,414	3,716	3,990	4,259	4,513	4,754	5,002
Total	6,768	8,478	9,369	10,185	10,968	11,762	12,574	13,379	14,169	14,987

Source: SGS. 2025. SAM24 Population and Dwelling Forecast Model.

3.3 Households

Average household size is produced by dividing the population by the number of Occupied Private Dwellings. In 2026, average household size for Wonthaggi (being Wonthaggi, South Dudley and North Wonthaggi SA1 areas) is approximately 2.5 people per occupied dwelling. This is forecast to remain stable over the forecast period. Figure 6 below shows this trend.

Figure 6: Average household size in Wonthaggi – past and forecast



Source: SGS. 2025. SAM24 Population and Dwelling Forecast Model.

3.4 Dwellings

Dwelling forecasts between the SGS model and the Victoria in Future (VIF) model are similar for both structural private dwellings (SPDs) and OPDs (occupied private dwellings) for Bass Coast. This is shown in Figure 8 below where the VIF forecasts continues through to 2036, while the SGS model extends to 2061. Each forecast illustrates Bass Coast remaining an LGA with a relatively higher number of unoccupied dwellings (65% according to both forecasts), which is equivalent to OPDs divided by SPDs. This reflects that many dwellings, particularly in the coastal locations of Phillip Island and Inverloch, are secondary holiday dwellings. The SGS model is able to scale down to the Wonthaggi township for SPD and OPD dwelling demand forecasts. For Wonthaggi, the model illustrates that occupancy is expected to be higher than the Bass Coast average, at a consistent 75% from 2026-2061, indicating that people will be residing in Wonthaggi as a preferred choice for access for everyday trips, such as work, education and services.

SPDs are forecast to grow at an annual average growth rate of between 1.4% - 1.5% between 2026-2036, and slow down slightly to grow at an annual average rate of 1.2% between 2036-2061 in Bass Coast. However, growth within Wonthaggi will be at a higher annual average growth rate of 1.7% between 2026-2036 and then 1.3% from 2036-2061.

Figure 7: Forecast number of OPDs and SPDs in Wonthaggi to 2061 by SGS Model

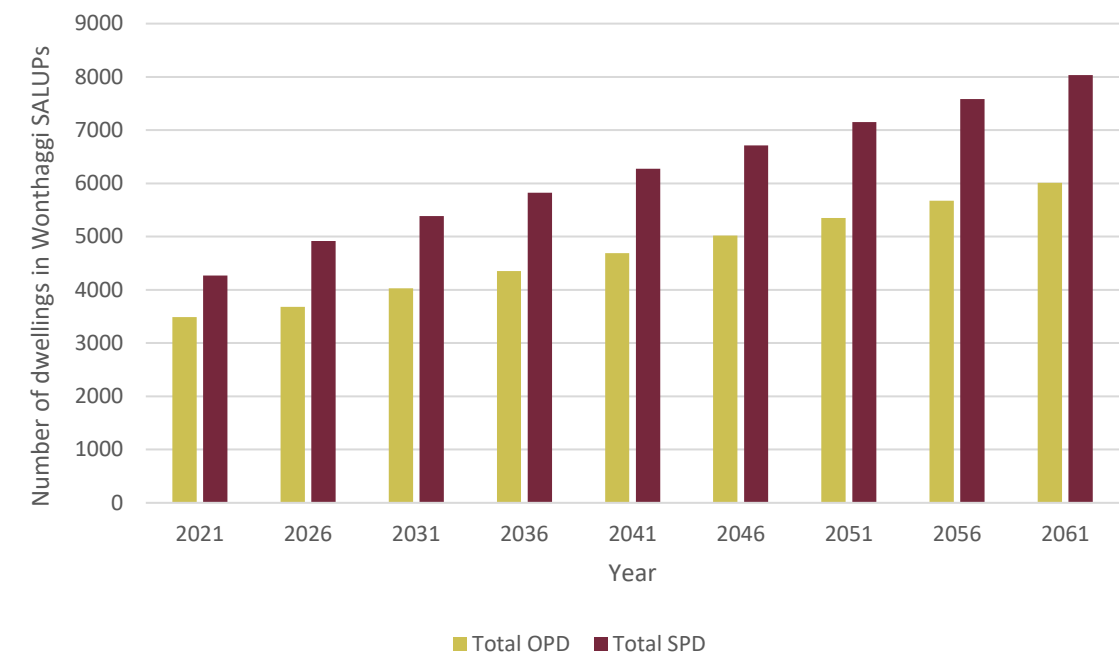


Figure 8: Forecast number of SPDs in Bass Coast by SGS Model and VIF

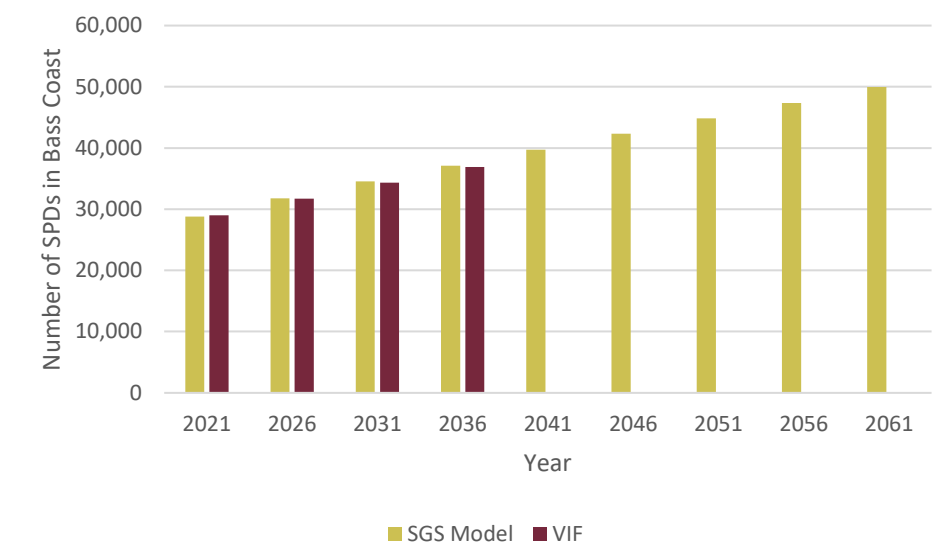
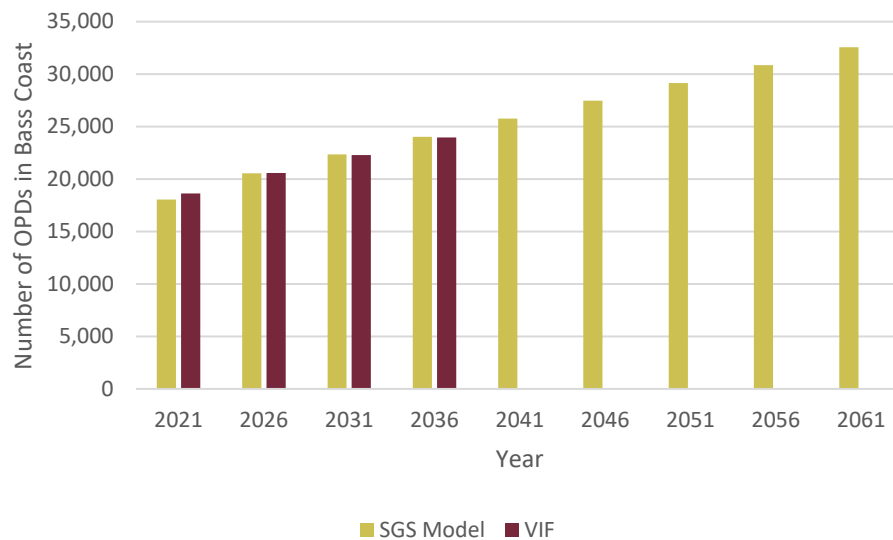


Figure 9: Forecast number of OPDs in Bass Coast by SGS model and VIF

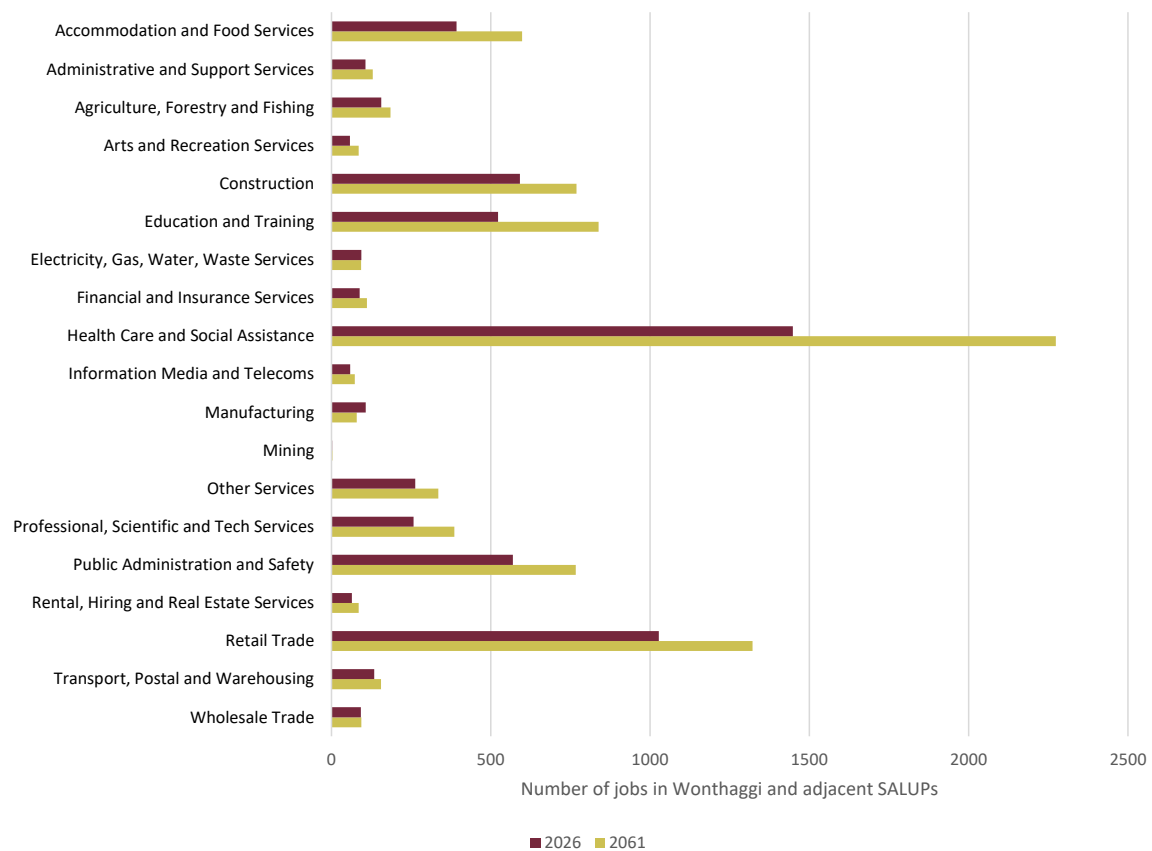


3.5 Jobs

Growth is forecast for a total of 17 out of the 19 broad industry classifications within Wonthaggi between 2026-2051²⁴. The most significant job growth will be in healthcare, which will add an additional 387 jobs. Combining the results of the SGS population and employment models for Bass Coast, we see that in 2026 there are 1.5 people of working age for every job in the LGA, and in 2051, that is forecast to be the same at 1.5 again. This indicates that there will be a similar portion of the population who will be either working remotely or commuting beyond the LGA to reach employment.

²⁴ SGS. 2025. SAM24 Employment Model.

Figure 10: The number of jobs in Wonthaggi and adjacent SALUPs by ANZSIC classification 2026-2061



3.6 Incomes

Income is harder to forecast, so while it is not included here, we instead summarise and compare historic income data. The national median household income for 2021 was \$1,770/week²⁵. In the study area of Wonthaggi, North Wonthaggi and South Dudley, 78.8% of households had an income below \$1,750 (including negative income). This lower average could be due to an older median age and greater number of retired households. This compares to the wider Gippsland Region, where 62.2% of households have an income below \$1,750.

The national median weekly personal income was \$789 in 2021²⁶, which is the latest available data. In Wonthaggi (including South Dudley and North Wonthaggi), 30.9% of households had an income approximately half of this (negative income up to \$399) and 10.7% of households had an income approximately double this (over \$1,500), see Figure 12.

²⁵ Australian Bureau of Statistics. 2021. New Census insights on income in Australia using administrative data. [https://www.abs.gov.au/articles/new-census-insights-income-australia-using-administrative-data#:~:text=Median%20income,\\$826%20for%20Rest%20of%20WA](https://www.abs.gov.au/articles/new-census-insights-income-australia-using-administrative-data#:~:text=Median%20income,$826%20for%20Rest%20of%20WA).

²⁶ Australian Bureau of Statistics. 2021. New Census insights on income in Australia using administrative data. [https://www.abs.gov.au/articles/new-census-insights-income-australia-using-administrative-data#:~:text=Median%20income,\\$826%20for%20Rest%20of%20WA](https://www.abs.gov.au/articles/new-census-insights-income-australia-using-administrative-data#:~:text=Median%20income,$826%20for%20Rest%20of%20WA).

Lastly, while wealth is yet harder to compile up-to-date data on, combined land and house price values offer an indication of asset wealth for the 77.5% of households who own their home outright or with a mortgage in North Wonthaggi, 66.7% in Wonthaggi, and 73.5% in South Dudley²⁷. Over the decade 2014-2024 house prices increased just a bit behind the regional Victorian average (by 219% compared 224% for Regional Victoria) in Bass Coast, see Figure 13.

Figure 11: Household income in 2021 in the Wonthaggi-Inverloch SA2 and all remaining (populated) SA2s

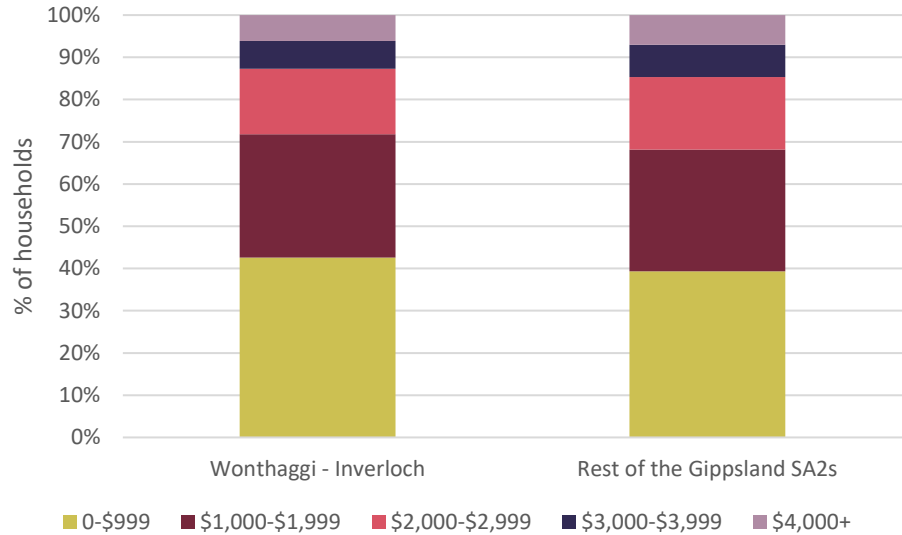
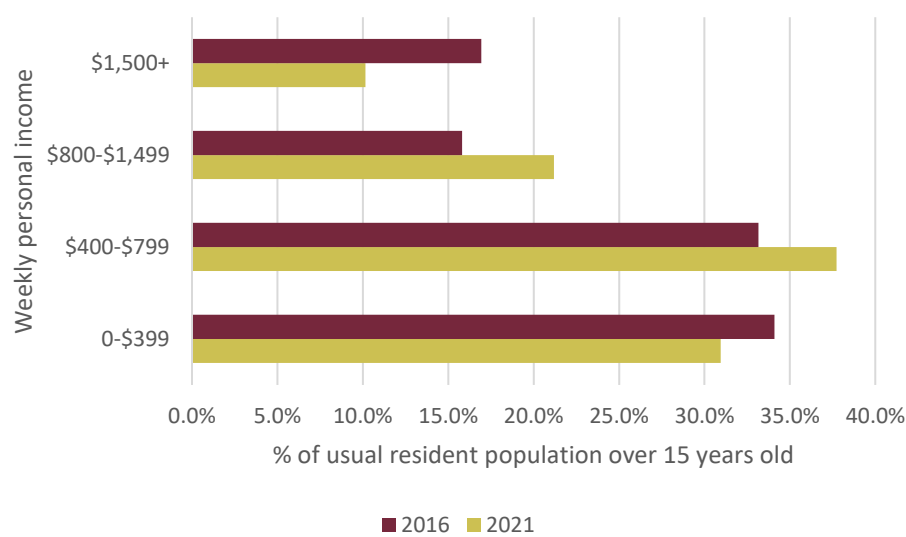
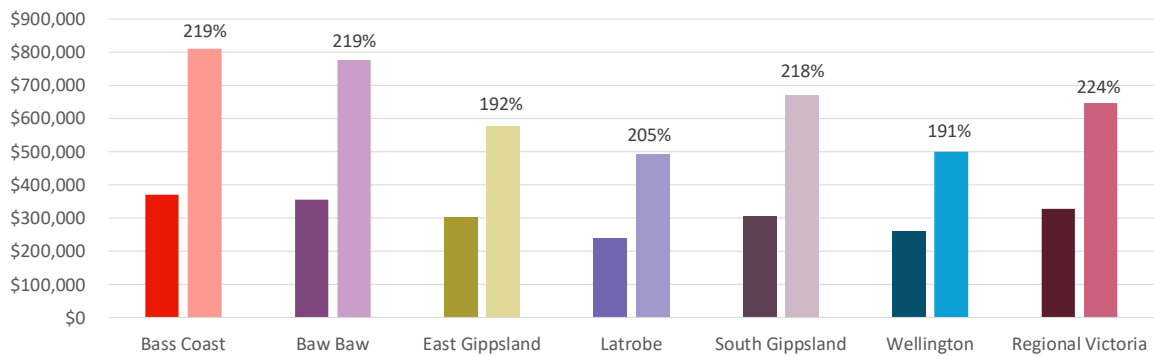


Figure 12: Weekly personal income for Wonthaggi, North Wonthaggi and South Dudley



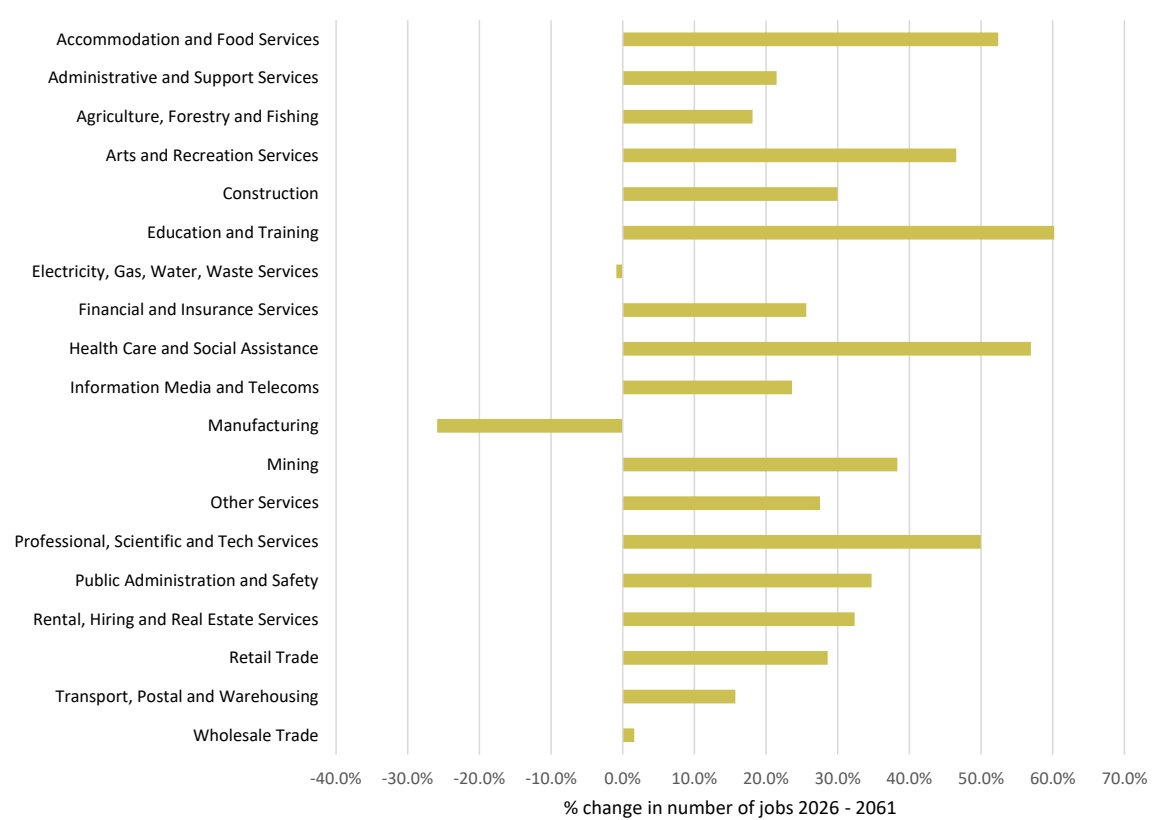
²⁷ Australian Bureau of Statistics. 2021. Quick Stats – Wonthaggi/North Wonthaggi/South Dudley.

Figure 13: Average house prices 2014 (left) and 2024 (right) compared



Source: Valuer General Land Valuations, 2024

Figure 14: Change in number of jobs 2026-2061 in Wonthaggi township SALUP areas



Source: SGS Employment Model

3.7 Headline opportunities

While population growth will be significant in Wonthaggi, key characteristics of the population, including age profile, employment status, and dwelling occupancy are not forecast to change much. According to measures such as house and land value, historic measures of personal and household income, and the types of jobs forecast to see the most growth, Wonthaggi is likely to comprise of a population with slightly below average income and wealth compared to the rest of regional Victoria.

Headline opportunities for commercial growth in Wonthaggi in the decades ahead include:

- The increase in the healthcare workforce will also likely create a noticeable demand for certain products and services in Wonthaggi. Those in the healthcare workforce are more likely to work shifts at night, with irregular start and end times and on weekends. This may be relevant to **demand for services which allow flexibility**, such as 24/7 gyms and extended hours childcare.
- **Demand for bulky goods** to supply new homes of young families moving into the area.
- **Sports and recreation services** to supply active families who are attracted to Wonthaggi for its healthy environment and smaller town feel. Spending in this sector would be on sports activities (e.g. gymnastics centres), associated retail (sports supplies stores), injury care (physio clinics) and State Government grants for sports infrastructure investment.
- While seniors are forecast to occupy a relatively consistent portion of the population, the number of seniors will grow by 2,031 people from the 2026 population, which is a 68% increase. The increase in seniors can be expected to create **additional demand for health care services** and create **demand during business hours**. This might be relevant to the profitability of businesses, such as osteopath clinics or cafes.
- An increase in people working from home could create **demand for co-working spaces**, while also adding to demand for services during business hours (as workers can be more flexible with their time). In 2021, 8.7% of employed people aged 15 and over worked from home, which is lower than the Victorian average of 25.7%²⁸.

²⁸ ABS. 2021. Wonthaggi 2021 Census All Persons Quick Stats. Accessed on 23 January 2026.
<https://abs.gov.au/census/find-census-data/quickstats/2021/UCL214022>

4. Supply and demand

This section of the report delves into the extent to which existing supply of commercial land is and will be sufficient for accommodating demand and growth in the township's commercial activities in the long run out to 2061. It is structured as follows:

- Section 5.1 Supply of commercially zoned land - describes the existing pattern of commercial zoning, along with documentation of commercial jobs and floorspace in Wonthaggi.
- Section 5.2 Demand - provides demand forecast for a number of land uses including: retail in centre (C1Z), population-serving commercial (C1Z), bulky goods retail (C2Z), and business service commercial. As demand for most of these land uses is driven by population growth, there is a detailed discussion about population growth in Wonthaggi at the start of Section 5.2.
- Section 5.3 Gap analysis - considers whether the existing supply of commercial land will be sufficient for accommodating growth in demand for commercial activity in the long term.

4.1 Supply of commercially zoned land

Existing supply

There are currently four main areas of commercial and industrial land supply in Wonthaggi:

- A bulky goods cluster at the northwest entrance to the town,
- The town centre of Wonthaggi itself,
- A second bulky goods cluster/trade retail to the south-east of the town,
- An industrial area between White Road and McKenzie Road; and
- An industrial area in the mid-east.

There are also two future centres identified in the Wonthaggi North East PSP:

- A village hub, and
- A smaller local convenience centre.

All of these current and future areas are shown on Figure 15 below. Note this report focuses on the commercial and retail precincts only, with the industrial area covered by Council's 2024 Industrial Land Use Strategy. The Mixed Use Zone is also shown, but generally land in this type of zoning tends to focus on housing development in the long run.

There is approximately 20 hectares of Commercial 1 Zone (C1Z) land and 17 hectares of Commercial 2 Zone (C2Z) land in Wonthaggi (see Table 3).

Figure 15: Commercial and industrial employment areas and features of employment interest

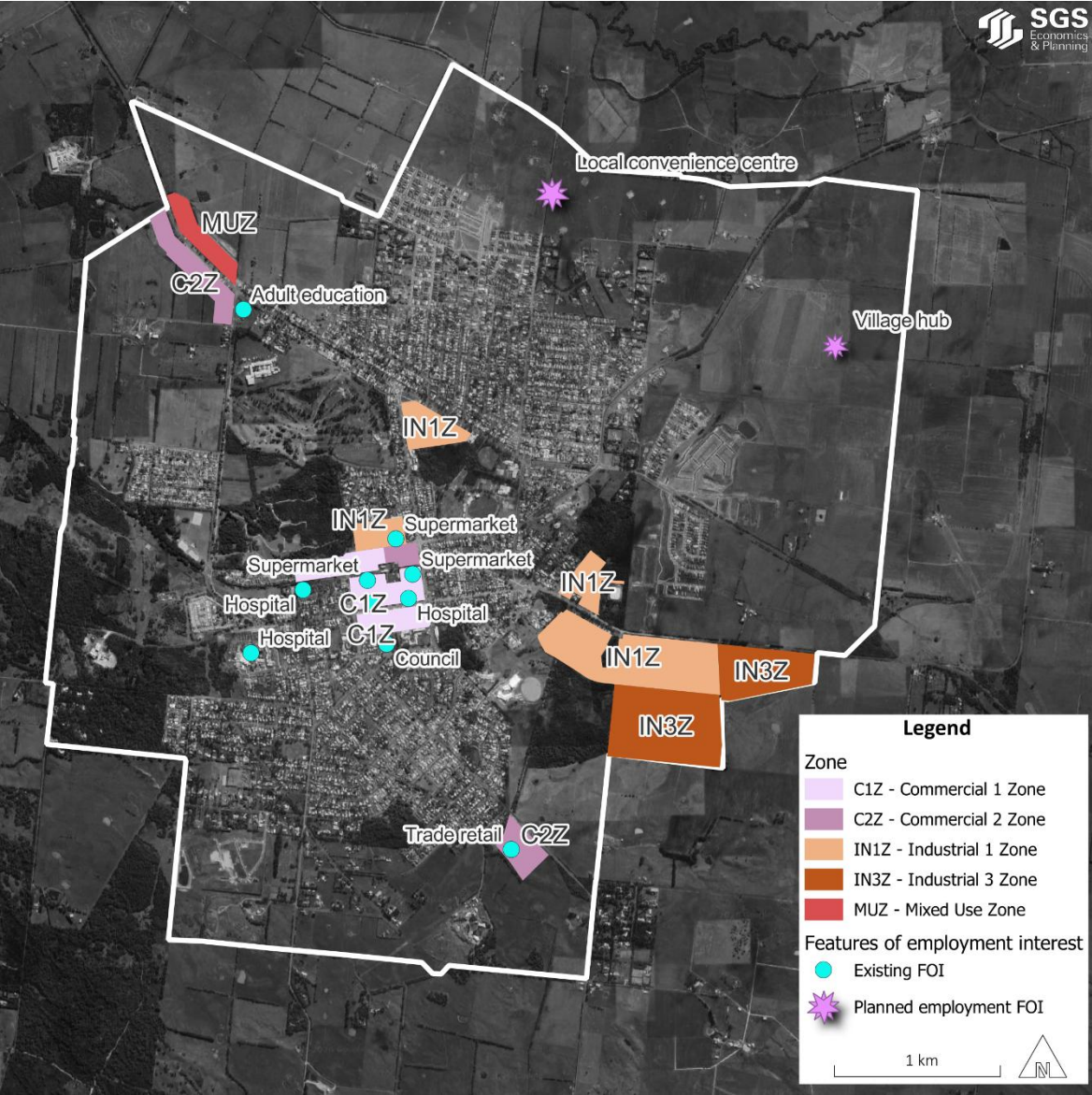


Table 3: Commercial employment zones

Zone	Area (ha)
Commercial 1 Zone	20.3
Village hub and convenience retail within PSP	0.6 ²⁹
Total Activity Centre Zoning	20.9
Commercial 2 Zone	17.4

Table 4 and Table 5 show the existing composition of employment and floorspace in the township. Table 4 focuses on retail and food industries, whilst Table 5 focuses on commercial industries.

Employment numbers have been estimated using SGS's SAM model, whilst floorspace numbers have been calculated by multiplying jobs by a general floorspace to job ratio of 25sqm per job for retail and office buildings. Only a small proportion of health and education jobs (15%) have been retained in the analysis as the majority of those workers are employed at hospitals and schools on land that is not commercially zoned.

For retail industries, the majority of jobs are in retail trade, whilst public administration dominates commercial industries. Overall, there is an estimated currently 18,200sqm of Activity Centre (C1Z) retail, 5,825sqm of bulky goods retail (C2Z), and 44,000sqm of commercial floorspace in either the C1Z or C2Z in the township (Table 4 and Table 5).

Table 4: Jobs and floorspace for Population Serving Industry in Wonthaggi and surrounding areas

Zone	ANZSIC	2026 jobs	2026 floorspace (sqm)
C1Z	Accommodation and food services	393	9,825
C1Z	Retail trade	336	8,400
Total retail & food in C1Z		729	18,200
C2Z	Retail trade	233	5,825
Total retail trade in C2Z		233	5,825
Total		962	24,100

Source: SGS SAM forecasts for Regional Victoria 2025

²⁹ Village hub and convenience retail in PSP will have 2,000sqm of floorspace. This has been multiplied by a factor of 2.8 to derive zoned land area.

Table 5: Jobs & floorspace for Business Serving Industries for Wonthaggi and adjacent SALUPs

ANZSIC Industry	# of jobs 2026	Floorspace 2026
Administrative and Support Services	107	2,675
Arts and Recreation Services	58	1,450
Education and Training ³⁰	78	1,950
Financial and Insurance Services	89	2,225
Health Care and Social Assistance ³¹	217	5,425
Information Media and Telecommunications	59	1,475
Other Services	263	6,575
Professional, Scientific and Technical Services	257	64,25
Public Administration and Safety	569	14,225
Rental, Hiring and Real Estate Services	64	1,600
Total	1,716	44,025

Source: SGS SAM forecasts for Regional Victoria 2025

³⁰ 85% of Education and training jobs have been excluded to acknowledge that most of these jobs are not located in the C2Z.

³¹ 85% of Health Care and Social Assistance jobs have been excluded to acknowledge that most of these jobs are not located in the C2Z.

4.2 Demand for commercially zoned land

Population

Demand for commercially zoned land is predominantly driven by population growth. The following subsection outlines population forecasts for Wonthaggi using the SGS Small Area Model (SAM) at the SA1 scale, combined with details from the Victorian Planning Authority's Wonthaggi North East Precinct Structure Plan (PSP).

To incorporate the Wonthaggi North East PSP, a new polygon outlining the PSP has been added to the population map. As this new polygon was made up of sections from two different SA1s, a population estimate does not exist for it in the SGS SAM. The current (2026) population of the new polygon was estimated by splitting the 76 ha of existing residentially developed land as follows;

- The 45 ha developed to standard density were assumed to have a dwelling density of 11 dwellings/hectare (as outlined as the target density for the PSP).
- The 31 ha developed to low density (Regency Drive, previously Low Density Residential Zone) were examined on high resolution satellite imagery (NearMap) to count the number of dwellings.
- Population was estimated from the number of dwellings, as outlined in Table 2. This produced a population estimate of 904 people in 2026.

From the PSP we have derived an estimated population of 11,500. Therefore, the growth between 2026-2061 will be 11,500 minus the current population of 904 people. The overall population outcome for Wonthaggi combined is shown in Table 6, with the maps on following pages showing the distribution of population growth.

Figure 16: Planning zone map from 2009 showing LDRZ surrounding Regency Drive³²



³²Nation Partners. 2024. Preliminary Risk Screen Assessment Report Parklands Stage 5, Wonthaggi, VIC. Accessed on 21 January 2026. https://www.parklandswonthaggi.com.au/wp-content/uploads/2024/06/240607-Parklands-Estate-Stage-5-PRSA-Nation-Partners-V2.0-2_compressed.pdf

Table 6: Calculating existing population in the new polygon for the PSP area

Geography	Area (ha)	Average density / number of dwellings	Occupancy ³³	Average household size ³⁴	2026 population
Existing normal density residential in PSP	45	11 dwellings/ha	75%	2.3	854
Existing low density residential in PSP	31	29 dwellings in total	75%	2.3	50
Total existing residential in PSP	76				904

Table 7: Population change Wonthaggi 2026-2061

	Population 2026	Population 2061	Population change	AAGR
Wonthaggi excluding PSP area	9,368	14,731	5,363	1.30%
Wonthaggi North East PSP area	904	11,500	10,596	7.54%
Rural SA1s adjacent to Wonthaggi	1,576	2,519	943	1.35%
Total	11,848	28,750	16,902	2.57%

³³ A 75% occupancy rate is observed in the SAM model (and also VIF Model).

³⁴ Bass Coast Shire informed SGS of an average household size of 2.3 people.

Figure 17: Population 2026

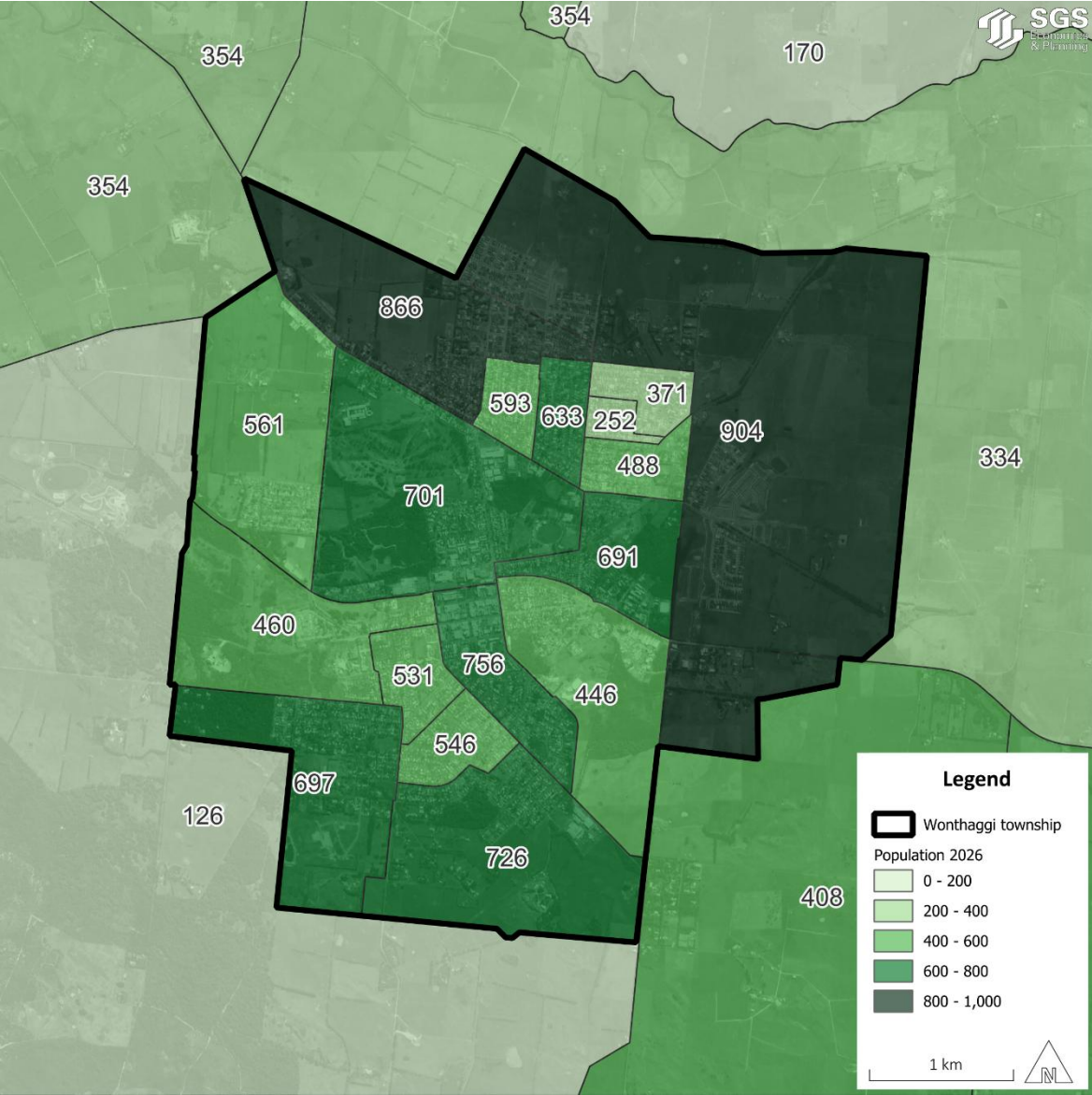


Figure 18: Population change in Wonthaggi 2026-2061

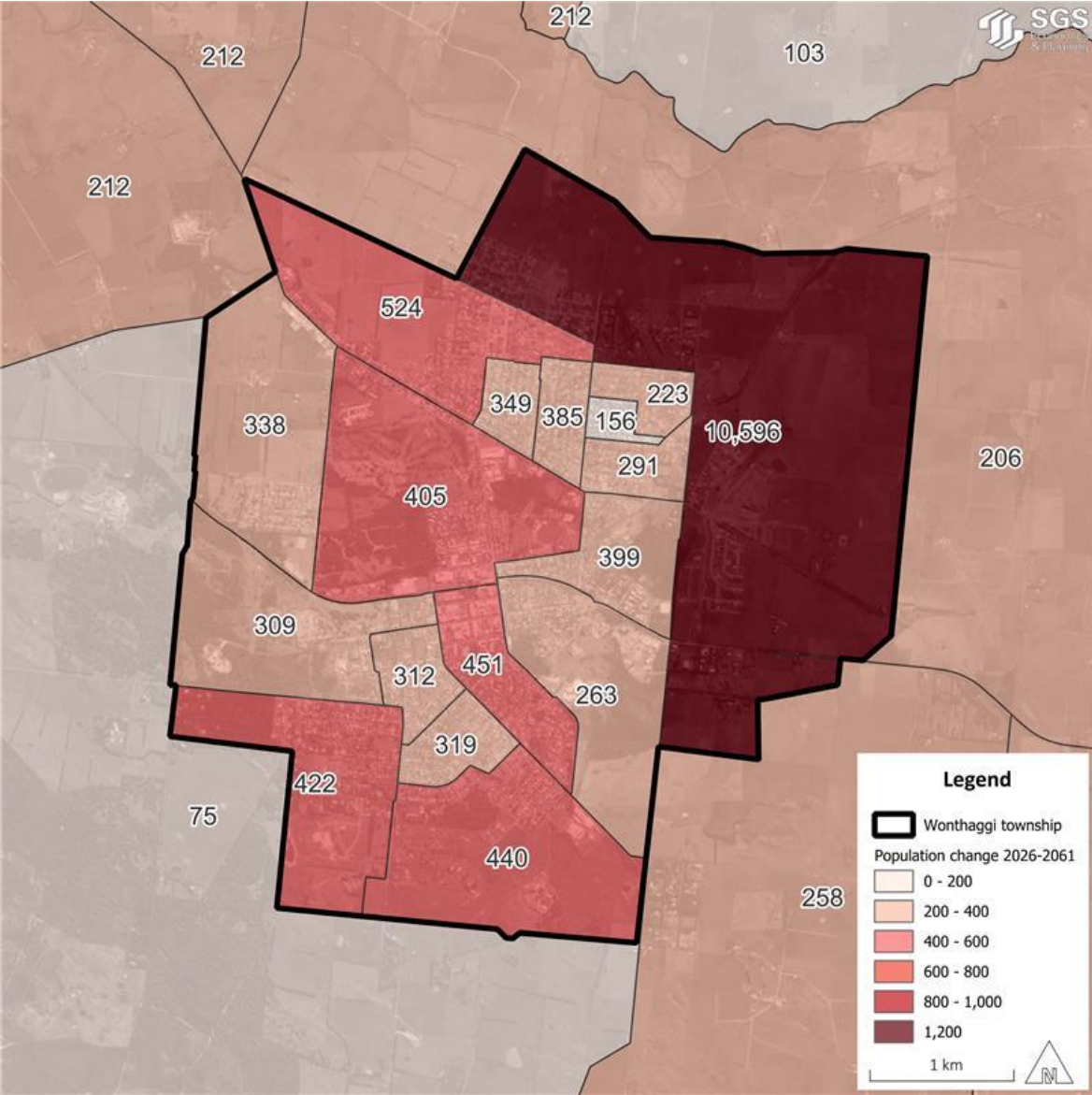
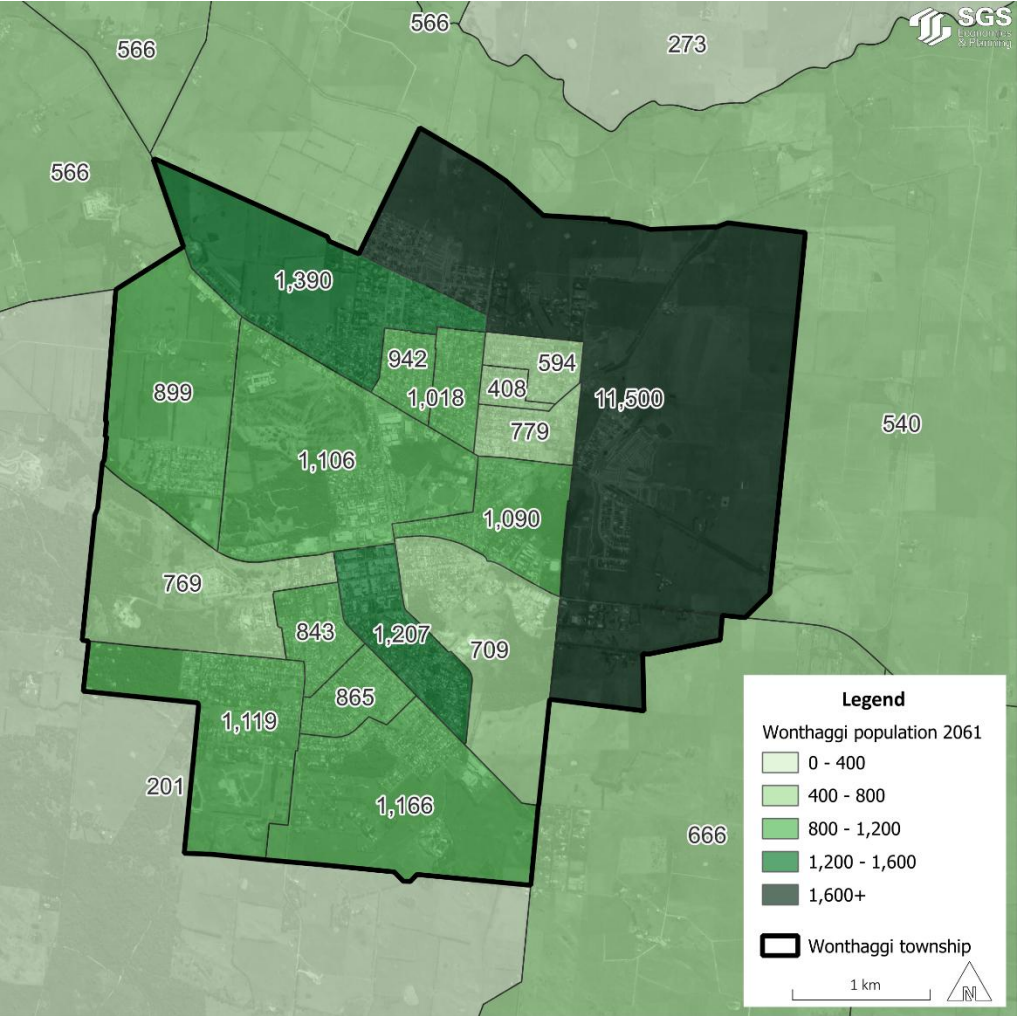


Figure 19: Forecast population 2061 with PSP



Demand for Retail in Centre (C1Z uses)

The SGS retail thresholds model has been used to determine retail floorspace demand for Wonthaggi's 2026 and 2061 population based on standard population to retail benchmarks.

The current population in Wonthaggi and surrounding catchment area is 11,800 persons. This generates demand for approximately 9,100 sqm of retail floorspace. However, we know that currently there is approximately 18,200sqm of retail floorspace in town. With significant visitor spending in Bass Coast (\$503m in 2018 in Bass Coast Shire³⁵), we have conservatively estimated that approximately 10%, or \$50m, per annum of this visitor spending is captured in Wonthaggi. This brings total estimated retail floorspace demand of 19,200sqm. Our analysis certainly found that this centre is already a size that is well beyond what the local population would support. We have accounted for out-of-town spending at a high level to amount to 10,000sqm of demand. This includes both out of town shopping as well as tourists. The occupancy rate of 95.1% as at December 2024 (Bass Coast Council data) illustrates that retail spaces are being utilised.

With a population forecast of 28,750 residents by 2061, 22,000sqm of population serving retail floorspace will be needed in the Wonthaggi township. In addition, we hold constant (a conservative assumption) the capture rate from visitor expenditure at \$50m (in 2026 dollars) – which translates to 10,100sqm. The total retail floorspace demand in Wonthaggi township by 2061 is 32,100sqm.

Table 8: Activity Centre retail floorspace demand

Year	Population	Role	Retail floor space (sqm)	Floorspace serving expenditure by visitors & out of town shoppers	Total retail floorspace
2026	11,800	Sub-regional Centre	9,100	10,100 (\$50m)	19,200
2061	28,750	Sub-regional Centre	22,000	10,100 (\$50m)	32,100

The table below then summarises the land area that this centre would occupy (based on a 36% occupancy rate as land would be needed for features such as parking, vegetation, walkways etc).

³⁵ [https://investgippsland.com.au/locations/bass-coast-shire/#:~:text=Bass%20Coast%20hosts%20over%202.4,the%20year%20ending%20March%202018\).](https://investgippsland.com.au/locations/bass-coast-shire/#:~:text=Bass%20Coast%20hosts%20over%202.4,the%20year%20ending%20March%202018).)

Table 9: Floorspace demand (Activity Centre C1Z)

Floorspace type	Floorspace demand (sqm)	Land area demand (Ha)
2026	19,200	5.4
2061	32,100	9.0

Demand for Bulky Goods Retail (C2Z use)

In a regional context, bulky goods retail can be developed as part of a Commercial 2 Zoned precinct on the edge of centre or town and so demand for this land use is considered here.

Demand for bulky goods for the Wonthaggi township is based on the population projections earlier in the section.

- Population of 28,750 by 2061
- Per capita expenditure of \$2,500 per resident per annum
- Total demand of \$71.9million per annum by 2061 on bulky goods retail (by multiplying population and per capita expenditure)
- Average Retail Turnover Density (RTD) of \$3,600 per sqm
- Demand for 19,960sqm of bulky goods retail floorspace by 2061 (total expenditure divided by RTD) (rounded to 20,000sqm)
- Average site coverage of 60% for bulky goods stores
- Demand for **3.3ha of bulky goods retail land by 2061** (floorspace divided by site coverage).

Demand for Commercial Uses

Finally, the table below summarises the long-term commercial employment forecasts for Wonthaggi, which have then been converted to floorspace demand by 2061.

These jobs can be accommodated in either the C1Z or C2Z. From a regional economic development perspective (where land is more freely available than in some metropolitan locations), it is generally best to provide land for both commercial zoning types, or even C3Z, so that businesses have the option to locate either:

- directly in town - particularly for population serving businesses that benefit from co-location with retail activities and even passing foot traffic (at the cost of higher rents and smaller floorplates); or
- on the edge of town, for businesses that prefer to save on rental costs, do not need passing foot traffic and/or would like some flexibility in their floorplate with some warehousing which would generally not be a good use of activity centre land.

Given the above, Table 10 splits the employment yield 80-20 between directly in town (C1Z) and edge of town (C2Z), as currently the majority of commercial office activity in the township is located in town rather than on the edge of town (which is normal in regional towns which generally don't have a dedicated major office/business park). The floorspace to job ratio of 25 in centre reflects the same

development and floorspace pattern of the predominant land use in centre – retail, whilst the higher floorspace to job ratio of 40 for edge of town reflects the lower density nature of development at the edge of town where space is generally easier to come by amid lower land values and greater flexibility in built form.

This pattern is repeated for land area calculations, where the activity centre occupancy rate is 36% for centres, with a lower 20% expected in the edge of town/C2Z land.

Table 10: Employment & Floorspace demand for 2061 for Business Serving Industries in Wonthaggi and adjacent SALUPs

ANZSIC Industry	In town (C1Z)			Edge of town (C2Z)		
	Jobs	Ratio (sqm)	F'space (sqm)	Jobs	Ratio (sqm)	F'space (sqm)
Administrative and Support Services	104	25	2,602	26	40	1,041
Arts and Recreation Services	68	25	1,711	17	40	684
Education and Training (15%) ³⁶	101	25	2,515	25	40	1,006
Financial and Insurance Services	89	25	2,226	22	40	891
Health Care and Social Assistance (15%) ³⁷	273	25	6,821	68	40	2,728
Information Media & Telecommunications	58	25	1,462	15	40	585
Other Services	268	25	6,707	67	40	2,683
Professional, Scientific & Technical	309	25	7,724	77	40	3,089
Public Administration and Safety	614	25	15,339	153	40	6,135
Rental, Hiring and Real Estate Services	68	25	1,707	17	40	683
Total jobs (#) & floorspace (sqm)	1,953		48,813	488		19,525
Total land area (ha)	13.6ha			9.8ha		

Note this excludes retail/food (which was part of the population serving demand) and industrial jobs (which are part of the industrial land study)

Source: SGS SAM24 Employment Model.

³⁶ Total jobs reduced by 85% to reflect that most education and training jobs are not in commercial zones, as schools are often located in Special Use Zones

³⁷ Total jobs reduced by 85% to reflect that most health care and social assistance jobs are not in commercial zones, as Hospitals are often located in Special Use Zones.

Demand Summary

In summary, commercial land use demand by 2061 for Wonthaggi will be:

- 22.6ha of Commercial 1 Zoned land (9.0ha of in town retail + 13.6ha of in town commercial)
- 13.1ha of Commercial 2 Zoned land (3.3ha of bulky goods retail + 9.8ha of commercial)

The Commercial 1 Zoned area should be kept in line with demand. Extra land over and above demand generates gaps in the market (and streetscape) through vacant lots/floorplates and should be avoided. Undersupply would inflate rents and cause some lower-rent businesses (start-ups, creatives, community services) to miss out on opportunities. Keeping C1Z land supply in line with demand would keep the Wonthaggi township vibrant whilst still maximising opportunities for local businesses.

Council should take a different approach to planning for the Commercial 2 Zoned areas. The issue of vacancy/urban blight is not as pressing, whilst extra C2Z land can assist with market churn for a broad range of businesses (including some light industrial). So creating a 25% extra allowance of C2Z land in the local market would be beneficial. With that in mind, the long-term planning goal should be to:

- Keep C1Z land at 22.6ha
- Allow for 16.4ha of C2Z land (25% increase on 13.1ha demand).

4.3 Total Demand vs Supply (Gap Analysis)

Table 11 compares all the demand and supply numbers in this section for commercial land uses in Wonthaggi for 2026 through to 2061. It shows that there is likely to be sufficient Commercial 1 and 2 zoned land through to 2051 as indicated by the positive values in the demand and supply comparison in the last section of the table. There is likely to be a slight shortage of Commercial 1 Zoned land by 2061.

Given the above, there is no immediate need for Council to rezone land for commercial land uses in the short to medium term.

In the long term Council may look to slightly expand the C1Z core of Wonthaggi (up to 5ha). This could be achieved through rezoning the entire C2Z area at the centre of town (rather than creating a new area of C1Z detached from the town centre which would then compete for foot traffic). In turn, there may be a need to provide additional C2Z land elsewhere around town (up to 5ha) to make up for the redeployment of that C2Z land in the centre of town.

However, the time horizon it would be prudent to revisit the question of whether there is a need for additional employment land in the future using more contemporary information on local land regional employment trends and drivers that will affect demand and supply.

A discussion of the suitability of three alternative sites for employment land uses (and corresponding economic opportunities which were identified in Section 3) are discussed in Section 5 of this report.

Table 11: Supply and demand for commercial land compared (2026 though to 2061)

	Commercial 1 Zone (ha)	Commercial 2 Zone (ha)	C1Z + C2Z
Supply			
Existing Supply	20.3	17.4	37.7
Planned Supply	0.6	0	0.6
Total Supply	20.9	17.4	38.3
Demand			
Current demand	13.8	9.0	22.8
2031 demand	15.1	10.1	25.1
2041 demand	17.2	11.9	29.1
2051 demand	18.8	13.2	31.9
2061 demand	22.6	16.4	39.0
Total supply minus demand (positive values indicate a surplus; negative values indicate a deficit)			
Current gap	6.5	8.4	14.9
Surplus/shortfall 2031	5.8	7.3	13.2
Surplus/shortfall 2041	3.7	5.5	9.2
Surplus/shortfall 2051	2.1	4.2	6.4
Surplus/shortfall 2061	-1.7	+1.0	-0.7

5. Site specific assessment

5.1 Overview

Three sites located have been identified by Council to investigate for zoning changes to better support local economic growth. These sites are;

1. Industrial (IN1Z) land on three blocks surrounding Cyclone Street and Mortimer Street in central Wonthaggi (Site 1).
2. Mixed Use Zoned land at the northwest entrance to Wonthaggi (Site 2).
3. Farming zoned land to the northwest of Wonthaggi (Site 3).

These sites are assessed for suitability and economic growth opportunities before Section 5.4 compares the sites according to their ability to attract new economic activity.

5.1 Site 1 - Cyclone and Mortimer Street

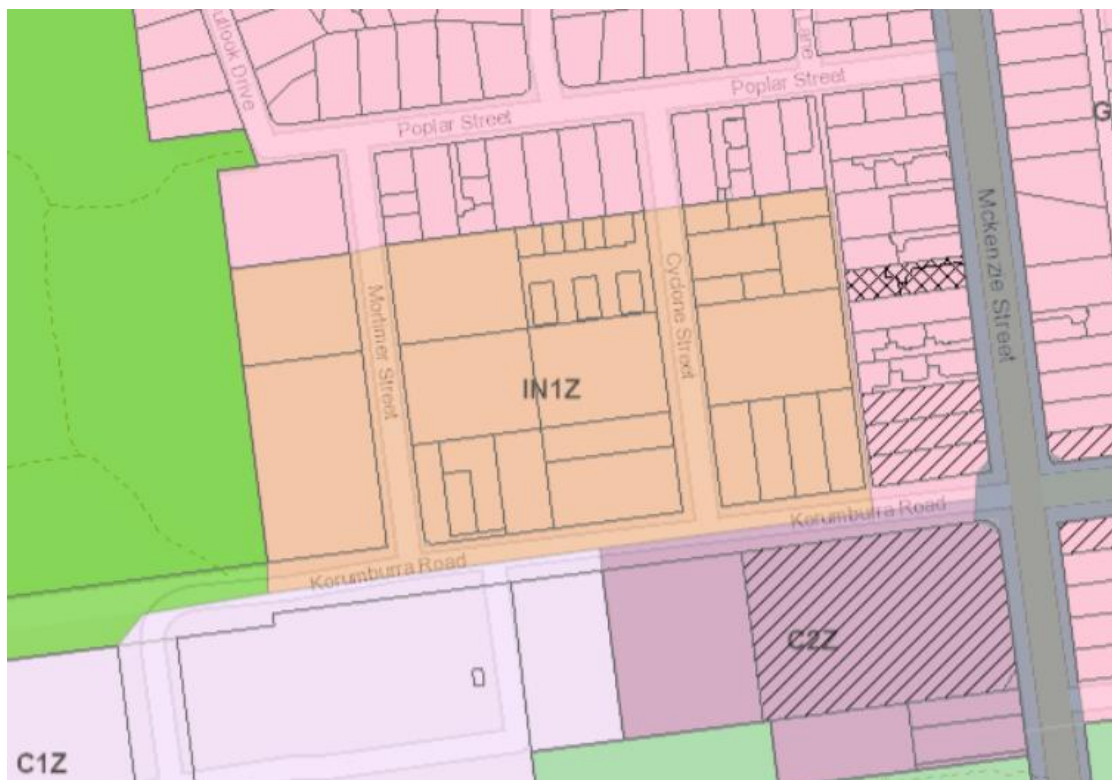
The first site is comprised of approximately 4.7ha of Industrial 1 Zoned land adjacent to General Residential Zoned land to the north and east and Park and Recreation Zoned land to the west. To the south is Korumburra Road, with commercial land (C1Z and C2Z) on the other side. The red outline on the below aerial image shows the industrial area, while the fine yellow outlines show property boundaries. Existing businesses within this IN1Z are largely supply stores for specialty goods, including agricultural, plumbing, fireplace and screening supplies. Other current uses include a church and supermarket. Buffer distances of over 100m from residential zones (distances listed in Cl 53.10) for uses such as manufacturing, depots, dry cleaning and recycling make most of the properties in Site 3 unable to be used for core IN1Z uses.

Figure 20: Aerial view of Site 1 (image from September 2025)



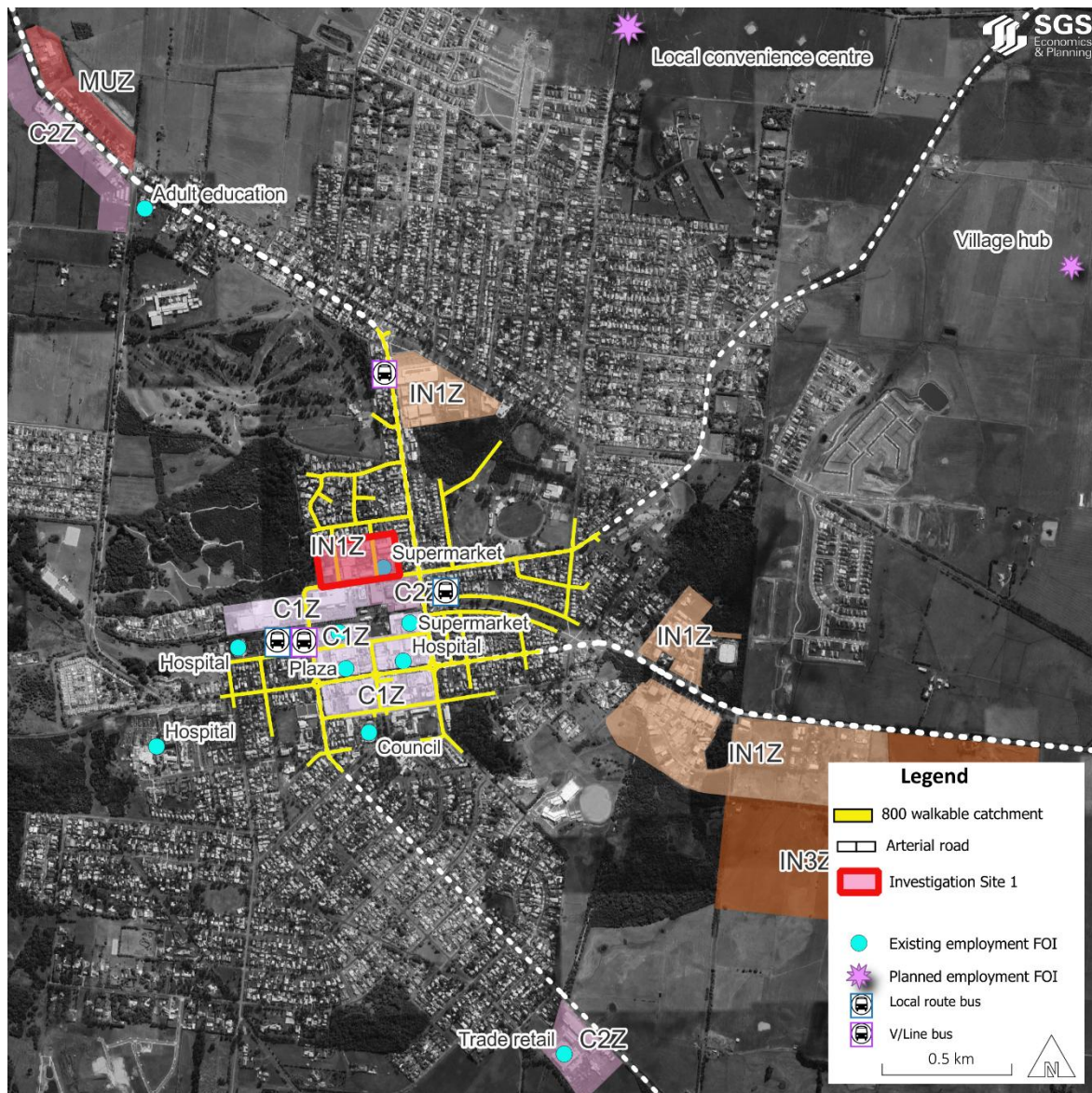
Source: NearMap. 2025. Map browser. Accessed 22 January 2026. <https://apps.nearmap.com/maps/>

Figure 21: Current zoning of Site 1



Source: VicPlan. 2026. <https://mapshare.vic.gov.au/vicplan/>

Figure 22: Site 1 context



Road access and exposure to passing traffic and trade

Site 1 is highly accessible from main roads. The site is located half a block from the Bass Highway/Mckenzie Street, which is an arterial road managed by the Department of Transport and Planning. The site sits to the north of Koumburra Road, which is a dual carriageway local road. Mortimer Street and Cyclone Street are local roads, with a kerb-kerb width of 9.3-9.5m. This area has high exposure to passing traffic and trade, due to being located centrally within Wonthaggi and close to the town's main arterial roads and established retail precinct.

Public transport proximity

While most people currently accessing the area likely travel by private vehicle (as indicated by extensive ground level car parking and general vehicle over pedestrian movement prioritization) there are opportunities for alternative modes. This includes the Wonthaggi-Wonthaggi North-Wonthaggi local bus route and the Melbourne-Cowes-Inverloch V/Line bus route, each with stops within 300m of the

site. Furthermore, the site's location within the centre of Wonthaggi places it within a reasonable walking distance of many residences.

Access to employment anchors

As demonstrated in Figure 22, seven existing features of employment interest are located within an 800m walking catchment of Site 1. This includes supermarkets, a hospital, and council offices.

Residential catchment

Site 1 is predominately surrounded by commercial land, though multiple blocks of residential development is within the 800m walkable catchment in all directions. Furthermore, as Site 1 is located between three SA1s which are each forecast to grow by approximately 300-450 people by 2061, residential densification can be expected to occur within Site 1's catchment. Site 1 is located beyond 1.5km to the closest residential development in the PSP, though its location beside arterial roads likely will help connection to these new communities.

Possible constraints

A number of overlays and designations apply to Site 1. While the identified list below may have some influence over development possibilities, there are no definite impediments to development. Further investigation by a fire risk consultant, Aboriginal heritage expert and by an ecologist or arborist would assist.

- Bushfire management overlay covers the western half of Site 1
- Designated bushfire prone area covers all Site 1
- Aboriginal Cultural Heritage covers all Site 1
- Vegetation Protection Overlay sits adjacent to the western boundary of Site 1.

While Site 1 is not identified as at risk of flooding within the current flood maps, the West Gippsland Floodplain Management Strategy 2018-2027 identifies Wonthaggi as vulnerable to urban flash flooding.

5.2 Site 2 – Mixed Use Zone land at Wonthaggi’s northwest entrance

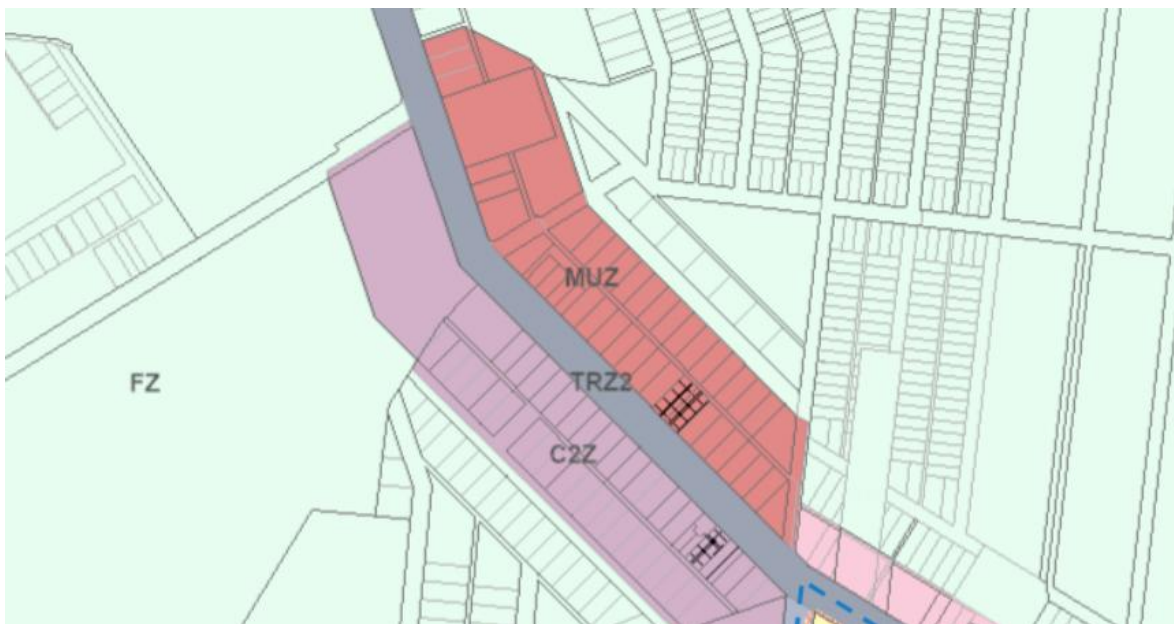
Site 2 comprises approximately 64,500sqm of land zoned Mixed Use Zone on the northeast side of Bass Highway/White Road at Wonthaggi’s northwest entrance. This area comprises mostly of separate dwelling development, with some vacant lots, a cluster of display homes and a car rental provider.

Figure 23: Aerial view of Site 2 (image from September 2025)



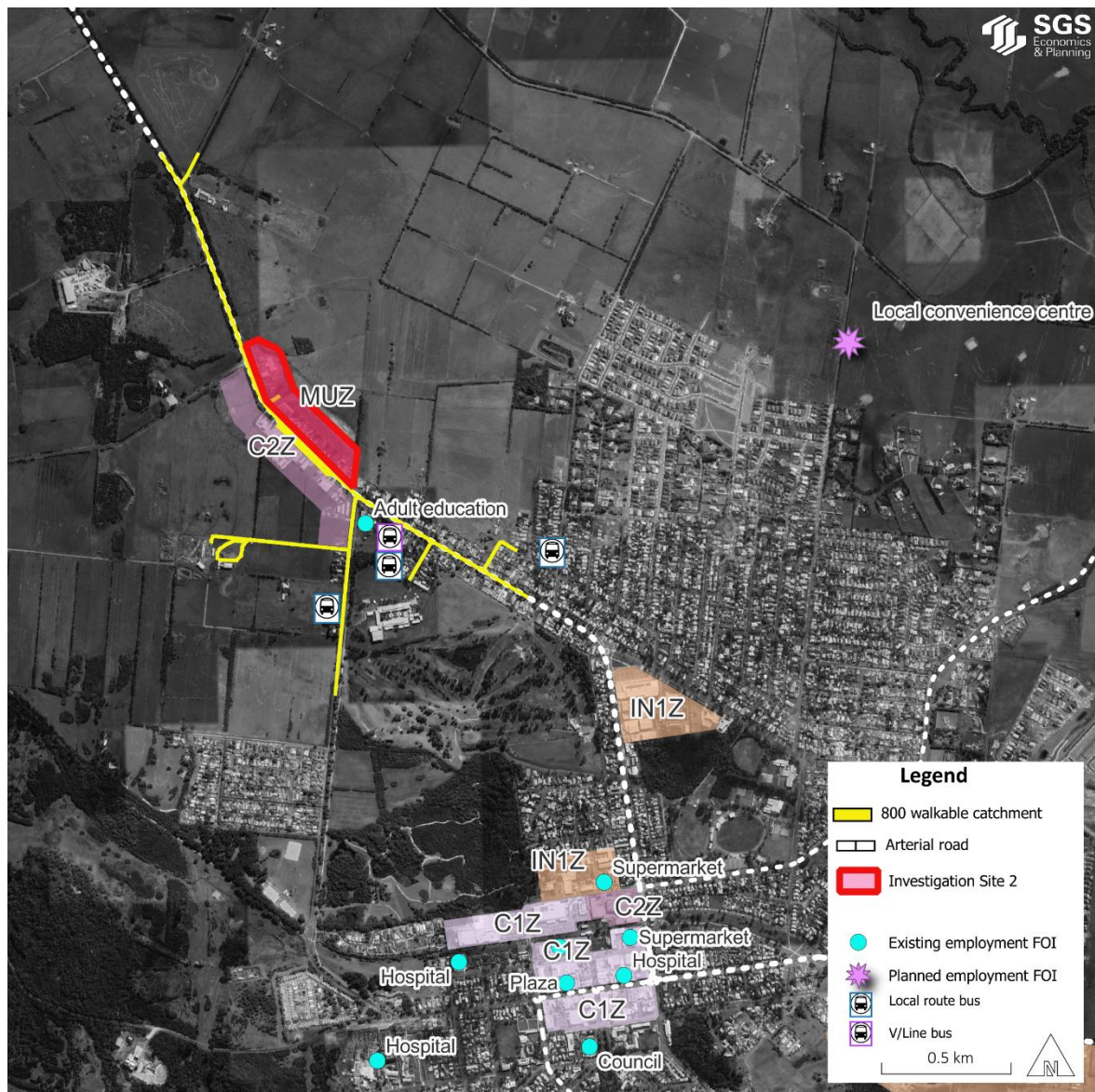
Source: NearMap. 2025. Map browser. Accessed 22 January 2026. <https://apps.nearmap.com/maps/>

Figure 24: Current zoning of Site 2



Source: VicPlan. 2026. <https://mapshare.vic.gov.au/vicplan/>

Figure 25: Site 2 context



Road access and exposure to passing traffic and trade

Site 2's location adjacent to the Bass Highway positions it strategically in terms of connection to Melbourne and Phillip Island. Site 2 sits at what can be considered the main entrance to Wonthaggi, so traffic flows would be expected to fluctuate, with flows likely higher during busy holiday periods when people are entering/leaving Wonthaggi, and during morning/evening peak, when non-local workers are commuting beyond/to Wonthaggi. While it is a harsh road environment (70km/h road) the wide nature strip between the road and Site 2 provides some buffering.

Public transport proximity

Public transport accessibility at Site 2 is better than most areas of Wonthaggi. The closest bus stop, 150m south along Bass Highway, has V/Line buses going to Cowes, Inverloch and Melbourne, as well as local network buses going between Cowes and Wonthaggi. Site 2 is located 2.5km from the town centre

of Wonthaggi, which puts it beyond a reasonable walking distance. While there is space for a separated or protected bicycle path along Bass Highway, none exists currently to connect people to Site 2.

Access to employment anchors

Site 2 is located across the Bass Highway from Chisholm Wonthaggi (shown on the maps as “Adult education”). The similarly sized Commercial 2 Zone directly opposite Site 2 contains a mix of employment uses, including retail, a service station and a gym (leisure and recreation facility). Bass Coast College – Dudley Campus is also within the 800m walking catchment area.

Residential catchment

The 800m residential catchment of Site 2 is small, with farming being the dominant land use to the north and west. Site 2 is situated further than 800m from the boundary of the PSP, so it appears unlikely that the residential catchment will increase in the near future.

Possible constraints

The Environmental Significance Overlay Schedule 4 covers all of Site 2, therefore a geotechnical report would need to inform any decisions to rezone the land for more intensive development. The whole of Site 2 is also within a Designated Bushfire Prone Area, which requires building to a bushfire construction standard.

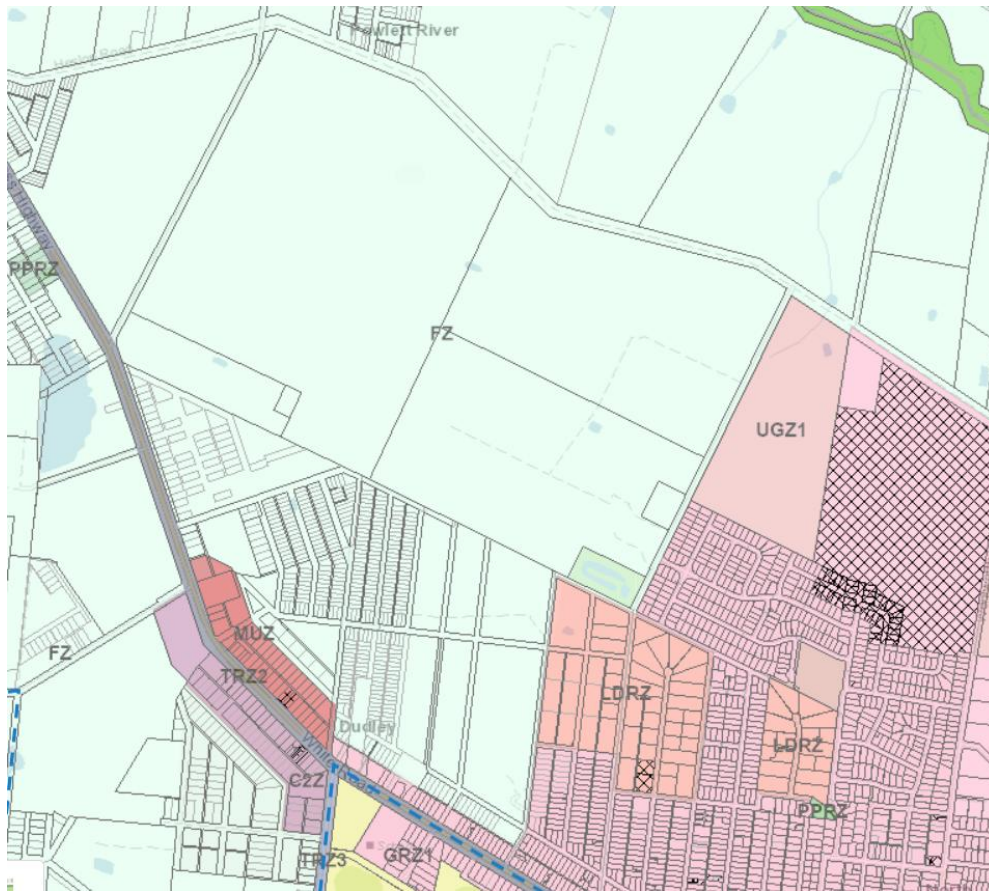
5.3 Site 3 – Farming zone to the northwest of Wonthaggi

Site 3 is an approximately 171 ha area to the northwest of Wonthaggi. It comprises of three large properties, which appear to be being used for farming, and two smaller properties, one of which contains a single dwelling (107 Fuller Road) and the other which contains a retarding basin (south of 107 Fuller Road).

Figure 26: Aerial view of Site 3 (approximate outline, image from September 2025)

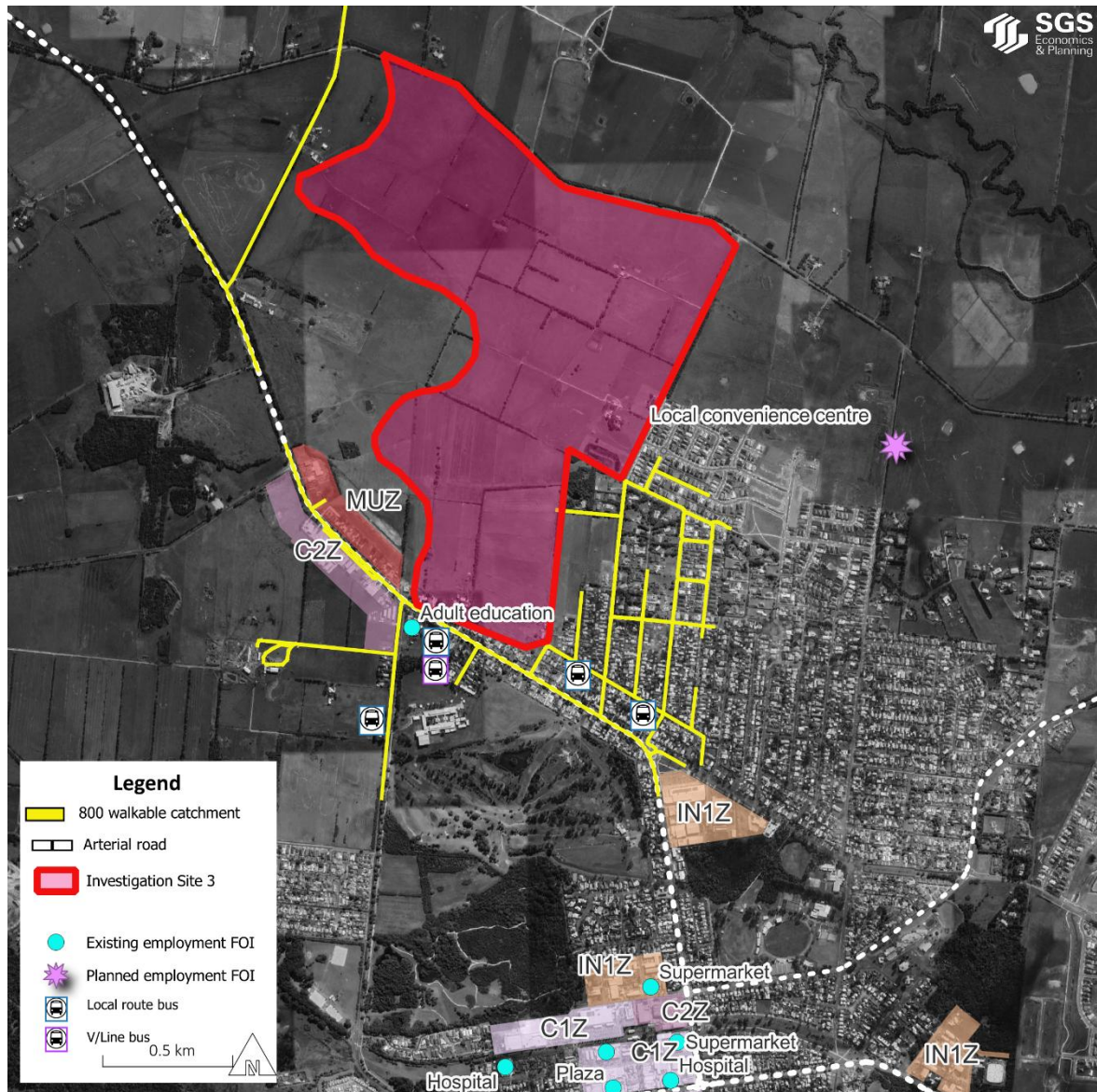


Figure 27: Current zoning of Site 3



Source: VicPlan. 2026. <https://mapshare.vic.gov.au/vicplan/>

Figure 28: Site 3 context



Road access and exposure to passing traffic and trade

Site 3 is setback one lot (approximately 60m) from Bass Highway/White Road, which is the main arterial road that connects Wonthaggi to Melbourne and Phillip Island. To the north, Site 3 is bound by Heslop Road, which is a gravel connector road. The Environmental Significance Overlay sits between Site 3 and Loch-Wonthaggi Road to the northwest, though only by approximately 50m at the narrowest point, so a connection would likely be possible if this area were to develop.

Public and active transport proximity

Public transport accessibility to Site 3 is low, as can be seen on the Site 3 Context map, where only the very south of the Site can reach a bus stop within 800m. While Site 3 can be accessed by walking and cycling, improvements to the safety of active transport connections would need to be explored if Site 3

were to be developed more intensely. For example, Gordon and James Streets do not have footpaths nor traffic calming measures implemented to make the road safer to walk on. Furthermore, as mentioned above, Bass Highway/White Road currently does not dedicate space to cycling, meaning bike riders are either riding in the shoulder/car parking strip along the 70km/h road, or are riding along the footpath where visibility to vehicles entering/exiting driveways is low, or else are not comfortable to cycle at all.

Access to employment anchors

Site 3 is beyond the walkable catchment to Wonthaggi's core employment precincts, such as the hospitals and main commercial precinct. The Commercial 2 Zone and Chisholm Wonthaggi (adult education), both on the south side of the Bass Highway/White Road, are the closest employment areas currently. While the location has not yet been finalised, the Wonthaggi North East PSP details that a village hub convenience centre of approximately 1,500sqm will be located close to Wentworth Road, which is less than 900m from the eastern boundary of Site 3. The new employment areas of the PSP will be located at the other (southeast of the PSP boundary) side of the PSP to Site 3, beyond 800 metres.

Residential catchment

Assuming links are made between the closest points of Site 3 and the existing residential street network, Site 3 connects to multiple residential blocks. Land adjacent to the eastern boundary of Site 3 is in the PSP and will likely be developed with housing. Such development would expand the residential catchment of Site 3.

Possible constraints

The Environmental Significance Overlay - Schedule 4 applies to the western boundary of site 3. This overlay has constrained the current extent of Site 3. Furthermore, all of Site 3 is within a Designated Bushfire Prone Area, which requires buildings to be built to a bushfire construction standard. It is noted that the PSP boundary is also a Designated Bushfire Prone Area, and while this is addressed in the PSP report, it is described as a risk that can be managed.

5.4 Summary

To refine the three investigation areas for competitiveness and suitability, in Table 12 we link back to the economic opportunities outlined in Section 3. The symbol 'A' denotes an advantage for the site, whilst the symbol 'D' denotes a disadvantage.

Table 12: Investigation site advantages and disadvantages for economic growth opportunities.

Growth opportunity	Site 1 (4.7 ha, IN1Z)	Site 2 (6.5 ha, MUZ)	Site 3 (~171 ha, FZ)
New and second-hand bulky goods (C2Z use)	A: Mix of lot sizes. A: Proximity to existing commercial centre and residential growth in PSP. D: Increases to truck traffic into Wonthaggi downtown.	A: Lot sizes likely suitable for smaller businesses (e.g. second hand distributors). A: Opportunity for truck parking/loading where wide nature strip is. D: Lot sizes are small in terms of big business bulky goods retail.	A: Proximity to residential growth in the PSP. A: Ability to subdivide for appropriate lot size. D: Lack of existing connection to PSP. D: Access to Highway will be limited by DTP
Pets' goods and services (C1Z or C2Z use)	A: Central location. A: Close to parks. D: Wide roads and narrow footpaths (safety concerns for clients handling animals).	A: - D: Lack of public greenspaces (e.g. dog parks) close by.	A: Noise impacts (e.g. of a dog kennel) would be minimal on existing land uses. D: Low accessibility.
Micro-mobility/biking goods and services	A: Central location. A: Close to the Nyora-Wonthaggi Bike Trail and public parks.	A: Cluster advantages with C1Z opposite site. D: No existing biking infrastructure.	A: - D: Low accessibility.
24/h or outside of traditional business hours services (C1Z or C2Z use)	A: Close to the Wonthaggi Hospital. D: Existing residential development would put restrictions on noise.	A: Strategic location for non-local shift workers entering/exiting Wonthaggi. D: Far from Wonthaggi Hospital. D: Existing residential development would put restrictions on noise.	A: Noise impacts (e.g. of gym music or childcare) would be minimal on existing land uses. D: Low accessibility. D: Low passive surveillance (relevant to perceptions of safety). D: Far from Hospital.
Co-working spaces (C1Z or C2Z use)	A: Higher accessibility. A: Appeal of close by restaurants and cafes. D: Some noise impacts from surrounding uses.	A: Proximity to PSP. D: Not central.	A: Proximity to PSP. A: Landscape views. D: Not central.

A = advantage, D = disadvantage.

5.5 Summary and recommendation

Site 1 - Cyclone and Mortimer Street:

Has the potential to be a Commercial 1 Zoned site in the future, subject to future need. However as discussed in the conclusion to Section 4, that is currently (in the short term) risky as it could attract some business growth away from the C1Z core in the Township.

If a rezoning were to be contemplated, Commercial 2 would therefore be a lower-risk prospect that still protects its future employment and maybe C1Z status in the long run.

A further consideration any rezoning of this precinct would be the impact of potential displacement of the current industrial land uses. This would require a more fulsome analysis of the supply and demand of industrial land and the current function of this and other industrial precincts.

Site 2 - Mixed Use Zone land at Wonthaggi's northwest entrance:

Site 2 is not recommended for rezoning. It is a MUZ area currently being used as mostly residential, and real mixed use development would be more likely to occur with the use of the C3Z and in a location closer to the town centre, such as at Site 1. If rezoning to a commercial zone were to occur, transition of uses would likely take time given the existing residential development. Rezoning also comes with the risk of creating a new out-of-centre retail location.

Site 3 - Farming zone to the northwest of Wonthaggi:

This is a larger site and were it to be used for commercial purposes, the land closer to the main road would be most viable for rezoning. As with Site 2, rezoning Site 3 to C1Z would create a new out of centre location, so C2Z would be a better option. This would require refining of the area boundary and road connections. Given road connection and exposure are most important it would be better to rezone the land fronting the main road first.

If this site is a candidate for other uses – such as residential development – in the medium to longer term, the location decision to rezoning to support multiple alternative land uses and the spatial configuration of those activities should be reserved for the future.

Recommendation

The analysis in the preceding chapter found that there is not an immediate need for additional employment land. So there is no compelling evidence for rezoning any of these sites to provide more commercial land.

If Council is of a mind to rezoning commercial land, creating surplus/extra C2Z land is a lower risk than C1Z. C2Z protects their potential for higher value employment uses in the long term, reduces the risk of Commercial 1 Zoning diverting demand away from the Town Centre before the population growth has occurred, and also has the potential to provide for some light industrial or service industrial land given the undersupply of industrial land noted in BILUS.

Such a move would just need to be balanced against other potential needs for the land such as increased housing supply.

Surplus C1Z land in the short term would be riskier for the Town Centre from a vacancy perspective and is not recommended based on the evidence explored in this section.

Appendix 1. ABS and VPA Data

Table 13: Percentage of workforce in broad industry

	Bass Coast (%)	Baw Baw (%)	Welling ton (%)	East Gippsla nd (%)	South Gippsla nd (%)	Latrobe (%)
Agriculture, Forestry and Fishing	2.5	8.5	10.3	7.7	6.9	5.1
Mining	0.3	1.0	1.9	0.6	0.4	2.0
Manufacturing	3.7	9.5	6.5	7.9	4.7	12.8
Electricity, Gas, Water and Waste Services	1.3	1.6	1.5	0.9	0.8	4.9
Construction	9.7	16.4	9.8	9.5	6.6	17.8
Wholesale Trade	2.5	5.3	2.4	2.9	2.3	4.4
Retail Trade	10.7	14.1	11.2	13.0	6.4	21.0
Accommodation and Food Services	11.2	10.5	8.7	10.5	6.0	14.2
Transport, Postal and Warehousing	2.7	4.7	3.4	3.9	2.8	5.8
Information Media & Telecommunications	0.8	1.4	0.6	0.6	0.5	2.5
Financial and Insurance Services	3.1	5.6	2.9	3.0	2.4	7.5
Rental, Hiring and Real Estate Services	2.1	2.6	2.2	2.2	1.3	3.9
Professional, Scientific & Technical Services	5.9	8.6	4.9	4.8	3.9	9.8
Administrative and Support Services	6.3	10.2	8.5	7.3	5.1	15.8
Public Administration and Safety	4.5	8.1	8.6	7.3	3.5	14.2
Education and Training	7.8	13.4	9.1	9.1	6.2	12.7
Health Care and Social Assistance	13.1	21.8	16.0	17.6	9.8	29.7
Arts and Recreation Services	3.6	3.6	2.1	2.1	1.8	3.2
Other Services	3.7	6.8	3.7	5.2	3.2	7.0
Inadequately Described and Missing	4.3	8.0	7.4	7.1	7.0	4.6

Source: Australian Bureau of Statistics. 2021. TableBuilder - Jobs and Income of Employed Persons, 2021-2022. Accessed 5 December 2025. <https://tablebuilder.abs.gov.au/webapi/jsf/dataCatalogueExplorer.xhtml>

Table 14: Percentage of workers in each industry, 2021 census.

	Baw Baw	Welling ton	East Gippsla nd	South Gippsla nd	Latrobe	Bass Coast
Agriculture, Forestry and Fishing	5.3%	8.4%	6.3%	8.5%	2.6%	2.5%
Manufacturing	5.9%	5.4%	6.4%	5.8%	6.4%	3.7%
Construction	10.1%	8.0%	7.7%	8.1%	9.0%	9.7%
Retail Trade	8.8%	9.2%	10.5%	7.9%	10.6%	10.7%
Accommodation and Food Services	6.5%	7.2%	8.5%	7.3%	7.1%	11.2%
Professional, Scientific & Technical Services	5.3%	4.0%	3.9%	4.8%	4.9%	5.9%
Administrative and Support Services	6.3%	7.0%	5.9%	6.3%	7.9%	6.4%
Public Administration and Safety	5.0%	7.1%	5.9%	4.3%	7.1%	4.5%
Education and Training	8.3%	7.5%	7.4%	7.6%	6.4%	7.8%
Health Care and Social Assistance	13.5%	13.2%	14.3%	12.0%	14.9%	13.1%
Other	25.1%	23.0%	23.1%	27.5%	23.0%	24.4%

Source: Australian Bureau of Statistics. 2021. TableBuilder Dataset: Jobs and Income of Employed Persons, 2021-22. Accessed 10 December 2025.

Table 15: Employment by ANZSIC in Wonthaggi

Combined Wonthaggi SALUP	2026	2051	change	% change
Agriculture, Forestry and Fishing	11	12	2	15.0%
Mining	0	0	0	0.0%
Manufacturing	91	80	-11	-12.1%
Electricity, Gas, Water and Waste Services	28	29	1	3.6%
Construction	242	280	38	15.7%
Wholesale Trade	28	31	3	10.7%
Retail Trade	509	595	86	16.9%
Accommodation and Food Services	189	252	63	33.3%
Transport, Postal and Warehousing	32	36	4	12.5%
Information Media and Telecommunications	13	16	3	23.1%
Financial and Insurance Services	47	50	3	6.4%
Rental, Hiring and Real Estate Services	33	38	5	15.2%
Professional, Scientific and Technical Services	99	137	38	38.4%
Administrative and Support Services	65	72	7	10.8%
Public Administration and Safety	289	358	69	23.9%
Education and Training	323	440	117	36.2%
Health Care and Social Assistance	1,230	1,617	387	31.5%
Arts and Recreation Services	63	78	15	23.8%
Other Services	133	155	22	16.5%
Total	3,425	4,276	851	24.8%

Source: SGS SAM24 Employment forecast model.

Table 16: Wonthaggi population by age groups

	2016	2021	2026	2031	2036	2041	2046	2051	2056	2061
0-4	331	365	484	516	565	605	650	697	745	796
12-17	440	532	668	689	733	785	839	894	948	1,004
18-25	537	626	851	1,039	1,124	1,192	1,262	1,331	1,398	1,468
26-64	3,023	3,757	3,776	3,884	4,131	4,439	4,758	5,078	5,397	5,728
5-11	523	611	620	643	698	750	807	866	926	988
65+	1,914	2,588	2,971	3,414	3,716	3,990	4,259	4,513	4,754	5,002
Total	6,768	8,478	9,369	10,185	10,968	11,762	12,574	13,379	14,169	14,987

Source: SGS SAM24 population forecast model.

Table 17: Wonthaggi forecast population by age groups as a proportion of total Wonthaggi population

	2016	2021	2026	2031	2036	2041	2046	2051	2056	2061
0-4	4.9%	4.3%	5.2%	5.1%	5.2%	5.1%	5.2%	5.2%	5.3%	5.3%
5-11	7.7%	7.2%	6.6%	6.3%	6.4%	6.4%	6.4%	6.5%	6.5%	6.6%
12-17	6.5%	6.3%	7.1%	6.8%	6.7%	6.7%	6.7%	6.7%	6.7%	6.7%
18-25	7.9%	7.4%	9.1%	10.2%	10.2%	10.1%	10.0%	9.9%	9.9%	9.8%
26-64	44.7%	44.3%	40.3%	38.1%	37.7%	37.7%	37.8%	38.0%	38.1%	38.2%
65+	28.3%	30.5%	31.7%	33.5%	33.9%	33.9%	33.9%	33.7%	33.6%	33.4%

Source: SGS SAM24 Population and Dwelling forecast model.

Figure 29: Anticipated employment creation in the PSP

Land use	Employment measure	Jobs per employment measure	Anticipated quantity in precinct	Anticipated quantity of jobs
Village Hub & convenience retail	jobs/30m ²	1	2,000	67
Community centre	jobs/centre	10	2	20
School	jobs/school	40	1	40
Home-based business	jobs/dwelling	0.05	5,000	250
Employment land	jobs/hectare	20	64	1,280
Total estimated				1,657

Source: VPA. 2025. Wonthaggi North East PSP.

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