Moorabool Shire Council – Retail Strategy 2041

March 2016

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Glossary

Activity centres: Activity centres provide a focus for retail facilities, services, employment, housing, transport and social interaction and include major town centres, neighbourhood centres and local centres.

Retail: The definition of retail used in this report includes spending on food, non-food and retail services and is detailed in Section 1.4.

Regional shopping centre: A regional shopping centre typically includes at least one full line department store, a full line discount department store, one or more supermarkets and approximately 100 specialty shops. Gross leasable area (GLA) of retail floorspace totals at least 30,000 sq.m.

Sub-regional shopping centre: A sub-regional shopping centre is medium sized centre typically anchored by at least one full line discount department store, a major supermarket and including approximately 40 specialty shops. Total GLA of retail ranges between 10,000 and 30,000 sq.m.

Neighbourhood centre: A local shopping centre comprising a supermarket and a range of specialty shops. Total GLA of retail floorspace is generally, though not always, less than 10,000 sq.m.

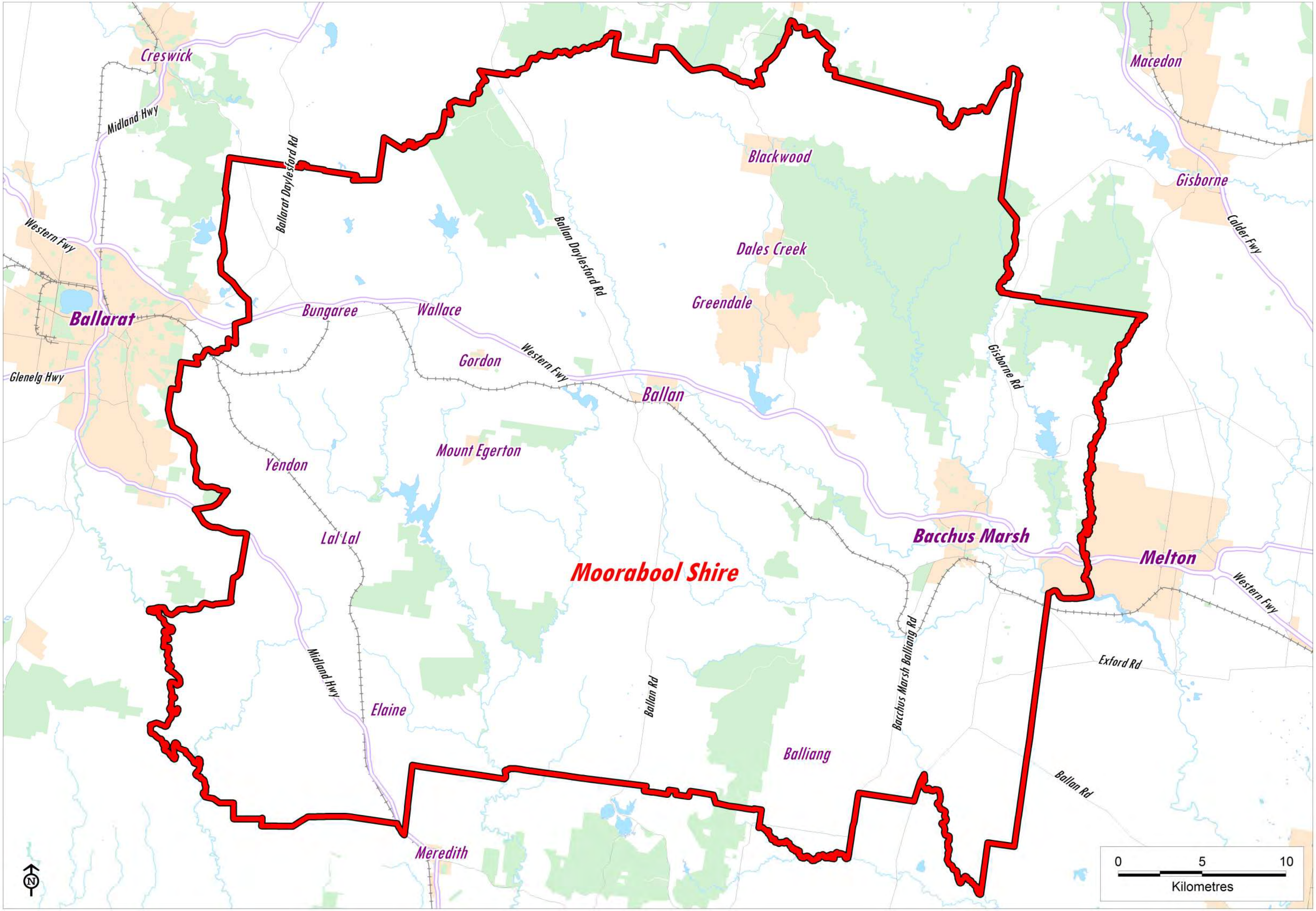
Metropolitan Melbourne: The area of Melbourne which includes 31 municipalities within the designated Melbourne urban growth boundary.

Peri-urban regions: The areas located immediately beyond the Melbourne urban growth boundary.

Throughout the report there are a number of references to the following acronyms and abbreviations.

Acronym	**Term**
ABS	Australian Bureau of Statistics
DDS	Discount department store
ERP	Estimated resident population
FLG	Food, liquor and groceries
RTD	Retail turnover density

Abbreviation	**Name**
Growth Plan	Central Highlands Regional Growth Plan
Planning Scheme	Moorabool Planning Scheme
Council	Moorabool Shire Council
Moorabool	Moorabool Shire



Creswick
Macedon
Midland Hwy
Ballarat Daylesford Rd
Blackwood
Gisborne
Western Fwy
Ballan Daylesford Rd
Dales Creek
Calder Fwy
Greendale
Ballarat
Bungaree
Wallace
Gordon
Western Fwy
Gisborne Rd
Glenelg Hwy
Ballan
Mount Egerton
Yendon
Lal Lal
Bacchus Marsh
Melton
Moorabool Shire
Western Fwy
Bacchus Marsh Balliang Rd
Exford Rd
Midland Hwy
Ballan Rd
Elaine
Balliang
Ballan Rd
Meredith
N
0
5
10
Kilometres

Main Street, Bacchus Marsh

Executive summary

Vision

That retailing in Moorabool will be the catalyst for thriving activity centres that meet the growing community's retail, services and recreation needs, providing employment opportunities for residents and engaging places for people to interact.

The key findings of this Strategy which led to this vision are set out below.

Region and location context

Moorabool Shire (referred to as Moorabool in this report) is a large municipality located in Central Victoria approximately 60 km west of the Melbourne CBD. Moorabool is easily accessible from the two largest regional cities in Victoria, namely Geelong and Ballarat, which are located 57 km to the west and south of Bacchus Marsh respectively. Moorabool includes some 64 towns/localities, with the majority being small rural communities. Bacchus Marsh is the largest town in the municipality, with the Bacchus Marsh region accounting for around 65% of Moorabool's population. Many residents of Bacchus Marsh travel to the western parts of Melbourne for work.

The Western Freeway is one of two key transport routes linking Moorabool with Melbourne, providing convenient access for residents of Moorabool to Melton to the east and Ballarat to the west. The other is the Melbourne – Ballarat rail line with stations at Bacchus Marsh and Ballan. Both Melton and Ballarat include major retail shopping precincts providing a broad range of food and non-food facilities. Geelong and the broader Melbourne region are also easily accessible from Moorabool, and include a range of major shopping centres as well as their CBD.

Population

The population within Moorabool is estimated at 31,200 as at June 2014, including 20,300 people in the Bacchus Marsh region, which extends some 5 km around Bacchus Marsh and includes the town of Myrniong (refer Map 1). Recent population growth is estimated to have been strong within Moorabool, averaging 2.7% per annum between 2011 and 2014, primarily driven by a number of residential developments in Bacchus Marsh.

Moorabool Shire population, 2011-2041*

	Est. population		Forecast population			
Region	2011	2014	2016	2021	2031	2041
Bacchus Marsh	18,330	20,280	21,620	24,920	30,670	35,870
Central (Ballan)	6,990	7,350	7,590	8,190	9,690	11,590
Western	3,490	3,550	3,570	3,620	3,870	4,270
Total Moorabool Shire	**28,810**	**31,180**	**32,780**	**36,730**	**44,230**	**51,730**
		Average annual growth (no.)				
Region		2011-14	2014-16	2016-21	2021-31	2031-41
Bacchus Marsh		650	670	660	575	520
Central (Ballan)		120	120	120	150	190
Western		20	10	10	25	40
Total Moorabool Shire		**790**	**800**	**790**	**750**	**750**
		Average annual growth (%)				
Region		2011-14	2014-16	2016-21	2021-31	2031-41
Bacchus Marsh		3.4%	3.3%	2.9%	2.1%	1.6%
Central (Ballan)		1.7%	1.6%	1.5%	1.7%	1.8%
Western		0.6%	0.3%	0.3%	0.7%	1.0%
Total Moorabool Shire		**2.7%**	**2.5%**	**2.3%**	**1.8%**	**1.5%**

**As at June*
Source: ABS Census 2011; Victoria In Future, May 2014; Forecast.id; MacroPlan Dimasi

Strong growth is expected to continue for the foreseeable future, with the population of Moorabool estimated to grow to 51,700 by 2041, an increase of 20,550 residents. Much of this growth is estimated to occur within the Bacchus Marsh region, which is estimated to almost double in population to 35,900 residents by 2041. A large amount of land is planned for residential developments in Moorabool, most notably at the Stonehill Estate in West Maddingley and the Underbank Stud Farm west of Bacchus Marsh.

Peri-urban designation

Moorabool has been identified as a peri-urban area as part of the Victorian Government's *Plan Melbourne*, which states that one of the aims of peri-urban areas is to attract population growth away from Melbourne. Moorabool offers an attractive country lifestyle different to that of metropolitan Melbourne, though still well connected with the capital city. In particular, the major towns of Moorabool (Bacchus Marsh and Ballan) are both located on a major transport corridor, which includes the Western Freeway and the Melbourne - Ballarat rail corridor. *Plan Melbourne* specifically lists Bacchus Marsh and Ballan as potential peri-urban towns which could accommodate substantial population growth.

Retail trends

Generally, retail sales in Australia are steadily gathering momentum following a weak post-GFC period, with recent trends (past 2 years) showing steady year on year increases. These increases have been mainly underpinned by sound population growth generally across Australia; recovery in the housing market; slowly improving consumer confidence; and a very low interest rate environment by Australian standards.

Across the major retail categories, department stores and discount department stores continue to experience a tough trading environment, as they cater for the more discretionary spending market, which has suffered since the GFC. Food retailing, comprising fresh food (e.g. groceries) and food catering (restaurants, cafés, take-away food outlets), on the other hand, continues to perform strongly, underpinning a paradigm shift in consumer attitudes towards eating out.

Stakeholder consultations

A range of stakeholders, including customers, local retailers and Moorabool Shire's Economic Development Reference Group, were consulted to gain their views on a number of factors that have an influence on the retail sector in Moorabool.

The key **strengths** of retailing in Moorabool identified from these consultations include the community feel of the area; the opportunity for local employment; and customer service, with the latter valued highly in the Ballan Town Centre. The key **issues** raised include the traffic congestion and lack of carparking in the Bacchus Marsh Town Centre; the lack of variety in shops; a large incidence of escape expenditure for non-food retail goods; and the somewhat limited trading hours of many retailers, particularly on the weekends. The limited range of retail services was identified as a key issue for the Ballan Town Centre.

The key **recommendations** from these stakeholders to improve retailing in Moorabool include better traffic management; more effective parking and signage; longer trading hours; a desire for the retention of the local feel of Moorabool; and the need for major and warehouse style retailers to draw and retain customers.

Regions

For the purpose of the analysis set out in this report Moorabool has been divided into three main regions. Two of these regions (Bacchus Marsh and Central) reflect the areas of most relevance for the retail centres of Bacchus Marsh and Ballan. The Western region is the part of Moorabool located in close proximity to Ballarat, the residents of which at present relate much more to Ballarat than Moorabool in terms of their shopping behaviours.

Region	**Towns/localities**
Bacchus Marsh	Bacchus Marsh
	Darley
	Maddingley
	Balliang
	Balliang East
	Hopetoun Park
	Myrniong
Central (Ballan)	Ballan
	Barkstead
	Blackwood
	Gordon
	Greendale
	Mount Egerton
	Korweinguboora / Spargo Creek
Western	Bungaree
	Clarendon
	Dunnstown
	Elaine
	Lal Lal
	Wallace
	Yendon

Retail floorspace demand and supply

The provision of retail floorspace per person throughout Australia at present is estimated at around 2.2 sq.m. The indicative total retail floorspace demand by residents of Moorabool, based on a population of 31,200, is estimated at approximately 69,000 sq.m (26,350 sq.m of food and 42,780 of non-food). Much of this demand is, and will continue to be, satisfied by the broader and larger provisions of retail facilities located beyond Moorabool, such as those at Melton, Ballarat and Melbourne.

The retail floorspace supply within Moorabool is estimated at approximately 31,200 sq.m, based on a survey completed by MacroPlan Dimasi in September 2014. The majority of this floorspace, some 80%, is located within the Bacchus Marsh region, mostly within the Bacchus Marsh Town Centre which includes The Village Bacchus Marsh, a sub-regional shopping centre anchored by Coles and Aldi supermarkets and a small Target Country; a Foodworks supermarket; and a large number of food and non-food specialty stores.

Map 2 illustrates the physical layout of the Bacchus Marsh Town Centre by broad retail category, with vacant and Council owned land also highlighted. The map also shows the expansion area of The Village Bacchus Marsh to the west, and the Foodworks supermarket located in the north-western part of the town centre.

Escape expenditure

More than half of the retail expenditure by the residents of Moorabool is currently escaping the municipality, and being directed to facilities primarily at Melton and Ballarat. Most food expenditure is being retained and directed to facilities within Moorabool, while the majority of non-food expenditure is escaping the municipality. The amount of retail expenditure escaping Moorabool by retail category, having regard to recent customer telephone survey conducted by AFS (Australian Fieldwork Solutions), is estimated as follows:

- Around 30% for spending on FLG (i.e. supermarkets, bakeries, butchers);
- 20 – 25% for food catering spending (i.e. cafés, restaurants);
- 70 – 75% of apparel spending (i.e. clothing, footwear);
- 80 – 85% of household goods spending (i.e. hardware, electrical goods);
- 70 – 75% of leisure goods spending (i.e. stationary, books, sports);
- 55 – 60% of general retail spending (i.e. pharmacy, florist); and
- 40 – 45% of retail services (i.e. hairdressing, beauty).

Bacchus Marsh out-of-centre potential

The floorspace supply/demand analysis indicates that around 6,000 sq.m of bulky goods/homemaker floorspace is supportable in Bacchus Marsh. An out-of-centre development is considered required given lack of large sites in the Bacchus Marsh Town Centre, which need to be retained for the current gaps in the traditional retail offer.

Creating a bulky goods/homemaker hub in Bacchus Marsh, and attracting a number of large format retailers, would contribute significantly to reducing the amount of non-food retail expenditure escaping Moorabool.

Guideline supportable floorspace

A baseline 'guideline' supportable retail floorspace in Moorabool, which is a theoretical supportable floorspace provision if a better range of retail facilities were offered, is estimated based on retention rates assumed to be achievable. It is estimated that around 80% of FLG spending, some 60-70% of spending on food catering, general retail and retail services, and between 40% - 50% of spending on other non-food goods can be retained within Moorabool. In total, around 65% of total retail expenditure is estimated to be potentially retained within Moorabool if a wider range of retail facilities are provided in line with the Shire's growing population.

The current guideline supportable retail floorspace in Moorabool is estimated at around 45,500 sq.m, indicating that there is currently a shortfall of retail floorspace in the municipality of some 14,300 sq.m. This gives a broad estimate of the quantum of floorspace supportable and should be viewed as indicative only. As the population of Moorabool increases, the indicative undersupply of retail floorspace is estimated to increase to around 40,000 sq.m by 2031, and to approach 55,000 sq.m by 2041 if no further additions were to be made.

Bacchus Marsh Town Centre potential

The analysis indicates the following amount of retail floorspace could potentially be supportable in the Bacchus Marsh Town Centre once certain population thresholds are reached:

- At 25,000 residents (by 2021) - around 47,000 sq.m, or 20,000 sq.m greater than the current provision. The additional floorspace would require approximately 5 - 6 hectares of land.

- At 30,000 residents (by 2031) - around 60,000 sq.m, or 30,000 - 35,000 sq.m greater than the current provision. The additional floorspace would require approximately 8 - 10 hectares of land.

- At 35,000 residents (by 2041) - around 70,000 sq.m, or 40,000 - 45,000 sq.m greater than the current provision. The additional floorspace would require approximately 10 - 12 hectares of land.

West Maddingley and Darley potential

There is currently sufficient market demand for Darley Plaza to be expanded to include a larger supermarket and additional specialty shops, potentially including around 4,000 – 6,000 sq.m of retail floorspace, though site constraints restrict the centre's ability to be easily expanded.

In the longer term, a new centre of around 4,000 – 6,000 sq.m is considered supportable at West Maddingley to serve existing and future residents.

Ballan Town Centre potential

There is currently demand for additional FLG floorspace in Ballan, which could potentially be met through an expansion of the existing supermarket, subject to land constraints, and additional fresh food specialty stores. By 2021, Ballan Town Centre is considered able to support a medium sized supermarket, a greater range of supporting fresh food stores, a few new cafes/restaurants, additional convenience retail stores, a discount variety outlet and more retail services such as additional hairdressers.

By 2041, once the population of the Ballan (Central) region reaches 11,500 residents, a total of around 13,000 – 14,000 sq.m of retail floorspace is considered supportable in the region. Potentially around 8,000 – 9,000 of this retail floorspace could be provided within the Ballan Town Centre; 3,000 - 4,000 sq.m in Gordon; and around 1,000 sq.m elsewhere in the region.

Small Town potential

As the population of the small towns in Moorabool increases, there will be potential for additional retail facilities, particularly in Gordon and Wallace / Bungaree. An indication of the amount of retail floorspace which may be supportable within a town once it reaches certain population thresholds is as follows:

- 1,000 residents - A foodstore of 300 - 500 sq.m and some 10 specialty stores;

- 2,000 residents - A small supermarket of 500 – 1,000 sq.m and around 15 - 20 specialty stores; and

- 3,000 residents - A medium supermarket of 1,000 – 1,500 sq.m and around 20 - 30 specialty stores.

Recommendations

1 Optimise the retail mix and encourage a concentration of facilities within the Bacchus Marsh Town Centre.

2 Position the Bacchus Marsh Town Centre for growth, in keeping with its role as the key activity centre for Moorabool, and improve movement in the town centre.

3 Create a sense of place for the Bacchus Marsh Town Centre.

4 Provide a broader range of facilities and services in and around Bacchus Marsh Town Centre.

5 Develop Moorabool as a retail tourism destination.

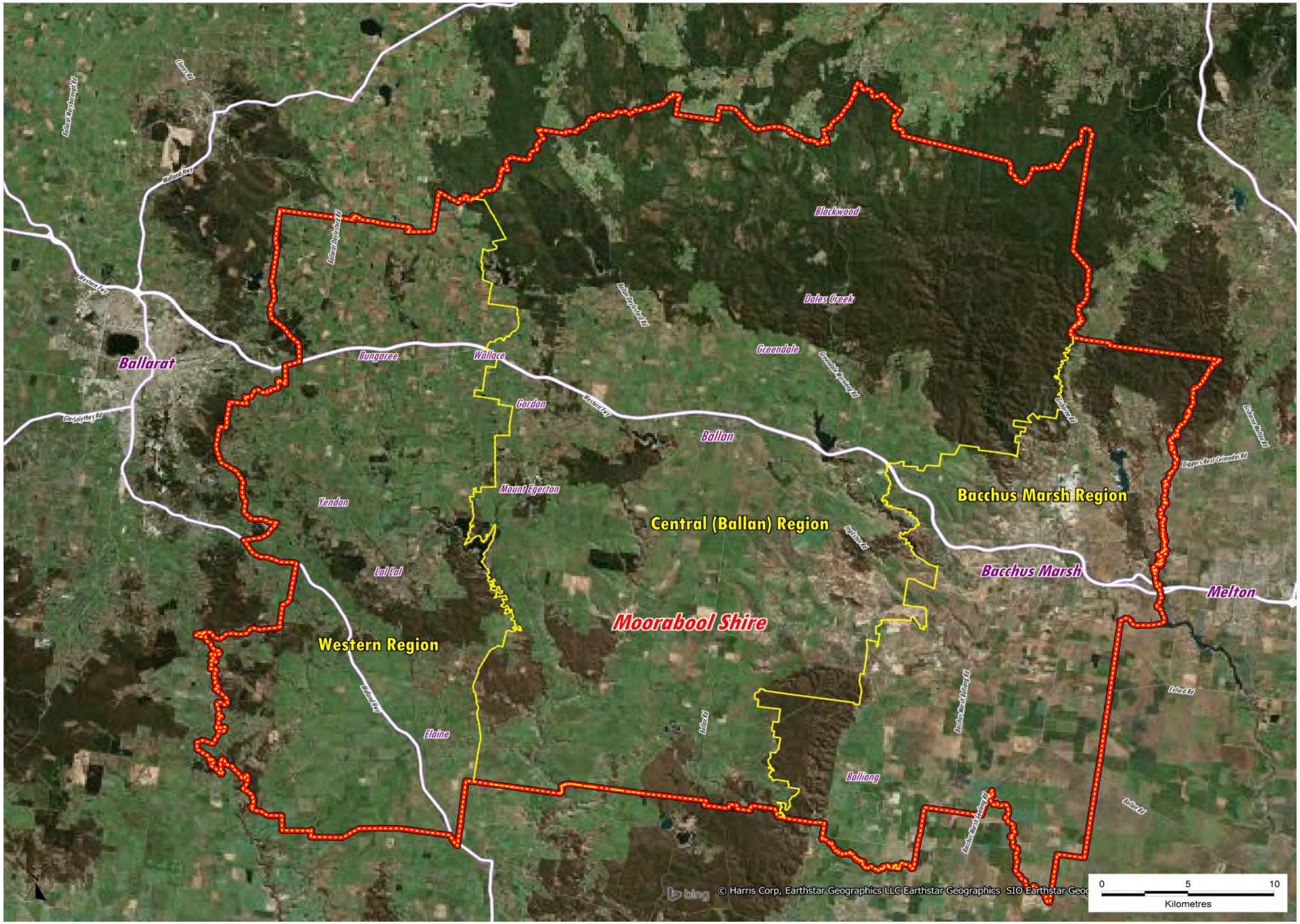
6 New/expansions of activity centres to serve growth areas.

7 Out-of-centre development in Bacchus Marsh.

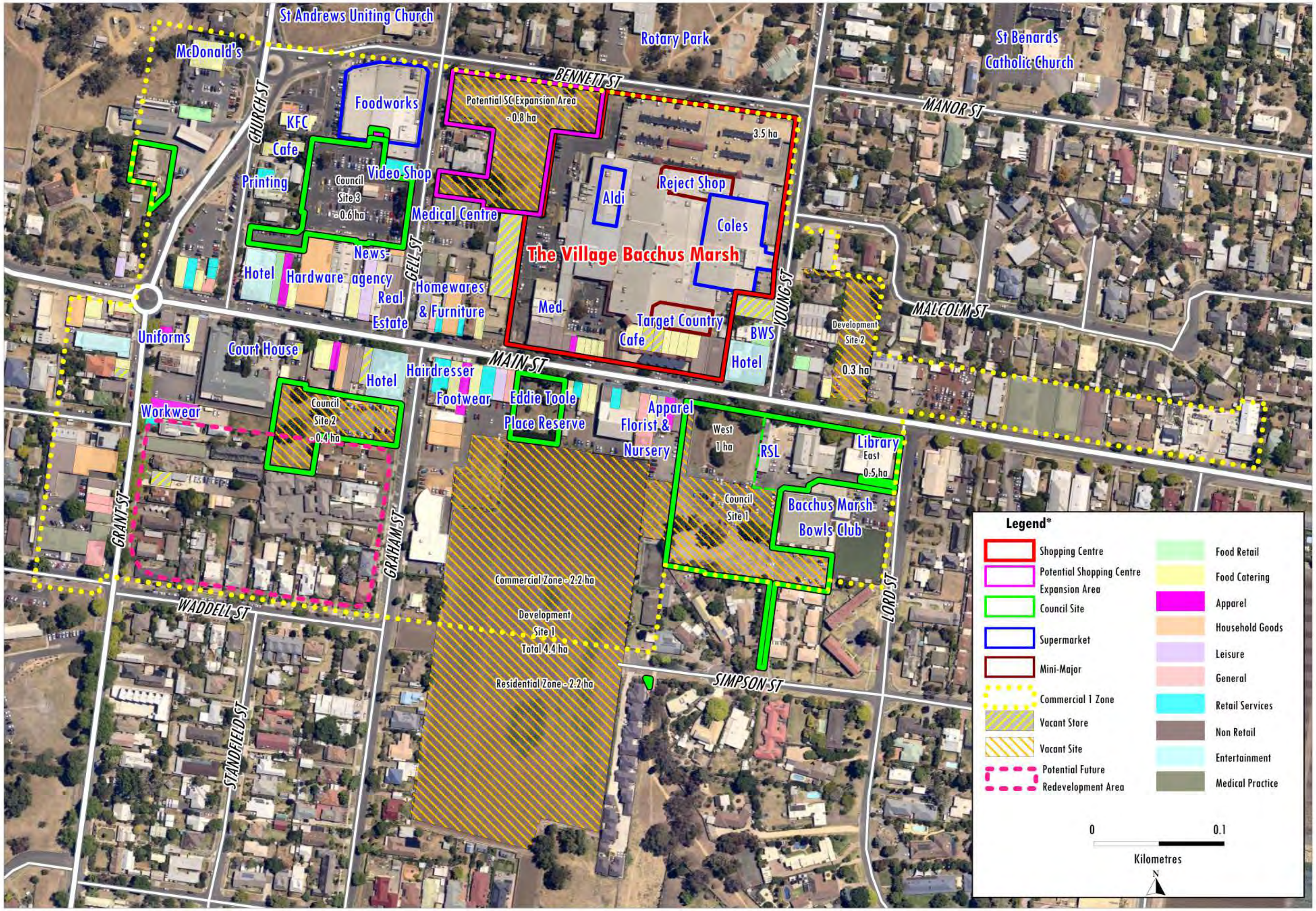
9 Facilitate the improvement of the retail offer at the Ballan Town Centre.

10 Encourage the small towns to reach their potential.

The recommendations have led to a number of **actions** which are detailed in Section 9.



Map 1: Moorabool Shire



Map 2: Bacchus Marsh Town Centre

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Report structure

This strategy is structured as follows:

- **Section 1** provides the context of the report, detailing the key objectives, issues and policy relating to the Retail Strategy, as well as providing an overview of the retail terms used throughout the report.
- **Section 2** includes an overview of the regional and competitive context and the peri-urban designation of Moorabool.
- **Section 3** reviews the current retail trends, and how they relate to Moorabool.
- **Section 4** provides a breakdown of Moorabool into three regions and a number of sub-regions. The section examines the current and projected population levels within Moorabool; provides estimates of the retail expenditure capacity of the population; reviews of the socio-demographic profile of residents; and provides an employment profile of Moorabool.
- **Section 5** details the current supply of retail and non-retail floorspace within Moorabool.
- **Section 6** includes an analysis of the total market demand for retail floorspace by residents of Moorabool, based on population and retail expenditure.
- **Section 7** provides a summary of the stakeholder views and the discussions with major retailers.
- **Section 8** includes the importance of having a hierarchy of activity centres, and an analysis of the current and potential future retail floorspace needs of Moorabool residents; as well we the potential retail outlooks for Bacchus Marsh, Ballan and small towns within Moorabool.
- **Section 9** provides a number of key recommendations and actions to be considered by Council.

Big Apple Tourist Orchard, Bacchus Marsh Road, Bacchus Marsh

Source: http://tedsmakemyday.blogspot.com.au/2012/05/bacchus-marsh-just-skip-and-jump-from.html

Section 1: Introduction and study context

MacroPlan Dimasi was commissioned by Moorabool Shire Council (Council) to prepare a retail strategy for the municipality. The Strategy examines the retail sector's role in the broader Moorabool economy and in optimising the provision of local services and facilities to meet the needs of the residents of Moorabool. The retail strategy is to form part of Moorabool's planning for growth under the **Moorabool 2041 Framework (M2041)**.

1.1 Key objectives

The main purpose of M2041 is to provide Council with the necessary data analysis and recommendations to inform policy direction in the future. The key objectives of the strategy are to:

- Identify the significant retail trends in Australia, and consider how these trends are likely to influence retailing in Moorabool;
- Investigate the expected rates of population growth in the municipality, and the areas where this growth is likely to occur;
- Provide an understanding of the views of key stakeholders, including local residents, local business owners, Council and major retailers;
- Develop a vision for the retail landscape in Moorabool to 2041, particularly allowing for the substantial population growth projected for the Shire; and
- Provide clear and actionable recommendations which can assist Council to update the planning scheme as appropriate in order to deliver its objectives on retail policy.

The strategy has regard to previous retail studies completed for Council, including *'Growing Moorabool' Economic Development Strategy and Action Plan* (SGS Economics & Planning, April 2006); and *A Strategy for Retail Business Development in Ballan* (Essential Economics, March 2001).

1.2 Key issues

There are a number of key issues facing the retail sector in Moorabool, with the following identified as particularly pertinent:

- the changing national retail landscape and the impacts of technology and the digital environment on the retail sector;
- the level of escape retail expenditure by residents of Moorabool, i.e. expenditure that is directed to facilities located beyond the municipality;
- the lack of larger format retail stores in Moorabool, and the potential needs and impacts of out-of-centre developments;
- the need to ensure a broad range of retail facilities is provided within Moorabool which meets the needs of the growing community; and
- The ability of the retail sector to provide employment opportunities for residents of Moorabool.

1.3 Policy framework

The *Central Highlands Regional Growth Plan* (referred to as the Growth Plan) provides guidance for the region on land use planning and development for the municipalities of Ararat, Ballarat, Golden Plains, Hepburn, Moorabool and Pyrenees. The plan aims to "*Position the Central Highlands region to 2030 and beyond to provide a productive, sustainable and liveable region for its people*" (p.2). The key relevant principles and directions identified include (p.77 - 81):

- *"The region's economy should be strengthened so that it is more diversified and resilient:*
    - *Encourage greater economic self-sufficiency for the region;*
    - *Pursue economic development opportunities based on the emerging and existing strengths of the region;*
    - *Support growth through the development of employment opportunities in towns identified for population growth;*
- The development of sustainable and vibrant communities should be supported by enhancing the level of access to key services:
    - *Encourage services, facilities and housing that meet the diverse needs of the community;*
    - *Build on local opportunities to support resilience of small towns;*
- Land use patterns, development and infrastructure should make the region more self-reliant and sustainable:
    - *Develop communities that provide local jobs and services"*.

The Moorabool Planning Scheme (the Planning Scheme) provides further policy guidance for activity centres through both the State Planning Policy Framework and the Local Planning Policy Framework. Key relevant objectives set out in the Planning Scheme include:

- *"To build up activity centres as a focus for high-quality development, activity and living for the whole community by developing a network of activity centres" (Clause 11.01-1);*
- *"To encourage the concentration of major retail, residential, commercial, administrative, entertainment and cultural developments into activity centres which provide a variety of land uses and are highly accessible to the community" (Clause 11.01-2);*
- *"To encourage development which meet the communities' needs for retail, entertainment, office and other commercial services and provides net community benefit in relation to accessibility, efficient infrastructure use and the aggregation and sustainability of commercial facilities" (Clause 17.01-1);*
- *"To promote an accelerated rate of population and local employment growth to support the provision of improved social and physical infrastructure in the Shire" (Clause 21.03-2)*
- *"To plan and mange sustainable urban growth that is concentrated in and around the Shire's major towns" (Clause 21.03-2);*
- *"To reinforce Bacchus Marsh's and Ballan's role as regional centres for employment, shopping, tourism, industry, business, and cultural services" (Clause 21.04-3);*
- *"Support the development and facilitation of increased local employment opportunities in order to strengthen the local economy" (Clause 21.04-5);*
- *"To consolidate and enhance the development of the inner area of Bacchus Marsh" (Clause 21.07-2); and*

- *"To identify and manage urban growth opportunities driven by the upcoming sewering of Gordon and other growth drivers" (Clause 21.09-1).*

In summary the objectives of policy in relation to retailing in Moorabool encompass the following:

- Encourage the concentration of retail and commercial development in activity centres;
- Ensuring all existing and future development meets the needs of the community and is easily accessible; and
- That future development aims to make the region more self-sufficient and sustainable.

1.4 Retail definition

The definition of retail used in this report, includes spending on food, non-food and retail services and is described as follows:

Food retailing:

- Take-home food, liquor and groceries (FLG) – all food and grocery items, typically sold in supermarkets and specialty fresh food stores, plus packaged beer, wine and spirits.
- Food catering – cafés, take-away food outlets and restaurants.

Non-food retailing:

- Apparel – clothing, footwear, fashion, accessories, and jewellery.
- Household Goods – giftware, electrical, computers, furniture, homewares, and hardware goods.
- Leisure Retail – sporting goods, music, DVDs, games, books, newsagents and film processing/photography.
- General Retail – pharmaceutical goods, cosmetics, toys and mobile phones.

Bulky goods/homemaker is a sub-sector of non-food retail and includes large format retail stores which sell items such whitegoods, furniture, camping goods and large sporting items.

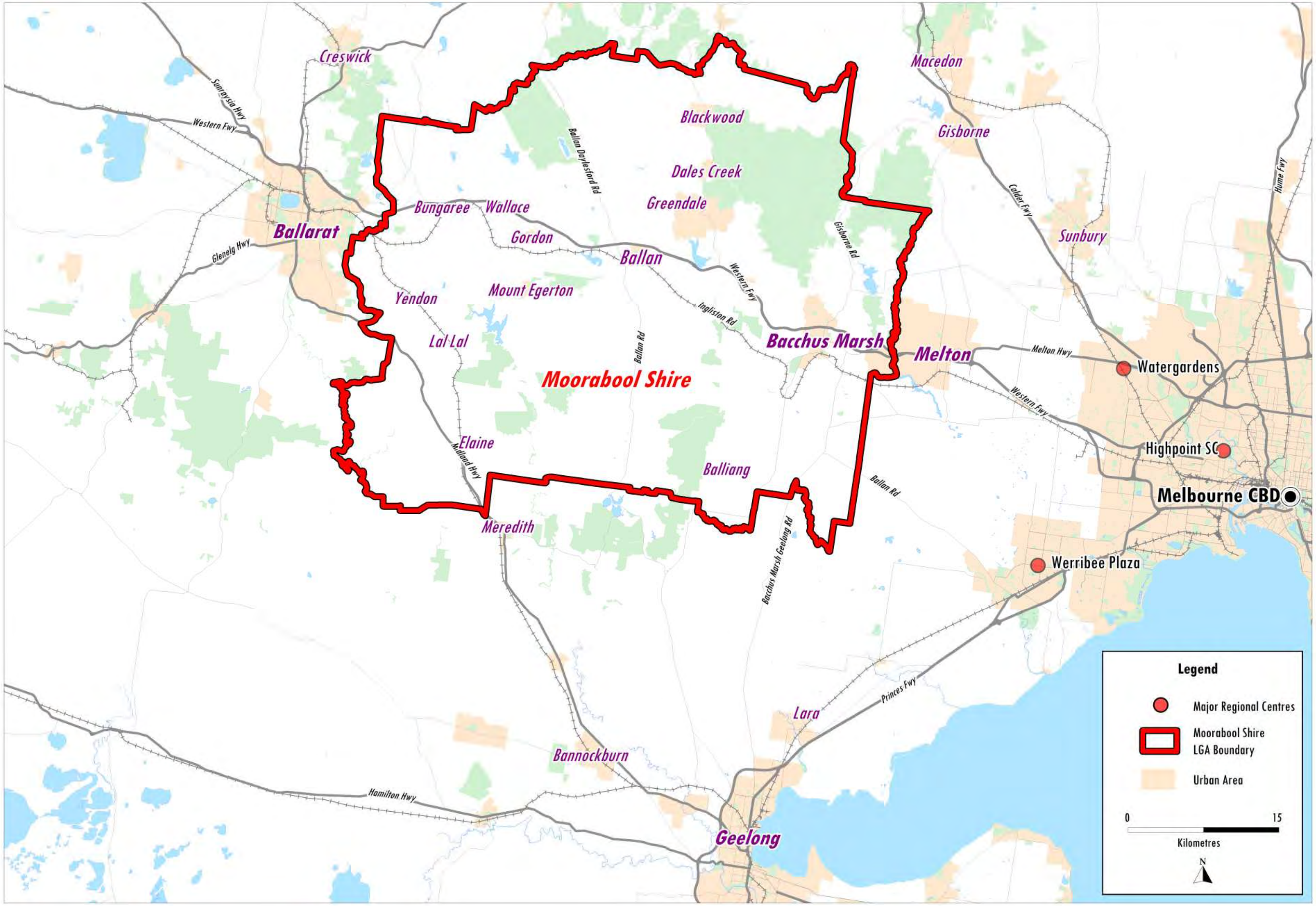
Retail services:

- Retail Services – Optometry, hair and beauty, key cutting, shoe repairs and dry cleaning.

In all shopping precincts a range of '**non-retail**' facilities are provided, which are typical shopfronts that do not sell retail products or offer retail services – such as banks, retail estate agencies, travel agencies, medical centres, tattoo parlours and massage outlets. Some entertainment facilities, such as pubs can also be included as shopfronts in town centres.

In this strategy, the term **shopfront** therefore refers to all majors (department stores, discount department stores, supermarkets and mini-majors) and specialty shops typically located in shopping centres and in strip centres, including all retail and non-retail uses. This term is used as, at times, it is not necessary to distinguish between retail and non-retail shopfront uses, and also acknowledges that some shopfront uses can and do change regularly between retail and non-retail.

In this report, retail expenditure is defined in accordance with ABS definitions, thus it excludes all spending on motor vehicles and motor vehicle parts.



Map 2.1: Regional context

Section 2: Region overview

2.1 Region and location context

Moorabool is located approximately 40 km west of the Melbourne CBD (refer Map 2.1). Geelong and Ballarat are located about 57 km to the south and west, respectively, of Bacchus Marsh.

Moorabool offers a country lifestyle with easy accessibility to the broad range of services and facilities available in western Melbourne, and particularly in Melton. The main drivers of the local economy include construction, agriculture and horticulture, health care and education. Moorabool comprises 64 towns/localities, while more than 70% of the municipality's 210,954 hectares consist of national/state parks or water catchments.

Substantial population growth has been occurring in the municipality in recent years, and Moorabool has been identified as a peri-urban area in the Victorian Government's *Plan Melbourne*. This strong growth is expected to continue and even accelerate for the foreseeable future, with the population of Moorabool projected to increase from 31,200 in 2014 to 51,700 by 2041, **an increase of 20,500 residents**.

Moorabool is located in Central Victoria, roughly equidistant from Melbourne, Geelong and Ballarat. It has been identified as a peri-urban area and is experiencing strong population growth.

The Western Freeway is the key transport route linking Moorabool with both Melbourne to the east and Ballarat to the west. The town centres of both Bacchus Marsh and Ballan are located near the freeway. The Western Freeway is also the principal road link between Melbourne and Adelaide, with over 70,000 vehicles using the freeway every day.

The Melbourne – Ballarat V-line train service provides excellent public transport linkages from Moorabool to Melbourne and Ballarat, with train stops at both Bacchus Marsh and Ballan. A V-line coach service runs through the western part of the municipality, connecting the towns of Elaine, Clarendon, Lal Lal, Yendon and Navigators with Geelong, Ballarat and Bendigo.

The main north-south traffic routes through Moorabool include Bacchus Marsh-Geelong Road and Gisborne Road, which provide direct access from Bacchus Marsh to Geelong in the south and to Gisborne in the north. In the south-western part of Moorabool, Ballan Road provides convenient access from Bacchus Marsh to the rapid growth region of Wyndham/Werribee. Other major north-south roads include Ballan-Daylesford Road and Geelong-Ballan Road, which run through the centre of Moorabool.

Competitive facilities

The Western Freeway extends through Moorabool and provides convenient access for residents of Moorabool to Melton to the east and Ballarat to the west. Both Melton and Ballarat include major retail shopping precincts providing a broad range of food and non-food facilities. The broader

Melbourne region is also easily accessible from Moorabool, and includes a range of major shopping centres as well as the central business district (CBD). The most relevant retail centres/precincts to Moorabool include the following:

- The main enclosed shopping centre in **Melton** is Woodgrove SC, which was expanded in October 2013 and is now anchored by Big W and Kmart discount department stores (dds), as well as Coles, Woolworths and Aldi supermarkets. The centre also includes a wide range of mini-major stores and specialty stores and in total contains nearly 50,000 sq.m of retail floorspace. The main strip (town) centre in Melton is on High Street, while a number of smaller supermarket centres are located throughout the urban area. A range of bulky goods facilities is also provided in Melton, including a Bunnings Warehouse.

- **Ballarat** is a large regional city and contains a number of major retail areas, the most significant being the Central Business Area (CBA), Wendouree and Sebastopol. The Ballarat CBA includes over 200,000 sq.m of retail floorspace with Myer, Target, Big W and Harris Scarfe being the major non-food shopping anchors, while Woolworths, Coles and Aldi supermarkets are also provided. Ballarat also contains a broad range of bulky goods stores, with the majority located at the Wendouree Homemaker Centre, while a number of large hardware stores are also located throughout the city, including Bunnings, Masters and Home Hardware.

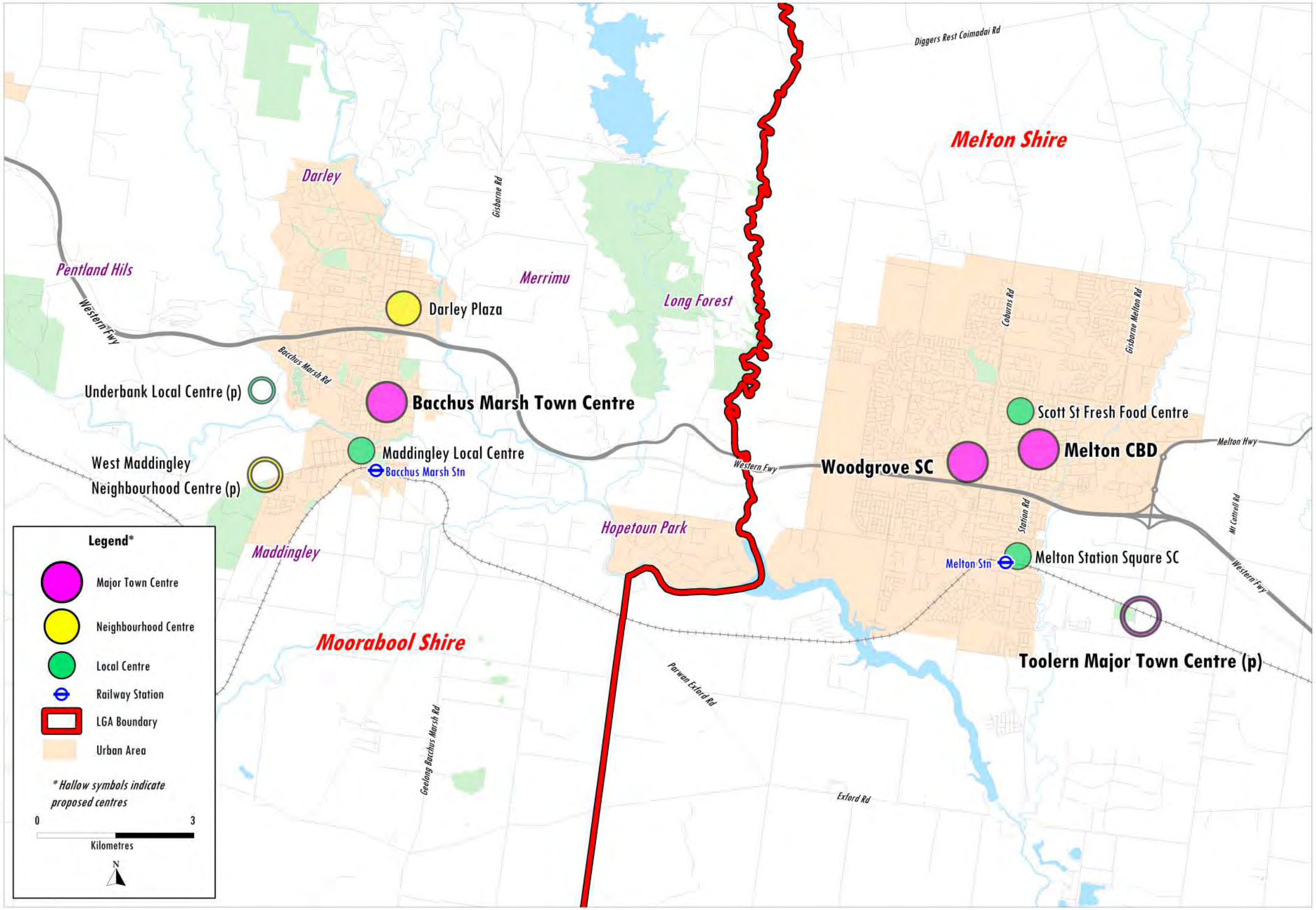
- **Watergardens** is a regional shopping centre located on Melton Highway in the north-western Melbourne suburb of Taylors Lakes. The centre includes a broad range of traditional retail facilities, totalling around 60,000 sq.m of floorspace, while a major bulky goods/homemaker precinct also adjoins the centre, comprising approximately 57,000 sq.m of floorspace.

- **Highpoint** is the premier regional shopping centre in western Melbourne, located in the suburb of Maribyrnong. The centre has recently been expanded and is now one of the largest shopping centres in Australia with approximately 150,000 sq.m of floorspace. A wide range of bulky goods/homemaker retail facilities is also provided opposite the centre.

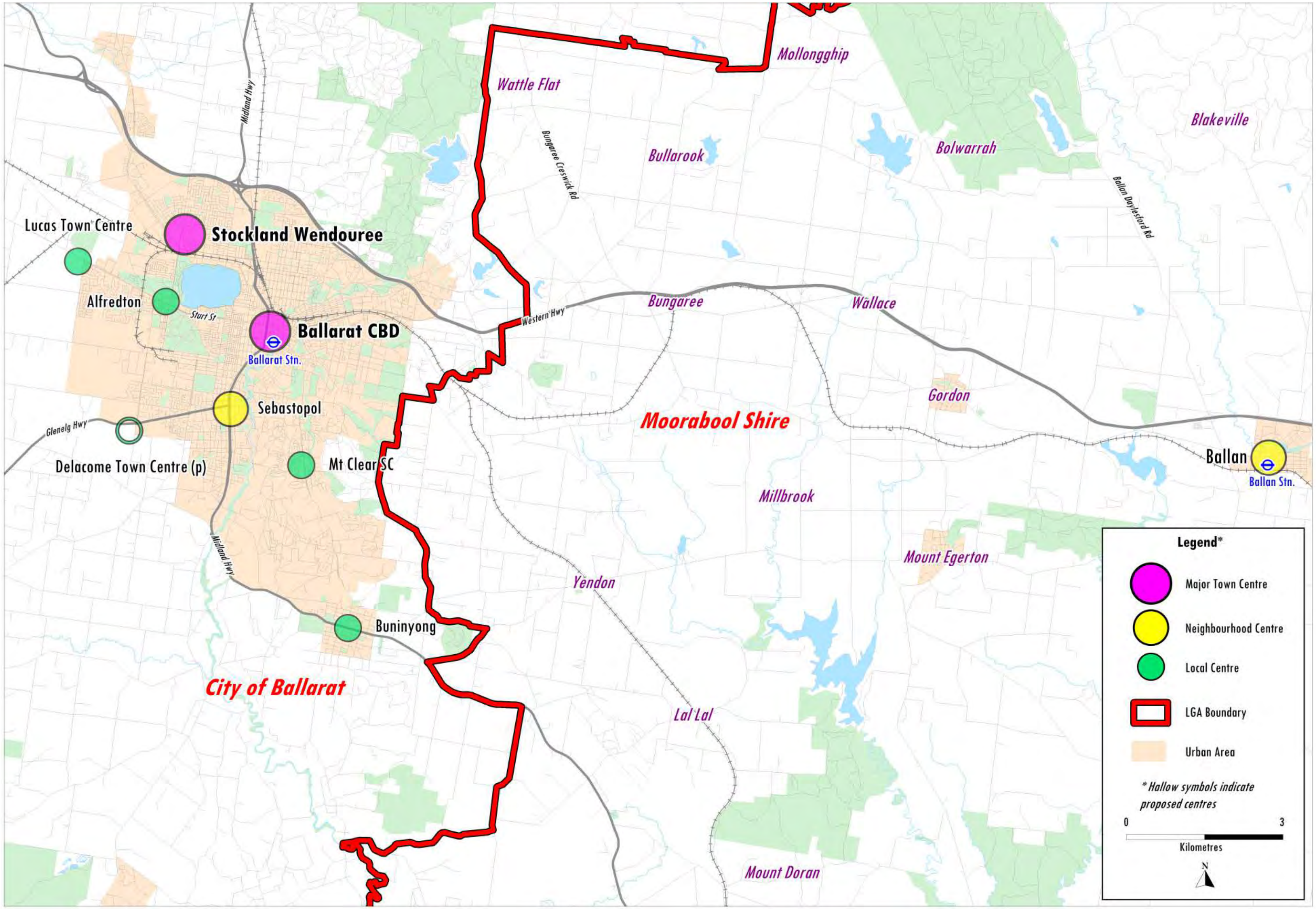
- **Melbourne CBD** offers the largest concentration of retail facilities in the state. The retail core is generally located around Swanston Street and Bourke Street, and accommodates flagship Myer and David Jones department stores as well as a number of recently added flagship international retailers including H&M, Uniqlo and Zara. A number of large, high quality shopping centres also form part of the CBD including Emporium, Melbourne Central and QV.

The town of **Daylesford** is also worth acknowledging, as it is a popular tourism and leisure destination located approximately 55km north-west of Bacchus Marsh. The Daylesford-Hepburn Springs region is well known for its natural mineral springs, and Daylesford provides a number of food destinations and accommodation options for visitors.

In summary, Moorabool provides a linkage between the urban areas of Melbourne with the regional city of Ballarat, and has been identified as a peri-urban area. Moorabool is well connected with the western parts of Melbourne in particular and Ballarat via strong road and rail linkages, and many people in Moorabool work and shop in those larger urban areas.



Map 2.2: Bacchus Marsh and Melton – Competitive context



Map 2.3: Ballan/Western Moorabool and Ballarat – Competitive context

2.2 Peri-urban designation/role

Moorabool has been identified as a peri-urban area under the Victorian Government's *Plan Melbourne*, and is one of a number of designated peri-urban areas surrounding Melbourne, each presenting unique opportunities and constraints. Some of the fasting growing municipalities in Victoria are located in peri-urban areas, signifying their popularity. Peri-urban areas are increasingly becoming sought-after places to live, as they offer residents an attractive semi-rural lifestyle close to the employment opportunities available in Melbourne. One of the aims of peri-urban areas in *Plan Melbourne* is to attract population growth away from Melbourne.

Moorabool is well positioned to capitalise on its peri-urban status, offering an attractive country lifestyle different to that of metropolitan Melbourne, though still very well connected with the capital city. *Plan Melbourne* specifically lists Bacchus Marsh and Ballan as potential peri-urban towns which could accommodate substantial population growth.

The designation of Moorabool as a peri-urban area presents a number of opportunities for the Shire. The increased population will substantially contribute to the local economy and present the retail sector in particular with an opportunity to expand and evolve to cater for the large number of new residents, enabling Moorabool to progressively reach population thresholds required to support a number of larger retail offerings. It will also result in an increased rate base for Council.

The increased population will, however, present a number of challenges for Moorabool, particularly financially, with the Shire needing to contribute to the infrastructure which will be required to accommodate the population growth. It is also important for Council to protect the high-value agricultural/horticultural activities, natural resources and cultural assets within the municipality.

Planning for the future is therefore very important, and needs to be appropriately managed. Such planning will enable significant population growth to occur in Moorabool, without impacting unduly on the existing strengths of the region, such as the semi-rural lifestyle and the natural resources. In this regard, the Growth Plan provides a regional approach to planning, identifying the range of opportunities and challenges presented by the anticipated population growth in the region, and how to best manage this growth.

Example of peri-urban development

Source: http://www.sustainablemelbourne.com/tag/peri-urban/

2.3 Tourism

Tourism is a key industry in Moorabool with a number of events attracting visitors from Victoria, Australia and overseas. Key events in the region are listed in the table following, with the largest including the Strawberries & Cherries Festival and the Harvest Festival.

The Shire of Moorabool is located within the Daylesford and Macedon Ranges (DMR) region. The DMR region includes the towns of Bacchus Marsh, Ballan, Daylesford, Lancefield, Romsey, Kyneton, Woodend, Gisborne and Hepburn Springs. According to the Daylesford & Macedon Ranges Market Profile (year ending December 2013, Tourism Victoria) the region had over 2 million visitors in 2013. Over 76% of these visitors were domestic day trips, with 21% being domestic overnight visitors and the remaining 3% from overseas.

Most tourism data for Moorabool is released at the DMR region level. In 2012 Moorabool Council commissioned Urban Enterprise to further analyse the regional data to get results specific to Moorabool. The analysis found the following:

- 16 % of visitors to the DMR region visited Moorabool;
- The most significant age group for day trips to Moorabool was 45-64 year olds (36%) followed by 25-44 year olds (33%);
- Of those on day trips 83% were visiting for social and other purposes with 14% partaking in outdoor or nature activities;

The Moorabool Destination Management Plan 2013-2018 (Simon McArthur and Associates) provides an overview of tourism in Moorabool and recommended actions and timing to strengthen and build on the existing offer. The plan includes a list of the top 5 economic generating events for day trippers. These include:

- Strawberries and Cherries Festival (est. $584,000);
- Show, Shine & Swap Meet (est. $352,000);
- David Calleja Memorial Car Show (est. $336,000);
- Bacchus Marsh Harvest Festival (est. $196,000);
- Ballan Autumn Festival (est. $188,000).

The plan also includes an audit of operational attractions in 2009 and 2013. It shows that there are 8 food and wine establishments that in 2013 were no longer operating, however there were 10 new establishments. There were also 10 new bed and breakfast establishments.

	Major Events	Monthly events	Other attractions
Bacchus Marsh	• Harvest Festival	• Bacchus Marsh Hospital Ladies Auxiliary Caravan • Country Craft Market • Darley Market	• Bacchus Marsh Rotary Art Show
Ballan	• Ballan Vintage Machinery Rally & Tractor Pull	• Ballan Farmers Market • Ballan Market	• Ballan Autumn Festival • Ballan Art Show • Ballan Quilt and Craft Show
Moorabool Other	• Myrniong Music Festival • Strawberries & Cherries festival	• Greendale Market	• Brisbane Ranges National Park • MooraFest • Yuulong Estate Lavender Festival • Wombat State Forest • Lerderderg Gorge • Werribee Gorge • Blackwood Easter Woodshop • Australia Day Greendale Pub Woodchop Championship • Spring Festival at Garden of St Erth • David Calleja Memorial Car Show

Source: Visit Moorabool Website (http://www.visitmoorabool.com.au) Nov 2014

Strawberries and Cherries Festival

http://www.weeklytimesnow.com.au/business/horticulture/thousands-of-fruit-lovers-descend-on-bacchus-marsh-at-the-weekend-for-strawberry-and-cherry-festival/story-fnker6g8-1227132808789

A number of the towns in Moorabool are popular destinations with visitors, with the key highlights below.

Bacchus Marsh

A popular way to arrive in Bacchus Marsh is via the Avenue of Honour. Other popular activities include taking a historic tour through town, picking fruit at a local farm, visiting the farmers markets, sampling local wine, and walking around the surrounding parks and reserves.

Ballan

Existing tourist attractions in Ballan include the weekly Ballan Farmers Market and Ballan Market, the 1,000 weathervanes project (currently 47), the mineral springs, and annual festivals (Autumn Festival and the Ballan District Vintage Machinery Festival). The Brisbane Ranges National Park is also a popular destination just 30 minutes south of Ballan.

Lal Lal

Lal Lal is a destination in its own right, with tourists visiting to see the historic town as well as Lal Lal falls. South of Lal Lal is the town of Elaine where the Narmbool Lodge is located.

Gordon

The town of Gordon contains a number of unique shops, experiences and history, including a number of art galleries, craft shops and the Yuulong Lavender Estate. A short drive west of Gordon along the Western Freeway leads to Kryal Castle, another popular destination.

Myrniong

Myrniong includes the recently renovated restaurant The Plough, and also provides the annual Myrniong Classic Car Spring and the Myrniong Music Festival.

Blackwood

The Wombat State Forest is a popular destination near Blackwood, with other nearby attractions including The Garden of St Erth, The Lerderderg State Park and The Gorge.

Top row: Weathervanes in Ballan

Bottom left: Lal Lal Falls

Bottom right: Wombat State Forest entrance sign

Photo sources: ballanweathervanes.com.au,
http://andrewthomasphotographer.blogspot.com.au/2011_01_01_archive.html,
https://www.flickr.com/photos/spacountry/7806034854/

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Section 3: Retail trends and their implications

The retail sector throughout Australia generally enjoyed an extended period of strong and steady growth for some 15 years leading up to the global financial crisis (GFC) in 2008. Following the GFC, retailing throughout Australia remained strong in 2009, underpinned by federal government stimulus spending, including handouts to families, designed specifically to support the retail sector.

However, retail sales were then very weak for the 2-year period 2009 – 2011, as the realities of the GFC started to impact on the Australian economy and Australian consumers, particularly paying back excessive credit levels which had been run up in the pre-GFC period. Nonetheless, overall, the impacts on the Australian retail sector from the GFC were relatively benign compared with other western economies, many of which saw reductions of 10% or more in their respective retail sectors. By contrast, within Australia the worst outcome was a reduction in growth rates in the retail sector, from pre-GFC levels of 4% – 6% annually to post-GFC levels of 1% – 3%.

Generally, retail sales in Australia are steadily gathering momentum, with recent trends (past 2 years) showing steady year on year increases. These increases have been mainly underpinned by sound population growth generally across Australia; recovery in the housing market; slowly improving consumer confidence; and a very low interest rate environment by Australian standards.

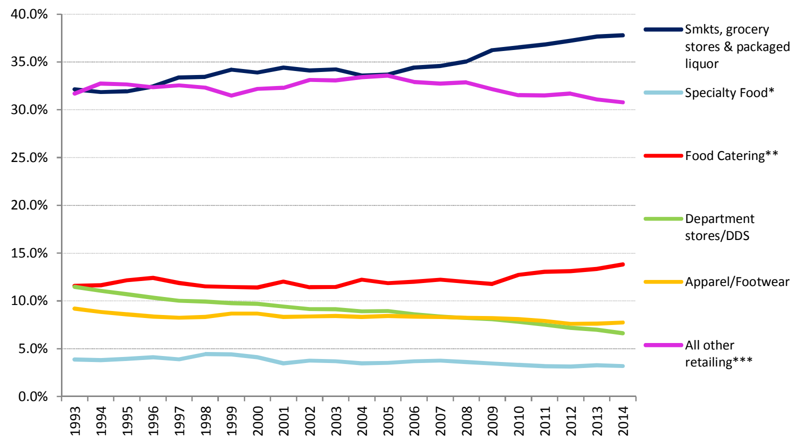
Retail sales by category

Across the major retail categories, department stores and dds continue to experience a tough trading environment, as they cater for the more discretionary spending market, which has suffered since the GFC. Food retailing, comprising fresh food (e.g. groceries) and food catering (restaurants, cafés, take-away food outlets), on the other hand, continues to perform strongly, underpinning a paradigm shift in consumer attitudes towards eating out.

Supermarkets and food specialty sales have been growing strongly, despite some deflation in food and grocery prices. However, non-food specialty sales are not performing as strongly, as discretionary spending continues to be impacted from depressed customer sentiment, which has recently been further negatively impacted following the release of the 2014 federal budget. Chart 3.1 shows the readily evident post-GFC trends in retail expenditure behaviour throughout Australia, highlighting the growth in supermarkets and grocery stores as well as food catering, and the significant declines in non-food retailing generally, but particularly in department stores/discount department stores (dds).

Chart 3.1

ABS Retail Trade: Percent of Total Retail Trade by Category (1993 - 2014)



**Specialty food includes fresh meat, fish and poultry, fruit and vegetables, and other specialty food retailers not captured by the above categories.*
***Food Catering includes take-away food, cafes and restaurants.*
**** All other retailing includes furniture/floor coverings, electrical/electronics, hardware /garden, newspapers/books, other recreational goods, pharmaceuticals and other retailing n.e.c.*
Source: ABS Retail Trade Cat.8501.0, Aug 2013

International retailers continue to show very strong interest in entering Australia, evidenced by the recent opening of 'fast fashion' global retailers Uniqlo and H&M in the Melbourne CBD, joining the previously arrived Zara and Topshop. Though not all global retailers are expected to succeed, their entry is reshaping the shopping centre landscape, putting some downward pressure on rental levels, as they are seen as 'must-haves' and have a strong bargaining position.

The dds, as well as the mid-market specialty fashion retailers, have suffered the most from the new international entrants. As a consequence, some regional shopping centres are likely to suffer, some sub-regional shopping centres will need to re-invent themselves, and some more domestic retailers may fail.

As part of the fallout of the post-GFC trends, Australian department stores and, even more so, dds have reported generally poor results, particularly Target and Big W. Over the past two years, Target has reported same store sales declines of 3.3% in 2013 and 5.3% in 2014. Big W has reported same store sales declines of 0.7% and 3.1% over the same period.

One of the repercussions of these trends has been a significantly lower trading environment for dds and department store operators, other than Kmart which continues to trade solidly (though not outstandingly) and is still looking to open at least some new stores in sub-regional type locations. By contrast, both Big W and Target are now much more focused on locating at regional shopping centres (anchored by department stores such as Myer or David Jones), and are generally less inclined to consider locations at sub-regional shopping centres or in regional towns – locations which those chains were aggressively seeking in the pre-GFC period.

Online Retailing

Online retailing combined with falling expenditure on discretionary retailing generally has placed significant pressure on some retail categories over the past 3 – 4 years. At present online retailing accounts for almost 6% of total retail sales in Australia, and has been growing at rates between 15% – 20% annually over the past few years. However, the rate of growth has now started to decrease (down from 20+% to around 7% over recent months) and many retail categories have not been particularly affected.

The combination of factors which has led to a rapid deceleration in the rate of growth of online retail purchasing by Australian consumers has included the following:

- A much weaker Australian dollar over the past 3 – 4 months.
- Improved competitiveness, and pricing, of bricks and mortar retailers, which have also significantly improved their online offers, thereby helping to reduce the attractiveness of online retailing relative to bricks and mortar retailing.
- Increasing bricks and mortar presence of international retailers within Australia which previously were only available via the online channel to Australian consumers.
- The general shift to more food purchasing (both take-home food and in particular take-away food and cafés/restaurants) which in Australia suffers only minimal online penetration.

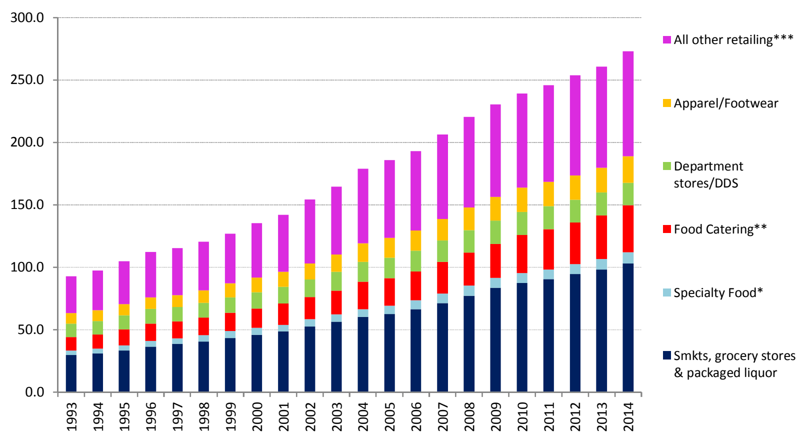
The extensive physical improvements of major shopping centres now underway throughout Australia – a trend which is generally more relevant to major metropolitan areas rather than peri-urban regions such as Moorabool– is yet another factor which in the future will improve the attractiveness of bricks and mortar retailing relative to online. Shopping centre improvements include creating places where people can meet and interact as well as go shopping to encourage people to visit the centres for a variety of reasons.

Clearly, food catering (cafes, restaurants and take-away food outlets) has been minimally affected by the online retailing trend, and that category has continued to grow very strongly, including in the post-GFC period. Similarly, take-home food retailing (food and groceries purchased at supermarkets, specialty stores, fresh food markets) is largely protected from online retailing, with Australians having shown relatively limited interest in purchasing their food and groceries online. Again, the take-home food category has continued to grow strongly, even in the post-GFC period, as previously noted.

Chart 3.2 shows the shifts in relative contribution to total retail sales in Australia over the past two decades.

Chart 3.2

ABS Retail Trade: Australia (1993 - 2014), $ Billions



**Specialty food includes fresh meat, fish and poultry, fruit and vegetables, and other specialty food retailers not captured by the above categories.*
***Food Catering includes take-away food, cafes and restaurants.*
**** All other retailing includes furniture/floor coverings, electrical/electronics, hardware /garden, newspapers/books, other recreational goods, pharmaceuticals and other retailing n.e.c.*
Source: ABS Retail Trade Cat.8501.0, Aug 2013

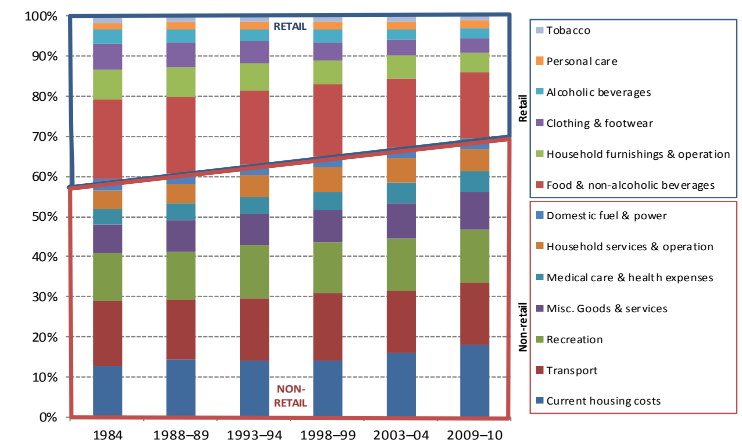
Real growth in retail sales has also been negatively impacted in the post-GFC period by a range of economic and social factors. Firstly, there has been an increased rollout of cheaper goods, particularly by mainstream retailers. For example, Kmart is increasingly sourcing directly from overseas suppliers and driving down prices in the dds sector. Shoppers are also increasingly using the internet to purchase retail goods, with lower prices being one of the most important considerations.

The downward pressure on the price of retail goods is not only contained to non-food items, with fresh food also experiencing price deflation over recent years. However, this has not been an outcome of the GFC, and has been primarily led by large retailers, most notably by Wesfarmers (Coles supermarkets) as a competitive strategy. The ongoing downward pressure on price has particularly hit some independent traders, who are unable to compete on price as easily as major retailers.

Shopping centres have also increasingly been seeking to include a wider range of non-retail uses/services to support the retail offer, in line with the changing expenditure behaviours of Australian households. Charts 3.3 and 3.4 following highlight the pressures on Australian households in relation to the more essential non-retail requirements of the household budget – housing, transport, education and health. Rising costs for these services have resulted in an ever increasing share of the household budget being devoted to non-retail uses, as shown in the charts.

Chart 3.3

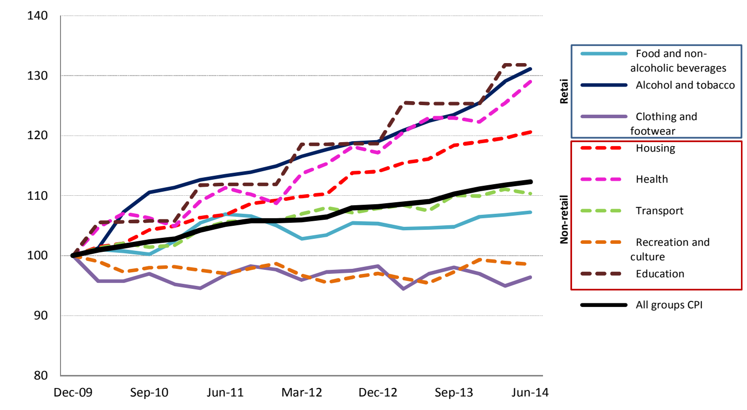
Average Weekly Household Expenditure (1984 - 2010)



**NB: Approx 35% of recreation is retail, 20% misc. Goods & services is retail; 23% of household services is retail and 37% of alcoholic beverages is 'non-retail'*
Source: ABS Household Expenditure Survey

Chart 3.4

CPI - Selected Groups (Dec 2009 to Jun 2014)



Source: Consumer Price Index

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As a consequence of the combination of factors outlined above, the general outlook for the Australian retail sector is reasonably optimistic, but with an expectation that growth in the retail sector over the next one to two decades will generally be lower than the growth rates enjoyed in the 15 years pre-GFC. A combination of factors in the decade and a half between 1993 and 2008 saw a long period of particularly strong growth in the retail sector, driven by steady year on year economic growth, increasing household incomes, house prices, and a rapid rise in household borrowings to fund consumption, including retail consumption.

By contrast, the five years since 2009 have already seen significant changes in a number of those trends, in particular with households reduced borrowings, and with non-retail demand on the household budget constraining household's ability and willingness to continue spending on discretionary retail goods.

For the next decade we expect to see improvement in the retail sector compared with the past five years, however, with steady growth anticipated to be generally in the range of 3% – 4%, rather than the 5% – 6% recorded for many of the years between 1993 and 2008.

The services economy is expected to continue growing at generally faster rates than the retail sector, in line with the trends witnessed over the past decade. Continuing upward pressures on costs for health, housing, transport and education, together with a steadily aging population, are expected to underpin higher inflation rates generally for the services sector as compared with the retail sector.

Implications for future retail development in Moorabool

The various retail developments which have occurred across the municipalities to the east and west of Moorabool over the past 15 years are typical of the retail development patterns witnessed generally across Australia over that period. Some examples of the developments completed over this period include the following:

- Expansions to higher order shopping centres, both sub-regional shopping centres and regional shopping centres, typically adding dds, supermarkets, and a range of specialty stores and services, many of which are national brand stores. Relevant centres which have undergone expansions/developments of this nature include the following:
  - Woodgrove Shopping Centre at Melton
  - Watergardens at Sydenham
  - Highpoint Shopping Centre
  - Brimbank Shopping Centre
  - Caroline Springs Square
- Delivery of an increasing number of supermarket developments, via a combination of new neighbourhood centres built on greenfield/brownfield sites, as well as redevelopments of existing stores or vacant sites within town centres. The following is a list of relevant examples of this type of development:
  - Watervale Shopping Centre at Burnside Heights
  - Taylors Hill Shopping Centre
  - Lucas Town Centre at Alfredton

- Large footprint new store entrants, typically built in homemaker centres or as freestanding locations. The most obvious example being the new Masters Home Improvement superstore being rolled out by Woolworths. That in turn has elicited a competitive response by Wesfarmers' Bunnings Hardware format that has resulted in a number of new Bunnings stores being built at locations which were previously not being considered, as well as existing Bunnings stores being significantly expanded. For example, the recent development of both Masters and Bunnings stores, directly opposite each other, at Burnside.
- New homemaker centre developments, primarily in the pre-GFC period, though not so much post-GFC, which substantially increased the provision of floorspace within or near major retail precincts, although that space was generally low turnover space and not built within existing centres. Examples of this type of development in the broad region surrounding Moorabool include the following:
  - Along Melton Highway in Sydenham opposite Watergardens Town Centre;
  - On the western side of Rosamond Road opposite Highpoint Shopping Centre in Maribyrnong;
  - Wendouree Homemaker Centre at Ballarat.

One of the most significant implications of the recent trends in the Australian retail landscape, particularly the arrival of new international retailers, is that the big centres are getting and will continue to get bigger, while the more 'in between' centres have been harder hit. This trend is likely to continue

Regional shopping centres are the natural homes for the new global retailers, which command very large trade areas, and generate enormous sales volumes. Those retailers are simply not interested in locating in lower order centres.

The attraction of new global retailers to regional shopping centres then has a snowball effect, making those centres even more popular destinations, both for consumers and for the supporting range of specialty retailers, who wish to be located at the best centres where the customers interested in undertaking comparison shopping are visiting.

The cycle described above then continues to make life more difficult for the lower order centres, particularly sub-regional shopping centres which in the past have been largely dependent on dds as their primary non-food shopping anchors.

These trends are more pertinent to the major metropolitan areas, in particular the state capital cities, where large regional shopping centres are available – such as Chadstone Shopping Centre, Westfield Doncaster, Highpoint and even, following further planned expansions, Watergardens at Sydenham.

In regional cities and towns such as Bacchus Marsh, the issue is not so much that regional shopping centres are getting bigger, since centres of that scale generally do not exist. Rather, the more important issue is that additions of new non-food anchor stores (e.g. dds) or expansions to existing centres based on additional non-food anchor stores are generally less likely to occur in the foreseeable future than they were in the pre-GFC period.

This reduced likelihood of further expansions/additions of such facilities is not so much a result of the GFC, but rather the result of the changing retail landscape within Australia, which in part has been driven by the events of the GFC, but certainly not in total. In a number of specific instances, dds operators which in the pre-GFC period were quite aggressively seeking out new store locations in regional cities and provincial towns, often for smaller format stores, have now abandoned that policy. They are instead tending to focus on larger format stores in regional shopping centre locations. As a consequence, towns such as Bacchus Marsh which were certainly on the radar for new store locations for these operators have fallen down the priority list.

The trends in the food categories remain strong, and apply to all areas (i.e. major metropolitan areas, provincial cities and towns, and even rural areas). Subject to appropriate threshold population levels being achieved (with a full scale national chain supermarket typically requiring a population threshold of around 7,000 – 8,000 people to be viable) the rollout of new supermarket based developments will continue. However, even for supermarkets the rate at which new additions will occur is likely to be considerably slower than has been the case over the past decade, primarily because many of the existing gaps have been progressively filled. Aldi, for example, has now opened stores at most of the cities and towns across Victoria, including at Bacchus Marsh, so the rate at which new Aldi stores will be added over the next decade is expected to be considerably slower.

One of the key drivers of future demand for supermarkets will of course be population growth, thus those areas across the region where future residential development is planned will be priorities for the appropriate addition of supermarkets and related convenience shopping facilities.

In addition, we can expect to see an increased focus on catered food (take-away food, cafés & restaurants) as an important driver of new retail development – the recent expansion of Woodgrove Shopping Centre at Melton being a good example of these influences. Increasingly, major shopping centres will be using catered food options (extensive foodcourts, new generation café courts, as well as recently emerging restaurant precincts) as additional anchors, adding to the list of traditional anchor stores which has typically included department stores, discount department stores and major supermarkets. Some of Australia's larger centres are already doing so.

Smaller centres, including centres such as Bacchus Marsh Town Centre, will however also have the opportunity to improve their offers through an increased focus on catered food options.

Overall, the future growth of lower-order retail centres (i.e. centres other than regional shopping centres), be they enclosed, managed malls, town centres or village centres, will be generally more limited and more difficult to deliver than was the case in the 10 – 15 years pre-GFC.

Reflecting the changing priorities of the household budget, shopping centre developments in Australia are now also increasingly looking to incorporate uses such as medical (sophisticated medical centres which contain general practitioners, dental, physiotherapy, massage, and other related uses), gymnasiums, spas, and a wider range of non-retail uses such as professional services, community services and commercial uses.

Centres in provincial cities and smaller towns are therefore more likely to be fine-tuned, with generally lower expansion demand than was available in the pre-GFC period – at least in terms of retail uses – over the next decade.

Trader at the Bacchus Marsh Harvest Festival

Photo source: http://www.visitmoorabool.com.au/feast-of-march/bmhf

Section 4: Population and retail expenditure analysis

This section details the estimated current and projected population and retail expenditure levels within Moorabool, together with a review of the socio-demographic profile of residents.

4.1 Moorabool regions and sub-regions

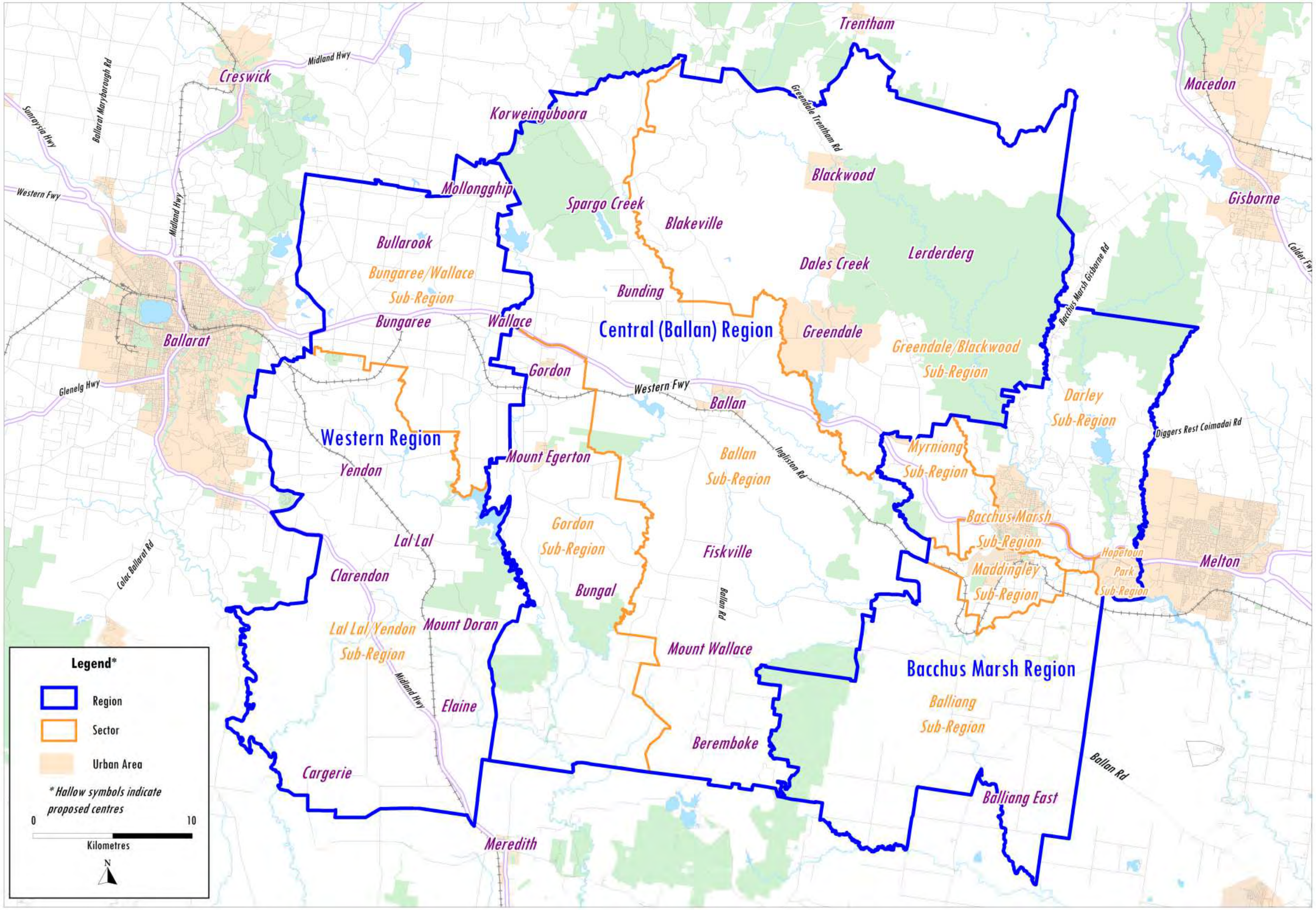
Moorabool covers an extensive area and includes two main town centres - Bacchus Marsh and Ballan. For the purposes of the analysis presented in this Strategy, the municipality has been divided into three regions – **Bacchus Marsh**; **Central (Ballan)**; and **Western**. The first two of these regions reflect the areas of most relevance to the town centres of Bacchus Marsh and Ballan, while the Western region is the part of Moorabool located in close proximity to Ballarat. This breakdown allows for a detailed retail floorspace analysis to be undertaken for each of the regions, which are all different and have different opportunities and challenges.

Moorabool was divided into the above three regions based on the following key considerations:

- the location of the major provision of retail facilities within Moorabool, primarily at Bacchus Marsh and Ballan;
- the large number of small towns located throughout Moorabool;
- the accessibility of the town centres at Bacchus Marsh and Ballan from the various towns within Moorabool;
- the available road network and public transport options provided throughout Moorabool; and
- the range of retail facilities provided at competitive locations in the surrounding areas, particularly at Melton to the east and Ballarat to the west.

Map 4.1 illustrates the regions and sub-regions defined for Moorabool.

Former Myrniong Hotel



Map 4.1: Moorabool Shire – Regions and sub-regions

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The **Bacchus Marsh region** encompasses the eastern extent of Moorabool and includes the urban area of Bacchus Marsh (including Darley and Maddingley), as well as the towns/localities of Myrniong, Hopetoun Park, Balliang, Balliang East, Rowsley, Parwan, Merrimu and Pentland Hills. Residents within this region are expected to readily use the retail facilities at the Bacchus Marsh Town Centre and Darley Plaza, and are also located in close proximity to the broad range of retail facilities provided at Melton, most notably Woodgrove Shopping Centre.

The **Central (Ballan) region** is located west of the Bacchus Marsh region and includes Ballan as well as the towns/localities of Greendale, Dales Creek, Blackwood, Spargo Creek, Korweinguboora, Barkstead, Bunding, Mount Wallace, Glenmore, Gordon and Mount Egerton. Ballan contains the only major retail centre in this region, and residents within the region would likely use Ballan for supermarket and other convenience shopping needs, while accessing Bacchus Marsh, Melton and Ballarat for their broader retail needs.

The **Western region** encompasses the western part of Moorabool and includes the towns/localities of Bungaree, Wallace, Claretown, Clarkes Hill, Dunnstown, Yendon, Lal Lal, Clarendon and Elaine. The region contains a limited provision of retail facilities. Residents are likely to travel to Ballarat for a large proportion of their shopping needs.

The **Bacchus Marsh region** is divided into the following sub-regions:

- The **Bacchus Marsh sub-region** includes central Bacchus Marsh and is bordered by the Western Freeway in the north and Werribee River in the south. It also includes the land located on either side of Korkuperrimul Creek known as Underbank Stud Farm, which is to be developed for residential uses.

- The **Darley sub-region** extends north of the Western Freeway and includes the growing suburb of Darley and rural areas to the north.

- The **Maddingley sub-region** extends south of the Werribee River, encompassing the suburb of Maddingley, including the West Maddingley Growth Area.

- The **Myrniong sub-region** extends north-west from Bacchus Marsh along the Western Freeway to the town of Myrniong.

- The **Hopetoun Park sub-region** encompasses Hopetoun Park, which is located halfway between Bacchus Marsh and Melton.

- The **Balliang sub-region** is located south of Bacchus Marsh and extends to the southern extent of Moorabool.

The **Central (Ballan) region** is divided into the following sub-regions:

- The **Ballan sub-region** includes the town of Ballan and extends to the north along Ballan–Daylesford Road, and to the south along Ballan–Meredith Road.
- The **Greendale/Blackwood sub-region** generally extends north of the Western Freeway along Greendale–Trentham Forest Road.
- The **Gordon sub-region** extends south of the Western Freeway, and includes the towns of Gordon, Mount Egerton and Morrisons.

The **Western region** is divided into the following two sub-regions:

- The **Bungaree/Wallace sub-region** extends west along the Western Freeway from Wallace to Leigh Creek.
- The **Lal Lal/Yendon sub-region** generally extends south of Dunnstown to Elaine and Cargerie.

The regions and sub-regions defined for Moorabool are summarised below.

Region	Sub-region
Bacchus Marsh	Bacchus Marsh
	Darley
	Maddingley
	Balliang
	Hopetoun Park
	Myrniong
Central (Ballan)	Ballan
	Gordon
	Greendale/Blackwood
Western	Bungaree/Wallace
	Lal Lal/Yendon

Old Melbourne Road, Ballan
Source: http://tedsmakemyday.blogspot.com.au/2012_04_01_archive.html

4.2 Moorabool– population forecasts

The population within Moorabool is estimated at 31,200 as at June 2014. Recent population growth is estimated to have been strong within Moorabool, averaging 2.7% per annum between 2011 and 2014, primarily driven by a number of residential developments in the Bacchus Marsh region. In comparison, the annual average growth rate for the state of Victoria is estimated at 1.8% over that period[1]. In particular, Moorabool was one of the fastest growing municipalities in regional Victoria over 2012-13[2].

Moorabool is projected to reach a population of 36,700 by 2021, increasing further to approximately 51,700 by 2041, reflecting an average annual growth rate of 1.9% over the forecast period. It is expected that most of the Shire's growth will continue to be concentrated within the Bacchus Marsh region.

There is the potential for higher rates of population growth to occur within this region if additional services such as sewerage, gas and water infrastructure were to be provided in the small rural towns located in the area, such as Bungaree and Wallace. However, we expect that the majority of the population growth will occur in the major centres of Bacchus Marsh and Ballan, which is reflected in our population forecasts.

Map 4.2 illustrates the extent of the sub-regions within the Bacchus Marsh region.

[1]Victoria in Future 2014, Department of Transport; Planning and Local Infrastructure (May 2014)

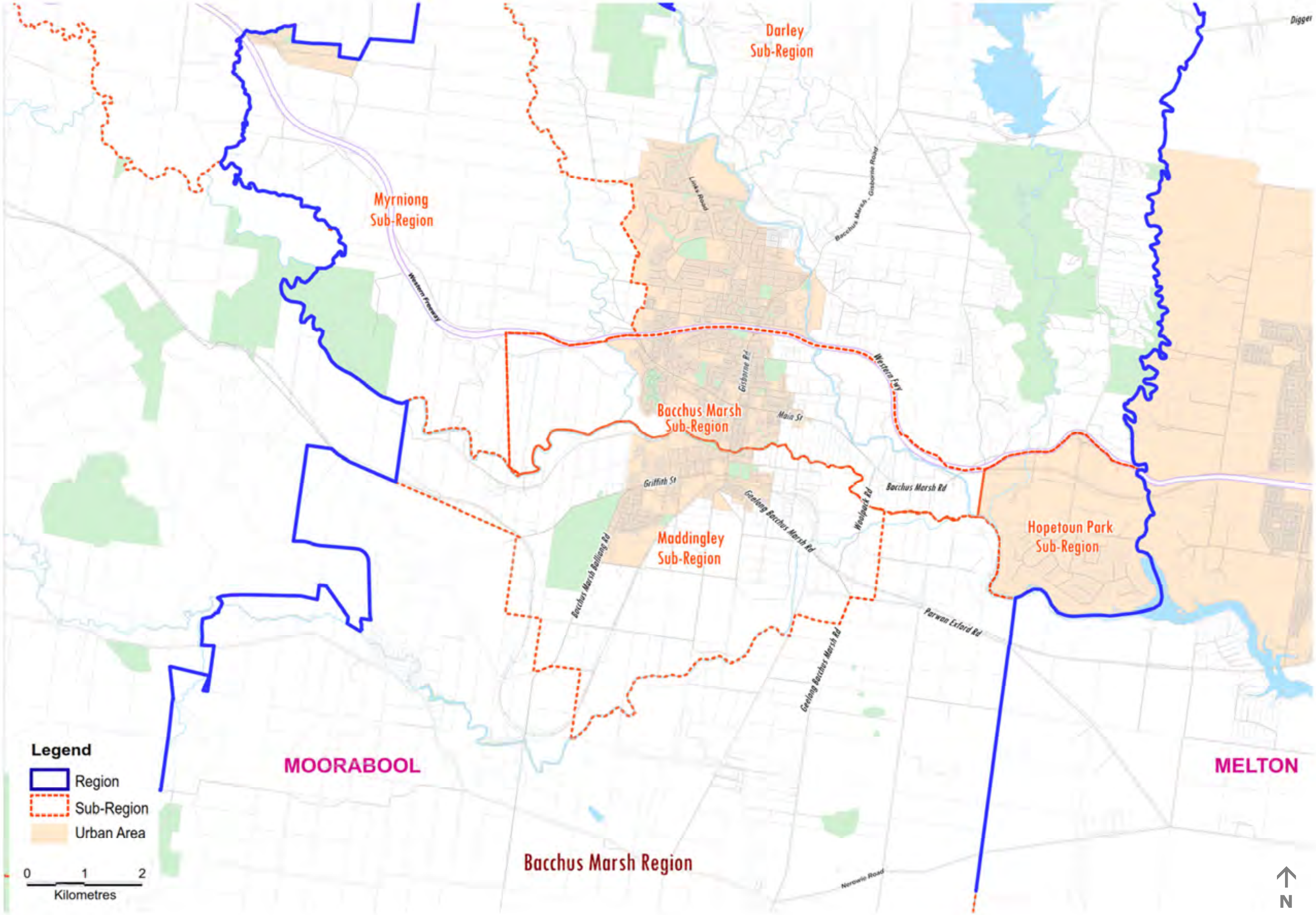
[2]Regional Population Growth, Australia (3218.0), Australian Bureau of Statistics (April 2014)

Table 4.1

Moorabool Shire population, 2011-2041*

	Est. population		Forecast population			
Region	2011	2014	2016	2021	2031	2041
Bacchus Marsh	18,330	20,280	21,620	24,920	30,670	35,870
Central (Ballan)	6,990	7,350	7,590	8,190	9,690	11,590
Western	3,490	3,550	3,570	3,620	3,870	4,270
Total Moorabool Shire	**28,810**	**31,180**	**32,780**	**36,730**	**44,230**	**51,730**
		Average annual growth (no.)				
Region		2011-14	2014-16	2016-21	2021-31	2031-41
Bacchus Marsh		650	670	660	575	520
Central (Ballan)		120	120	120	150	190
Western		20	10	10	25	40
Total Moorabool Shire		**790**	**800**	**790**	**750**	**750**
		Average annual growth (%)				
Region		2011-14	2014-16	2016-21	2021-31	2031-41
Bacchus Marsh		3.4%	3.3%	2.9%	2.1%	1.6%
Central (Ballan)		1.7%	1.6%	1.5%	1.7%	1.8%
Western		0.6%	0.3%	0.3%	0.7%	1.0%
Total Moorabool Shire		**2.7%**	**2.5%**	**2.3%**	**1.8%**	**1.5%**

**As at June*
Source: ABS Census 2011; Victoria In Future, May 2014; Forecast.id; MacroPlan Dimasi



Map 4.2: Bacchus Marsh context

4.3 Bacchus Marsh region – population forecasts

Bacchus Marsh is the major population centre of Moorabool, and is the closest major town to Melton and Melbourne, being located on the eastern boundary of Moorabool. The Bacchus Marsh region has been defined to include the urban area of Bacchus Marsh, including the suburbs of Darley and Maddingley, as well as the towns of Myrniong, Hopetoun Park, Balliang and Balliang East.

The population of the Bacchus Marsh region is estimated at 20,280 as at June 2014, with estimated recent annual growth averaging 650 people between 2011 and 2014. This growth is expected to increase steadily over the forecast period, with a large amount of land planned for residential development within and adjacent to the Bacchus Marsh urban area, most notably at the Stonehill Estate in West Maddingley.

There is also a significant amount of land located to the west of Bacchus Marsh at Underbank Stud Farm, which is currently under consideration for rezoning for residential development. If this land is rezoned, it will contribute to population growth in Bacchus Marsh over the medium to long term.

Table 4.2

Bacchus Marsh region population, 2011-2041*

	Est. population		Forecast population			
Sub-region	2011	2014	2016	2021	2031	2041
• Bacchus Marsh	5,920	6,310	6,670	7,670	10,170	12,670
• Darley	8,450	9,290	9,750	10,750	11,250	11,750
• Maddingley	2,390	2,930	3,330	4,430	6,930	8,930
• Myrniong	380	410	430	480	580	680
• Hopetoun Park	580	700	780	880	930	930
• Balliang	610	640	660	710	810	910
Total Bacchus Marsh	**18,330**	**20,280**	**21,620**	**24,920**	**30,670**	**35,870**
		Average annual growth (no.)				
Sub-region		2011-14	2014-16	2016-21	2021-31	2031-41
• Bacchus Marsh		130	180	200	250	250
• Darley		280	230	200	50	50
• Maddingley		180	200	220	250	200
• Myrniong		10	10	10	10	10
• Hopetoun Park		40	40	20	5	0
• Balliang		10	10	10	10	10
Total Bacchus Marsh		**650**	**670**	**660**	**575**	**520**
		Average annual growth (%)				
Sub-region		2011-14	2014-16	2016-21	2021-31	2031-41
• Bacchus Marsh		2.1%	2.8%	2.8%	2.9%	2.2%
• Darley		3.2%	2.4%	2.0%	0.5%	0.4%
• Maddingley		7.0%	6.6%	5.9%	4.6%	2.6%
• Myrniong		2.6%	2.4%	2.2%	1.9%	1.6%
• Hopetoun Park		6.5%	5.6%	2.4%	0.6%	0.0%
• Balliang		1.6%	1.6%	1.5%	1.3%	1.2%
Total Bacchus Marsh		**3.4%**	**3.3%**	**2.9%**	**2.1%**	**1.6%**

**As at June*
Source: ABS Census 2011; Victoria In Future, May 2014; Forecast.id; MacroPlan Dimasi

4.4 Central (Ballan) region – population forecasts

The Central (Ballan) region of Moorabool contains the towns of Ballan, Gordon, Mount Egerton, Greendale, Dales Creek, Blackwood, Spargo Creek and Barkstead. Ballan is located in the centre of Moorabool, and is the second largest population centre of Moorabool. The population of the Central (Ballan) region is estimated at 7,350 as at June 2014.

The town of Ballan is estimated to include the majority of the growth in the Central (Ballan) region. There is a significant amount of land currently zoned for development located to the north-east of the town centre, with more land available to be zoned for residential development located beyond the current urban area.

The population of the Central (Ballan) region is projected to reach 8,190 by 2021, increasing further to 11,590 by 2041, reflecting an average annual growth rate of 1.6% over the forecast period.

Table 4.3

Central (Ballan) region population, 2011-2041*

Sub-region	Est. population 2011	Est. population 2014	Forecast population 2016	Forecast population 2021	Forecast population 2031	Forecast population 2041
• Ballan	3,770	3,980	4,120	4,470	5,470	6,670
• Greendale/Blackwood	1,630	1,690	1,730	1,830	2,030	2,230
• Gordon	1,590	1,680	1,740	1,890	2,190	2,690
Total Central (Ballan)	**6,990**	**7,350**	**7,590**	**8,190**	**9,690**	**11,590**

Sub-region	Average annual growth (no.) 2011-14	2014-16	2016-21	2021-31	2031-41
• Ballan	70	70	70	100	120
• Greendale/Blackwood	20	20	20	20	20
• Gordon	30	30	30	30	50
Total Central (Ballan)	**120**	**120**	**120**	**150**	**190**

Sub-region	Average annual growth (%) 2011-14	2014-16	2016-21	2021-31	2031-41
• Ballan	1.8%	1.7%	1.6%	2.0%	2.0%
• Greendale/Blackwood	1.2%	1.2%	1.1%	1.0%	0.9%
• Gordon	1.9%	1.8%	1.7%	1.5%	2.1%
Total Central (Ballan)	**1.7%**	**1.6%**	**1.5%**	**1.7%**	**1.8%**

**As at June*
Source: ABS Census 2011; Victoria In Future, May 2014; Forecast.id; MacroPlan Dimasi

MacroPlanDimasi

4.5 Western region – population forecasts

The population of the Western region of Moorabool is estimated at 3,550 as at June 2014. The small towns which populate this region include Wallace, Bungaree, Dunnstown, Yendon, Lal Lal, Clarendon and Elaine. These towns are located relatively closer to Ballarat than Bacchus Marsh.

Population growth within the region is estimated to be low. The population of the Western region is projected to reach 4,270 by 2041, reflecting an average annual growth rate of 0.4% over the forecast period.

Urban Enterprise's Moorabool West Small Towns Residential Assessment (Draft – November 2014) analyses potential residential market demand in the small towns of Western Moorabool, namely Bungaree, Wallace, and Dunnstown. The report presents a number of urban growth scenarios for the three towns depending on varying levels of infrastructure investment. The report also details AECOM's study to assess the opportunities, challenges, and viability of providing reticulated utility services to Bungaree, Wallace and Dunnstown, and provides a potential capacity population for the towns of Bungaree and Wallace based on available land.

If additional infrastructure is provided in these small towns, particularly Gordon, Bungaree and Wallace, the population growth within the towns may be greater than is detailed in Table 4.4. This potential higher growth scenario is addressed in Section 8.7 of this Strategy.

Table 4.4

Western region population, 2011-2041*

Sub-region	Est. population 2011	2014	Forecast population 2016	2021	2031	2041
• Bungaree/Wallace	1,170	1,170	1,170	1,170	1,320	1,620
• Lal Lal/Yendon	2,320	2,380	2,400	2,450	2,550	2,650
Total Western	**3,490**	**3,550**	**3,570**	**3,620**	**3,870**	**4,270**
		Average annual growth (no.)				
Sub-region		2011-14	2014-16	2016-21	2021-31	2031-41
• Bungaree/Wallace		0	0	0	15	30
• Lal Lal/Yendon		20	10	10	10	10
Total Western		**20**	**10**	**10**	**25**	**40**
		Average annual growth (%)				
Sub-region		2011-14	2014-16	2016-21	2021-31	2031-41
• Bungaree/Wallace		0.0%	0.0%	0.0%	1.2%	2.1%
• Lal Lal/Yendon		0.9%	0.4%	0.4%	0.4%	0.4%
Total Western		**0.6%**	**0.3%**	**0.3%**	**0.7%**	**1.0%**

**As at June*
Source: ABS Census 2011; Victoria In Future, May 2014; Forecast.id; MacroPlan Dimasi

4.6 Socio-demographic profile

The socio-demographic profile of the Moorabool population is based on the results from the 2011 ABS Census of Population and Housing. The key features of Moorabool's population are compared with the benchmarks for metropolitan Melbourne and total Australia, with the following highlights:

- The average age of Moorabool residents is higher than the Melbourne metropolitan average; however, it is consistent with the Australian average. The age profile of the Bacchus Marsh region is slightly younger than the Central (Ballan) and Western regions, which both have a significantly higher than average proportion of residents aged 60 years and above; while all regions have a higher than average proportion of young children, especially in the Bacchus Marsh region.

- The average income levels throughout Moorabool are lower than the respective Melbourne metropolitan and Australian averages, on both a per capita and per household basis.

- Home ownership levels throughout Moorabool are significantly above the Melbourne metropolitan and Australian averages, especially in the Central (Ballan) and Western regions.

- The proportion of Australian born residents within Moorabool is significantly above the respective Melbourne metropolitan and Australian benchmarks, particularly in the Western region.

- In terms of family structure, Moorabool contains an average proportion of couple families with dependent children households compared to the Melbourne metropolitan average; and higher than average proportions of couples without children, particularly in the Central (Ballan) and Western regions.

In summary, the socio-demographic profile of Moorabool is typical of a semi-rural area, and reflects the attraction of the rural areas to retirees, while Bacchus Marsh is popular with younger families.

Bacchus Marsh Retirement Village, Bacchus Marsh

MacroPlanDimasi

Table 4.5

Moorabool Shire - socio-demographic profile, 2011						
Census item	Bacchus Marsh Region	Central (Ballan) Region	Western Region	**Moorabool Shire**	**Melb Metro avg.**	**Aust. avg.**
Per capita income	$30,879	$30,085	$29,686	$30,542	$35,169	$34,467
Var. from Melb Metro benchmark	*-12.2%*	*-14.5%*	*-15.6%*	*-13.2%*		
Avg. household income	$83,762	$77,647	$77,539	$81,459	$91,440	$88,205
Var. from Melb Metro benchmark	*-8.4%*	*-15.1%*	*-15.2%*	*-10.9%*		
Avg. household size	2.7	2.6	2.6	2.7	2.6	2.6
Age distribution (% of population)						
Aged 0-14	21.6%	19.6%	20.4%	20.9%	18.5%	19.3%
Aged 15-19	7.5%	7.6%	7.9%	7.6%	6.3%	6.5%
Aged 20-29	11.2%	7.8%	7.2%	9.9%	15.4%	13.8%
Aged 30-39	12.5%	11.4%	10.2%	11.9%	15.0%	13.8%
Aged 40-49	15.4%	17.5%	15.8%	15.9%	14.5%	14.2%
Aged 50-59	13.7%	15.3%	15.3%	14.3%	12.1%	12.8%
Aged 60+	18.1%	20.9%	23.3%	19.4%	18.2%	19.6%
Average age	37.0	39.3	39.8	37.9	37.3	37.9
Housing status (% of households)						
Owner (total)	79.4%	86.5%	87.0%	82.0%	71.3%	68.7%
• Owner (outright)	31.5%	36.9%	48.6%	34.9%	33.5%	32.9%
• Owner (with mortgage)	47.9%	49.6%	38.3%	47.1%	37.7%	35.8%
Renter	20.2%	12.6%	12.3%	17.4%	28.0%	30.4%
Other	0.5%	1.0%	0.7%	0.6%	0.8%	0.9%
Birthplace (% of population)						
Australian born	86.8%	86.2%	91.7%	87.3%	66.7%	74.0%
Overseas born	13.2%	13.8%	8.3%	12.7%	33.3%	26.0%
• Asia	1.4%	0.4%	0.5%	1.0%	13.4%	8.6%
• Europe	9.1%	11.1%	6.4%	9.2%	12.7%	10.5%
• Other	2.7%	2.3%	1.4%	2.5%	7.2%	7.0%
Family type (% of households)						
Couple with dep't children	47.3%	45.8%	49.3%	47.2%	47.4%	45.3%
Couple with non-dep't child.	8.8%	7.6%	8.7%	8.5%	8.7%	7.7%
Couple without children	20.3%	26.3%	24.4%	22.3%	21.0%	23.0%
One parent with dep't child.	10.2%	7.8%	5.7%	9.0%	8.2%	9.2%
One parent w non-dep't child.	3.6%	2.6%	2.9%	3.2%	3.8%	3.5%
Other family	0.8%	0.4%	0.5%	0.6%	1.3%	1.1%
Lone person	9.1%	9.6%	8.4%	9.1%	9.6%	10.2%

Source: ABS Census of Population & Housing, 2011; MacroPlan Dimasi

Chart 4.1

Moorabool Shire - socio-demographic profile, 2011

Source: ABS Census of Population & Housing, 2011; MacroPlan Dimasi

MacroPlanDimasi

4.7 Employment profile

The following Charts 4.2 and 4.3 detail the number of people employed by industry within Moorabool, sourced from the ABS Journey To Work Data from the 2011 and 2006 Censuses, including for the following:

- Place of Work – the number of people who work within Moorabool; and
- Place of Residence – the number of residents who are employed, whether within or outside of Moorabool.

The 'Place of Work' data shows the importance of **retail trade** for residents of Moorabool, which is the largest industry in terms of the number of people employed within Moorabool. The high number of people employed within **health care and social assistance** reflects the wide range of health facilities within Bacchus Marsh, including the Bacchus Marsh & Melton Regional Hospital which also serves the Melton region. **Education and training** is also important in terms of the number of people employed within Moorabool, while the high number of **construction** workers within Moorabool partly reflects the high levels of residential development within the area. **Agriculture, forestry and fishing** is the next most important industry in terms number of people employed, and is the only sector in which there is a greater number of jobs in Moorabool than residents employed within the industry. Overall, there are 6,081 people who work within Moorabool.

The 'Place of Residence' data reveals that 13,326 Moorabool residents are employed, and therefore more than half are employed outside the Shire. The largest employing industries for residents of Moorabool include construction, health care and social assistance, retail trade, manufacturing and education & training.

In terms of the major changes from 2006 – 2011, the biggest decline over the period for people employed within Moorabool has been within the manufacturing and agriculture industries, with number of jobs declining by 20% and 12% respectively. The biggest increases have been in the industries of professional services, construction, health care, and accommodation and food services, which have all increased by around a third over the five year period. The rise in professional services reflects the changing role and function of Moorabool, and in particular Bacchus Marsh, as a growing region located on the fringe of metropolitan Melbourne.

Chart 4.2

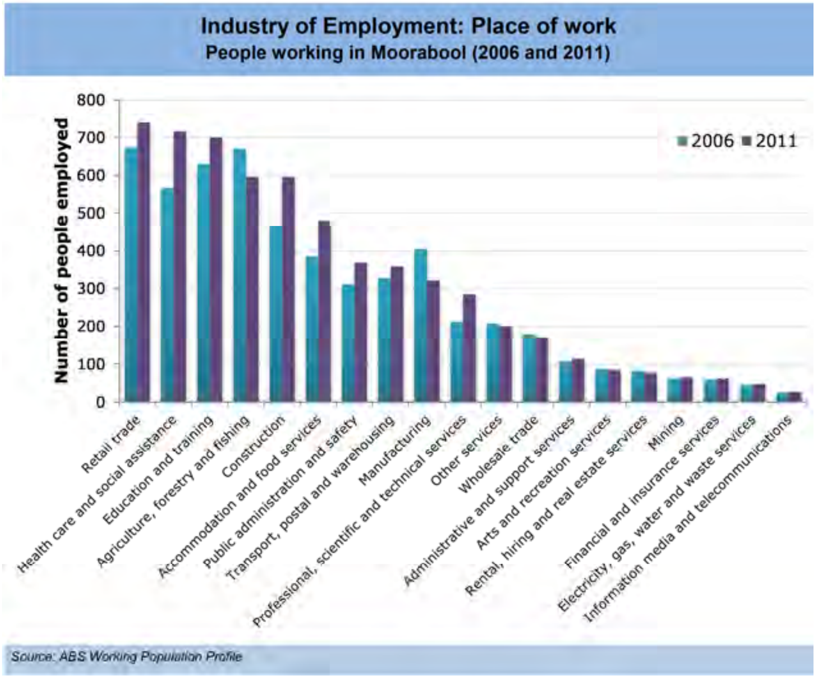
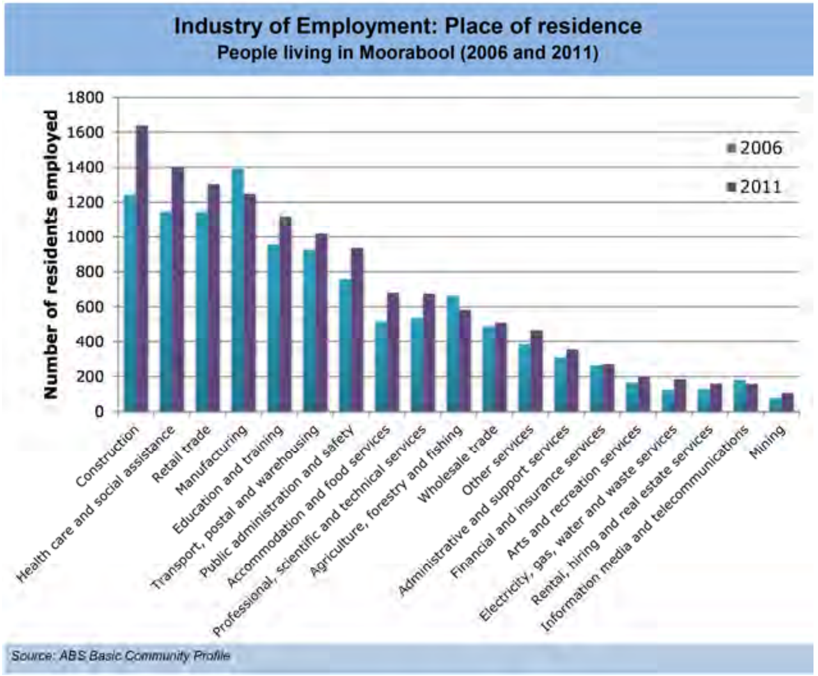


Chart 4.3



4.8 Retail expenditure

The per capita retail spending levels of Moorabool residents are compared with benchmarks for metropolitan Melbourne and total Australia. All spending estimates in this report include GST.

The calculation of retail expenditure capacity of the Moorabool population is based on detailed household expenditure data sourced from MarketInfo, which is developed by Market Data Systems (MDS). MarketInfo utilises a detailed micro-simulation model of household expenditure behaviour for all residents of Australia. The model takes into account information from a wide variety of sources, including the regular ABS Household Expenditure Surveys, national accounts data, Census data and other information. The MarketInfo estimates of household spending prepared independently by MDS are commonly used by all parties in economic impact assessments.

The MarketInfo dataset from MDS starts with the Household Expenditure Survey, a comprehensive exercise conducted by the ABS every five years. In the latest survey, just under 7,000 households across Australia were asked to provide complete details of their spending over a specific period.

In addition to a thorough interview, each member of the household in question over the age of 15 is required to keep a diary of every expenditure made over a two week period. The respondents itemise all outings by attaching grocery receipts as well as accurately recording all of the transactions which may range from taxi fares to insurance and alimony payments, to the amount of pocket money given to children in the household. Complete financial and social information about the entire household is also provided.

All these data are then matched with Census, Centrelink, National Accounts and other data collected by State and National Governments to create a model of spending that is at the heart of MarketInfo. Micro simulation techniques are the method by which these detailed calculations are performed.

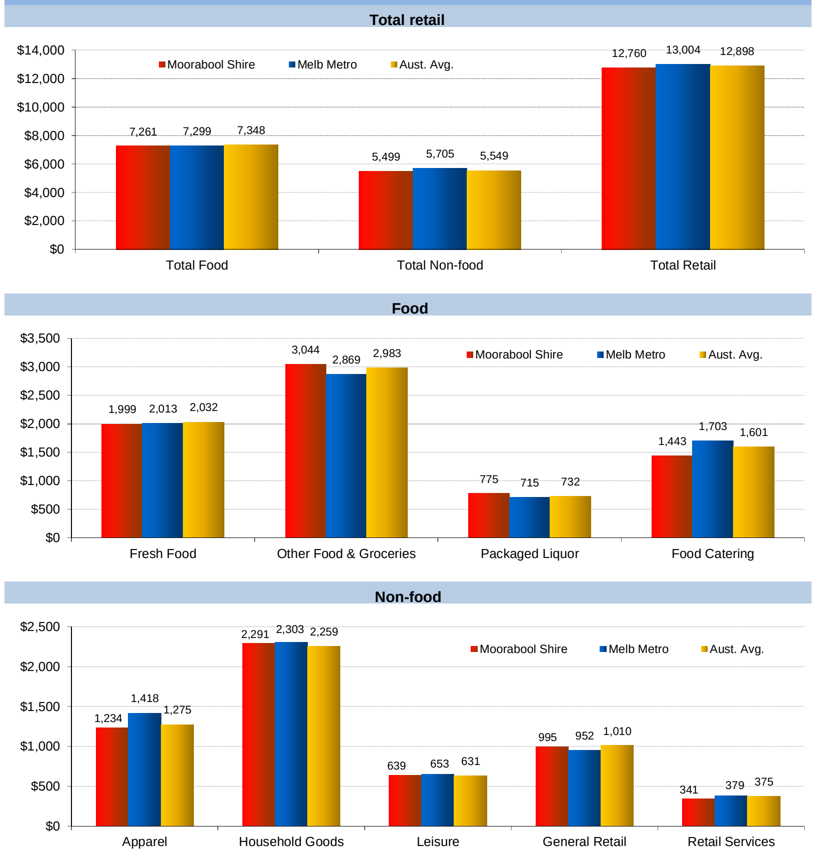
MarketInfo calculates spending levels down to the Statistical Area Level 1 (SA1) the smallest defined area used by the ABS. Each SA1 covers an area of approximately 160 households. MarketInfo is able to draw down to this level because it starts with the unit records from the Household Expenditure Survey and uses the spending and other information from all of the nearly 7,000 surveyed households as the basis for modelling these actual results to the broader community.

Total retail expenditure is detailed in a number of categories, as follows:

- Take-home food and groceries (F&G) – all food and grocery items typically sold in supermarkets and specialty fresh food stores.
- Packaged liquor – packaged beer, wine and spirits such as those purchased at bottle-shops and liquor outlets. The combination of take-home food and groceries and packaged liquor is referred to as FLG expenditure.
- Food catering – cafés, take-away outlets and restaurants, including liquor consumed on such premises.
- Apparel – clothing, footwear, fashion accessories and jewellery.
- Household Goods – giftware, electrical, computers, furniture, homewares, and hardware goods.
- Leisure retail – sporting goods, music, DVDs, games, books, newsagents and film processing/photography.
- General Retail – pharmaceutical goods, cosmetics, toys, florists, mobile phones.
- Retail Services – retail services such as key cutting, shoe repairs, hair and beauty.

Chart 4.4

Moorabool Shire trade area - retail spending per person, 2013/14*



*Including GST
Source: MarketInfo; MacroPlan Dimasi

The key spending categories for the Moorabool population are compared with the benchmarks for metropolitan Melbourne and total Australia, with the following highlights (refer Chart 4.4):

- Per capita spending on fresh food is comparable with the metropolitan Melbourne average.
- Per capita spending on 'other food and groceries' (i.e. excluding fresh food) is 6% above the average for metropolitan Melbourne.
- Per capita spending on general retail goods is 5% above the average.
- Spending on household goods is comparable to the metropolitan Melbourne benchmark.
- Per capita spending on food catering, apparel and retail services are significantly lower than the averages for metropolitan Melbourne.

Overall, per capita spending levels within Moorabool are comparable with the benchmarks for metropolitan Melbourne for most retail categories, reflecting its location and function as an emerging regional centre situated on the fringe of metropolitan Melbourne.

Coles supermarket, The Village Bacchus Marsh

Projections of the retail expenditure capacity for residents of each region and the total for Moorabool are now provided. For the purposes of showing real growth (as opposed to inflationary growth), all forecasts of future retail expenditure capacity in this report are expressed in constant 2013/14 dollar terms, i.e. excluding retail inflation.

Total retail spending by Moorabool residents is projected to increase from $392 million in 2014 to $811 million by 2041, expressed in constant 2013/14 dollar terms. These estimates reflect average annual growth of $15.5 million over the forecast period. Total retail spending for the Bacchus Marsh region is projected to increase, in real terms, from $253 million to $559 million over this period.

The average annual real growth rate for Moorabool over the forecast period to 2041 is estimated at 2.7%, and includes the following components:

- Population growth, which is estimated to average 1.9% per annum; and
- Real growth in per capita retail expenditure, which is projected to average 0.8% per annum.

Table 4.6

Moorabool Shire - retail expenditure ($M), 2014-2041*

	Forecast retail spend ($M)							Avg. ann. growth	
Sector	2014	2017	2021	2026	2031	2036	2041	($M)	(%)
Bacchus Marsh Region									
• Bacchus Marsh	80	89	102	124	147	173	200	4.5	3.4%
• Darley	115	126	140	151	161	171	183	2.5	1.7%
• Maddingley	35	43	56	74	95	114	135	3.7	5.1%
• Myrniong	5	6	7	8	9	10	11	0.2	2.7%
• Hopetoun Park	9	10	12	13	14	14	15	0.2	2.0%
• Balliang	9	9	10	11	13	14	16	0.3	2.1%
Total Bacchus Marsh	253	283	327	381	439	497	559	11.4	3.0%
Central (Ballan) Region									
• Ballan	50	54	59	68	78	91	104	2.0	2.8%
• Greendale/Blackwood	23	25	27	29	32	35	38	0.6	1.8%
• Gordon	21	23	25	29	32	37	43	0.8	2.6%
Total Central (Ballan)	95	101	111	126	142	163	185	3.3	2.5%
Western Region									
• Bungaree/Wallace	14	15	15	16	18	21	24	0.4	2.0%
• Lal Lal/Yendon	30	31	33	35	37	40	42	0.4	1.2%
Total Western	45	46	48	51	56	61	67	0.8	1.5%
Total Moorabool Shire	**392**	**430**	**486**	**559**	**637**	**721**	**811**	**15.5**	**2.7%**

**Constant 2013/14 dollars & including GST*
Source: MarketInfo; MacroPlan Dimasi

MacroPlanDimasi

The following table details the estimated retail spending capacity of the Moorabool population by category (with the category definitions listed previously), with the following highlights:

- FLG expenditure by Moorabool residents is by far the most significant retail category, accounting for almost half of the total retail expenditure in Moorabool.
- Spending on household goods, which is the most important expenditure category for bulky goods retailing, is the second largest retail category for residents of Moorabool.
- Retail expenditure on food catering is forecast to be the fastest growing retail category for the Moorabool population, increasing on average by 3.1% per annum (in real terms) from 2014-2041.

The estimated retail spending capacities of the Bacchus Marsh, Central (Ballan) and Western region's populations by category are detailed in Appendix 2.

Table 4.7

Moorabool Shire - retail expenditure by category ($M), 2014-2041*

Year ending June	FLG	Food catering	Apparel	Household goods	Leisure	General retail	Retail services	**Total retail**
2014	179	44	38	70	20	31	10	**392**
2017	197	49	41	76	22	34	11	**430**
2021	223	56	46	85	24	39	13	**486**
2026	258	66	51	95	28	45	15	**559**
2031	296	77	58	107	31	52	17	**637**
2036	337	88	64	118	35	59	19	**721**
2041	381	101	70	130	39	68	21	**811**
Average annual growth ($M)								
2014-2041	7.5	2.1	1.2	2.2	0.7	1.4	0.4	**15.5**
Average annual growth (%)								
2014-2041	2.8%	3.1%	2.3%	2.3%	2.6%	3.0%	2.6%	**2.7%**

**Constant 2013/14 dollars & including GST*
Source: MarketInfo; MacroPlan Dimasi

Baby Black Café, Church St, Bacchus Marsh

Ballan Post Office

Section 5: Retail floorspace supply

This section provides a detailed review of the existing provision of retail and non-retail floorspace within Moorabool. The floorspace estimates are based on a detailed survey of shopfront floorspace in Moorabool, conducted in September 2014.

5.1 Moorabool – retail floorspace supply

The major concentrations of retail floorspace within Moorabool are provided in the Bacchus Marsh and Ballan Town Centres.

The Village Bacchus Marsh is a sub-regional shopping centre located in the Bacchus Marsh Town Centre, and is anchored by two supermarkets (Coles and Aldi) and a small dds (Target Country). Also located in the town centre is a Foodworks supermarket and a large number of food and non-food specialty stores, as well as a range of non-retail facilities.

Darley Plaza is located to the north of the Bacchus Marsh Town Centre, and is anchored by a Champions IGA supermarket, while a number of shops are provided at Maddingley on Grant Street.

The Ballan Town Centre contains the only other supermarket in Moorabool, along with a range of mostly food and non-retail specialty stores.

There are a number of other small towns within Moorabool that contain retail stores - mostly general stores and hotels.

The shopfront floorspace supply within Moorabool is estimated at 43,930 sq.m as at September 2014, including approximately 33,660 sq.m of retail floorspace. The majority of this floorspace, some 80%, is located within the Bacchus Marsh region, mostly within the Bacchus Marsh Town Centre.

Table 5.1 details the number of shops by category in each region, while Table 5.2 provides the estimates of floorspace.

The Village Bacchus Marsh, Main Street

Table 5.1

Moorabool Shire - estimated shopfronts (no.), 2014*				
Category	Bacchus Marsh region	Central (Ballan) region	Western region	Total Moorabool Shire
Supermarket	4	1		**5**
Other food, liquor and groceries	15	6	2	**23**
Food catering	39	11		**50**
Total food	**58**	**18**	**2**	**78**
DDS	1			**1**
Apparel	20	4		**24**
Household goods	12	5		**17**
Leisure	5	2		**7**
General retail	7	1		**8**
Retail services	20	3		**23**
Total non-food	**65**	**15**		**80**
Total retail	**123**	**33**	**2**	**158**
Non-retail**	22	7		**29**
Entertainment	5	5	4	**14**
Total non-retail	**27**	**12**	**4**	**43**
Vacant	24	4	2	**30**
Total	**174**	**49**	**8**	**231**

**Based on surveys conducted September 2014*
***Non-retail includes banks, real estate agencies, travel agencies, tattoo parlours, massage centres, antique stores, pet services and printing*
Source: MacroPlan Dimasi

Table 5.2

Moorabool Shire - estimated shopfront floorspace (sq.m), 2014*				
Category	Bacchus Marsh region	Central (Ballan) region	Western region	Total Moorabool Shire
Supermarket	9,150	950		**10,100**
Other food, liquor and groceries	1,600	530	300	**2,430**
Food catering	4,620	1,080	100	**5,800**
Total food	**15,370**	**2,560**	**400**	**18,330**
DDS	910			**910**
Apparel	2,340	340		**2,680**
Household goods	3,550	920		**4,470**
Leisure	600	130	160	**890**
General retail	1,820	80		**1,900**
Retail services	1,790	240		**2,030**
Total non-food	**11,010**	**1,710**	**160**	**12,880**
Total retail	**26,380**	**4,270**	**560**	**31,210**
Non-retail**	2,520	700		**3,220**
Entertainment	1,780	1,800	1,850	**5,430**
Total non-retail	**4,300**	**2,500**	**1,850**	**8,650**
Vacant	3,110	560	400	**4,070**
Total	**33,790**	**7,330**	**2,810**	**43,930**

**Based on surveys conducted September 2014*
***Non-retail includes banks, real estate agencies, travel agencies, tattoo parlours, massage centres, antique stores, pet services and printing*
Source: MacroPlan Dimasi

5.2 Bacchus Marsh region – retail floorspace supply

Bacchus Marsh sub-region

The Bacchus Marsh Town Centre generally extends along Main Street between Lord Street in the east and Grant Street in the west, and along Gisborne Road and Grant Streets between Bennett Street in the north and Waddell & Simpson Streets to the south (refer Map 5.1).

The Bacchus Marsh Town Centre contains the only sub-regional shopping centre in Moorabool, namely The Village Bacchus Marsh, which is anchored by a Coles supermarket of approximately 3,500 sq.m, an Aldi supermarket of 1,350 sq.m and a Target Country of some 900 sq.m. The centre contains three mini-major stores, namely The Reject Shop, Raffaele Furniture and Nova Pharmacy, along with 29 retail specialty stores – largely focused on food catering and apparel – six non-retail stores and some 12 vacancies. Several stores front Main Street - comprising mostly food catering outlets and real estate agencies. The Village is currently undergoing a redevelopment to include an expanded Coles supermarket, a slightly expanded Aldi supermarket and additional mini-major and specialty shops.

The town centre also contains a Foodworks supermarket of approximately 3,000 sq.m and a range of specialty stores including a substantial provision of food catering outlets (i.e. cafes/restaurants). The 3,550 sq.m of floorspace in the household goods categories includes 2 hardware stores.

Non-retail stores within the town centre consist mostly of real estate agencies, travel agencies and banks. There are several accountants and other professional related services, primarily located along Grant Street which also includes a number of vacancies. Wilson Trade Centre is located on South Maddingley Road in Maddingley and sells mostly trade supplies, and is therefore not included in the estimates of retail floorspace.

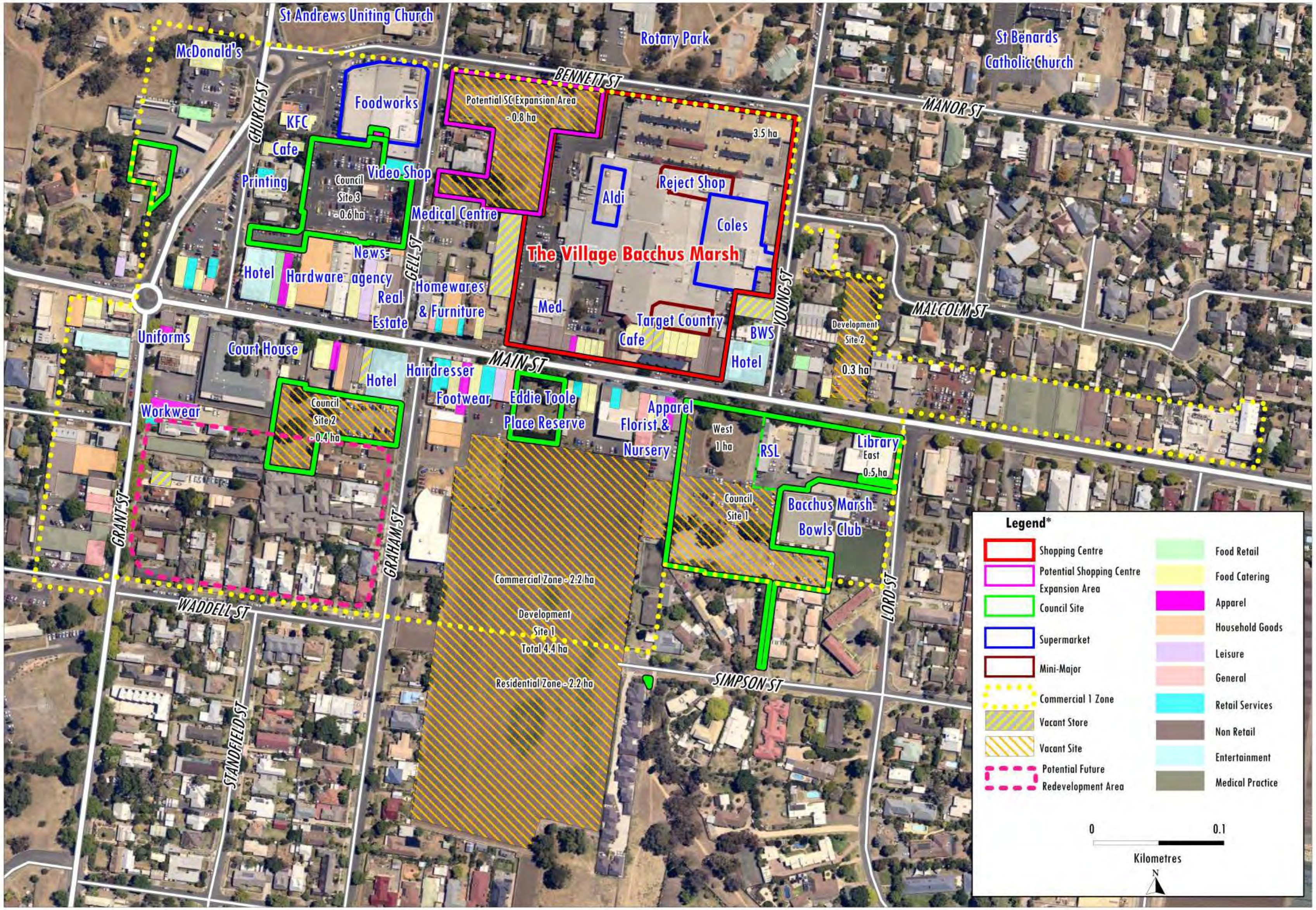
There are a number of sizable vacant sites and several council owned sites located within the Bacchus Marsh Town Centre, including the following:

- Development Site 1, which is a large site located to the south of Main Street with approximately 2.2 hectares zoned Commercial 1 (an additional 2.2 hectares to the south is zoned Residential);
- Development Site 2, which is located on Main Street to the east of The Village and is approximately 2,860 sq.m in size;
- Council Site 1, which is located south of Main Street and includes a number of existing community uses, such as the Library, as well as land currently used for carparking (total land is 1.5 hectares);
- Council Site 2, which is located on Graham Street a short distance south of Main Street and is 4,260 sq.m in size; and
- Council Site 3, which is located south of the Foodworks supermarket is used for carparking and is 5,970 sq.m in size.

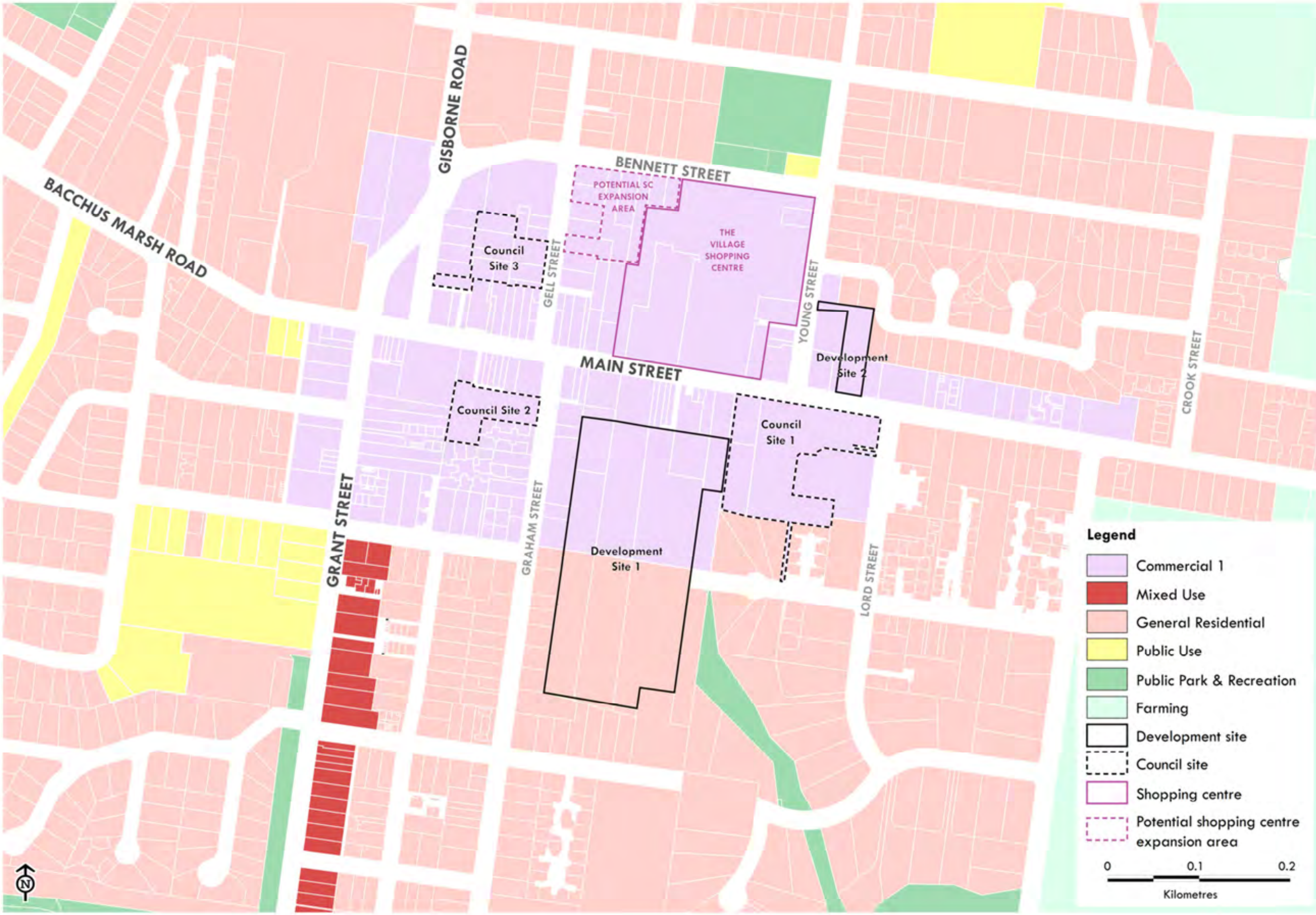
Map 5.1 also outlines a potential future redevelopment area which is within the Commercial 1 zone located to the south of Main Street and bound by Graham, Waddell and Grant Streets. There may be opportunities for future developed in this area subject to the heritage overlay.

Map 5.2 illustrates the various zonings in central Bacchus Marsh. The Bacchus Marsh Town Centre is zoned Commercial 1, which stretches along Main Street from Grant Street / Gisborne Road in the west to generally Lord Street in the east. The Commercial 1 zone is predominantly surrounded by General Residential, while a Mixed Use zone stretches south along Grant Street. Council Site 1, Council Site 2 and Development Site 2 are zoned Commercial 1, while Development Site 1 is zoned half Commercial 1 and half Residential.

Beyond the town centre, there is a small service oriented centre located on the corner of Gisborne Road and Clifton Drive which includes a vet, accountant, health clinic and chiropractor. There is also a childcare and kindergarten centre located on the opposite side of Clifton Drive.



Map 5.1: Bacchus Marsh Town Centre



Map 5.2: Bacchus Marsh Zoning Map

Table 5.2

Bacchus Marsh region - estimated shopfront floorspace (sq.m), 2014*									
	Sub-region								Total Bacchus Marsh Region
	Bacchus Marsh TC			Darley			Maddingley	Myrniong	
Category	The Village BM	Balance	Total	Darley Plaza	Balance	Total			
Supermarket	4,850	3,000	7,850	1,300		1,300			**9,150**
Other food, liquor and groceries	90	1,010	1,100	100	150	250	250		**1,600**
Food catering	1,100	2,330	3,430	80	160	240	300	650	**4,620**
Total food	**6,040**	**6,340**	**12,380**	**1,480**	**310**	**1,790**	**550**	**650**	**15,370**
DDS	910		910						**910**
Apparel	1,040	1,120	2,160		100	100	80		**2,340**
Household goods	1,070	2,480	3,550						**3,550**
Leisure	240	360	600						**600**
General retail	1,440	260	1,700	120		120			**1,820**
Retail services	160	1,390	1,550		160	160	80		**1,790**
Total non-food	**4,860**	**5,610**	**10,470**	**120**	**260**	**380**	**160**		**11,010**
Total retail	**10,900**	**11,950**	**22,850**	**1,600**	**570**	**2,170**	**710**	**650**	**26,380**
Non-retail**	1,060	1,220	2,280	80	80	160	80		**2,520**
Entertainment		1,380	1,380				400		**1,780**
Total non-retail	**1,060**	**2,600**	**3,660**	**80**	**80**	**160**	**480**		**4,300**
Vacant	1,420	1,490	2,910		200	200			**3,110**
Total	**13,380**	**16,040**	**29,420**	**1,680**	**850**	**2,530**	**1,190**	**650**	**33,790**

**Based on surveys conducted September 2014*
***Non-retail includes banks, real estate agencies, travel agencies, tattoo parlours, massage centres, antique stores, pet services and printing*
Source: MacroPlan Dimasi

Darley sub-region

Beyond the Bacchus Marsh Town Centre, the only other substantial retail centre within the Bacchus Marsh region is Darley Plaza, located in the suburb of Darley. Darley Plaza comprises a Champions IGA supermarket of approximately 1,300 sq.m, a pharmacy, a small convenience store, a café/bakery and a tattoo parlour. There are current plans for a minor expansion of Darley Plaza.

Also in Darley is the Bacchus Marsh Business Centre on Albert Street, which includes two take-away food shops, a hairdresser, a laundromat, a real estate agency, a trade supply store and a vacancy. The Darley General Store is located on Nelson Street, adjacent to the Darley Primary School, while a car wash and an opportunity shop are located on Holts Lane, west of Gisborne Road.

Underbank is a planned residential development located west of the urban area of Bacchus Marsh. There may be potential in the future for some retail facilities to be provided within the estate once it approaches capacity.

Maddingley sub-region

The Maddingley sub-region contains a number of retail and non-retail shops fronting Grant Street to the south of the Werribee River, including a hotel, a liquor drive-thru outlet, a convenience store, an Indian restaurant, a children's apparel store, a pet washing service and a petrol station which includes a take-away food shop.

Also located in Maddingley is the Bacchus Marsh Leisure Centre, which is located on Labilliere Street a short distance west of Grant Street. It includes a health club, sports courts and swimming pool. There is also an accountant's office located on Labillere Street.

South of the train line, on South Maddingley Road, is Wilson's Home Trade Centre; while on Griffiths Street to the west is a small industrial precinct with two fitness centres and a café.

A Neighbourhood Centre is proposed within the Stonehill residential estate in West Maddingley, which is planned to contain approximately 1,500 residential lots upon completion.

Myrniong sub-region

The sole retail facility in Myrniong is The Plough, a contemporary dining restaurant located on Main Street. The town also contains a primary school and is host to a number of annual festivals.

West Maddingley Neighbourhood Centre site

5.3 Central (Ballan) region – retail floorspace supply

Ballan sub-region

The Ballan Town Centre is the only substantial retail centre within Moorabool outside Bacchus Marsh. It is anchored by an IGA supermarket of approximately 950 sq.m, with other retail facilities including a bakery, two cafés, two take-away food stores, a pharmacy, a newsagency, a True Value Hardware store, a number of apparel stores, two opportunity shops, a computer shop, a giftware store, two beauty salons, a laundromat and two hotels. Map 5.3 shows the existing uses and vacant sites within Ballan Town Centre, while Map 5.4 shows the planning zones.

In terms of non-retail stores, the town centre contains four real estate agents, two banks and a trade supply store. There are also two vacant shopfronts and three vacant sites within the town centre.

Other retail facilities in the Ballan sub-region include two service stations with attached fast food outlets located on the Western Freeway. On the east-bound side is a BP service station with associated convenience and café facilities, as well as a KFC restaurant; while on the west-bound side is BP service station and a McDonalds restaurant.

Gordon sub-region

The township of Gordon contains a general store, which incorporates a newsagency, fish and chip take-away facilities and a bakery; the Gordon Hotel and associated bottle shop; an antique store; and a post office.

Beyond Gordon, in the town of Mount Egerton, there is a vacant store which was previously the Mount Egerton general store.

Blackwood/Greendale sub-region

Within Blackwood is The Blackwood Merchant, a café which has recently taken over the site of the Blackwood General Store, and the Blackwood Hotel. Both are located on Martin Street. There is also a vacant store located the Main Street which was previously a mechanic.

The Greendale Hotel is the only retail premise in Greendale, which contains a general store and café as well as the hotel facility.

The Garden of St Erth is located on Simmons Reef Road in Blackwood and includes a nursery, gift shop and café.

Blackwood Merchant café, Main Street

Table 5.3

Central (Ballan) region - estimated shopfront floorspace (sq.m), 2014*

Category	Ballan: Ballan TC	Ballan: Western Fwy	Ballan: Total	Gordon: Gordon	Gordon: Mount Egerton	Gordon: Total	Blackwood/Greendale: Blackwood	Blackwood/Greendale: Greendale	Blackwood/Greendale: Total	Total Central (Ballan) Region
Supermarket	950		950							**950**
Other food, liquor and groceries	80	200	280	200		200		50	50	**530**
Food catering	320	460	780	150		150	150		150	**1,080**
Total food	**1,350**	**660**	**2,010**	**350**		**350**	**150**	**50**	**200**	**2,560**
DDS										
Apparel	340		340							**340**
Household goods	920		920							**920**
Leisure	80		80	50		50				**130**
General retail	80		80							**80**
Retail services	240		240							**240**
Total non-food	**1,660**		**1,660**	**50**		**50**				**1,710**
Total retail	**3,010**	**660**	**3,670**	**400**		**400**	**150**	**50**	**200**	**4,270**
Non-retail**	500		500	200		200				**700**
Entertainment	700		700	400		400	350	350	700	**1,800**
Total non-retail	**1,200**		**1,200**	**600**		**600**	**350**	**350**	**700**	**2,500**
Vacant	160		160		200	200	200		200	**560**
Total	**4,370**	**660**	**5,030**	**1,000**	**200**	**1,200**	**700**	**400**	**1,100**	**7,330**

**Based on surveys conducted September 2014*
***Non-retail includes banks, real estate agencies, and antique stores*
Source: MacroPlan Dimasi

Map 5.3: Ballan Town Centre

Map 5.4: Ballan Zoning Map

5.4 Western region – retail floorspace supply

Bungaree/Wallace sub-region

A general store is located in Bungaree on Bungaree–Wallace Road which includes a petrol station, newsagency and take-away food facilities.

The Wallace Hotel is the only retail facility in Wallace, which also comprises restaurant facilities.

The Leigh Creek Roadhouse is located on the Western Highway and caters to the convenience and takeaway food needs of passers-by and local residents

Lal Lal/Yendon sub-region

Lal Lal Falls Hotel is located on Clarendon Lal Lal Road, with a vacant store located at the former Lal Lal General Store site.

There is also a vacant shopfront at the former Yendon General Store, which closed in the early 2000's.

The Shamrock Hotel is located on Old Melbourne Road and is the only retail store in Dunnstown.

The township of Elaine contains the Elaine General Store and the Railway Hotel on the Midland Highway.

Table 5.4

Western region - estimated shopfront floorspace (sq.m), 2014*

Category	Sub-region Bungaree/Wallace Total	Sub-region Lal Lal/Yendon Total	Total Western Region
Total food	150	250	400
Total non-food	80	80	160
Total retail	**230**	**330**	**560**
Total non-retail	**550**	**1,300**	**1,850**
Vacant		400	400
Total	**780**	**2,030**	**2,810**

**Based on surveys conducted September 2014*
Source: MacroPlan Dimasi

Shamrock Hotel, Old Melbourne Road, Dunnstown

Lal Lal Falls Hotel

Section 6: Retail floorspace demand

This section details the total market demand for retail floorspace by residents of Moorabool, without accounting for escape expenditure or demand from beyond Moorabool. It determines the overall demand for retail floorspace by residents within Moorabool, whether residents access facilities within or beyond the municipality.

Modelling retail demand for a given area is an inexact task, and for that reason there are a number of methodologies available to test retail floorspace demand. In undertaking the overall demand modelling for Moorabool, we have utilised two methodologies which are widely used in economic studies of this nature, as follows:

- A retail demand per capita methodology; and
- A retail expenditure methodology.

The results should be viewed as indicative only, and provide a broad estimate of the total demand for retail floorspace generated by retail expenditure of Moorabool residents. These estimates do not detail the amount of retail floorspace which may be supportable within the municipality, which is considered later in this Strategy.

6.1 Per capita methodology

The provision of retail floorspace per person throughout Australia at present is estimated at around 2.23 sq.m. There are no official figures measuring retail floorspace on a national basis, with the Australian Bureau of Statistics having ceased the 5-yearly Retail Census in 1991/92. Having regard to data previously available from retail censuses, and also allowing for the amount of retail floorspace which have been built over the past 20 years, a figure in the order of 2.23 sq.m is considered a robust estimate.

Historically, the level of retail floorspace provision throughout Australia has increased steadily over the past 50 years, driven by both supply and demand factors. On the demand side, the real incomes of Australian residents have improved steadily over this period, due to the robust health of the Australian economy. On the supply side, development trends within the retail industry have seen new store types introduced on an ongoing basis to improve consumers' amenity and shopping experience.

The following Table 6.1 details the estimated breakup of the current national provision of retail floorspace per capita into store types/retail categories, and presents the indicative retail floorspace demand for residents of Moorabool based on an estimated population of 31,000 in 2014. This demand is compared with the estimated retail floorspace supply within Moorabool (refer Section 5) to provide an indicative view of which categories are well supplied and which may be undersupplied.

The analysis indicates that there is significant under supply of FLG; apparel, household goods, leisure & general retail; and bulky goods floorspace in Moorabool, while smaller underprovision exist in the food catering and retail services categories.

Much of the demand for discretionary spending (i.e. apparel and household goods) is, and will realistically continue to be, satisfied by the broader and larger retail facilities located beyond Moorabool, such as those at Melton, the broader Melbourne region, and Ballarat.

Table 6.1

Moorabool Shire - inidcative retail floorspace demand (sq.m), 2014 Per capita methodology				
Category	Aust. avg. (per capita)	Indicative demand[1]	Estimated supply[2]	Difference
FLG	0.60	18,600	12,530	-6,070
Food catering	0.25	7,750	5,800	-1,950
Total food	**0.85**	**26,350**	**18,330**	**-8,020**
Apparel, household goods, leisure, general retail*	0.70	21,700	8,550	-13,150
Bulky goods	0.60	18,600	2,300	-16,300
Retail services	0.08	2,480	2,030	-450
Total non-food	**1.38**	**42,780**	**12,880**	**-29,900**
Total retail floorspace	**2.23**	**69,130**	**31,210**	**-37,920**

[1]Based on the Moorabool Shire population as at June 2014 of 31,000
[2]Based on surveys conducted September 2014
**Excluding bulky goods*
Source: MacroPlan Dimasi

6.2 Expenditure methodology

This sub-section then repeats the exercise based on an expenditure methodology. Firstly, the amount of retail expenditure by product group generated by the resident population of Moorabool is determined (as calculated in Section 4) and detailed in Table 6.2.

The estimated retail expenditure pool is translated into an estimate of retail floorspace demand by applying appropriate industry standard retail turnover densities (RTDs) by category. These RTDs are the average levels of sales per sq.m typically achieved by retailers in each category, and are based on our retail experience; standard industry data sources; and knowledge of the trading performance of retailers throughout Victoria.

The analysis indicates that overall demand for retail floorspace by residents of Moorabool is estimated at around 68,500 sq.m in 2014.

Table 6.2

Moorabool Shire - indicative retail floorspace demand, 2014* Expenditure methodology								
Year ending June	FLG	Food catering	Apparel	Household goods	Leisure	General retail	Retail services	**Total**
Retail expenditure ($M)	178.7	44.5	37.9	70.3	19.7	30.7	10.5	**392.2**
RTD ($/sq.m)*	9,000	6,000	4,000	3,500	5,000	6,000	4,000	**5,730**
F'space demand (sq.m)	19,860	7,410	9,470	20,080	3,930	5,110	2,620	**68,480**

**Constant 2013/14 dollars & including GST*
Source: MarketInfo; MacroPlan Dimasi

Table 6.3 provides a comparison of the indicative retail floorspace demand by residents of Moorabool with the estimated retail floorspace supply within Moorabool in 2014. It provides a broad overview of the varying degree in which demand is being met for each retail category.

The analysis indicates that there is a net demand for additional retail facilities in all categories except food catering. However, this does not take into account the extent in which food catering facilities serve visitors to Moorabool.

Table 6.4 shows the indicative amounts of retail floorspace demand for Moorabool over the period from 2014 to 2041. The figures assist in giving a general understanding of how the total quantum of floorspace demand increases over time as the population of the municipality increases. In broad terms, total retail floorspace demand is expected to more than double over the period to 2041, increasing by around 70,000 sq.m. As stated previously, even in the long term some of this demand will continue to be satisfied by retail facilities located beyond Moorabool, such as those at Melton, the broader Melbourne region and Ballarat.

We have allowed the RTDs to increase over time to allow for increases in real spending growth, assumed to average 0.7% per annum.

Table 6.3

Moorabool Shire - indicative retail floorspace demand (sq.m), 2014
Expenditure methodology - comparison

Category	Indicative demand[1]	Current supply[2]	Difference
FLG	19,860	12,530	-7,330
Food catering	7,410	5,800	-1,610
Total food	**27,270**	**18,330**	**-8,940**
Apparel	9,470	3,590	-5,880
Household goods	20,080	4,470	-15,610
Leisure	3,930	890	-3,040
General retail	5,110	1,900	-3,210
Retail services	2,620	2,030	-590
Total non-food	**41,210**	**12,880**	**-28,330**
Total retail	**68,480**	**31,210**	**-37,270**

[1]Based on 2013/14 retail expenditure
[2]Based on surveys conducted September 2014
Source: MarketInfo; MacroPlan Dimasi

Table 6.4

Moorabool Shire - indicative retail floorspace demand (sq.m), 2014-2041*
Expenditure methodology - forecast

Year ending June	Est. population (no.)	FLG	Food catering	Apparel	Household goods	Leisure	General retail	Retail services	Total
2014	**31,180**	19,860	7,410	9,470	20,080	3,930	5,110	2,620	**68,480**
2017	**33,570**	21,870	8,220	10,280	21,780	4,300	5,650	2,860	**74,960**
2021	**36,730**	24,800	9,410	11,420	24,180	4,830	6,440	3,210	**84,290**
2026	**40,480**	28,690	11,020	12,870	27,260	5,530	7,490	3,670	**96,530**
2031	**44,230**	32,900	12,800	14,380	30,440	6,270	8,650	4,160	**109,600**
2036	**47,980**	37,450	14,740	15,960	33,750	7,050	9,910	4,680	**123,540**
2041	**51,730**	42,360	16,880	17,590	37,200	7,880	11,280	5,240	**138,430**

**Constant 2013/14 dollars & including GST*
Source: MarketInfo; MacroPlan Dimasi

6.3 Out-of-centre development

Out-of-centre development is referred to as development that is not provided within a town centre. In general, such development is required to allow for the accommodation of bulky goods/homemaker facilities, which are typically very large footprint/low turnover stores which require large site areas that are generally not available within traditional town centres and which would not, in any case, represent the highest and best use of town centre sites in most instances. Bulky goods/homemaker facilities are classified as Restricted Retail in the Planning Scheme, which is defined as land used to sell or hire:

- Automotive parts and accessories;
- Camping, outdoor and recreation goods;
- Electric light fittings;
- Animal supplies including equestrian and pet goods;
- Floor and window coverings;
- Furniture, bedding, furnishings, fabric, manchester and homewares;
- Household appliances, household electrical goods and home entertainment goods;
- Party supplies;
- Swimming pools;
- Office equipment and supplies;
- Baby and children's goods, children's play equipment and accessories;
- Sporting, cycling, leisure, fitness goods and accessories; or
- Goods and accessories which:
  - Require a large area for handling, display and storage of goods; or
  - Require direct vehicle access to the building by customers for the purpose of loading or unloading goods into or from their vehicles after purchase or hire.

It does not include the sale of food, clothing and footwear unless ancillary to the primary use.

Source: Victorian Planning Provisions, Clause 74 - Definitions

In the case of Bacchus Marsh, there are no existing out-of-centre developments of any significant scale. In the future, as the population grows and the demand for new large format stores increases, an out-of-centre development may be required. There is limited land available within the Bacchus Marsh Town Centre, and this land should ideally be reserved to be developed for additional "traditional" retail facilities, which as outlined previously will be required in the future. The definition of traditional retail facilities covers department stores, discount department stores, supermarkets, mini-majors, retail specialty stores and retail services i.e. the normal retail facilities which form the basis of town centres or shopping centres.

The challenges associated with locating bulky goods/homemaker facilities in the Bacchus Marsh Town Centre include the lack of appropriate vacant sites; existing difficulties with congestion and parking; and the **preference to preserve any significant sites in the town centre for future traditional retail** facilities.

It is likely that in the future Council will continue to be approached with proposals for bulky goods/homemaker facilities in locations outside the Bacchus Marsh Town Centre, and outside the designated activity centre hierarchy. In 2015, an application for a restricted retail development at a site on Gisborne Road, immediately south of the Western Highway, was received by Council, which was later refused. If Council is open to including bulky goods/homemaker facilities in the retail mesh of Moorabool, it is preferable that they be clustered in one location, creating a bulky goods/homemaker destination. Ideally this would be located on a major traffic route, and slightly removed from the main town centre.

There are numerous examples of planned out-of-centre developments in areas similar to Moorabool. In Traralgon, for example, the majority of the large format stores are located on the Princes Highway east of the Traralgon Town Centre.

Creating a bulky goods/homemaker hub in Bacchus Marsh, and attracting a number of large format retailers, would contribute significantly to reducing the amount of non-food retail expenditure escaping Moorabool. Currently many residents travel to Melton and other parts of Melbourne for comparison shopping given the lack of such facilities in Bacchus Marsh. Results from the telephone survey outlined previously, showed that around 80% of large household goods spending by Moorabool Shire residents is directed outside the Shire. This accounts for hundreds of jobs which are being supported by the spending of Moorabool residents but which are located beyond the Shire boundary. The development of a number of bulky goods/homemaker stores in Bacchus Marsh would greatly reduce the need for residents of Moorabool to access such facilities located outside Moorabool, thus increasing the amount of retail expenditure being retained within Moorabool and reducing vehicle trips.

Table 6.5 provides a summary of the total indicative demand for bulky goods/homemaker floorspace by residents of Moorabool, based on a demand per capita methodology as detailed previously in this section. There is no precise figure of the amount of bulky goods/homemaker floorspace in Australia, though based on all available information it is estimated that the provision of bulky goods/homemaker floorspace per person is around 0.6 sq.m. Applying this average to the population of Moorabool, the indicative bulky goods/homemaker floorspace demand is estimated at 18,700 sq.m in 2014, with around 12,000 sq.m of the demand from residents of the Bacchus Marsh region. There is currently around 2,300 sq.m of bulky goods/homemaker floorspace provided in Moorabool, or around 12% of total demand.

Table 6.5

Moorabool Shire - Bulky goods floorspace indicative demand (sq.m), 2014 - 2041*

Year ended June	Bacchus Marsh region	Central (Ballan) region	Western region	Total Moorabool
Current supply**	1,700	600	-	**2,300**
2014	12,168	4,410	2,130	**18,710**
2017	13,368	4,626	2,148	**20,140**
2021	14,952	4,914	2,172	**22,040**
2026	16,692	5,364	2,232	**24,290**
2031	18,402	5,814	2,322	**26,540**
2036	19,962	6,384	2,442	**28,790**
2041	21,522	6,954	2,562	**31,040**

**Based on 0.6 sq.m of bulky goods floorspace per person*
***Based on a survey completed September 2014*
Source: MacroPlan Dimasi

There is no exact amount of bulky goods/homemaker floorspace which is appropriate or supportable within Moorabool. On the one hand it is highly unlikely that the total demand of bulky goods/homemaker floorspace will be met by facilities within Moorabool, particularly reflecting the surrounding competitive context. On the other hand, the current floorspace provision of 12% of floorspace demand is very low.

The type and range of bulky goods/homemaker facilities supportable in Moorabool will mostly depend on certain population thresholds being reached. These threshold levels in the most part reflect the views of individual retailers based on current market conditions. Nevertheless, an indicative amount of supportable bulky goods/homemaker floorspace can be estimated based on the demand by residents of Moorabool.

In broad terms, it is reasonable to expect that over time, particularly as the population of Moorabool increases, **at least half of the bulky goods/homemaker floorspace demand** could be provided for by facilities within Moorabool, excluding the Western region due to its close proximity to Ballarat. Therefore, at present it is considered that around 8,000 – 8,500 sq.m of bulky goods/homemaker floorspace is supportable in Moorabool. The current under-provision is estimated at around 6,000 sq.m. This under-provision is estimated to increase to around 7,000 – 8,000 sq.m by 2021, if no new bulky goods/homemaker facilities are developed, and to around 9,800 sq.m by 2031 and 12,000 sq.m by 2041. Table 6.6 summaries the guideline supportable and estimated under supply of bulky goods floorspace in Moorabool over the period from 2014 – 2041.

Table 6.6

Moorabool Shire - Guideline supportable bulky goods floorspace (sq.m), 2014 - 2041*

Assumes 50% retention of estimated demand of Bacchus Marsh and Central (Ballan) regions

Year ended June	Bacchus Marsh region	Central (Ballan) region	Western region	Total Moorabool Supportable	Total Moorabool Under supply**
2014	6,084	2,205	-	**8,300**	**6,000**
2017	6,684	2,313	-	**9,000**	**6,700**
2021	7,476	2,457	-	**9,950**	**7,650**
2026	8,346	2,682	-	**11,050**	**8,750**
2031	9,201	2,907	-	**12,100**	**9,800**
2036	9,981	3,192	-	**13,150**	**10,850**
2041	10,761	3,477	-	**14,250**	**11,950**

**Based on 0.6 sq.m of bulky goods floorspace per person*
***Guideline supportable floorspace less estimated current supply*
Source: MacroPlan Dimasi

In terms of threshold population levels, all of the comparably sized towns to Bacchus Marsh - Bairnsdale, Warragul and Sale as detailed previously - include a small Bunnings hardware store, a Harvey Norman outlet and a handful of other bulky goods/homemaker stores.

Once the population of Bacchus Marsh reaches 25,000 residents by around 2021, there is expected to be demand for around 5 – 10 additional large format retailers. By **2031, when the population of Bacchus Marsh exceeds 30,000, a broad range of bulky goods/homemaker facilities are considered supportable**. The stores located at Traralgon, as detailed previously, indicate the types of retailers which may be interested in locating at Bacchus Marsh in the future. The challenge for

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Bacchus Marsh is reaching a consensus as to where a bulky goods/ homemaker facility should ultimately occur.

Given the amount of bulky goods/homemaker floorspace potentially supportable, an out-of-centre development is highly likely to be required as the limited land available within Bacchus Marsh Town Centre should ideally be retained to address the current and projected future gaps in the traditional retail offer.

The addition of a bulky goods/homemaker precinct in Moorabool would create local jobs, particularly in retail in the region and reduce the level of expenditure escaping the region. Given the clear undersupply of bulky goods/homemaker floorspace in Moorabool it is recommended that Council start planning for a bulky goods/homemaker hub development in the Bacchus Marsh region.

This study has previously stated that there are limited floorspace opportunities within the Bacchus Marsh Town Centre. A bulky goods/ homemaker centre is considered unlikely to reflect the highest and best use of this scarce town centre land.

The key site attributes for an out-of-centre bulky goods/homemaker development typically include the following:

- Located on an arterial road, highly visible and well exposed to passing traffic;
- Easily accessible for local residents, as well as residents in the broader surrounding region;
- Sufficient size to cluster similar uses;
- A relatively flat site; and
- Sympathetic to surrounding uses (particularly sensitive residential uses) with adequate buffer separation provided as appropriate.

Additional detailed research will be required in relation to the future provision of bulky goods/ homemaker floorspace in Moorabool. The research should comprise an overview of the current and future trends for bulky good/ homemaker retailing in Australia; a comparative analysis of a number of other towns/cities comparable to Bacchus Marsh and Moorabool Shire; an analysis of the likely bulky goods/homemaker retailers which could locate in Moorabool; an assessment of principles, locational criteria and weighting of criteria which can guide Council in its consideration of any bulky goods/homemaker proposals; and preferred zones and controls to cater effectively for these uses.

Farmers Market on Bacchus Marsh Road

Source: http://tedsmakemyday.blogspot.com.au/2012/05/bacchus-marsh-just-skip-and-jump-from.html

Section 7: Stakeholders and major retailers

This section summarises the views of a range of stakeholders who were interviewed as part of this strategy, as well the views of major retailers who may be interested in opening stores in Moorabool in the future.

7.1 Stakeholder views - Summary

As part of preparing this Strategy, a range of stakeholders were consulted/surveyed to gain their views on a number of factors that influence the retail sector in Moorabool. It included a telephone survey of 250 residents throughout Moorabool; a survey of Moorabool's 'Economic Development Reference Group' (refer to Appendix 1 for further details); and face to face interviews with local retail and other businesses in Moorabool. The results of these consultations/surveys are presented in *Appendix 1* of this Strategy, with the key learnings and conclusions summaries as follows:

Resident spending behaviour

- Residents of the Bacchus Marsh region typically direct most of their supermarket and fresh food expenditure to facilities within Moorabool, while a majority of spending on pharmaceutical goods, newspapers and retail services is also retained within Moorabool. Residents of Bacchus Marsh direct the majority of their apparel and household goods expenditure to facilities located beyond Moorabool – mostly to Woodgrove Shopping Centre at Melton.
- Residents of the Central (Ballan) region direct around half of their spending at supermarkets, specialty food stores, food catering outlets, pharmacies and newsagencies to facilities within Moorabool. Retention rates for apparel, household goods and retail services are lower at around 20% – 30%. For Central (Ballan) residents, the most popular shopping precincts outside Moorabool include Ballarat, and to a lesser degree Melton.
- Western region residents direct a majority of their retail expenditure to facilities located beyond Moorabool, mostly at Ballarat, reflecting the close proximity of the regional city to the western region.

Strengths

- The key strengths of the retail sector identified from these consultations included the community feel of the area; the fact that the retail sector provides employment opportunities for local residents; friendly customer service; the location of the facilities in close proximity to their home; and the fresh food offer at the Bacchus Marsh Town Centre.

Weaknesses/issues

- A number of weaknesses/issues were raised including the limited range of non-food facilities and retail services; the congestion, particularly at peak times; the limited carparking provision in the Bacchus Marsh Town Centre and the lack of particular retailers such as electronic/whitegoods stores. The limited range of retail services was identified as a key issue for the Ballan Town Centre.

Stakeholder suggestions

- Some of the key suggestions to improve retailing in the municipality included the following:
  - Encouraging a greater variety of shops in Bacchus Marsh;
  - Investing in streetscaping in the Bacchus Marsh and Ballan Town Centres;
  - Encouraging the increase of trading hours;
  - Investigating the opportunities for niche rural style retailers with a desire to retain the local feel of Moorabool;
  - Increasing the provision of carparking in Bacchus Marsh;
  - Improving linkages between Bacchus Marsh Village and the Main Street;
  - Investing in infrastructure to improve congestion;
  - Creating a Chamber of Commerce in Bacchus Marsh; and
  - Increasing the amount of advertising of the range of activities and facilities within the Bacchus Marsh and Ballan Town Centres.

7.2 Major retailer discussion

Specific consultations have been undertaken with a substantial number of national retailers as part of the information gathering for the preparation of this strategy. These retailers were asked about their views and future plans regarding Moorabool and specifically Bacchus Marsh. The responses in general reflect the trends outlined above, and are summarised below.

<u>Discount department stores</u>

- Target is the only national discount department store (dds) operator currently represented in Bacchus Marsh, with a small store (900 sq.m) in The Village Bacchus Marsh. Target has expressed a view, over the medium to longer term, to expand the store to a larger format outlet of around 3,500 sq.m. However, Target's view is that this is a medium term rather than short term plan.

- Big W is one dds operator which has significantly changed its strategy in the post-GFC period, and is now tending to focus on larger stores at regional centre locations, rather than smaller stores in provincial cities or large towns. Big W is therefore considered highly unlikely prospect for Bacchus Marsh at any point in the foreseeable future.

- Kmart has been the most successful dds operator in the post-GFC period, and has been rolling out new stores to a greater extent than either Big W or Target, although those stores have generally been in major metropolitan areas. Kmart considers Bacchus Marsh to be too small at present to support a store, but remains interested in a possible future store, though a substantially greater population will be required.

Supermarkets

A full scale supermarket (say of 3,000+ sq.m) typically requires a trade area population of around 7,000 – 8,000 in order to trade successfully. In provincial cities and country towns, the threshold can be a little lower, since typically supermarkets in such areas retained a significantly higher proportion of the available take-home food and grocery expenditure than is the case in major metropolitan areas. In large part, that situation is due to the fact that alternative food and grocery providers (e.g. fresh food specialty stores such as greengrocers, butchers, bakeries, fish mongers, delicatessens, etc.) are sparsely represented in non-metropolitan areas.

For lower population thresholds of course smaller foodstore offers, e.g. a smaller IGA supermarket or convenience store operated by IGA or Foodworks, can provide a significant food and grocery shopping presence but not with the range and depth of items available at a chain supermarket.

At present within Moorabool there are five supermarket outlets – Coles and Aldi in The Village; Foodworks in the Bacchus Marsh Town Centre; a sizeable IGA supermarket at Darley Plaza; and a similarly sizeable IGA supermarket at Ballan.

Our consultations with the supermarket operators have shown that Coles is comfortable with its representation in the Bacchus Marsh Town Centre, and is planning to expand their existing store, but does not as yet see any opportunities for a second store elsewhere in Moorabool.

Woolworths is committed to obtaining representation within Moorabool, but realistically considers that only the Bacchus Marsh Town Centre would offer a viable opportunity.

Aldi is content with its one store in Moorabool, within the Bacchus Marsh Town Centre, with no other opportunities identified at this point, unless and until the Shire population has increased significantly.

Foodworks is very content with its existing supermarket in the Bacchus Marsh Town Centre, and may consider new opportunities in the future.

Mini-majors

Many of the national mini-majors we contacted were already present at Woodgrove Shopping Centre and are not actively looking for new sites in the area. However, in the medium to long term, as the population of Bacchus Marsh continues to increase, they indicated they would investigate Bacchus Marsh for potential opportunities.

Ballan Farmers Market

Photo source: http://www.ballanfarmersmarket.com/our-beautiful-venue.html

Section 8: Future retail floorspace provision

This section outlines the importance of having a hierarchy of activity centres and addresses the current and potential future retail floorspace needs of Moorabool residents.

8.1 Activity centres – policy and principles

What is an activity centre?

Activity centres are defined as "centres that provide a focus for services, employment, housing, transport and social interaction" (Plan Melbourne, 2014).

In the context of Moorabool, activity centres are clusters of uses where people can make multi-purpose trips at a single location. Activity centres can be places to shop; work; learn; meet people; access public transport; access health and community services; and access professional and commercial services.

Policy Context

Previous strategies and documents that have addressed activity centres and retailing in Moorabool include:

- Ballan Structure Plan: Consultation Draft (2013);
- Bacchus Marsh Activity Centre Structure Plan (2011);
- Bacchus Marsh Retail and Commercial Assessment (2008);
- 'Growing Moorabool' Economic Development Strategy and Action Plan (2006); and
- A strategy for retail business development in Bacchus Marsh Town Centre (2001).

The activity centre hierarchy proposed in this Strategy takes into consideration the previous studies undertaken and is based on knowledge and experience of the retail industry in Moorabool and more broadly throughout Victoria and Australia.

Network of activity centres

Moorabool Shire includes a network of activity centres with varying roles and functions that is expected to grow with the expanding population. Benefits of a strong network of activity centres include:

- Maintaining the primacy of the Bacchus Marsh Town Centre and providing a network of supporting activity centres;
- Giving investors and stakeholders a clear understanding of Council's plans for activity centres into the future; and
- Planning for conveniently located activity centres that are easily accessible to the local population.

Principles

Recommended principles to create a strong network of activity centres include:

- Maximising Bacchus Marsh's important retail and service role

  This includes supporting investment for major retail stores and services to locate within the most appropriate centre. As a major town centre, Bacchus Marsh is the preferred location for significant retail and service investment.

- Create inviting, accessible, sustainable and multi-purpose centres for the community

  All activity centres with Moorabool should aim to serve as multi-purpose destinations with a wide range of activities to ensure they remain commercially viable and provide employment opportunities. This can include co-location of community facilities, retail stores and services, and professional and commercial services, and should be conveniently located for existing and future residents.

- Maintain and consolidate the network of existing and planned activity centres

  Ensuring that activity centres develop in a manner consistent with the preferred activity centre hierarchy will strengthen the major town centre and ensure that neighbourhood and local centres have suitable and supportable retail floorspace. A strong activity centre hierarchy will aid in minimising potential escape expenditure to surrounding areas by providing stores and services within Moorabool Shire.

When making decisions relating to activity centres it is recommended that applicants consider the decision making guidelines addressed below.

Decision-making framework

When assessing future retail developments council should refer to this decision-making framework. While all development is strongly encouraged to locate within the designated activity centre hierarchy this strategy recognises that there are exceptions. Significant retail developments or developments which are proposed to be located outside of the designated activity centre hierarchy should provide a submission to Council that addresses the applications compliance with the following:

- State and local planning policy;
- Zone and overlay controls;
- Moorabool Shire Council Retail Strategy 2041;
- The relevant Structure Plan applying to the specific activity centre, where applicable; and
- All other relevant Council policy.

Submissions should also be accompanied by the following where requested by Council:

- Trade area and catchment details;
- Economic impacts on surrounding stores and services;
- Assessment of net community benefit; and
- Any additional information requested by Council.

8.2 Hierarchy of activity centres

As part of this strategy, a hierarchy of activity centres has been defined. Creating a clear hierarchy of activity centres that identifies the preferred location for retail uses is important in maintaining the primacy of the Bacchus Marsh Town Centre and ensuring future retail is situated at the most appropriate location.

Each existing and likely future shopping centre has been designated as Major Town Centre, Neighbourhood Centre or Local Centre. These designations should be viewed as somewhat flexible, for example if the population of an area increases more than was previously expected, then a Local Centre may need to be reclassified as a Neighbourhood Centre. The hierarchy of centres should be used as a guide to the general type and range of facilities likely to be supportable at each site. It should not be used to preclude development if there is demand for such facilities.

Map 8.1 illustrates the hierarchy of centres within the Bacchus Marsh region, which includes the following:

- The Bacchus Marsh Major Town Centre;
- Darley Plaza as a Neighbourhood Centre;
- Maddingley Local Centre on Grant Street;
- West Maddingley as a future Neighbourhood Centre; and
- A possible future Local Centre at the proposed Underbank development.

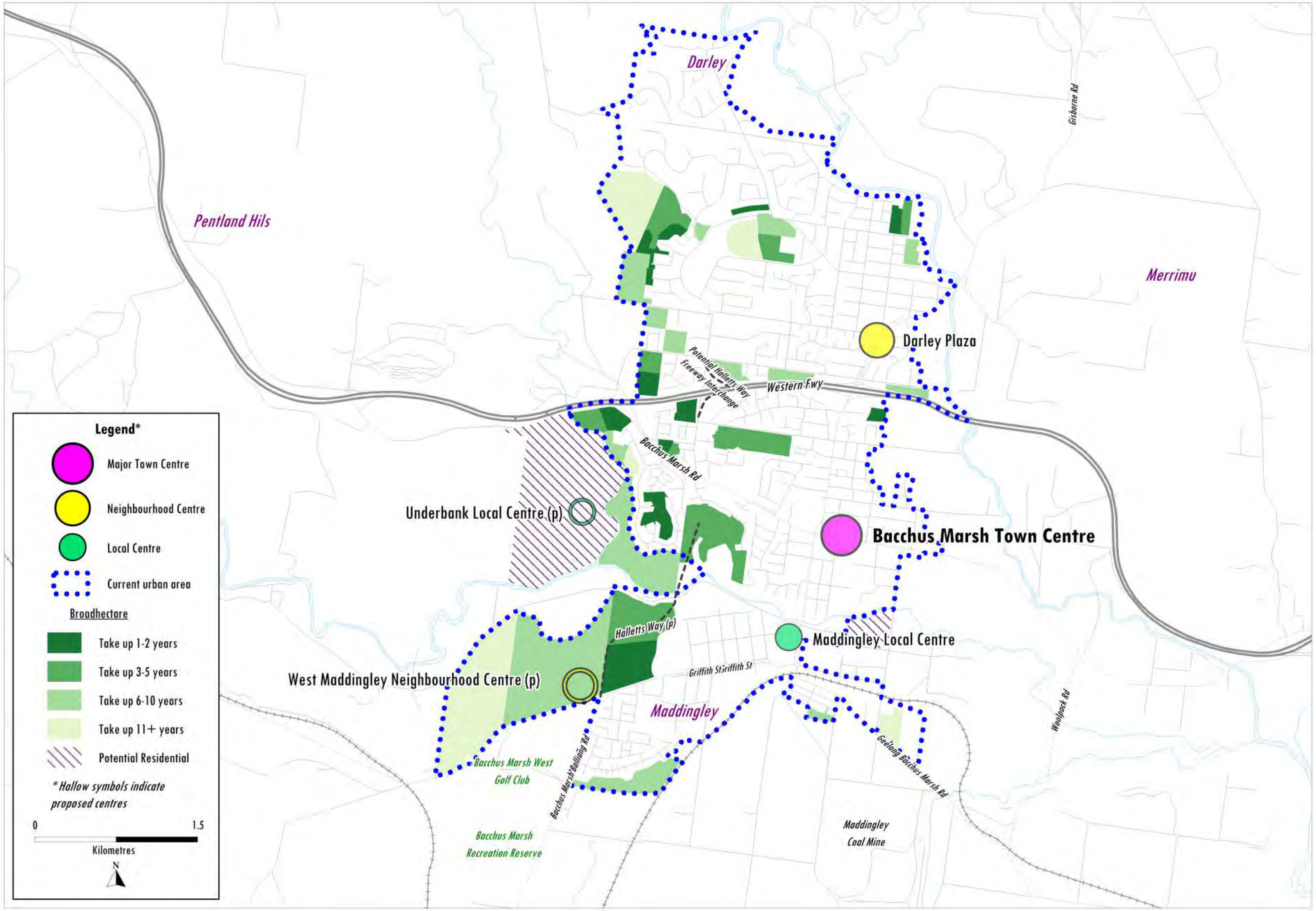
Table 8.1 provides a summary of the activity centres located in Moorabool, as well as the key elements of the different centre classifications.

<u>Supermarket sizes:</u>

There is no industry wide definition of the different sizes of supermarkets, and the store size is highly dependent on the operator. Major Coles and Woolworths supermarkets typically range in size from 2,800 to 4,500 sq.m or larger; Aldi – 1,300 to 1,500 sq.m; Supa IGA – 1,000 to 2,500 sq.m; IGA – 500 to 1,500 sq.m; and Foodworks – 500 to 2,000 sq.m. In this strategy supermarkets sizes are defined as follows:

- Large supermarkets as 2,500 sq.m and larger;
- Medium supermarkets as 800 sq.m to 2,500 sq.m; and
- Smaller supermarkets/foodstores as less than 800 sq.m.

However, this range should be viewed as indicative, and the size of any new supermarkets would need to be based on a range of considerations.



Map 8.1: Bacchus Marsh – Retail hierarchy

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Table 8.1

	Major Town Centre	Neighbourhood Centre	Local Centre
Role	Major Town Centres serve large catchments and provide a range of convenience and discretionary shopping facilities. They typically include a variety of retail, professional, commercial, entertainment and community services.	Neighbourhood Centres cater for most daily/weekly convenience shopping needs, are typically anchored by a supermarket and including a range of supporting stores and services.	Local Centres cater for convenience daily shopping needs with limited supporting stores.
Centres in Moorabool	Bacchus Marsh Town Centre	Existing • Ballan • Darley Plaza Proposed • West Maddingley	Existing • Maddingley Local Centre Proposed • Underbank Local Centre
Catchment population	Greater than 10,000.	5,000 – 10,000 people.	Less than 5,000 people.
Key retail elements	• Discount department store/s. • A number of supermarkets.	• Large supermarket (typically 2,500 sq.m or greater).	• Medium supermarket (typically 800 – 2,500 sq.m).
Supporting stores and services	• A full range of retail stores and services. • Banking services. • Medical services. • Commercial and professional services. • Community facilities. • Entertainment facilities.	• A range of supporting retail stores and services, particularly food and convenience stores. • Medical services. • Some commercial and professional services.	• Supporting local stores mostly convenience in nature. • Some non-retail facilities.
Typical shopfront floorspace range*	n.a.	4,000 – 8,000 sq.m	1,500 – 3,000 sq.m

**Shopfront floorspace: Refers all major and specialty retail and non-retail shops typically located in shopping centres and in high street strip centres. In general, the proportion of retail floorspace ranges from around 80 – 90% of total shopfront floorspace.*

8.3 Retail expenditure retained and captured

Table 8.2 details a calculation of retail expenditure currently directed to facilities in Moorabool by retail category. The key estimates in the table include the amount of retail expenditure generated by Moorabool residents and retained within the Shire, and the proportion of expenditure captured from beyond the municipality.

The retention rates applied have been estimated based on the results of the telephone survey as previously outlined. These retention rates were applied at the category level for each of the three regions (i.e. Bacchus Marsh, Central (Ballan), and Western) with the figures provided in Appendix 2.

Retail facilities within Moorabool also capture business from people living beyond the municipality, i.e. from visitors/tourists. The demand from beyond Moorabool is estimated to vary across different retail categories, from around 5% for the non-food categories up to 30% for food catering. The high proportion for food catering reflects the fact that many tourists spend at cafés and restaurants during their visit.

Overall, **46% of total retail expenditure is estimated to be retained within Moorabool**, and therefore a high proportion of the retail expenditure generated by residents is escaping Moorabool. While the majority of spending on food and groceries, food catering, and retail services (e.g. optometrists, hairdressers and beauty salons) is directed to retailers within Moorabool, spending on apparel, leisure items and household goods is mostly directed to larger shopping precincts located beyond Moorabool, particularly in Melton and Ballarat.

Table 8.2

Moorabool Shire - estimated retail expenditure retained and captured, 2014* (Current situation)

	FLG	Food catering	Apparel	Household goods	Leisure	General retail	Retail services	**Total retail**
Retail expenditure by Moorabool residents ($M)	178.7	44.5	37.9	70.3	19.7	30.7	10.5	**392.2**
Proportion retained within Moorabool Shire (%)**	63%	54%	27%	18%	24%	40%	52%	**46%**
Estimated expenditure retained within Moorabool Shire ($M)	112.1	24.2	10.1	12.9	4.8	12.2	5.5	**181.6**
Estimated demand from beyond Moorabool Shire (%)	10%	30%	5%	5%	5%	5%	10%	**12%**
Total expenditure directed to retail facilities within Moorabool Shire ($M)	**124.5**	**34.4**	**10.6**	**13.5**	**5.1**	**12.8**	**6.1**	**207.0**

**Constant 2013/14 dollars & including GST*
***Based on telephone survey of residents conducted in September 2014*
Source: AFS; MarketInfo; MacroPlan Dimasi

When reviewing the amount of residents' retail expenditure retained within, or escaping from, Moorabool, it is important to understand the regional breakup of the Shire, as residents of the three defined regions - Bacchus Marsh, Central (Ballan) and Western – all have vastly different rates of retention, reflecting their respective proximity to retail facilities located outside the Shire. This analysis for each region is provided in *Appendix 1* and is summarised in the following Chart 8.1, with the key findings as follows:

- Around three quarters of FLG spending (take-home food, packaged liquor and groceries) by residents of the Bacchus Marsh region is directed to stores within Moorabool, which reflects the fact that the

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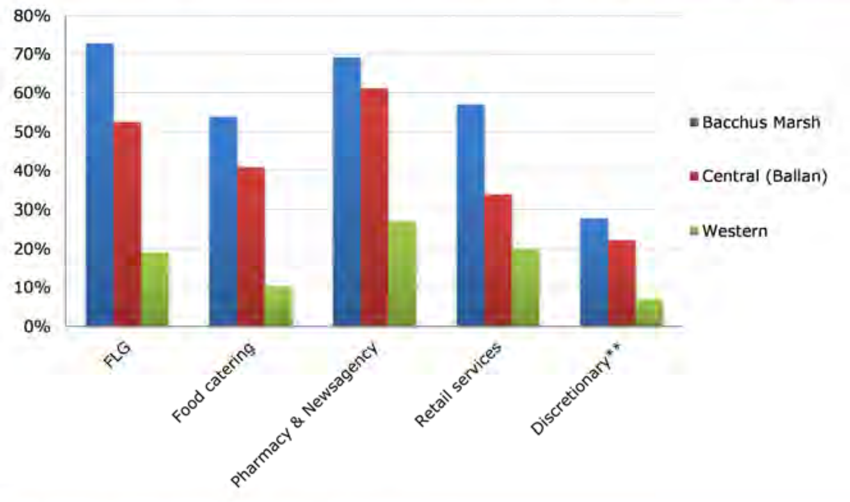
region contains four supermarkets – three supermarkets within the Bacchus Marsh Town Centre and a Champions IGA at Darley Plaza.

- Around half of the FLG spending of residents within the Central (Ballan) region is directed to stores within Moorabool. Residents of this region have good access to the Supa IGA within the Ballan Town Centre and relatively good access to Bacchus Marsh and Darley, but can also quite easily access the supermarkets at Ballarat and Melton.
- Less than 20% of Western region residents' FLG expenditure is retained within Moorabool. This low rate of retention reflects both the relative isolation of these residents from supermarket facilities within Moorabool and the close proximity of these residents to the extensive facilities available in Ballarat.
- Expenditure retention rates by region for food catering broadly resemble the patterns of FLG expenditure, though at lower rates. This partly reflects that many residents of Moorabool work outside the municipality, and would spend money at take-away food stores and cafes while at work.
- The patterns of expenditure retention for the other retail categories broadly follow the same directional trends but are generally lower compared to food expenditure. By far the lowest retention rates are in discretionary spending (i.e. spending on apparel and household goods), which range from 28% for the Bacchus Marsh region to only around 8% for the Western region.

Chart 8.1

Moorabool Shire - Retention rates of retail expenditure by region and category*



*Based on a telephone survey completed September 2014
**Discretionary spending includes appare and household goods
Source: AFS; MacroPlan Dimasi

Net escape expenditure

As detailed previously, a substantial amount of retail expenditure by residents of Moorabool is currently escaping the Shire, being directed to facilities primarily at Melton and Ballarat. While most food and groceries expenditure is being retained and directed to retail facilities within Moorabool, the majority of non-food expenditure is escaping the municipality.

The proportion of retail expenditure escaping Moorabool varies considerably across the three regions, with the percentage escaping being the lowest in the Bacchus Marsh region, while the Western region presents the highest rate of escape expenditure, as would be expected. More than half of the overall retail expenditure of the Bacchus Marsh region is retained within the municipality, and this also holds true for the Bacchus Marsh region across retail categories other than apparel, household goods, and leisure retailing i.e. the comparison shopping categories.

The proportions of net escape expenditure (allowing for captured expenditure by visitors) for total Moorabool by retail category are broadly estimated as follows:

- Around 30% for spending on FLG (i.e. supermarkets, bakeries, butchers);
- 20 – 25% for food catering spending (i.e. cafés, restaurants);
- 70 – 75% of apparel spending (i.e. clothing, footwear);
- 80 – 85% of household goods spending (i.e. hardware, electrical goods);
- 70 – 75% of leisure goods spending (i.e. stationary, books, sports);
- 55 – 60% of general retail spending (i.e. pharmacy, florist); and
- 40 – 45% of retail services (i.e. hairdressing, beauty).

The 2006 Strategy by SGS Economic & Planning estimated that in 2001 net escape retail expenditure for Moorabool was 37%, with the highest rates of escape expenditure exhibited within the department store and clothing & soft goods categories. The latest survey indicates that net escape expenditure has increased to approximately 46%, perhaps reflecting the recent expansion of Woodgrove Shopping Centre in Melton, but also the fact that, in relative terms, the overall retail offer in Moorabool has not grown/improved relative to the alternative destinations.

Escape expenditure opportunity

The current rate of escape expenditure indicates that residents of Moorabool are directing nearly half of their retail expenditure to facilities located outside Moorabool. This firstly impacts the amount of retail floorspace supportable in the municipality, but also impacts on the amount of investment in Moorabool as well as employment opportunities for local residents. This final point is reflected in the employment profile of Moorabool (refer Section 4.7), which shows that more than half of the employed residents of Moorabool work outside the municipality.

Encouraging the development of additional retail facilities, particularly a broader range of retail facilities such as bulky goods/homemaker stores, will reduce the amount of retail expenditure escaping Moorabool. This will result in additional investment in the municipality and provide jobs for local residents. In particular, retail provides employment opportunities for the youth, which is important for Moorabool as there is high youth unemployment in the region.

A lack of local employment results in more residents needing to travel outside the region to find employment, which adds to congestion and increases environmental costs. Providing local retail jobs will result in more people working in Moorabool, particularly younger residents. Furthermore, local jobs will encourage growth in expenditure potential in the region, as people shop near their place of work, with local jobs resulting in less expenditure escaping the region.

As a majority of residents currently work outside Moorabool they have more opportunities to shop outside the municipality, thus exacerbating the level of escape expenditure. However, this also presents an opportunity, because as the population of Bacchus Marsh increases, there is the potential to increase retention rates of retail expenditure over time as additional retailers consider Moorabool for new stores. This would create employment opportunities for local residents, who are then likely to shop more often in Moorabool, which will contribute to the local economy and encourage additional investment.

Health of retailers

Over the past 6 years since the GFC, the retail sector overall has performed at subdued levels. While retail sales in Australia have steadily gathered momentum over the past 2 years, in general the retail sector in regional areas has been slower to show signs of steady growth. Nevertheless, based on discussions with retailers, and a thorough inspection of retail facilities within Moorabool, most retail businesses are stable or growing, though the majority were clearly impacted to some degree by the expansion of Woodgrove Shopping Centre in Melton.

The Bacchus Marsh Town Centre appears to be performing well, with 4 vacant shopfronts out of 63 (6%), which is within the normal vacancy range of a healthy centre of around 3% - 7%. These figures exclude The Village which is currently being expanded. The retailers located on Grant Street appear to be trading more moderately which is reflected in the number of vacant shopfronts – 5 out of 24 (21%).

Darley Plaza includes a supermarket and a number of specialty shops which appear to be performing reasonably, with no vacancies at the centre.

The Maddingley Centre on Grant Street, which includes nine shops, appears to be trading sustainably, with no vacancies evident at an inspection in September 2014.

The performances of the retail stores at Ballan appear to be quite varied. A number of retailers are trading well, while other businesses have indicated that they are in a state of decline. Over time the retail mix at Ballan is likely to change to reflect the needs of local residents.

8.4 Guideline retail floorspace provision: baseline

The previous sub-section dealt with the current situation in Moorabool. This sub-section investigates a baseline 'guideline' retail floorspace provision, which is a theoretical supportable floorspace provision if a better range of retail facilities were offered. It is calculated by applying higher retention rates (particularly to the Bacchus Marsh and Central regions) which are considered achievable if new retail facilities are developed.

There is no right or wrong answer as to the amount of retail floorspace which is appropriate or supportable within Moorabool. Across Australia, there are many municipalities comparable in scale to Moorabool with floorspace provisions that are well above the national average of approximately 2.2 – 2.3 sq.m per person, and there are many with lower provisions. At present, Moorabool has a particularly low provision.

The level of retail floorspace provided in individual towns or municipalities across Australia reflects a number of factors, including, often, a number of unintended consequences. In some municipalities, for example, there may be a substantial population across the municipality, but no one significant urban area affording a level of population concentration with which major retailers are comfortable. As a consequence, major retailers are often dissuaded from locating in such areas.

On the other hand, there may be municipal areas with lower overall populations, but one significant town, which concentrates the population at one locality. In those situations, often the provision of retail facilities will be very high relative to population, both because many larger retailers see the town as a potentially profitable opportunity, and because the town serves the role of providing retail facilities for the broader region.

There is also the question of population thresholds which need to be achieved for various levels of retail facilities to become viable. For example, typically a full scale national supermarket (Coles or Woolworths) will require a main catchment or trade area population of around 7,000 – 8,000 to be viable. However, it is not unusual when the population threshold exceeds around 10,000, that both groups will be able to be comfortably represented. Examples of towns of this nature and scale are Hamilton and Seymour.

In order to support higher order shopping facilities (i.e. significant non-food anchor stores, such as discount department stores, even a smaller dds) a higher population threshold is normally required. Historically, a main trade area population threshold of around 15,000, with at least one town offering a substantial concentration of that population in one locality, has been able to support a small discount department store, e.g. Target Country – Bacchus Marsh at present is such an example.

In order to accommodate a larger discount department store, and bearing in mind that 'larger' can mean anywhere between 5,000 sq.m and 7,500 sq.m in today's climate, a significantly higher population threshold is required. Furthermore, in the post-GFC period as discussed previously in Section 3 of this report, the tendency has been for requisite thresholds to increase, reflecting greater reluctance on the part of the dds operators to consider smaller towns and localities post-GFC.

Because of these principles, it also follows that Moorabool can reasonably expect to see higher rates of retention of residents' retail expenditure, particularly non-food expenditure, as the population continues to grow, and once the available population reaches requisite threshold levels. Threshold levels are not definitive or precise, rather they will reflect the views of individual retailers at different points in time, and indeed population thresholds can themselves change over time in response to the evolving retail climate, as noted above. In broad terms, however, significant changes in the likely order of retention particularly of non-food retail expenditure can be expected for a municipality like Moorabool when the following occurs:

- When the available population at any one locality exceeds 25,000, and the total trade area or catchment population (i.e. including the subject locality and the surrounding areas which are reasonably likely to also direct a significant share of their retail expenditure to that locality) exceeds 35,000, then a 'full scale' discount department store is likely to prove supportable. At such levels, Moorabool could reasonably expect to see a Kmart discount department store, for example, becoming interested in locating at Bacchus Marsh, and/or Target expanding its existing relatively small store within the town.

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- When the population of any one locality exceeds 30,000, and the catchment area population, including surrounding towns or rural areas, exceeds 40,000, then a substantial 'sub-regional' centre with an extensive provision of non-food specialty shopping is also likely to be supportable. At that point, the rate of retention of available non-food spending will increase significantly, potentially to around 50%.

Based on our discussions with major retailers, Moorabool is somewhat disadvantaged in terms of its perceived attraction for significant non-food anchor stores because of its location – sandwiched between Melton to its east and Ballarat to its west. Many major retailers tend to the view, as expressed in a number of instances in discussions conducted for the purposes of preparing this strategy, that Moorabool can effectively be covered by representation in Melton and Ballarat, rather than directly within Moorabool itself. That view reflects the perception in the broader market at this point that Bacchus Marsh is a relatively small town (and for many retailers, Bacchus Marsh equals Moorabool) and that historically the growth in Bacchus Marsh has been modest. As Bacchus Marsh grows more substantially and there is ready physical evidence of that growth, the perceptions of these retailers will almost certainly change.

The above discussion therefore highlights the fact that the supportable provision of retail floorspace within Moorabool, and the provision which the market will be prepared to deliver, are not necessarily always the same thing. It also highlights the fact that to a significant extent the provision of retail floorspace within Moorabool is at the whim of the market, and particularly of the major retailers. However, a coherent, well-articulated and well publicised strategy will, over time, provide Moorabool with the best possible opportunity to attract and encourage the optimal mix of retail facilities.

Having regard to the caveats outlined above, the approximate amounts of expenditure generated by Moorabool residents that could reasonably be retained within the Shire, assuming that the facilities and infrastructure within Bacchus Marsh and Ballan are upgraded and the centres generally improved, are presented in the following Table 8.3.

Table 8.3

Moorabool Shire - guideline supportable retail floorspace, 2014*

	FLG	Food catering	Apparel	Household goods	Leisure	General retail	Retail services	**Total retail**
Retail expenditure by Moorabool Shire residents ($M)	178.7	44.5	37.9	70.3	19.7	30.7	10.5	**392.2**
Proportion of expenditure retained by region (%)								
Bacchus Marsh	90%	75%	50%	50%	50%	75%	80%	**74%**
Central (Ballan)	75%	65%	50%	40%	50%	65%	70%	**63%**
Western	25%	15%	10%	5%	30%	20%	20%	**19%**
Estimated expenditure retained within Moorabool Shire (%)	79%	66%	45%	42%	48%	66%	71%	**65%**
Estimated expenditure retained within Moorabool Shire ($M)	141.2	29.2	17.2	29.8	9.4	20.3	7.4	**254.5**
Estimated demand from beyond Moorabool Shire (%)	10%	30%	5%	5%	5%	5%	10%	**12%**
Total potential retail expenditure available ($M)	**156.8**	**41.9**	**18.1**	**31.4**	**9.9**	**21.3**	**8.3**	**287.8**
RTD ($/sq.m)*	9,000	6,000	4,000	3,500	5,000	6,000	4,000	**6,300**
Guideline supportable retail floorspace (sq.m)	**17,430**	**6,980**	**4,530**	**8,980**	**1,970**	**3,560**	**2,070**	**45,520**

**Constant 2013/14 dollars & including GST*
Source: MarketInfo; MacroPlan Dimasi

The key assessments and estimates underpinning the calculations are as follows:

- 90% of spending at supermarkets by residents within the Bacchus Marsh region is considered to be potentially retained by stores within Moorabool;
- Around half of Bacchus Marsh and Central (Ballan) residents' spending on apparel and household goods is assessed to be potentially retained within Moorabool;
- Given the fact that residents of the Western region are located closer to Ballarat than to Bacchus Marsh, and primarily shop at Ballarat for most of their retail needs, any improvements to Bacchus Marsh, or potentially Ballan, are considered likely to have little impact on their retail expenditure within Moorabool. However, if the towns in the Western region increase their populations to levels which can support a more extensive provision of retail facilities, then the rate of retention from the Western region could potentially be increased. This point is discussed further later in this section.

In total, around 65% of total retail expenditure is estimated to be potentially retained within Moorabool if a wider range of retail facilities are provided.

Retail turnover densities (RTDs) by category have then been applied to translate the estimated retail expenditure pool in to the guideline retail floorspace provision for Moorabool. The RTD is simply the level of sales per sq.m which retailers in each category typically achieve in order to trade reasonably successfully. Adopted RTD levels for this analysis are as follows:

- FLG retailers (including any supermarket provided): $9,000 per sq.m;
- Food catering: $6,000 per sq.m;
- Apparel: $4,000 per sq.m;
- Household goods: $3,500 per sq.m;
- Leisure: $5,000 per sq.m;
- General retail: $6,000 per sq.m; and
- Retail services: $4,000 per sq.m

It is again stressed, however, that the estimates shown above represent merely a guideline, under the set of assumptions and estimates that we have adopted. Whilst this is considered to be a 'reasonable' likely outcome, it is possible that higher rates of retention could be targeted for Moorabool Shire, though we would expect they would be difficult to achieve.

Table 8.4 compares the current retail floorspace provision within Moorabool (Section 5), to the guideline retail floorspace provision at 2014. The differences indicate an estimated underprovision or overprovision of floorspace within each retail category for Moorabool. Key findings include:

- A 4,900 sq.m shortfall in FLG floorspace, which indicates that a new large supermarket may be supportable;
- A significant underprovision of households goods floorspace (such as electrical goods and homewares);
- Shortfalls in the food catering, apparel, leisure, general retail categories; and
- Retail services are generally well provided – at least in quantum.

Table 8.4

Moorabool Shire - guideline supportable retail floorspace (sq.m), 2014*

	FLG	Food catering	Apparel	Household goods	Leisure	General retail	Retail services	**Total retail**
Current**	12,530	5,800	3,590	4,470	890	1,900	2,030	**31,210**
Guideline	17,430	6,980	4,530	8,980	1,970	3,560	2,070	**45,520**
Difference	**-4,900**	**-1,180**	**-940**	**-4,510**	**-1,080**	**-1,660**	**-40**	**-14,310**

**Constant 2013/14 dollars & including GST*
***Based on floorspace survey conducted in September 2014*
Source: MarketInfo; MacroPlan Dimasi

Table 8.5 then projects the guideline retail floorspace provision over the period 2014 – 2041, based on projected real growth in retail expenditure by the population of Moorabool.

Table 8.5

Moorabool Shire - guideline supportable retail floorspace (sq.m), 2014-2041*

Year ending June	**Est. population (no.)**	FLG	Food catering	Apparel	Household goods	Leisure	General retail	Retail services	**Total retail**	Cumulative undersupply
Current supply**		**12,530**	**5,800**	**3,590**	**4,470**	**890**	**1,900**	**2,030**	**31,210**	
2014	**31,180**	17,430	6,980	4,530	8,980	1,970	3,560	2,070	**45,520**	14,310
2017	**33,570**	19,190	7,690	4,990	9,890	2,170	3,920	2,280	**50,130**	18,920
2021	**36,730**	21,650	8,680	5,630	11,150	2,450	4,420	2,570	**56,550**	25,340
2026	**40,480**	24,550	9,840	6,390	12,650	2,780	5,010	2,910	**64,130**	32,920
2031	**44,230**	27,440	10,990	7,140	14,130	3,110	5,600	3,250	**71,660**	40,450
2036	**47,980**	30,190	12,100	7,850	15,550	3,420	6,160	3,580	**78,850**	47,640
2041	**51,730**	32,980	13,210	8,580	16,990	3,740	6,730	3,910	**86,140**	54,930

**Constant 2013/14 dollars & including GST*
***Based on floorspace survey conducted in September 2014*
Source: MarketInfo; MacroPlan Dimasi

8.5 Bacchus Marsh potential

Bacchus Marsh current potential

The previous sub-section highlighted the current potential for a substantial amount of additional retail floorspace within Moorabool, and more specifically within the Bacchus Marsh region (as detailed in Appendix 2).

The analysis for the Bacchus Marsh region highlights the current potential for additional FLG floorspace within the Bacchus Marsh Town Centre, including additional supermarket facilities and fresh food specialty stores. There is also an apparent underprovision of apparel and household goods (such as electrical goods and homewares) floorspace. These under provisions were also highlighted in the views of stakeholders, which particularly identified the lack of electrical/whitegoods stores in Bacchus Marsh.

Map 8.2 highlights the vacant sites within the Bacchus Marsh Town Centre, which could be utilised for the development of additional retail facilities in the future. In particular, the large vacant site located to the south of Main Street (Development Site 1), could potentially be utilised to **help create a vibrant retail heart within the town centre**, benefiting from its strategic location opposite The Village Shopping Centre, which is currently being upgraded. The site presents a unique opportunity within the middle of the Bacchus Marsh Town Centre. The adjacent Council Site 1 could also be developed to include community uses, and possibly some retail facilities such as food and beverages stores, to provide a linkage with any new development on Development Site 1 with the existing community facilities in the town centre such as the Library.

The key additions to the Bacchus Marsh Town Centre which are expected to be supportable in the future, and the potential locations where the facilities could be provided, are as follows:

- <u>Another full scale supermarket.</u> This would provide competition to the Coles supermarket which is currently being expanded. A full scale supermarket could potentially be located on the northern part of Development Site 1. A full scale supermarket of say, 3,500 – 4,000 sq.m, together with requisite carparking, would require a site area of approximately 1 hectare. In order to allow for other specialty store uses normally provided with such a development, and which are required to enable the project’s viability, a total site area of close to 2 hectares is required. It can be noted in this regard that the total site area of Bacchus Marsh Village, for example, is approximately 3.5 hectares.
- <u>An expanded Target store.</u> The existing Target is provided at The Village and this is the logical location for an expanded store. A modest expansion of the Target store could be accommodated within the existing envelope of The Village, while allowing for the potential expansion area available to The Village which is identified on Map 8.2, a larger expansion could be accommodated in due course.
- <u>A full scale dds.</u> This would most likely be a smaller than average sized store of perhaps 5,000 sq.m. The dds may be able to be provided on the southern part of Development Site 1 or as part of a potential future expansion of The Village. Again, allowing for requisite carparking, a site area in excess of 1 hectare would be required just to accommodate a new discount department store of this scale. However, a dds on its own is unlikely to be a viable development alternative given the relatively low rental capacity of such an operator, and a development which can provide a full scale dds would

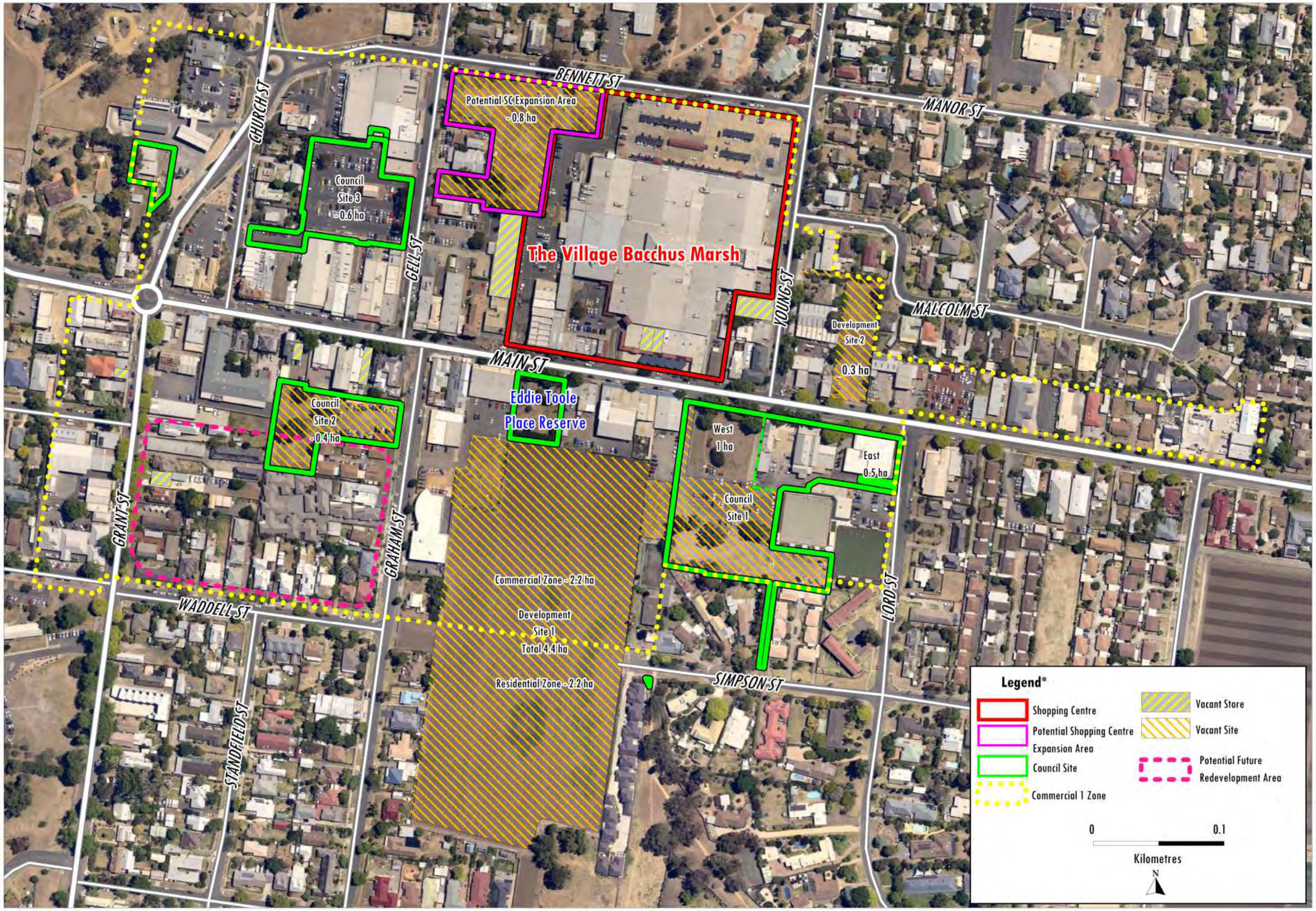
require a range of high rated paying specialty uses, meaning that a total site area of greater than 1 hectare, and realistically closer to 1.5 – 2 hectares, would be required.

- A food & beverage precinct. A dining precinct would assist in the activation the town centre during the evenings and on weekends, and ideally could form part of a future development on Council Site 1, linking with Development Site 1, thereby helping to integrate any development on Development Site 1 effectively with the main street, and at the same time creating a focus for the town centre.
- Improve fresh food offer. An expanded fresh food offer could potentially be linked to a permanent farmers market highlighting the fresh produce of the region, which could also be used to encourage additional visitation to the town centre. Such on offer could also be considered for Council Site 1.
- Expanded non-food offer. As the population grows additional non-food stores and retail services will need to be provided, potentially on Development Site 1 or as part of a future expansion of The Village.

Overall, when considering the amount of additional retail floorspace that is required in Bacchus Marsh over the longer term, there are not too many opportunities available in the town centre. Therefore, good planning of the available sites is critical, to ensure an optimal mix of retail facilities can be provided in the town centre in the future. This is fundamental to enable the town centre to grow and adapt to meet the expectations and needs of the growing community. Therefore, the available sites should be retained for the development of tradtional retail facilities, and any bulky goods/homeamker facilities should be encouraged to be provided in an out-of-town location. This will assist in ensuring Bacchus Marsh fulfills its potential as a successful and vibrant town centre serving the surrounding residents.

A number of bulky goods/homemaker facilities are considered supportable in Bacchus Marsh in the future, and are recommended to be located in an out-of-centre development. An out-of-centre location for these types of facilities is considered preferable given the land constraints in the town centre and the desire to retain any available land for future traditional retail facilities. Further detail of the need/potential for an out-of-centre development is provided later in this sub-section.

The roll out of the National Broadband Network (NBN) in Bacchus Marsh, Darley and Maddingley provides further opportunities for businesses that rely on high speed internet to locate within the region, particularly the professional and commercial services.



Map 8.2: Bacchus Marsh – vacant and council owned sites

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Grant Street service precinct

The mixed use precinct on Grant Street to the south of Main Street currently includes a range of retail and commercial facilities such as accountant offices. There is excellent potential for Grant Street to become a key services precinct in the future, drawing on its location slightly removed, but still easily accessible, from the main retail facilities within the Bacchus Marsh Town Centre.

Grant Street also includes a range of medical services, based around the Bacchus Marsh & Melton Regional Hospital, such as medical centres, podiatrists, chiropractors and physiotherapists. The number and range of these services could also be increased in the future as the population increases, cementing Bacchus Marsh as a key destination for health services and related facilities in the surrounding region.

Entertainment facilities

As the population of Moorabool increases, there will be growing demand for additional entertainment facilities in Bacchus Marsh, and there may be potential to create an entertainment hub within the town. The types of entertainment uses which could potentially be accommodated in Bacchus Marsh in the foreseeable future include the following:

- Ten pin bowling – which is generally popular with all ages. There are no ten pin bowling facilities located in Melton, with the closest options to Bacchus Marsh located in Ballarat (operated by Oz Ten Pin) and Taylors Lakes in western Melbourne (operated by AMF Bowling);
- Mini golf – which is also popular with all ages. The closest facilities to Bacchus Marsh are located in Ballarat and Sunbury, with courses typically operated independently;
- Go-karting – which is targeted towards older children and teenagers. An indoor go-kart facility is located in Ballarat and in Sunshine in western Melbourne;
- Laser tag – which is popular with older children and teenagers and typically accompanies other entertainment facilities such as go-karting or bowling. There are laser tag facilities available at the go-kart centres in Ballarat and Sunshine;
- Indoor bike/skate park – which generally locate in low rent warehouses in industrial precincts and typically range in size between 1,000 and 1,500 sq.m. They are mostly popular with teenagers with operators in Melbourne including TheShed, Bunker, Rampit and Rampfest;
- Indoor trampolining centre – which is an emerging entertainment use in the Australian market targeted towards users ranging from young children up to adults. These facilities range in size from 1,000 to 3,000 sq.m and there are three main operators – Sky Zone, Bounce Inc., and Flip Out, with a number of centres located in Melbourne;
- Young children's indoor play centre – which can include play pits, climbing equipment, playgrounds and games for kids, such as the 'Junglemania Kids Indoor Play Centre' in Taylors Lakes; and
- Cinemas - there are a number of cinema complexes located in areas surrounding Moorabool, including at Melton, Sunbury, Ballarat, Geelong and western Melbourne. The cinemas in Melton and Sunbury each serve catchment populations of around **80,000 people**, and therefore the potential for a major cinema complex at Bacchus Marsh is likely to be a much longer term opportunity.

An example of an operator which provides a number of entertainment facilities aimed at young teenagers in the one location is Fun City in Sunshine, which includes Go Karts, Laser Tag and an arcade game centre.

Office space

An assessment of the estimated need or demand for office space in Moorabool is beyond the scope of this strategy, however, as the population of the Shire increases the demand for office floorspace will also increase. The ideal location for new office space is considered to be within or adjacent to the Bacchus Marsh Town Centre, perhaps on Grant Street or provided on upper levels of any future developments in the town centre. Providing office space in the town centre would assist to activate the retail core in Bacchus Marsh, with workers contributing to the demand for additional retail facilities.

Comparable towns

Learnings as to the potential for Bacchus Marsh, at present and in the future, can be drawn from a comparative analysis of other Victorian towns. Though no two areas are the same, the selected towns are considered to possess broadly comparable attributes to Bacchus Marsh, and serve broadly similarly population catchments.

The selected towns which broadly satisfy these attributes for Bacchus Marsh at present (i.e. a catchment population of approximately 20,000 residents) are Bairnsdale, Warragul and Sale. The retail provisions within the comparable towns are summarised as follows:

- The three towns all include dds facilities; full scale stores of over 6,000 sq.m in both Bairnsdale and Sale, with a 3,500 sq.m Target Country in Warragul. Bairnsdale also includes a second smaller dds of around 2,000 sq.m (Target Country).
- Each of the towns contains two large supermarkets (over 2,500 sq.m in size) and a number of smaller supermarkets, with all three containing over 10,000 sq.m of supermarket floorspace.
- The three towns all include more extensive ranges of food and non-food facilities, providing a broad variety of retailers.
- The towns all contain a range of bulky goods/homemaker retailers, including hardware, electrical and large homeware stores, with all three towns containing a large Harvey Norman outlet. Bairnsdale contains a small ‘out-of-centre’ homemaker/bulky goods development leading into the town centre (approximately 2 km west) which includes a 5,000 sq.m Bunnings, Carpet Choice, Repco and some large bedding and furniture stores. Warragul contains an out-of-town Bunnings hardware store (located 2 km to the east), while the majority of the bulky goods/homemaker facilities in Sale (including a Bunnings store) are located in the sizable town centre.

Generally, the provisions of retail facilities within these towns are significantly more extensive than that which is currently available at Bacchus Marsh. The reasons for this situation are, in our view, partly historical, and partly the fact that each of these towns is situated a substantial distance from larger urban centres, unlike Bacchus Marsh which is seen by many to be located quite close to Melton in particular for the purposes of retail servicing.

Bacchus Marsh at 25,000 residents

By 2021, the Bacchus Marsh region is estimated to contain almost 25,000 residents. By that time, the guideline retail floorspace potential analysis indicates that around 46,000 – 47,000 sq.m of retail floorspace is supportable, which is some 20,000 sq.m greater than the current provision (refer Appendix 2).

At 25,000 residents, the Bacchus Marsh Town Centre is expected to be able to support the following additional retail facilities:

- An increase in the amount of dds floorspace – at least 3,500 sq.m - possibly achieved by an expansion of the existing Target store;
- An increase in the provision of supermarket floorspace, potentially achieved through the addition of a new large supermarket (i.e. Woolworths), together with a wider selection of fresh food specialty operators;
- A range of mini-majors (i.e. tenants ranging in size from around 400 sq.m to 1,500 sq.m), potentially including large apparel/sporting goods stores; major electrical goods outlets (e.g. The Good Guys); discount variety stores; and large format chemists (e.g. Priceline / Chemist Warehouse);
- Additional food catering outlets, with the analysis indicating that some 2,000 sq.m of additional food catering would be supportable by 2021. This figure could be even higher if existing and new facilities attract additional visitation to the town centre;
- A broader range of specialty shops offering increased choice to local residents (a list of retailers located in other broadly comparable regional Victoria towns, but not currently provided in Bacchus Marsh, are listed in Table 8.6); and
- A small bulky goods/homemaker precinct, most likely located in an out-of-town location. Such a centre or precinct could include a number of stores selling items such as hardware, furniture, bedding and electrical goods.

Table 8.6

Typical retailers located in regional Victoria - not located in Bacchus Marsh					
Category/Retailers					
Food and Liquor					
Boost Juice	BreadTop	Brumby's	Lenard's	The Cheesecake Shop	
Food catering					
Coffee Club	Fancy Fillings	Hungry Jacks	Nando's	Pizza Hut	Sushi Sushi
Cold Rock Ice Cream	Gloria Jean's Coffees	Muffin Break	New Zealand Natural	Red Rooster	Wendys
Apparel/Fashion					
Angus & Coote	Country Road	Jay Jay's	Prouds	Sportsco	The Athlete's Foot
Aussie Sox	Diva Accessories	Jeanswest	Pumpkin Patch	Sportsgirl	Westco
Autograph	Dotti	Katies	Rivers	Strandbags	Williams The Shoeman
Betts & Betts	Equip	Michael Hill Jeweller	Rockmans	Sunglass Hut	Witchery
Bras 'n Things	Factorie	Noni B	Roger David	Supre	Wittner Shoes
Brown Sugar	Gazman	Novo	Rubi Shoes	Sussan	yd
Casual Guy	Goldmark Jewellers	Payless Shoes	Showcase Jewellers	Suzanne Grae	Zamels
Cotton On	Jacqui E	Portmans	Spendless Shoes	Tarocash	
Household goods					
Adairs	Beacon Lighting	Bed Bath N Table	Carpet Call	Godfreys	House
Leisure					
Aussie Disposals	EB Games	NewsXpress	Nextra	Sanity	Typo
General retail					
Allphones	Chem-mart Pharmacy	Hairhouse Warehouse	Telechoice	Terry White Chemist	Toyworld
Amcal Pharmacy	Guardian Pharmacy	My Chemist	Telstra	The Body Shop	Vodafone

Source: MacroPlan Dimasi

In broad terms, the 20,000 sq.m of <u>additional</u> floorspace would require approximately 5 - 6 hectares of land, depending on the mix added and the provision of carparking provided. Some of the required floorspace could be met by locating bulky goods/homemaker stores in an out-of-centre development. The traditional retail facilities could be provided on the vacant sites in the town centre which total 4 hectares of land zoned Commercial.

<u>Comparable towns</u>
As a comparison, other Victorian towns which serve population catchments in the order of 25,000 residents include <u>Horsham</u>, <u>Moe</u> and <u>Morwell</u>. The provisions of retail facilities in these towns are summarised as follows:

- All of the towns contain at least one full scale dds, while Morwell has a second major dds and Horsham contains a second mid-sized dds (a 3,000 sq.m Target). The retail offer at Morwell town centre is split between the town centre and Mid Valley Shopping Centre located approximately 3 km to the east.
- All of the towns contain major Coles and Woolworths supermarkets, which creates a competitive supermarket landscape, together with several other medium and smaller supermarkets.
- There is a range of both food and non-food specialties located in each town, typically provided on several main streets.
- A broad range of bulky goods/homemaker facilities is provided in each town, as follows:
    - Horsham contains a broad range of bulky goods stores which are mostly located within the town centre including hardware (3 stores), furniture and whitegoods (2 stores), car accessories (3 stores), computer and electrical (2 stores), and fabrics/furnishings (3 stores).
    - Moe contains a number of bulky good/homemaker tenancies located within the town centre, including Harvey Norman, Better Home Living, Repco, Supercheap Auto and Home Hardware.
    - In Morwell, Harvey Norman is located within the town centre and Home Hardware approximately 1.1 km to the north. The remaining larger format retailers are located near Mid Valley Shopping Centre, and include Bunnings, Dick Smith and Repco.

Bacchus Marsh at 30,000 residents

By 2031, the Bacchus Marsh region is estimated to contain over 30,000 residents, with the guideline retail floorspace potential analysis indicating that more than double the current provision will be supportable, i.e. around 60,000 sq.m.

At over 30,000 residents, the Bacchus Marsh Town Centre is expected to be able to support a much broader range of retail facilities, including the following additions:

- A full scale dds of around 6,000 sq.m and possibly a smaller dds of 2,000 – 3,000 sq.m. Potentially a tenant such as Harris Scarfe would consider Bacchus Marsh for a store opportunity at that point;
- Expansions of the supermarkets and additional fresh food retailing;
- A much broader range of mini majors, with many national and independent operators (refer to the mini-majors present at Traralgon, detailed following, as an example of the types of operators who may be interested in opening stores in Bacchus Marsh);

- A wider range of food catering facilities, with the analysis indicating that around 8,500 – 9,000 sq.m of food catering floorspace would be supportable in the Bacchus Marsh region (currently 4,600 sq.m);
- Additional specialty stores, refer to Table 8.6 previously for a list of retailers located in regional Victoria that are not currently located in Bacchus Marsh;
- Additional retail services (such as hairdressers, beauty salons and optometrists), with the analysis indicating that around 10 – 12 additional outlets would be supportable by 2021; and
- A major bulky goods/homemaker node located in an out-of-centre location. It could potentially include a major hardware store together with a range of other large format retailers.

In broad terms, the 30,000 – 35,000 sq.m of additional floorspace would require approximately 8 - 10 hectares of land, depending on the mix added and the provision of carparking provided.

There is currently around 6 – 7 hectares of land available for development in the Bacchus Marsh Town Centre including the following:

- Development Site 1 – 4.4 hectares of which half is zoned Commercial;
- Development Site 2 – 0.3 hectares;
- Council site 2 – 0.4 hectares;
- Expansion area of The Village – 0.8 hectares; and
- Possibly part of the Council Site 1, which could include a mix of community and possibly some complementary retail uses – 1 hectare.

Therefore, by 2031 the indicative amount of supportable retail floorspace in the Bacchus Marsh Town Centre would require more land than what is available in the identified sites. This emphasises the need to retain these sites for the development of traditional retail uses and the need to locate bulky goods/homemaker stores in an out-of-centre development.

Comparable town

Traralgon is located in eastern Victoria with a catchment population of approximately 30,000 residents. It is situated between a number of other major regional towns, including Warragul, Moe, Morwell and Sale. The Traralgon Town Centre contains an estimated 72,000 sq.m of retail floorspace spread across 230 establishments. A summary of the major retail facilities in Traralgon is as follows:

- Traralgon contains a large Kmart dds of over 8,000 sq.m and a Target Country of 3,500 sq.m. There is also a Harris Scarfe of 2,000 sq.m;
- Traralgon contains around 14,000 sq.m of supermarket floorspace, including large Coles and Woolworths stores, an Aldi store and six independent supermarkets;
- A number of mini-majors are provided including Priceline, Chemist Warehouse, Dan Murphy's, The Reject Shop, Planet Surf, JB Hi-Fi, Dick Smith, Toy World, Best & Less, Betta Home Living, Forty Winks, Repco, and Vast Interiors; and
- There is a very large provision of bulky goods/homemaker retailers in Traralgon. Some smaller bulky goods/homemaker retailers are located in the town centre, while the majority of the large format retailers are located outside the town centre (around 1 km west) on the Princes

Highway including Bunnings, Harvey Norman, Spotlight, Officeworks, Forty Winks, Snooze, The Good Guys, BCF and various household related retailers such as Fantastic Furniture, Vast Interior and Betta Home Living.

Bacchus Marsh at 35,000 residents

By 2041, the Bacchus Marsh region is estimated to contain around 35,000 residents, with the guideline retail floorspace potential analysis indicating that some 70,000 sq.m of retail floorspace would be supportable.

Overall, the range and mix of retail facilities supportable would be similar to that listed above for Bacchus Marsh at 30,000 residents, though with possible expansions of the anchor tenants and additional speciality stores which could satisfy the demand for around 10,000 sq.m of additional retail floorspace.

Maddingley

The existing small shopping centre in Maddingley on Grant Street has limited potential to be expanded, given both land constraints and its location in close proximity to the Bacchus Marsh Town Centre. The existing shops are expected to be able to continue to perform their current role in the future, as in providing a limited range of facilities and services for local residents.

There is considered limited potential for a shopping centre or substantial retail facilities to be provided near the Bacchus Marsh train station, or on the Mixed Use zoned site located to the east on Bacchus Marsh - Geelong Road. This reflects the location of the site at the eastern edge of the urban area, and the lack of residents located in the surrounding area.

<u>West Maddingley (proposed)</u>

A shopping centre has approval to be developed on a 2 hectare parcel of land on McCormacks Road in Maddingley, as part of the Stonehill residential estate. The site is located in the growth area of Maddingley and is well positioned to serve both existing and future residents within the surrounding area. The site also borders Halletts Way, which is planned to be extended north over Werribee River and connect with Bacchus Marsh Road and the Western Freeway. The Halletts Way connection will provide direct access to the site from the western parts of Bacchus Marsh. A school and other community facilities are proposed to be developed adjacent to the site. The population of the Maddingley sub-region (refer Section 4) is estimated at 2,930 in 2014, and is projected to reach over 8,930 residents by 2041.

Allowing for the above, **the proposed West Maddingley shopping centre on McCormacks Road is expected to eventually support around 4,000 - 6,000 sq.m of shopfront floorspace, anchored by a medium or large supermarket.** The centre may need to be developed in stages, with a small supermarket possibly anchoring the first stage. A population threshold of around 6,000 in growing areas is typically required to support a large supermarket, and such a level is likely to be reached within the Maddingley sub-region by around 2027/28.

Darley

Darley Plaza is located at the intersection of Bacchus Marsh-Gisborne Road and Grey Street. It is anchored by a 1,300 sq.m Champions IGA supermarket and includes 3 shops (a pharmacy, a café/bakery and a tattoo parlour) as well as a service station / convenience store, on a site of approximately 0.7 hectares (refer Map 8.3)

The population of the Darley sub-region is estimated at 9,290 in 2014, and is projected to grow to 11,750 by 2041 (refer Section 4). **A population catchment of this scale could support a Neighbourhood Centre of around 4,000 – 6,000 sq.m anchored by a larger supermarket**, which would require approximately 1.5 – 2 hectares of land. However, the population of Darley is also reasonably well served by the Bacchus Marsh Town Centre, which contains three supermarkets.

The biggest issue facing a potential expansion of Darley Plaza is land constraints (refer Map 8.3). A future significant expansion of the centre would require some surrounding residential land to be acquired (in addition to the vacant site on Jonathan Drive). While the local population catchment would currently support an expansion of Darley Plaza, particularly a larger supermarket, a potential expansion of the centre would come down to being economically viable.

Any future expansion of the centre, if it could be delivered, would provide local residents with improved shopping choice and convenience. It would also reduce the number of times residents of Darley would need to travel to the Bacchus Marsh Town Centre, thus taking some pressure off the traffic congestion in the town centre. Darley Plaza is currently proposed to undergo a minor expansion, and would also benefit from refurbishment and improvements to its overall presentation.

Any future expansion of the centre, if it could be delivered, would provide local residents with improved shopping choice and convenience. It would also reduce the number of times residents of Darley would need to travel to the Bacchus Marsh Town Centre, thus taking some pressure off the traffic congestion in the town centre. Darley Plaza is currently proposed to undergo a minor expansion, and would also benefit from refurbishment and improvements to its overall presentation.

The population of Darley is of course also part of the primary trade area population for the much larger Bacchus Marsh Town Centre, which contains three substantial supermarkets. The population of Darley, therefore, should not be seen as needing to be 'self-contained' with regard to its retail needs – rather, the Darley Neighbourhood Centre should be encouraged to provide an appropriate level of convenient food and grocery shopping as well as supporting daily/weekly convenience shopping and services. A substantial proportion, potentially the majority, of even the food & grocery expenditure of Darley residents will continue to be directed to the Bacchus Marsh Town Centre, simply because of the primacy of that centre, and the very broad range of food & grocery shopping alternatives which it currently offers, and will offer even more so in the future.

Map 8.3: Darley Plaza local context

8.6 Ballan potential

There is a significant amount of land currently zoned for residential development in Ballan, and the population of the town is expected to grow to 6,670 people by 2041. The broader Central (Ballan) region is estimated to contain a population of around 11,590 at that time.

The Ballan Town Centre currently contains a small IGA supermarket of approximately 950 sq.m and a limited range of specialty shops, and many local residents travel to Bacchus Marsh, Ballarat and Melton for their supermarket and other retail shopping needs. Currently, there is an estimated 3,000 sq.m of retail floorspace within the Ballan Town Centre, with a total of 4,270 sq.m within the Ballan (Central) region.

Around half of the supermarket spending by residents within the Central (Ballan) region is directed to stores within Moorabool, according to the customer telephone survey results as detailed in *Appendix 1*, with around half of this spending estimated to be directed to the supermarkets at Bacchus Marsh. Therefore, there is potential for the amount of supermarket floorspace in Ballan to be increased.

There is a good opportunity for local expenditure retention rates to be improved, particularly in FLG spending. We estimate that there is currently an underprovision of FLG floorspace of around 1,500 – 1,700 sq.m in the region. If the amount of supermarket floorspace in Ballan was expanded, then local retention rates would be improved, and fewer residents would be travelling to Bacchus Marsh or beyond for their supermarket and other retail needs. This would also support the provision of a wider range of other supporting retail facilities in the town centre. Land constraints may limit the expansion capabilities of the existing supermarket (refer previous Map 5.3), and an additional supermarket may be required on another site in the longer term. The Consultation Draft of the Ballan Structure Plan states that three key sites in the Ballan Town Centre have been identified for development. This presents opportunities for additional civic and retail uses in the town centre.

<u>Potential retail floorspace supportable</u>

The following provides a summary of the amount of retail floorspace considered supportable at various population thresholds. It is worth noting that as the population of Ballan increases, and the range of facilities in the town centre is increased, then the Ballan Town Centre will serve a catchment which will increase over time. In broad terms, the guideline retail floorspace potential analysis indicates the following:

- As stated previously, there is estimated demand for some 1,500 – 1,700 sq.m of additional FLG floorspace, which could be achieved by an expansion of the existing supermarket, subject to land constraints, and additional fresh food specialty stores.
- By 2021 the population of the Central (Ballan) region is estimated at 8,200, and a total of around 8,000 – 9,000 sq.m of retail floorspace is considered likely to be supportable. The key elements could include a medium sized supermarket, a greater range of supporting fresh food stores, cafes/restaurants, additional convenience retail stores, a discount variety outlet and more retail services such as additional hairdressers.

- By 2031, when the population of the Central (Ballan) region is estimated to reach around 9,700 people, the analysis suggests the potential for a large supermarket (or two medium sized supermarkets) in Ballan, and a total of 11,000 – 12,000 sq.m of retail floorspace in the region. A small proportion of this retail floorspace could be provided in Gordon, potential around 2,000 - 2,500 sq.m, as detailed later in this Strategy. By 2031, the Ballan Town Centre could include additional fresh food retailers, a much broader range of cafes and restaurants, a number of additional discretionary retailers such as apparel and homeware stores, and more retail services such as optometrist.
- By 2041, once the population of the region reaches 11,500 residents, a total of around 13,000 – 14,000 sq.m of retail floorspace is considered supportable in the Ballan (Central) region. Potentially around 8,000 – 9,000 of this retail floorspace could be provided within the Ballan Town Centre; 3,000 - 4,000 sq.m in Gordon; and around 1,000 sq.m elsewhere in the region.

There is around 12,000 sq.m of vacant land within the Ballan Town Centre, which could potentially accommodate around 8,000 – 9,000 sq.m of retail floorspace. This amount of floorspace would sustain the indicative floorspace demand in the Ballan Town Centre up to around 2041.

<u>Comparable towns</u>

Some examples of towns which serve a population catchment similar to Ballan include the following:

- Whittlesea is located on the outer fringe of metropolitan Melbourne, approximately 10 km north of Mernda, and is anchored by an IGA supermarket of approximately 2,200 sq.m as well as a smaller Foodworks supermarket of approximately 600 sq.m. The town includes approximately 45 specialty stores.
- Bannockburn is located around 20 km west of Geelong and is anchored by a small Safeway supermarket of approximately 2,200 sq.m, and includes some 30 shopfront stores.

8.7 Small towns potential

There may be potential for increased residential demand/growth in a number of small towns located in Moorabool, possibly at Gordon, Bungaree and Wallace, provided that additional services, such as sewerage, gas and water infrastructure, are developed. If the population of the towns reach certain population thresholds, there may be potential for additional retail facilities in the towns. In the case of Gordon, any new retail facilities will also serve residents of Mt Egerton given the close proximity of the two towns. However, it is important to note that as the provision of retail facilities in the Ballan Town Centre increases, residents of the towns will be likely to shop more regularly at Ballan.

Residents of these smaller towns are typically attracted to the larger centres at Ballarat, Bacchus Marsh and Melton, with residents of the Western region predominantly shopping at Ballarat. However, if the population of the towns were to grow substantially, they may be able to support a range of retail facilities in their own right.

In order to provide an indication of the amount of retail floorspace which may be supportable within each town, we have considered the amount of floorspace supportable when the towns reach different population thresholds, as follows:

- 1,000 residents;
- 2,000 residents; and
- 3,000 residents.

We have also detailed what is provided at other Victorian towns, as an example of the types of retailers which may be supportable when the population of the towns reach the certain population thresholds.

1,000 people:

- A foodstore of 300 – 500 sq.m.
- A small number of specialty shops, potentially around 10 stores, of around 100 sq.m each.
- A limited range of non-retail stores, such as a bank and a real estate agent, of around 150 sq.m each.

The following towns in regional Victoria serve a catchment population of around 1,000 residents and include the following facilities:

- Elmore (located north-east of Bendigo) – IGA X-Press (400 sq.m) and 10 specialty stores;
- Violet Town (located south-east of Shepparton) – IGA (350 sq.m) and 15 specialties;
- Murtoa (located north-east of Horsham) – IGA X-Press (500 sq.m) and 15 specialty stores;

In these towns the retail specialty stores typically include facilities such as a bakery, a convenience store (i.e. milk bar), 1 – 2 take-away food stores, a café, a newsagency, a hardware store and a pharmacy.

The non-retail specialty stores typically include 1 – 2 hotels, a post office, a bank, a real estate agent and a petrol station.

<u>2,000 people</u>:

- A small supermarket of 500 – 1,000 sq.m.
- A small number of specialty shops, potentially around 15 - 20 stores.
- A limited range of non-retail facilities.

The following towns in regional Victoria serve a catchment population of around 2,000 residents and include the following facilities:

- Mortlake (located north of Warrnambool) – IGA (500 sq.m) and 15 specialty stores;
- Winchelsea (located between Geelong and Colac) – IGA (750 sq.m) and 13 specialties;
- Beaufort (located between Ballarat and Ararat) – Supa IGA (800 sq.m) and 20 specialty stores;
- Timboon (located east of Warrnambool) – IGA (750 sq.m) and 15 specialty stores;
- Nagambie (located between Shepparton and Seymour) – IGA (1,000 sq.m) and 20 specialty stores.

Typical <u>retail specialty stores</u> include a bakery, a butcher, a convenience outlet, 2 - 3 take-away food stores, 1 – 2 cafés, 1 – 2 restaurants, a newsagency, an opportunity shop, a hair/beauty salon, a hardware store and a pharmacy.

The <u>non-retail</u> specialty stores include facilities such as 1 – 2 hotels, a post office, a bank, a real estate agency, an antique store and a trade supply outlet (i.e. building/flooring supplies).

<u>3,000 people</u>:

- A medium supermarket of 1,000 – 1,500 sq.m.
- A number of specialty shops, potentially around 20 - 30 stores.
- A range of non-retail facilities and services.

The following towns in regional Victoria serve a catchment population of around 3,000 residents and include the following facilities:

- Heathcote (located south-east of Bendigo) – Supa IGA (1,200 sq.m) and 25 specialties;
- Euroa (located between Seymour and Benalla) – Supa IGA (1,200 sq.m) and 30 specialty stores;
- Rochester (located between Bendigo and Echuca) – Supa IGA (1,200 sq.m) and 20 specialty stores;
- Nhill (located north-west of Horsham) – Supa IGA (1,500 sq.m) and 30 specialty stores;
- Riddells Creek (located some 10 km north-east of Gisborne) – Foodworks (600 sq.m) and 15 specialty stores, but with a proposal for a larger supermarket seeking planning approval.

Typical <u>retail specialty stores</u> include 1 – 2 bakeries, a butcher, a fresh produce store, 3 - 4 take-away food stores, 2 – 3 cafés, 1 – 2 restaurants, a newsagency, florist, an opportunity shop, a craft/giftware store, a hair/beauty salon, a small hardware store, a discount variety store, a furniture store, a pharmacy and a laundromat.

The <u>non-retail</u> specialty stores include facilities such as 2 – 3 hotels, a post office, 1 – 2 banks, 2 – 3 real estate agency, a trade supply outlet

Rural Small Towns

	Gordon	Wallace / Bungaree	Myrniong	Elaine	Blackwood
Population Forecasts	**2014**: 1,680 **2021**: 1,890 **2031**: 2,190 **2041**: 2,690	**2014**: 1,170 **2021**: 1,170 **2031**: 1,320 **2041**: 1,620	**2014**: 410 **2021**: 480 **2031**: 580 **2041**: 680	**2014**: 340 **2021**: 350 **2031**: 360 **2041**: 380	**2014**: 310 **2021**: 320 **2031**: 330 **2041**: 340
Current Retail Supply	• General store (incorporates a newsagency, fish & chips, bakery and café) • While The Billy Boils cafe • Gordon Hotel and bottle shop • Antique store • Post office	• General store (incorporates petrol station, newsagency and take away food facilities) • Wallace Hotel	• The Plough	• Elaine General Store • Railway Hotel	• Blackwood Hotel • Blackwood Merchant
Attractions	• Historic streetscape • Unique stores	• Wallace Hotel	• The Plough • Myrniong Music Festival • Myrniong Classic Car Sprint	• Narmbool Lodge	• Lerderderg State Forest • Wombat State Forest
Potential Opportunities	• Small supermarket • Cafés / restaurants • Fresh food store • Retail services	• Additional food stores • Small supermarket over the longer term			

A potential opportunity for many of the small towns is also increasing the provision of retail and other uses which cater to the tourism market.

Limited growth is expected for the towns of Lal Lal, Blackwood, Greendale and Dunnstown, as a result the existing retail offer of these towns is not likely to change in the foreseeable future.

Gordon/Mount Egerton

The Gordon Town Centre is currently governed by the Gordon Structure Plan 2011. The existing retail and commercial offer is a part of the Township Zone fronting Main Street. A revised structure plan was formed in 2013 but has not been adopted into the planning scheme. In January 2014, Planning Panels Victoria suggested that further analysis of supportable retail and commercial floorspace in Gordon be completed and made the following comment.

"This analysis should identify the likely demand for and type of businesses required to service the Gordon community and the extent of land that will need to be rezoned to accommodate these uses. In considering the future zoning of this 'core town centre' of Gordon, it would also be appropriate to consider the zone mix that would support the objective 'to encourage medium density dwellings in the central area of Gordon'." (p.ii)

Once the population of Gordon/Mount Egerton approaches 2,000 residents, potentially by around 2021, Gordon is expected to be able to support a small supermarket of 500 – 1,000 sq.m, around 15 - 20 specialty stores and some non-retail facilities such as a real estate agent and a bank, in addition to the existing post office. Therefore, potentially around 3,000 sq.m of shopfront floorspace is supportable, which would require approximately 0.5 – 0.8 hectares of land.

By 2041, once the population of Gordon/Mount Egerton reaches 2,700 - 3,000 residents, around 4,500 sq.m of shopfront floorspace is potentially supportable. This would require approximately 0.7 – 1.2 hectares of land depending on additional carparking requirements.

Bungaree/Wallace case study

According to Urban Enterprise's *Moorabool West Small Towns Residential Assessment (Draft – October 2014)*, Council considers a realistic population for Wallace and Bungaree in the short-to-medium term is 1,000 residents per town; with the capacity to grow further if there was additional demand. The staging of this growth is as follows:

- **Stage 1** would accommodate a total of 1,000 people, either totally in Bungaree or split evenly across the two towns.
- **Stage 2**, subject to demand, would see an increase in the population to 2,000 people, with a limit of 1,000 people per town.

The current provision of retail floorspace in the area consists of the Bungaree Store, a general store of approximately 250 sq.m (which includes associated facilities such as petrol, post office and newsagency) and the Wallace Hotel, which includes a restaurant.

Under Stage 1, based on the analysis detailed previously, the catchment population could accommodate a foodstore of around 500 sq.m, together with around 10 specialty stores. The population catchment in Stage 2 could support a foodstore in each town or one small supermarket of around 1,000 sq.m, along with a total of around 20 supporting retail specialty stores across the two towns.

8.8 Success stories – case study

Baw Baw Council

Baw Baw is a peri-urban council working to find its niche on the outskirts of Melbourne. Similar to Moorabool, Baw Baw borders the boundary of metropolitan Melbourne, is a key area for future growth, is located on the rail network, has a larger town (Warragul) with a supporting smaller town (Drouin) nearby and has experienced high population growth rates since the previous census period. The Council's vision is:

> *"Happy, healthy people sharing prosperity and knowledge from living sustainably and in harmony with our rural identity, thriving villages, productive and inspiring landscapes."*

To this end, Baw Baw has three key business initiatives to sustain and support local businesses and the community.

Buy Local

This initiative promotes locally grown, made and designed products which can be purchased from local owned outlets in Baw Baw. Council has developed a comprehensive website (www.buybawbaw.com.au), which enables the user to:

- Look for a retailer;
- Find a producer or wholesaler;
- Add their own business;
- Find information on establishing a business;
- Attend workshops and seminars.

Hydroponics

Council is working to promote the benefits of hydroponics as a sustainable alternative, able to grow consistent supplies of high quality produce. Council will assist local businesses to enter the hydroponics industry by facilitating the process from planning to meeting with necessary authorities.

Baw Baw Halal

Baw Baw Halal Program is an initiative which assists local businesses to identify their suitability to produce halal products and as a result expand their markets. It also matches buyers with halal certified Baw Baw businesses.

These initiatives are examples of ways that Council can work with local producers, makers and businesses to support and grow their markets.

Renew Australia

Renew Australia is working to activate towns and cities by liaising with property owners to create short term leases to transform otherwise empty tenancies into temporary workspaces for artists, creative projects, and community initiatives. The initiative is based on the Renew Newcastle program which has been highly successful at regenerating activity in the city. The initiative has since been adapted for cities and towns around Australia including:

- Empty Space Goldfields (collaboration between Hepburn Shire and Goldfields Shire) for the towns of:
  - Clunes
  - Creswick
  - Talbot

- Stockland Spaces – a pilot initiative to incubate new artistic and creative projects in Stockland owned buildings in Victoria and NSW. Currently active in:
  - Point Cook Town Centre
  - Stockland Nowra
  - Vincentia Shopping Village
- Dockland Spaces – an initiative commissioned by City of Melbourne, MAB Corporation and Places Victoria to activate currently underutilised spaces through short term leases to creative enterprises and independent local initiatives.
- Greensborough Comes Alive – a Chamber of Commerce initiative aiming to activate the strip shopping centre precinct in Main and Grimshaw Streets Greensborough.

Horsham

Horsham Rural City Council is located approximately 240 km north west of Moorabool Shire. Population figures for the town of Horsham are roughly comparable to Bacchus Marsh. To support future growth in businesses in the council area Horsham Rural City Council has an Investment Attraction Policy which includes strategies for attracting business investment to the community. The Council offers incentives to new businesses which increase relative to the economic, social and community benefits of each business.

Hamilton

The town of Hamilton sits within Southern Grampians Shire Council, and is located 100km from the South Australian border. The town has experienced a slight loss of population over recent years. Council has introduced the *Greater Hamilton: One Place. Many Possibilities* initiative to reinvent Hamilton. Council initiated the branding projects and is encouraging local businesses and agencies to embrace the brand to make Hamilton and the surrounding towns greater.

Shepparton

Greater Shepparton Shire Council is seeking funding from the government for key projects in Shepparton. The *Make Shepparton Greater* campaign, which was initiated by Council, seeks funding for a number of priority projects, including:

- Shepparton CBD Revitalisation;
- Goulburn Valley Health Redevelopment;
- Shepparton Court Redevelopment.

This initiative gives clear direction of funding priorities, and some of the projects are already partially/fully funded. Each of these will generate a number of jobs during construction with the health precinct and court redevelopment also generating a large number of ongoing jobs for the region.

Bacchus Marsh Avenue of Honour

Photo source: http://www.maryhaines.com.au/

Section 9: Vision, recommendations and actions

Vision

That retailing in Moorabool will be the catalyst for thriving activity centres that meet the growing community's retail, services and recreation needs, providing employment opportunities for residents and engaging places for people to interact.

Recommendations

The recommendations arising from this study are set out below, having regard to the objectives of the study and key issues facing Moorabool as detailed previously in Section 1. We have identified a list of the key recommendations which, we consider, will most assist Council in delivering the objectives of the retail strategy.

1 Optimise the retail mix and encourage a concentration of facilities within the Bacchus Marsh Town Centre

The mix of retail facilities available – both food and, even more so, non-food – will be the key driver of visitation to, and long term health of, the Bacchus Marsh Town Centre. The extent and quality of the retail mix available will not be the sole driver of visitation, however, it will be critical, and delivery of an optimal retail mix will also be a key enabler of the other objectives for the centre, discussed further below.

Council of course cannot directly determine the retail mix within the town centre, however, via a range of policies, and also as a result of ownership of a number of strategic sites, Council is well placed to have a significant impact on the quality of the town centre's retail mix.

Optimising the retail mix within the Bacchus Marsh Town Centre will be determined both by what happens within the town centre and what happens outside it. In that regard, the analysis shows that critical mass, in terms of requisite population thresholds, is a key consideration of a number of major retailers in their decision making. As a principle, we recommend that agglomeration and concentration of retail facilities is an objective, as opposed to potential fragmentation. In other words, to the greatest extent possible, the focus of additional retail floorspace, particularly anchor stores, should in our view be primarily the Bacchus Marsh Town Centre.

That is not to suggest that appropriate retail facilities should not be provided elsewhere, and particularly in areas within Moorabool that are currently undergoing growth or will undergo growth in the future. In particular, the existing shopping centre at Darley and the proposed centre at West Maddingley will play a critical role serving the local catchments. Rather, it is to recommend that the provisions of such facilities outside the town centre should always have regard for the overarching role which only the Bacchus Marsh Town Centre can play within Moorabool.

In order to assist in the optimisation of the retail mix and the concentration of facilities provided within the Bacchus Marsh Town Centre, Council can assist by encouraging potential development sites to be identified and preserved for the accommodation of the required future retail floorspace. Inspection of the Bacchus Marsh Town Centre shows that there are relatively few such sites available, particularly of a sufficient scale to accommodate future larger footprint requirements – e.g. a

Woolworths supermarket, a Kmart or Big W discount department store, or a full size Target discount department store. Therefore, it is imperative that those sites which do exist be identified and ideally encouraged to be utilised for the accommodation of such uses.

A review and update of the planning scheme should be undertaken to ensure the recommendations in this Retail Strategy are incorporated into the planning scheme. The future role of Council owned land should also be examined in detail, and a view of the most appropriate future uses for these sites to achieve Council's vision for the town centre should be formulated.

2 Position the Bacchus Marsh Town Centre for growth, in keeping with its role as the key activity centre for Moorabool, and improve movement in the town centre

In order to be able to grow, the functionality of the Bacchus Marsh Town Centre – i.e. its ability to service a growing population with high quality accessibility and high levels of amenity – will need to be improved. Traffic congestion is, based on feedback from Moorabool residents, an increasing issue for Bacchus Marsh Town Centre, and is perceived to be impacting negatively on the town centre, with concerns raised by retailers as well as residents. As the population of Bacchus Marsh continues to grow, traffic congestion can be expected to worsen, in the absence of infrastructure investment to address the traffic issues.

Halletts Way is a planned new north-south thoroughfare to be developed west of the town centre, which will be accessible from the Western Freeway to the north, linking through to the Maddingley growth area to the south. Accelerating such infrastructure investment wherever possible is highly recommended, as it will alleviate traffic congestion in central Bacchus Marsh and that in turn is highly likely to have a range of economic and social benefits including improved accessibility of the town centre.

Moorabool Council are already working towards addressing the existing traffic congestion issues through the following pieces of work:

- Bacchus Marsh Futures Framework Plan, which in partnership with Metropolitan Planning Authority, Moorabool Council has prepared to plan for structural infrastructure challenges associated with growth in the municipality.
- Bacchus Marsh Transport Study, which is being prepared by Cardno on behalf of Council to examine transport issues in the Bacchus Marsh region.

Effective movement and access within the Bacchus Marsh Town Centre for pedestrians is also fundamental in creating a vibrant centre. To this end, it is essential that Council works with developers to ensure the following considerations are met:

- Prioritise pedestrian access between new developments and the existing facilities;
- Ensure all new developments are well linked both by pedestrian walkways and roads to the existing activity centre, residential areas and surrounding uses; and
- Ensure sufficient car parks are supplied for new developments.

The provision of additional, modern carparking facilities as part of new developments within the town centre (e.g. a new supermarket development) will improve the overall quality of the available carparking facilities within Bacchus Marsh, and that is a key factor to be taken into consideration when assessing such proposals.

To improve transport and access within Moorabool it is also recommended that transport hubs are integrated into the Bacchus Marsh Town Centre, providing convenient access to the retail core.

Above all, any new development, whether retail facilities, community uses or public places, needs to have strong pedestrian linkages to the existing retail core, to encourage strong interaction between uses and a more active and vibrant town centre.

An updated structure plan for the Bacchus Marsh Activity Centre could assist, particularly examining the potential for improvements to the road network and cycle ways, as well as providing a clear parking strategy which focuses on including more effective and clearly signed car parking in the town centre.

Other initiatives which could be considered to position Bacchus Marsh for growth include encouraging trades groups, investigate special rate schemes, and develop a clearer branding of Main Street as a unique offering in the surrounding region.

3 Create a sense of place for the Bacchus Marsh Town Centre

Council has the opportunity to impact both what the Bacchus Marsh Town Centre contains and how effectively it functions, as well as the sense of place that the centre can convey to the growing population of Moorabool, and its visitors. A central heart or focal point, which is community oriented but can be a vibrant space, based around some retail services, e.g. food & beverage, offers the most realistic and most attractive option to assist in creating such a sense of place.

While the precise nature of any initiative which Council might take will need to have regard to community needs and aspirations, we recommend that Council consider how some of the key town centre sites which are under the ownership of Council can be most effectively utilised to assist in delivering this objective. Council could begin by undertaking an audit of all existing vacant sites to identify the most appropriate location for a potential public plaza or town square.

As the Shire's population grows, the provision of an improved retail mix as well as better accessibility and higher levels of amenity will enable the Bacchus Marsh Town Centre to grow strongly, to the benefit of existing retailers and service providers, as well as new ones which can be attracted to the centre. The creation of a sense of place in this context can further assist in the growth of the centre, by helping to make the town centre an attractive destination in and of itself, over and above the retail mix which the centre offers. Such an objective, while it may seem a little nebulous, has been shown to add considerably to the health and wellbeing of an activity centre, and in turn to the affection with which the community regards that centre.

Future development in Bacchus Marsh also provides the opportunity to ensure all proposals include high quality urban design outcomes that complement the town centre, as well as providing links between any new developments and the existing retail core.

It is also recommended that community facilities and services be integrated into existing town centre to enable residents to make multi-purpose trips into the centre. In particular, there is the opportunity to provide further community facilities and dedicated meeting places in the vicinity of the library and the RSL to further enhance the civic role of the town centre. Any future community uses or public places should be well linked to the retail core of the town centre to enhance its character and sense of place. Council could also encourage, where possible, for agency facilities to also locate centrally within the town centre.

4 Provide a broader range of facilities and services in and around Bacchus Marsh Town Centre

As the population of Bacchus Marsh increases, and land in the town centre is more sought-after, office space and professional services could be encouraged to locate in the mixed use precinct along Grant Street. Given its proximity to the core Bacchus Marsh Town Centre, Grant Street is the ideal location for commercial and professional services, and an opportunity exists to create a key services precinct.

The range of medical services in Bacchus Marsh could also be increased in the future as the population grows, in a precinct surrounding the Bacchus Marsh & Melton Regional Hospital. This would cement Bacchus Marsh as a key destination for health services and related facilities in the surrounding region.

In addition to a strong medical precinct, Bacchus Marsh would also benefit from a more extensive range of entertainment facilities to cater for the changing needs of the community, particularly as many young families are moving into the area. There may also be the potential to create an entertainment hub within Bacchus Marsh. Increasing the provision of entertainment options in Bacchus Marsh could have flow on benefits to the retail sector, as it would reduce the need for residents to travel outside Moorabool to access such facilities, thus potentially also reducing escape retail expenditure.

Council’s main role in this recommendation would be to ‘sell’ Bacchus Marsh to potential investors and to encourage and enable any future development.

5 Develop Moorabool as a retail tourism destination

Council should encourage the expansion of retail facilities based around, or catering to, tourism in line with the Moorabool Destination Management Plan 2013-2018 (DMP). Moorabool is already a popular destination for visitors, particularly domestic day trips but also overnight visitors. Attracting additional visitation is important as it contributes directly to the local economy. In particular, Moorabool has the potential to take advantage of its proximity to Melbourne.

Surrounding tourist attractions should be promoted together with the Bacchus Marsh and Ballan town centres, to encourage longer visits with the potential of capturing additional expenditure of visitors. Businesses which cater to the visitor market, particularly food and beverage outlets, should be encouraged to open during peak tourist times including throughout the weekends.

The DMP was prepared for Moorabool Shire in May 2013, and sets out a strategy to increase visitation to the region. Plans such as this, together with targeted marketing campaigns and encouraging appropriate development, can assist in making Moorabool a more popular tourist destination, particularly for day trippers from Melbourne and Geelong.

One of the key features of Moorabool is its agriculture industry. Expanding on the existing produce outlets located on The Avenue of Honour would allow the range of local and regional produce to be showcased, and such a concept could build on this. This type of development could be located on a council owned site within the Bacchus Marsh Town Centre to attract more people to the area.

The creation of a sense of place for the Bacchus Marsh Town Centre, and the recommended provision of an improved food & beverage offer, ideally as a key element of that sense of place, would dovetail nicely with the objective of further developing and promoting Moorabool as a visitor destination.

6 New/expansions of activity centres to serve growth areas

Moorabool is a growing municipality and as a result will be able to support additional or expanded activity centres to serve the main growth areas. Any new development should not undermine the primacy of the Bacchus Marsh Town Centre as the main activity centre in Moorabool, nor should it have an adverse impact on the vibrancy of the town centre. Activity centres should be planned in conjunction with population growth in new residential areas, and development should be encouraged to proceed as soon as it is supportable to serve existing residents.

The main existing and proposed activity centres in the growth areas of Bacchus Marsh include the following:

- Darley Plaza – There is sufficient market demand for an expansion of the centre to include a larger supermarket and additional specialty shops and services, though site constraints may restrict the centre's ability to be expanded, subject to acquiring adjacent properties. In the short to medium term, in terms of market demand, a centre of around 4,000 – 6,000 sq.m is considered supportable in Darley, potentially including a significantly larger supermarket plus in the order of 10 – 15 specialty shops and services. Some community uses could also be provided to create a more vibrant centre.
- West Maddingley (Stonehill) – A new centre is proposed to serve the growth area of West Maddingley, which should be encouraged to proceed in the short term to serve existing residents. Over the longer term, a centre of around 4,000 – 6,000 sq.m is considered supportable at West Maddingley.

As new growth areas are identified there may be demand for additional activity centres to serve local catchments. Any new centre would need to serve a population of around 2,000 – 3,000 residents to be viable. A medium/large supermarket is considered supportable once the population of an area exceeds 5,000 residents.

7 Out-of-centre development in Bacchus Marsh

It is recommended that out-of-centre development be permitted in Bacchus Marsh (i.e. outside of the town centre) to facilitate the development of a bulky goods/homemaker centre. There are only a limited number of vacant sites in the Bacchus Marsh Town Centre which are available for development, and these sites should be reserved for traditional retail uses. The demand for out-of-centre development will increase as the population of Moorabool continues to grow.

An out-of-centre development would allow for a range of large format bulky goods/homemaker stores to be provided in Bacchus Marsh, which are currently lacking. This would reduce the need for residents to travel outside Moorabool to access such facilities, thus greatly reducing the amount of retail expenditure escaping the municipality.

The key site attributes for an out-of-centre development typically include the following:

- Located on an arterial road, highly visible and well exposed to passing traffic;
- Easily accessible for local residents, as well as residents in the broader surrounding region;
- Sufficient size to cluster similar uses;
- A relatively flat site; and
- Sympathetic to surrounding uses (particularly sensitive residential uses) with adequate buffer separation provided as appropriate.

Based on the indicative demand, the current under-provision and estimated retention rates, around 6,000 sq.m of bulky goods/homemaker floorspace is considered supportable in an out-of-centre development in Moorabool. The estimated under-provision of bulky goods/homemaker floorspace in Moorabool is estimated to increase to around 7,500 sq.m by 2021, around 9,800 sq.m by 2031, and around 12,000 sq.m by 2041.

Any proposal for bulky goods retailing in Bacchus Marsh, on any site, should be subject to further assessment against the criteria set out in the Strategy, including any appropriate overlays to address site specific issues.

8 Facilitate the improvement of the retail offer at the Ballan Town Centre

A broader range of retail facilities and services are considered supportable at the Ballan Town Centre as the population of the town increases. In particular, there is demand for additional food and convenience facilities, as well as retail services. Council has the opportunity to invest in streetscape improvements in Ballan, and could promote it as a historic town.

This Strategy identifies a number of vacant sites along Inglis and Steiglitz Streets, between Stead and Cowie Streets totalling around 12,000 sq.m, which are zoned Commercial 1.

By 2041, once the population of the Ballan (Central) region reaches 11,500 residents, a total of around 13,000 – 14,000 sq.m of retail floorspace is considered supportable in the region. Potentially around 8,000 – 9,000 of this retail floorspace could be provided within the Ballan Town Centre; 3,000 - 4,000 sq.m in Gordon; and around 1,000 sq.m elsewhere in the region.

The Ballan Town Centre at present is arguably underperforming relative to the potential available to it. Improvements to the town centre, to take up more of the available potential, could include a larger supermarket offer as well as an improved food & beverage offer, more fresh food retailing, and additional services.

Like the Bacchus Marsh Town Centre, there are relatively few large development sites available within the Ballan Town Centre, though Council does own some land within the town centre. Therefore, Council can and should play an important role in enabling the future growth of the Ballan Town Centre by examining the optimal uses for the various sites which are under Council control.

9 Encourage the small towns to reach their potential

The population of some of the small towns within Moorabool is forecast to grow, particularly in Gordon and to a lesser extent Bungaree/Wallace. This growth will put demands on existing infrastructure and may require further infrastructure development. An indication of the amount of retail floorspace which may be supportable within a town once it reaches certain population thresholds is as follows:

- 1,000 residents - A foodstore of 300 - 500 sq.m and some 10 specialty stores;
- 2,000 residents - A small supermarket of 500 – 1,000 sq.m and around 15 - 20 specialty stores; and
- 3,000 residents - A medium supermarket of 1,000 – 1,500 sq.m and around 20 - 30 specialty stores.

Gordon/Mount Egerton is expected to experience the most growth with an existing population of 1,680, growing to 1,890 by 2021 and up to 2,690 by 2041. As this occurs, potential opportunities for Gordon include a small supermarket, additional cafes/restaurants, fresh food stores, retail services and some non-food specialty stores.

The Bungaree/Wallace sub-region has an existing population of approximately 1,170 people, forecast to grow to 1,620 by 2041. Over the medium to longer term this presents opportunities for a small foodstore to be developed in town, as well as additional specialty stores.

The small towns of Blackwood and Myrniong are unlikely to experience significant population growth in the future, however the towns do have tourism potential due to their proximity to the Wombat State Forest, Lerderderg State Forest, the Garden of St Erth, and a number of popular wineries and restaurants.

The remaining small towns in Moorabool are expected to experience very modest growth and no major retail opportunities have been identified in this strategy.

ACTION	DESCRIPTION
Action 1	Agree on/recognise the primacy of Bacchus Marsh Town Centre, and the need for the centre to be enabled to grow to meet aspirations of current and future residents of Moorabool.
Action 2	Identify appropriate sites to accommodate future growth of Bacchus Marsh Town Centre, especially the larger footprint uses, such as an additional supermarket and full scale discount department store. The availability of such sites will be critical to the future health and growth of the centre, and it is evident that there are limited opportunities in the Bacchus Marsh Town Centre to accommodate such uses. Council's own sites within the town centre can play a very significant role in this regard.
Action 3	Follow through as quickly as possible on addressing (and alleviating) the traffic congestion issues for the Bacchus Marsh Town Centre.
Action 4	Agree on the desirability of creating a well understood "sense of place" for the Bacchus Marsh Town Centre. Potentially, a public plaza/town square and a mix of municipal, state agency or community organisation shop fronts together with small-scale food and beverage outlets, together with improved streetscape/beautification can be key ingredients in delivering such a "heart" for the town centre.
Action 5	Implement the existing Destination Management Plan 2013 - 2018 (prepared for Moorabool Shire and Tourism Moorabool) focusing on creating a sense of place for the town centres of Bacchus Marsh and Ballan, as well as for the smaller towns.
Action 6	Agree that large footprint bulky goods / homemaker retail uses cannot realistically be accommodated within or adjacent to the Bacchus Marsh Town Centre, and identify appropriate areas for the accommodation of such uses in the future.
Action 7	Encourage redevelopment of Darley Plaza, both to improve/expand its retail and services offer, and to improve its urban design aspect.
Action 8	Enable Ballan Town Centre to grow by being proactive about identifying available development sites in the town centre.
Action 9	Recognise that Gordon/Mount Edgerton, and potentially Wallace/Bungaree, will accommodate sufficient growth which will support additional retail facilities in the future, but with Gordon expected to accommodate the greatest provision. Council can assist by accommodating and facilitating that growth.

ACTION	DESCRIPTION
Action 10	Prepare a separate strategy for Darley to promote opportunities for increased commercial development. This should include an analysis of potential sites suitable for use or redevelopment for commercial purposes, with the objective of providing a retail and services "village hub" for the large Darley population north of the freeway, but one which will be complementary with the primary role of the Bacchus Marsh Town Centre.
Action 11	Proactively encourage the delivery, at the earliest possible date, of the West Maddingley Neighbourhood Centre retail components, subject to acceptability of the opportunity costs of the appropriate mechanism to do so.

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