# Moorabool Shire Council – Retail Strategy 2041

## APPENDICES


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# Appendix 1 – Introduction: Moorabool Shire – Retail Strategy 2041

This **appendix** presents the results of the consultations/surveys undertaken by MacroPlan Dimasi with residents and businesses within Moorabool, as well as the Moorabool's 'Economic Development Reference Group' (refer page 17 for members of the reference group).

This appendix is structured as follows:

- **Section 1** details the results of a telephone survey of 250 residents within Moorabool regarding their retail shopping habits in September 2014, conducted by AFS (Australian Fieldwork Solutions), a leading field research organisation.

- **Section 2** presents the responses to a survey provided to Moorabool Shire's 'Economic Development Reference Group' over the period September – October 2014. The survey aimed to gather the views of the Group members as to how the retail sector meets the needs and demands of the local community; how it supports economic growth; and its contribution to the creation of employment opportunities for Moorabool residents.

- **Section 3** presents the results of a survey of retail and other shopfront businesses in Moorabool, which was conducted by MacroPlan Dimasi over the period September – October 2014. These surveys sought to identify from existing retailers and service providers the perceived strengths and weaknesses of retailing in Moorabool; issues which are impacting their businesses; and any suggestions they had for improving the retail offer in Moorabool.

Ballan Post Office

# Appendix 1 – Section 1: Community consultations (telephone survey)

MacroPlan Dimasi commissioned AFS (Australian Fieldwork Solutions), a major research data collection organisation, to conduct a telephone survey of **250 residents** within Moorabool regarding their retail shopping habits.

The quota of respondents, as detailed in Table A1.1, was broadly proportionally weighted between the population centres of Bacchus Marsh and Ballan, as well as the smaller towns within Moorabool, in order to provide an accurate reflection of Moorabool residents' views.

The questions put to these residents included

- the proportion of shopping conducted in Moorabool (for a range of retail categories);
- likes and dislikes of retail facilities available within Bacchus Marsh and Ballan;
- which centres located beyond Moorabool that they use for shopping;
- shops/brands that respondents would like to see at Bacchus Marsh or Ballan; and
- suggestions on improving retailing generally within Moorabool.

*Table A1.1*

**Telephone survey conducted by AFS - September 2014**

| Region/Locality | No. of respondents | Estimated population* |
|---|---|---|
| **Bacchus Marsh** | **175** | **20,100** |
| Bacchus Marsh / Darley / Maddingley (3340) | 160 | |
| Balliang East (3340) | 5 | |
| Hopetoun Park (3340) | 5 | |
| Myrniong (3341) | 5 | |
| **Central (Ballan)** | **50** | **7,350** |
| Ballan (3342) | 25 | |
| Blackwood (3458) | 5 | |
| Dales Creek (3341) | 5 | |
| Gordon (3345) | 5 | |
| Greendale (3341) | 5 | |
| Mount Egerton (3352) | 5 | |
| **Western** | **25** | **3,550** |
| Bungaree (3352) | 5 | |
| Elaine (3334) | 5 | |
| Lal Lal (3352) | 5 | |
| Wallace (3352) | 5 | |
| Yendon (3352) | 5 | |
| **Total Moorabool Shire** | **250** | **31,000** |

**As at June 2014*
*Source: AFS; MacroPlan Dimasi*

## Retail expenditure retention rates by category

Residents were asked what proportion of their retail spending typically goes to stores within Moorabool (i.e. Bacchus Marsh, Ballan and other small towns) for a number of different retail categories across food (supermarket, specialty food, takeaway food/café and restaurant) and non-food (apparel, newspaper and stationary, pharmacy, small and large household goods and retail services), as detailed in Tables A1.2 – A1.11.

### Supermarket and fresh food expenditure

- A majority (76%) of spending at supermarkets by residents within the Bacchus Marsh region is directed to stores within Moorabool. The remaining 24% is estimated to be escaping Moorabool, with a large proportion directed to the supermarkets at Melton (as detailed further later in this Appendix).

- Around half of the supermarket spending of residents within the Central (Ballan) region is directed to stores within Moorabool, and therefore half of the supermarket expenditure is being directed to stores located beyond Moorabool.

- For residents within the Western region, on average 20% of their supermarket spending is retained in Moorabool. Residents in the Western region are located closer to Ballarat than to Bacchus Marsh, and primarily shop at Ballarat for most of their retail needs.

- In terms of fresh food expenditure at specialty stores, the amount retained within Moorabool across each of the three regions is broadly comparable to the supermarket expenditure retention rates. A total of 67% of spending at specialty food stores is estimated to be directed to facilities within Moorabool for residents with the Bacchus Marsh region; falling to 54% for Central (Ballan) region residents; and 17% for residents within the Western region.

### Food catering expenditure

- Residents within the Bacchus March region direct a majority (60%) of spending at cafes and take-away food stores to facilities within Moorabool. The cafe and take-away food expenditure retained within Moorabool falls to 43% for Central (Ballan) residents, and to 13% for residents with the Western region.

- Nearly half (48%) of restaurant spending of residents of the Bacchus Marsh region is retained within Moorabool. The proportion of restaurant spending retained within Moorabool drops to 38% for Ballan (Central) region residents, while only 8% of restaurant spending of Western region residents is directed to facilities in Moorabool.

The Plough in Myrniong

Source: theplough.com.au

## Table A1.2

| Supermarket spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 6.9% | 9.2% | 13.2% | 28.7% | 42.0% | **76.1%** |
| Central (Ballan) | 32.0% | 22.0% | 8.0% | 8.0% | 30.0% | **51.6%** |
| Western | 65.2% | 21.7% | 4.3% | 4.3% | 4.3% | **20.2%** |
| **Total Moorabool** | **17.4%** | **13.0%** | **11.3%** | **22.3%** | **36.0%** | **66.0%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi

## Table A1.3

| Specialty food spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 20.0% | 10.0% | 12.4% | 17.1% | 40.6% | **66.6%** |
| Central (Ballan) | 30.6% | 18.4% | 6.1% | 16.3% | 28.6% | **54.4%** |
| Western | 72.7% | 18.2% | 0.0% | 4.5% | 4.5% | **16.7%** |
| **Total Moorabool** | **27.0%** | **12.4%** | **10.0%** | **15.8%** | **34.9%** | **59.6%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi

## Table A1.4

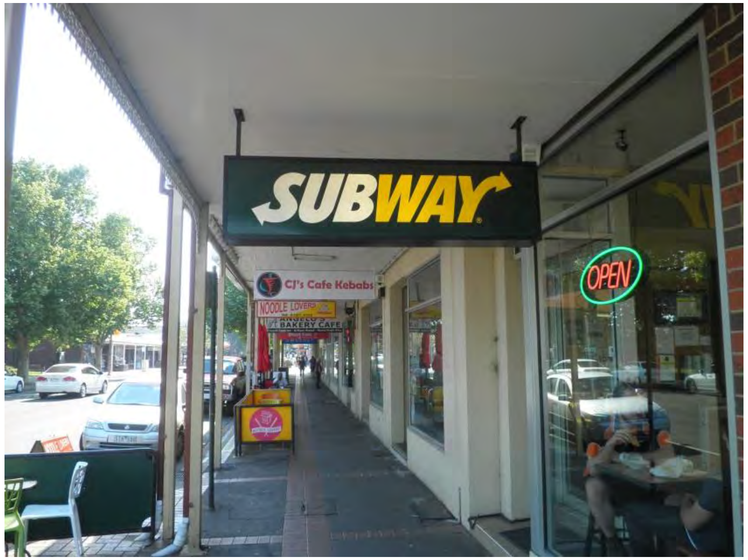
| Takeaway food/café spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 27.1% | 12.0% | 10.8% | 16.9% | 33.1% | **60.1%** |
| Central (Ballan) | 47.8% | 13.0% | 6.5% | 10.9% | 21.7% | **43.4%** |
| Western | 78.9% | 15.8% | 0.0% | 0.0% | 5.3% | **12.9%** |
| **Total Moorabool** | **35.5%** | **12.6%** | **9.1%** | **14.3%** | **28.6%** | **52.9%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi

## Table A1.5

| Restaurant spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 32.7% | 23.5% | 16.3% | 12.4% | 15.0% | **47.6%** |
| Central (Ballan) | 47.7% | 25.0% | 4.5% | 2.3% | 20.5% | **38.3%** |
| Western | 85.7% | 14.3% | 0.0% | 0.0% | 0.0% | **7.5%** |
| **Total Moorabool** | **40.8%** | **22.9%** | **12.4%** | **9.2%** | **14.7%** | **41.9%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi




Main Street, Bacchus Marsh

## Non-food spending

- The majority of apparel expenditure is escaping Moorabool, with retention rates ranging from 33% for Bacchus Marsh region residents to only 14% for Western region residents. The retention rates by region are broadly similar for the small household goods category.

- The highest retention rate across the non-food categories is pharmacy goods expenditure, with an average of 69% of total pharmacy spending of Moorabool residents retained within the municipality. The retention rate of pharmacy spending is highest for Bacchus Marsh residents at 75%.

- A majority (58%) of newspaper & stationery spending by Bacchus Marsh residents is retained within Moorabool, and the retention rate is more than half (52%) for residents of the Central (Ballan) region. 35% of Western region residents' newsagency and stationary spending is retained within Moorabool, which is the highest retention rate for these residents for any spending category. This reflects the number of general stores located throughout the Western region which mostly include a newsagency component.

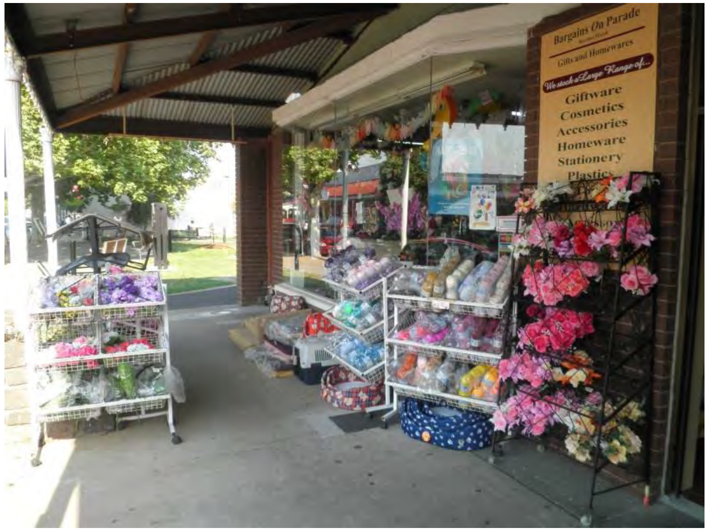
- Spending on large household goods (i.e. white goods) is mostly escaping the municipality across all regions, and reflects the lack of retailers with Moorabool selling such facilities.

- Over half (57%) of spending on retail services (i.e. hairdressers and beauty salons) by Bacchus Marsh residents is retained within Moorabool, which drops to 34% for Central (Ballan) region residents and 20% for Western region residents.

- Overall, in terms of non-food shopping, residents of the Bacchus Marsh region mostly shop within Moorabool for pharmacy goods, newsagency products and retail services, though travel beyond the municipality for more discretionary items such as apparel and households goods.

- The spending retention rates for residents of the Central (Ballan) region are broadly comparable, although lower, to those of the residents of the Bacchus Marsh. The lower retention rates reflects the limited provision of facilities within the Ballan Town Centre, and can easily access a broader range of retail facilities at both Melton and Ballarat.

- The majority of non-food spending by residents of the Western region is outside of Moorabool. This is in large part due to the proximity of Ballarat and the wide range of retail facilities and services available.



Main Street, Bacchus Marsh

## Table A1.6

| Apparel spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 51.5% | 26.7% | 10.3% | 4.2% | 7.3% | **33.3%** |
| Central (Ballan) | 68.9% | 15.6% | 6.7% | 4.4% | 4.4% | **24.8%** |
| Western | 82.4% | 5.9% | 5.9% | 0.0% | 5.9% | **13.5%** |
| **Total Moorabool** | **57.3%** | **22.9%** | **9.3%** | **4.0%** | **6.6%** | **30.1%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi

## Table A1.7

| Newspaper & stationery spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 27.5% | 16.2% | 11.4% | 13.8% | 31.1% | **57.6%** |
| Central (Ballan) | 37.8% | 11.1% | 6.7% | 17.8% | 26.7% | **52.1%** |
| Western | 56.5% | 4.3% | 13.0% | 8.7% | 17.4% | **34.9%** |
| **Total Moorabool** | **32.3%** | **14.0%** | **10.6%** | **14.0%** | **28.9%** | **54.3%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi

## Table A1.8

| Pharmacy goods spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 9.8% | 12.7% | 6.9% | 15.6% | 54.9% | **75.4%** |
| Central (Ballan) | 20.8% | 14.6% | 4.2% | 12.5% | 47.9% | **66.0%** |
| Western | 65.0% | 20.0% | 0.0% | 5.0% | 10.0% | **22.8%** |
| **Total Moorabool** | **16.6%** | **13.7%** | **5.8%** | **14.1%** | **49.8%** | **69.1%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi

## Table A1.9

| Small household goods spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 59.5% | 22.2% | 7.8% | 5.2% | 5.2% | **30.0%** |
| Central (Ballan) | 71.4% | 11.9% | 2.4% | 4.8% | 9.5% | **26.1%** |
| Western | 95.0% | 0.0% | 5.0% | 0.0% | 0.0% | **5.5%** |
| **Total Moorabool** | **65.1%** | **18.1%** | **6.5%** | **4.7%** | **5.6%** | **26.9%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi

## Table A1.10

| Large household goods spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 71.1% | 20.7% | 4.4% | 2.2% | 1.5% | **22.7%** |
| Central (Ballan) | 79.5% | 12.8% | 5.1% | 0.0% | 2.6% | **18.4%** |
| Western | 100.0% | 0.0% | 0.0% | 0.0% | 0.0% | **2.5%** |
| **Total Moorabool** | **75.5%** | **17.2%** | **4.2%** | **1.6%** | **1.6%** | **19.9%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi

## Table A1.11

| Retail services spending | | | | | | |
|---|---|---|---|---|---|---|
| Region | Less than 25% | 25% - 50% | 51% - 75% | 76% - 90% | More than 90% | **Total* retention** |
| Bacchus Marsh | 28.6% | 17.4% | 8.1% | 13.7% | 32.3% | **57.1%** |
| Central (Ballan) | 54.5% | 20.5% | 6.8% | 6.8% | 11.4% | **33.8%** |
| Western | 77.8% | 5.6% | 0.0% | 0.0% | 16.7% | **19.9%** |
| **Total Moorabool** | **37.7%** | **17.0%** | **7.2%** | **11.2%** | **26.9%** | **49.5%** |

*Total retention based on midpoints of each bracket
Source: AFS; MacroPlan Dimasi

## Shopping centres used outside of Moorabool

Residents were asked which other shopping centres/locations they regularly used for their food and non-food shopping needs.

### Food shopping

The majority of residents of the Bacchus Marsh region regularly use Woodgrove Shopping Centre in Melton for their food shopping needs compared to residents of the Central (Ballan) and Western regions who typically travel to Ballarat.

- Over half (56%) of the residents of the Bacchus Marsh region regularly travel to Melton for their food and grocery (including supermarket) shopping. A third (34%) of Central (Ballan) region residents regularly travel to Melton for food and grocery shopping.
- The vast majority (84%) of Western region residents regularly travel to Ballarat for their food and grocery shopping, compared to almost three quarters (72%) of residents from the Central (Ballan).
- 16% of residents of the Western region regularly travel to Buninyong for their food and grocery shopping needs.
- A small proportion of residents of the Bacchus Marsh region (7.4%) indicated that they regularly shop at the major regional centre Watergardens for food and groceries.
- A small percentage of residents from each region indicated they regularly use the Melbourne CBD for food and grocery shopping.

*Table A1.12*

**Food and grocery shopping**

| Region | Melton/ Woodgrove SC | Ballarat/ Wendouree | Buninyong | Watergardens | Highpoint | Melbourne CBD | Geelong | Other* |
|---|---|---|---|---|---|---|---|---|
| Bacchus Marsh | 56.3% | 6.3% | 0.6% | 7.4% | 1.7% | 5.1% | 4.0% | 5.7% |
| Central (Ballan) | 34.0% | 72.0% | 0.0% | 0.0% | 0.0% | 12.0% | 4.0% | 4.0% |
| Western | 0.0% | 84.0% | 16.0% | 0.0% | 0.0% | 8.0% | 0.0% | 8.0% |
| **Total Moorabool** | **46.2%** | **27.1%** | **2.0%** | **5.2%** | **1.2%** | **6.8%** | **3.6%** | **5.6%** |

**Other locations/centres include Buninyong, Carlton, Spotswood, Chapel Street, Westfield Doncaster, Essendon North, Footscray, Brisbane,*
*Source: AFS; MacroPlan Dimasi*


Woodgrove Shopping Centre, Melton

## Non-food shopping

Residents of Bacchus Marsh had similar non-food and food shopping habits, while residents of the Central (Ballan) and the Western region typically travel to Ballarat for their non-food shopping needs.

- 60% of residents of the Bacchus Marsh region regularly travel to <u>Melton</u> for their non-food shopping needs in contract to 30% of residents of the Central (Ballan) region.
- Residents of the Western region overwhelmingly shop beyond Moorabool for their non-food shopping needs, with 92% of residents regularly travelling to <u>Ballarat</u>. 68% of Central (Ballan) region residents also regularly travel to Ballarat for non-food shopping.
- Bacchus Marsh residents purchase over a third of their non-food needs from surrounding major regional centres including Watergardens (22%) and Highpoint (11%).
- 13% of Moorabool residents regularly travel to the <u>Melbourne CBD</u> for non-food shopping.

*Table A1.13*

**Non-food shopping**

| Region | Melton/ Woodgrove SC | Ballarat/ Wendouree | Buninyong | Watergardens | Highpoint | Melbourne CBD | Geelong | Other* |
|---|---|---|---|---|---|---|---|---|
| Bacchus Marsh | 60.2% | 13.1% | 0.0% | 22.2% | 11.4% | 14.2% | 7.4% | 6.3% |
| Central (Ballan) | 30.0% | 68.0% | 0.0% | 4.0% | 2.0% | 8.0% | 2.0% | 10.0% |
| Western | 0.0% | 92.0% | 8.0% | 0.0% | 0.0% | 16.0% | 4.0% | 0.0% |
| **Total Moorabool** | **48.2%** | **31.9%** | **0.8%** | **16.3%** | **8.4%** | **13.1%** | **6.0%** | **6.4%** |

**Other locations/centres include Buninyong, Carlton, Spotswood, Chapel Street, Westfield Doncaster, Essendon North, Footscray, Brisbane, Nelson, Northland, Taylors Lakes, Werribee Plaza and Online shopping*
*Source: AFS; MacroPlan Dimasi*


Alfred Square, Ballarat

## Residents' likes and dislikes

A key component of the community consultation was to ask residents what they liked / disliked about the existing retail facilities at Bacchus Marsh and Ballan. The results are summarised below.

### Bacchus Marsh Town Centre

Key **strengths** of the Bacchus Marsh Town Centre included proximity to home, customer service and the fresh food offer.

- Resident of the Bacchus Marsh region nominated *proximity to home* as the primary key strength (43%) of the Bacchus March town centre followed by *customer service* (10%) and the *fresh food offer* (7%).
- Central (Ballan) region residents nominated *proximity to home* as the key strength (20%) followed by *fresh food offer* (19%) and the *range of retail services* (11%)
- Other notable strengths identified as Other* in Table A1.14 include the *convenience of two supermarkets*, *the local feel, supporting local businesses* and *lack of crowds*.

**Weaknesses** identified by residents included range of non-food facilities, range of retail services and carparking.

- Overall Moorabool residents found the range of *retail services* (27%), *non-food facilities* (27%), *carparking* (15%) and *quality presentation of facilities* (7%) to be the key weaknesses of Bacchus Marsh
- Other perceived weaknesses include the *trading hours*; *traffic congestion*; the *lack of variety/dynamism* in the centre; the *domination of major retailers*; and a *lack of electrical and whitegoods stores*.

*Table A1.14*

**Bacchus Marsh Town Centre - Key strengths**

| Category | Bacchus Marsh n = 218 | Central (Ballan) n = 54 | Western n = 13 | **Total n = 285** |
|---|---|---|---|---|
| Distance from home | 43.1% | 20.4% | 23.1% | **37.9%** |
| Customer service | 10.1% | 5.6% | 23.1% | **9.8%** |
| Fresh food offer | 7.3% | 18.5% | 0.0% | **9.1%** |
| Distance from work | 6.9% | 3.7% | 0.0% | **6.0%** |
| Range of retail services | 3.7% | 11.1% | 7.7% | **5.3%** |
| Carparking | 4.1% | 7.4% | 15.4% | **5.3%** |
| Range of non-food facilities | 4.6% | 5.6% | 0.0% | **4.6%** |
| Quality/presentation of facilities | 4.1% | 1.9% | 23.1% | **4.6%** |
| General price of products | 1.8% | 7.4% | 0.0% | **2.8%** |
| Café and restaurant offer | 2.3% | 1.9% | 7.7% | **2.5%** |
| Other* | 11.9% | 16.7% | 0.0% | **12.3%** |

**Small and contained retail precinct; availability of goods; easy/quick access (unlike Ballarat); not busy/less crowded than other areas (Melton)/quiet; local feel/community atmosphere; local produce/locally owned/supporting local businesses; familiarity; pedestrian crossings; convenience of two supermarkets; transport availability.*

*Source: AFS; MacroPlan Dimasi*

*Table A1.15*

**Bacchus Marsh Town Centre - Key weaknesses**

| Category | Bacchus Marsh n = 222 | Central (Ballan) n = 44 | Western n = 7 | **Total n = 273** |
|---|---|---|---|---|
| Range of retail services | 28.4% | 20.5% | 28.6% | **27.1%** |
| Range of non-food facilities | 28.4% | 20.5% | 14.3% | **26.7%** |
| Carparking | 13.5% | 22.7% | 14.3% | **15.0%** |
| Quality/presentation of facilities | 8.1% | 4.5% | 0.0% | **7.3%** |
| General price of products | 4.5% | 2.3% | 14.3% | **4.4%** |
| Fresh food offer | 4.1% | 4.5% | 0.0% | **4.0%** |
| Customer service | 2.3% | 2.3% | 0.0% | **2.2%** |
| Distance from home | 0.5% | 4.5% | 14.3% | **1.5%** |
| Café and restaurant offer | 0.9% | 0.0% | 0.0% | **0.7%** |
| Distance from work | 0.0% | 0.0% | 0.0% | **0.0%** |
| Other* | 9.5% | 18.2% | 14.3% | **11.0%** |

**Stores closed on Sunday; crowded; noisy; dominated by major retailers; closure of butcher; difficult to access by public transport; lack of personal anonymity; distance between shops is too great; precinct is too closed in; no dynamic/lack of anything special; lack of choice/diversity/variety; no bakery in Coles; lack of clothing stores; lack of whitegoods stores; store closures; closure of electrical goods store; traffic; lack of green grocer.*

*Source: AFS; MacroPlan Dimasi*

## Ballan Town Centre

- The greatest **strength** of the Ballan Town Centre identified by surveyed residents of the Central (Ballan) and Western regions was customer service, (24% and 21% respectively). This was followed by quality/presentation of facilities and proximity to home.

- Other strengths of the centre provided by residents include the *country atmosphere*; *familiarity with business owners and staff*; the *unique shops*; and the fact that the centre was *not overrun with major brands*.

- The identified **weaknesses** of the Ballan Town Centre include the range of retail services, nominated by 24% of residents from the Central (Ballan) region; carparking, the range of non-food facilities, and the general price of products.

- Other weaknesses of the centre provided by residents include *the lack of major brands*; the *lack of clothing stores*; the *high turnover of shops*; and the *short trading hours* of most shops.

### Table A1.16

**Ballan Town Centre - Key strengths**

| Category | Bacchus Marsh n = 46 | Central (Ballan) n = 62 | Western n = 19 | **Total n = 127** |
|---|---|---|---|---|
| Customer service | 8.7% | 24.2% | 21.1% | **18.1%** |
| Quality/presentation of facilities | 17.4% | 12.9% | 15.8% | **15.0%** |
| Distance from home | 6.5% | 12.9% | 21.1% | **11.8%** |
| Fresh food offer | 13.0% | 6.5% | 10.5% | **9.4%** |
| Carparking | 10.9% | 8.1% | 10.5% | **9.4%** |
| Café and restaurant offer | 8.7% | 8.1% | 0.0% | **7.1%** |
| Range of retail services | 4.3% | 4.8% | 5.3% | **4.7%** |
| Range of non-food facilities | 2.2% | 6.5% | 0.0% | **3.9%** |
| Distance from work | 0.0% | 0.0% | 5.3% | **0.8%** |
| General price of products | 2.2% | 0.0% | 0.0% | **0.8%** |
| Other* | 26.1% | 16.1% | 10.5% | **18.9%** |

**Easy access; country feel/atmosphere/charm; wide footpaths/street; familiarity with owners and staff; honesty; not overwhelmed with major retailers; local newsagency; quiet; good butcher; unique shops (not in Ballarat); old style/not overdeveloped*

*Source: AFS; MacroPlan Dimasi*

### Table A1.17

**Ballan Town Centre - Key weaknesses**

| | Bacchus Marsh n = 29 | Central (Ballan) n = 37 | Western n = 6 | **Total n = 72** |
|---|---|---|---|---|
| Range of retail services | 17.2% | 24.3% | 33.3% | **22.2%** |
| Carparking | 31.0% | 8.1% | 16.7% | **18.1%** |
| Range of non-food facilities | 13.8% | 16.2% | 33.3% | **16.7%** |
| General price of products | 0.0% | 24.3% | 16.7% | **13.9%** |
| Fresh food offer | 10.3% | 2.7% | 0.0% | **5.6%** |
| Quality/presentation of facilities | 6.9% | 2.7% | 0.0% | **4.2%** |
| Distance from home | 3.4% | 2.7% | 0.0% | **2.8%** |
| Distance from work | 3.4% | 0.0% | 0.0% | **1.4%** |
| Café and restaurant offer | 0.0% | 0.0% | 0.0% | **0.0%** |
| Customer service | 0.0% | 0.0% | 0.0% | **0.0%** |
| Other* | 13.8% | 18.9% | 0.0% | **15.3%** |

**Not enough brand shops; high turnover of shops; main street creates a wind tunnel (cold in winter); lack of clothing stores; no pedestrian crossing; not enough seating; lack of stores/stock; security; old streetscape; shops close early; precinct spread out.*

*Source: AFS; MacroPlan Dimasi*

## Recommendations and nominated additional shops/brands

Residents were asked whether there were any additional shops/brands that they would like to see at Bacchus Marsh or Ballan.

**General recommendations** from residents included the following:

- More stores in the town centres;
- More variety in the mix of stores;
- More small/independent businesses;
- To create a shopping centre in Bacchus Marsh similar to Woodgrove SC (Melton) in Bacchus Marsh;
- A warehouse style retailer;
- Longer trading hours;
- Boutique shops;
- More major retailers;
- More variety in stores for older residents;
- A community centre in Bacchus Marsh;
- A Medibank office in Bacchus Marsh; and
- A Post Office in Darley.

Below is a summary of the requests by retail category by number of responses. Table A1.18 lists each brand/retailer/type of store that was nominated:

- Department/discount department store (e.g. larger Target) - 73
- Apparel (e.g. footware, fashion forward retailers) - 54
- Household goods (e.g. electrical goods, Bunnings) - 43
- Food retail (e.g. butcher) - 35
- Supermarket (e.g. Woolworths) - 30
- Bulky goods (i.e. Bunnings, large household goods retailer) - 19
- Food catering (e.g. more restaurants) - 12
- General (e.g. Chemist Warehouse) - 9
- Leisure (e.g. sporting goods) - 9
- Retail services (e.g Hairhouse Warehouse) - 1

*Table A1.18*

**Additional shops/brands**

| Brand/retailer/type | Category | No. of responses | Brand/retailer/type | Category | No. of responses |
|---|---|---|---|---|---|
| Target (larger store) | DDS | 28 | Art supplies | Leisure | 1 |
| Big W | DDS | 25 | Auto store | Household Goods | 1 |
| Electrical goods retailer | Household Goods | 22 | CDs/Movies | Leisure | 1 |
| Woolworths | Supermarket | 21 | Chinese restaurants | Food catering | 1 |
| Butcher | Food retail | 16 | Cinemas | Entertainment | 1 |
| Bunnings | Bulky goods | 15 | Coffee shop | Food catering | 1 |
| Kmart | DDS | 15 | Cotton On | Apparel | 1 |
| General clothing retailer | Apparel | 12 | Dan Murphy's | Food retail | 1 |
| Footware retailer | Apparel | 11 | David Jones | Department store | 1 |
| Fashion forward retailer | Apparel | 8 | Dress shop | Apparel | 1 |
| Hardware store | Household Goods | 5 | European goods | Food retail | 1 |
| Restaurants | Food catering | 5 | Foodworks | Supermarket | 1 |
| Deli | Food retail | 4 | Fresh fish | Food retail | 1 |
| Mens clothing | Apparel | 4 | Glassons | Apparel | 1 |
| Rockmans | Apparel | 4 | Hairhouse Warehouse | Retail services | 1 |
| Aldi | Supermarket | 3 | Harris Scarfe | DDS | 1 |
| Bakery | Food retail | 3 | Harvey Norman | Bulky goods | 1 |
| Chemist Warehouse | General | 3 | Hungry Jacks | Food catering | 1 |
| Furniture | Household Goods | 3 | IGA | Supermarket | 1 |
| The Good Guys | Household Goods | 3 | Ikea | Bulky goods | 1 |
| Fresh groceries | Food retail | 3 | Jay Jays | Apparel | 1 |
| High quality clothing | Apparel | 3 | Major brands | Apparel | 1 |
| Myer | Department store | 3 | Mature clothing | Apparel | 1 |
| Sporting store | Leisure | 3 | Nike | Apparel | 1 |
| Another supermarket | Supermarket | 2 | Nursery | Household Goods | 1 |
| Book store | Leisure | 2 | Officeworks | Leisure | 1 |
| Café | Food catering | 2 | Optometrist | General | 1 |
| Childrens clothing | Apparel | 2 | Patchworks shop | Household Goods | 1 |
| Coles | Supermarket | 2 | Pet store | General | 1 |
| Fast food | Food catering | 2 | Reject Shop | Household Goods | 1 |
| Fruit shops | Food retail | 2 | Skate shop | Leisure | 1 |
| Giftware | Household Goods | 2 | Specsavers | General | 1 |
| Green grocer | Food retail | 2 | Spotlight | Household Goods | 1 |
| Masters | Bulky goods | 2 | Supercheap Auto | Household Goods | 1 |
| Priceline | General | 2 | Sussan | Apparel | 1 |
| Tasman Meats | Food retail | 2 | Toys | General | 1 |
| White goods | Household Goods | 2 | *Other** | - | *23* |

**Other responses include more variety; more stores; similar provision to Melton; more small businesses; boutique shops; a community centre; longer trading hours; more major brands; more retail in Gordon; a Post Office in Darley; and more variety of stores for older residents*
*Source: AFS; MacroPlan Dimasi*

## Residents' feedback and key suggestions

- **Car parking** in the main street is hard. There is no car parking available in Bacchus Marsh, which makes it harder to shop there. Ballan has excellent main street parking.
- Bacchus Marsh **car parking** is too congested before school times (9am-10am) and evenings (after 6pm) and Saturday.
- One thing that can be done to improve retailing in the area would be to **move traffic away** from the areas where there are small shops. During school finishing times, there are high amounts of traffic and the shopping areas become very congested. It would be great to get this solved as it would make accessing small shops easier.
- It is **quite busy** as the traffic goes through the main shopping centre. Having **more parking** in the shopping centre would be great.
- Improve parking at the village shopping centre, **car parks are too small.**
- **Traffic flow and parking facilities**. There are sections of Bacchus Marsh with no hope of getting to the Western Highway. People from these areas need to travel to Melbourne through Exford or Werribee. Grant St cannot carry any more traffic. The school buses take more than 40 minutes to travel less than 2 km every morning down Grant St.
- **More shops** so that we can **support the shop owners**. The roads get so blocked and congested for a small country town, for example on Grant Street. We need **better traffic access**.
- There could be a few **more shops in Darley**. We only have a supermarket and no competition. I would like more variety of all kinds of shops – food, clothing, hardware – **so we do not have to travel and add to the traffic congestion**. Traffic congestion is a problem around the shops in Bacchus Marsh.
- Small **electronics** warehouse is needed; **I tend to go to Melton** to purchase these items.
- I would like to see a **white goods** shop as we lost the one that we had.
- I want more **outdoor eating venues**, besides pubs.
- **Bigger retail stores**, so there is more variety of goods. I want more choice of different brands within a product.
- The **variety of bigger shops** like Kmart and Target. We do have a Target already but it's too small, we need a bigger Target.
- Bigger choice, very limited hardware compared to Melton. Plenty of restaurants but a lot of stuff **we go to Melton for because they are open 24 hours**.
- We go to Melbourne because there is Bunnings. I have heard there is talk about getting Bunnings at Bacchus Marsh. I would be more likely to go to Bacchus Marsh if there were more **big stores like Bunnings**.
- The shops at Bacchus Marsh need to be **open for longer on a Saturday and Sunday**. The council needs to promote the local businesses because all of the shops are slowly closing down. They also need **more quality restaurants**.
- Need a **cinema** and **good quality restaurants**.
- **Build on the village type of atmosphere**. Most are banking, real estate type of shops. I feel it needs more charm to want to wander along the main street. We need more tourists. More nice little shops. Most are shut on the weekend and are not exciting. There's no effort to build a community feel.
- Ballan needs **more streetscaping**. Ballan needs more infrastructure, like more **beautifying the streets**. Ballan is very plain. Melbourne has more landscaping. I would like a big shopping centre, but Ballan doesn't have the people to support it.
- **Nothing at all** as I am reasonably happy with what we have here at Bacchus Marsh. I get all my shopping done here.
- I think it's good as it is, adding too much would make the Shire lose its **small town charm**.
- We need to get **more advertising from the local people**. All we get is advertising from people away from the area.
- I think a **better serviced supermarket** in Ballan as the one that's there is grubby. Ballan has a good butcher and bread shop.

**Moorabool Shire – Draft Telephone Survey**

Good morning/afternoon/evening. My name is ….. from AFS market research.

We are conducting a short survey on behalf of Moorabool Shire Council, who is preparing a retail strategy that considers retail's role in local services, facilities and places for people to meet. The retail strategy will form part of Moorabool Shire's planning for growth and development in the next 27 years under their Moorabool 2041 strategy.

May I speak with the person in this household who is 18 years and over, and who is usually responsible for the majority of the household's shopping.

Q1 Firstly, what town do you live in?

Q2a) What proportion of your supermarket spending goes to stores within Moorabool Shire (i.e. Bacchus Marsh, Ballan, small towns) – within the following brackets, more than 90%; 90 – 75%; 75 - 50%; 50 - 25%; or less than 25%?

Q2b) What proportion of your specialty food e.g. bakery/butcher spending goes to stores within the Shire, for the same brackets? - Repeat for all categories and record in below table.

| | Q.2 | | | | | |
|---|---|---|---|---|---|---|
| | More than 90% | 90 - 75% | 75 - 50% | 50 - 25% | Less than 25% | n.a. |
| Supermarket | | | | | | |
| Specialty food e.g. bakery/butcher | | | | | | |
| Take-away food / cafe | | | | | | |
| Restaurant | | | | | | |
| Clothing & footwear | | | | | | |
| Newspaper & stationery | | | | | | |
| Pharmacy | | | | | | |
| Small household goods, i.e. kitchen goods & electronics | | | | | | |
| Large household goods, i.e. white goods and furniture | | | | | | |
| Retail services e.g. hair & beauty / optometrist / dry cleaning | | | | | | |

Q3a) Other than Bacchus Marsh and Ballan, which other shopping centres/locations do you regularly use for your food and grocery shopping needs? Up to 3 centres

Q3b) Other than Bacchus Marsh and Ballan, which other shopping centres/locations do you regularly use for your non-food shopping needs (i.e. clothing and household items)? Up to 3 centres

| | Q3a) Food & grocery | Q3b) Non-food |
|---|---|---|
| Woodgrove SC / Melton | | |
| Ballarat / Wendouree | | |
| Watergardens | | |
| Highpoint | | |
| Melbourne CBD | | |
| Geelong | | |
| Other (specify) | | |

Q4a) What are the 2 things you most like about the shopping centre and shops at Bacchus Marsh?

Q4b) What are the 2 things you most dislike about the shopping centre and shops at Bacchus Marsh?

Q4c) What are the 2 things you most like about the main street shops at Ballan?

Q4d) What are the 2 things you most dislike about the main street shops at Ballan?

| | Q4a) Like – Bacchus Marsh | Q4b) Dislike – Bacchus Marsh | Q4c) Like – Ballan | Q4d) Dislike - Ballan |
|---|---|---|---|---|
| Fresh food offer (incl. supermarkets) | | | | |
| Cafe and restaurant offer | | | | |
| Range of non-food facilities | | | | |
| Range of retail services (e.g. hair & beauty / optometrist / dry cleaning) | | | | |
| Quality/presentation of facilities | | | | |
| Distance from home | | | | |
| Distance from work | | | | |
| General price of products | | | | |
| Carparking | | | | |
| Customer service | | | | |
| Other (specify) | | | | |
| None/n.a. | | | | |

**Q5) Are there any additional shops/brands you would like to see at Bacchus Marsh or Ballan? (MULTIPLE RESPONSE – UP TO 5)**

1. ..........................................................................................................................
2. ..........................................................................................................................
3. ..........................................................................................................................
4. ..........................................................................................................................
5. ..........................................................................................................................

**Q6) Do you have any other suggestions which you believe would improve retailing in the Shire?**

..........................................................................................................................................................

DEMOGRAPHICS

**Finally, some quick questions about you so that we can check the cross-section of people we have spoken to.**

**Q.7 Which of the following best describes the structure of the household you live in?**

Couple with children mainly under 10 years ..............................................................................................

Couple with children mainly 10-18 years ...................................................................................................

Couple with children mainly 18+ years .......................................................................................................

Couple, no children at home ........................................................................................................................

Single living with others ..........................................................................................................................

Single person household ..........................................................................................................................

Other/refused ..........................................................................................................................

**Q.8 Which of the following age categories are you in? Please stop me when I reach the one you are in.**

READ OUT. RECORD SINGLE RESPONSE.

| | |
|---|---|
| 18-24 years | 01 |
| 25-29 years | 02 |
| 30-39 years | 03 |
| 40-49 years | 04 |
| 50-59 years | 05 |
| 60-69 years | 06 |
| 70+ years | 08 |
| Refused | 09 |

**Q.9 Record sex of respondent. DO NOT ASK.**

| | |
|---|---|
| MALE | 01 |
| FEMALE | 02 |

**This concludes the survey. As this is market research, it is carried out in compliance with the Privacy Act and the information you provided will be used only for research purposes.**

**Thank you very much for your help.**

# Appendix 1 - Section 2: Economic Development Reference Group

A short survey was sent to the 'Economic Development Reference Group', as supplied by Council (refer below for members). The survey aimed to gather views as how the retail sector meets the needs and demands of the local community; how it supports economic growth; the sector's contribution to the creation of employment opportunities for residents. The following presents the key responses from the survey.

| Stengths/Opportunities | Weaknesses/Threats |
| --- | --- |
| • Parking is easy in Bacchus Marsh and access to shops is ideal because there is a concentrated shopping area, The range of limited stores is good and the country feel inside the shops is fine too. | • The retail sector meets some of the needs and demands of locals but suffers from having a large regional shopping centre 15-20 minutes away at Melton. In reality this can be no more difficult to access if you live in Darley than the centre of Bacchus Marsh. I do not believe the demand is there to expand current offerings which are migrating to 'low rent' 'low return' options other than in food. The rest of the municipality is either non-existent, focused on Ballarat or niche. |
| • Ballan is a small local community with wide streets and ample parking. Everyone knows everyone. | • Too many low rent/low return activities and the lack of a clear policy in relation to the type of activities to be promoted, leading to some unfortunate planning decisions in Bacchus Marsh |
| • The fruit and vegetable farms/market stalls selling direct to the public in Bacchus Marsh. | • There is no Chamber of Commerce to support retailers in Bacchus Marsh. Many shop retailers are tired and don't always portray a friendly manner, and there is a bit of 'old fashioned' and 'stuck in the rut' thinking with some owners. Many shop keepers are seeing problems rather than opportunities and being open on weekends is not always practiced by many traders. |
| • The opportunities for niche rural style retail experiences in Bacchus Marsh and Ballan. | • Locals do, and will continue to, shop out of the Shire and online to purchase certain items or seek advice |
| • The retail sector is important in terms of employment and convenience and in that way it supports growth but it is a by-product of residential growth not a primary driver. | • The lack of expansion in Ballan due to slow growing local population. Many families travel out of town for work and shop out of town. A limited range of shops. No extended shopping hours. There is no accommodation and Pub meals after hours is poor. |
| • Retailers look after the local residents reasonably well and provide basic products to meet the local demand. | • Lack of 'wine and dining' in Bacchus Marsh. |
| • The retail sector pays its rates, fees etc. and also provides a limited range of basic diversity to support economic growth in the Shire. | • The size of retailing in Ballan. |
| • The retail sector provides employment to part-time and casual workers, providing support for tourism. | • Parking in Bacchus Marsh is quite cramped and minimal in the main retail areas. |
| • Retail sectors provide good employment opportunities for part-time and casual workers (e.g. students). | • There are limited retail outlets in the Shire. Needs an injection of retail. |
| • The retail sector certainly does provide local opportunities and will continue to do so, mainly because the population is on their doorstep. | • More needs to be done to develop the retail sector in the Shire. |

**Recommendations**

- Rather than continuing to carry on about loss to other municipalities, the Shire would be far better to put its energies in developing niche retails around the Shires natural advantages e.g. The shopping area along the Avenue of Honour, which will develop meaningful employment rather than precarious part time work

- Bacchus Marsh will for the foreseeable future be a subsidiary centre to Melton. Better to accept that and do the sub-regional role really well rather than attempt to be the poor second fiddle of a regional hub

- I'd be talking to as broad a cross section as I could to gain valuable feedback and I'd also be speaking to local Bank Managers, Accountants and Real estate agents to gain another perspective because they often know more about what is going on than retails themselves.

- There needs to be a very active Chamber of Commerce in Bacchus Marsh, Ballan already has one, and the Shire could support this model further with financial assistance and a higher profile in the retail sector.

- Retail should play a very important role because older locals like to mingle and meet in the local town. The town provides great meeting rooms and facilities and often, retail business benefits from increased sales.

- If the Council see local retailers getting behind the push to grow, they will be happy. Unfortunately, in my experience with the retail sector, the COuncil has a lot of work to do to win back local business confidence.

- The Retail Strategy can provide for the expanding population and providing retail services that residents would normally need to leave the Shire for (i.e. large retailers, hardware etc.)

- The challenge for the retail sector is to ensure the locals are trained effectively and I'm not convinced many retail shop owners have well trained staff or the financial willingness to do so.

- The retail sector needs significant expansion with at least two more retail hubs.

- The Retail Strategy can assist to bring employment to the local community

## Economic Development Reference Group Members

| Member | Company |
|---|---|
| Don Calleja | Calleja |
| Shane Cook | Shane Cook Homes |
| Greg Crofts | MAF Oceania |
| James Deveny | Deveny Payne |
| Robert Eskdale | District Chamber of Commerce |
| Joe Failli | Westside Meats |
| Dionne Fenton | Bacchus Marsh Secondary College |
| Paul Hillyer | Boral |
| Bruce Marshall | Djerriwarrah Health Services |
| Chris Monaghan | Devine |
| Bree Mort | Abacus Property Group |
| Andrew Neal | Bacchus Marsh Grammar |
| Dave Nichols | BM Coachlines |
| Tony Parhammer | Parhammer |
| Frank Ruffo | Tripod Farmers |
| Noelene Watson | Don Watson Transport |
| Peter Whitefield | Ballan & District Chamber of Commerce |

# Appendix 1 – Section 3: Local retailers consultations

MacroPlan Dimasi surveyed a number of retail businesses throughout Moorabool, the majority within the Bacchus Marsh and Ballan Town Centres. Through conducting the surveys, we were able to ascertain individual owners/managers' views as to strengths and weaknesses of retailing within their local centre; the issues impacting their businesses; and any suggestions they had to improve the retail sector within Moorabool. We also collected information on the performance of these businesses over the past 2 – 3 years.

The following summarises the key findings from the surveys.

## Bacchus Marsh Town Centre

- The majority of the businesses within Bacchus Marsh have been growing or stable over the past 2 – 3 years.
- A number of businesses nominated food retailing as a key strength of the town centre.
- Almost all of the businesses claimed that inadequate parking and traffic issues are major weaknesses of the centre.
- Other weaknesses raised included too much shop replication; trading hours; lack of variety; and lack of support from the Council, while the perceived loss of trade to Melton was a major concern.
- Suggestions to improve retailing in Bacchus Marsh included improved parking facilities; more variety in the retail mix with major retailers as anchors; more advertising; and ensuring that the shopping centre and Main Street work together.

## Ballan Town Centre

- The majority of the businesses within Ballan have been stable over the past 2 – 3 years.
- The availability of parking, low rentals and a stable retail sector were given as strengths of the Ballan Town Centre.
- A number of businesses indicated the desire for support from the Council. Others wanted to see the supermarket in Ballan expanded and more shops to be provided in Ballan.
- Residents travelling beyond Ballan to do their shopping (primarily to Ballarat), high rates and a lack of sufficient public transport were also put forward as weaknesses in Ballan.
- Suggestions to improve retailing in the centre included better prices and competition, and to build a high school in the town to reduce residents' needs to travel to Ballarat.

The following presents the key responses from the surveys.

## Bacchus Marsh Town Centre

| Stengths/Opportunities | Weaknesses/Threats | Recommendations |
|---|---|---|
| • The main strengths in Bacchus Marsh are eating/take out places and hairdressers. | • The Woodgrove SC expansion at Melton has hurt businesses with a lot of customers no longer shopping locally. | • We have quite a lot of competition in Bacchus Marsh. We need a much bigger variety of shops to keep people in Bacchus Marsh. |
| • The redevelopment of the Village centre will be good for both retailers within the Village as well as Bacchus Marsh as a whole. | • People are shopping at Melton due to a generational difference, young people are not too concerned with 'staying local'. | • Need to concentrate on more variations in retail shops such as white goods store, men clothing, etc; definitely something for kids. Just simple things are needed in Bacchus Marsh. |
| • Bacchus Marsh is a growth area which is a mainstream of the retail sector. | • Traffic congestion in Bacchus Marsh, which is a population growth issue. | • Utilise the good things, need to give the main street of Bacchus Marsh a face lift. |
| • The pedestrian crossings over the main street in Bacchus Marsh is good for the community especially families. | • No butcher in Bacchus Marsh, at the moment everyone travels to Ballan or Melton for fresh meat. | • Large majors in Bacchus Marsh to capture residents, but only if the mix is right with small and independent retailers. |
| • The range of specialty stores in Bacchus Marsh. | • Lack of public knowledge about what stores are in Bacchus Marsh, or new stores opening. | • Councils could assist with advertising for local businesses in Bacchus Marsh. |
| • The fruit and local produce traders along The Avenue of Honour in Bacchus Marsh. | • There is a lack of communication between the Council and businesses. | • Council should encourage more business in the Bacchus Marsh Town Centre |
| • The retail sector in Ballan is very stable with minimal changes over the past 20 years. | • People causing traffic by using the main street in Bacchus Marsh to get to Melbourne or Gisborne. | • A bigger shopping centre may entice more people (not only from Bacchus Marsh) to pass through the town. |
| | • Businesses operating along The Avenue of Honour in Bacchus Marsh without a permit, taking business away from shops within the town centre. | • More is needed to promote trade on the weekend, making Bacchus Marsh Town Centre more attractive to visit on the weekend. |
| | • Council favouring The Village over smaller retailers, not supporting businesses | • Ensuring that the shopping centre and main street work well together in Bacchus Marsh. |
| | • A key weakness of The Village SC is that it has no exposure to the main street. | |
| | • Too many hairdressers and coffee shops in Bacchus Marsh, too much replication. | |
| | • No carparking for staff in Bacchus Marsh, inadequate carparking overall. | |
| | • The Bacchus Marsh Town Centre is dead on Saturdays. | |
| | • No collective spirit between businesses in Bacchus Marsh. | |

## Ballan Town Centre

| Stengths/Opportunities | Weaknesses/Threats | Recommendations |
|---|---|---|
| • Day-trippers coming to Ballan. | • Small supermarket in Ballan, need more shops. | • A bus service from Ballan to Bacchus Marsh/Ballarat. The trains is not sufficient and is located too far away from some residents. Possibly linking the train station to the town centre. |
| • Businesses in Ballan care about the community. | • Not enough variety of shops in Ballan. | • Build a high school in Ballan - too many people are travelling to Ballarat and doing their shopping while they are there. |
| • Easy parking in Ballan. | • Many residents work outside Ballan and shop at their place of work. | • Need to ensure that people passing through Ballan. Council needs to invest to ensure it is a nice place to visit. |
| • Low rentals in Ballan. | • Not enough for children to do in Bacchus Marsh. | • There is no local support from the Shire, particularly with the basics including a need for improved street-scaping and a refurbishment of the main street in Ballan. |
| | • Rates/electricity/water charges are far too high. They discourage any growth in the retail sector in Ballan. | |

# Appendix 2 – Introduction

This **appendix** presents the detailed tables as referred to in the Moorabool Shire – Retail Strategy 2041.

This appendix includes the following tables:

- The estimated retail spending capacity by category for each region of Moorabool Shire (i.e. Bacchus Marsh, Central (Ballan) and Western);
- An estimate of the expenditure currently generated by Moorabool residents and retained within each region;
- An estimate of the amount of expenditure generated by Moorabool residents that could be reasonably be retained within each region, assuming that facilities and infrastructure are upgraded in the Shire, and a calculation of the guideline retail floorspace provision given this expenditure;
- A comparison of the current retail floorspace supply within each region with the estimated guideline retail floorspace; and
- A projection of the guideline retail floorspace provision over the forecast period based on estimated population growth within each region.

# Appendix 2 – Detailed tables

## Retail expenditure

The following Tables A2.1 – A2.3 detail the estimated retail spending capacity for each region by category. The category definitions are given 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.

*Table A2.1*

**Bacchus Marsh region - retail expenditure by category ($M), 2014-2041***

| Year ending June | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|
| 2014 | 115.2 | 28.6 | 24.8 | 45.1 | 12.7 | 19.6 | 6.7 | **252.7** |
| 2017 | 129.5 | 32.4 | 27.4 | 49.9 | 14.2 | 22.1 | 7.5 | **283.0** |
| 2021 | 150.1 | 37.9 | 31.1 | 56.7 | 16.4 | 25.7 | 8.6 | **326.6** |
| 2026 | 176.3 | 45.1 | 35.6 | 64.8 | 19.0 | 30.4 | 10.0 | **381.2** |
| 2031 | 204.0 | 52.8 | 40.1 | 73.0 | 21.8 | 35.4 | 11.5 | **438.6** |
| 2036 | 232.5 | 61.0 | 44.6 | 81.0 | 24.5 | 40.6 | 12.9 | **497.1** |
| 2041 | 263.0 | 69.8 | 49.1 | 89.3 | 27.4 | 46.3 | 14.4 | **559.4** |
| Average annual growth ($M) | | | | | | | | |
| 2014-2041 | 5.5 | 1.5 | 0.9 | 1.6 | 0.5 | 1.0 | 0.3 | **11.4** |
| Average annual growth (%) | | | | | | | | |
| 2014-2041 | 3.1% | 3.4% | 2.6% | 2.6% | 2.9% | 3.2% | 2.9% | **3.0%** |

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

*Table A2.2*

**Central (Ballan) region - retail expenditure by category ($M), 2014-2041***

| Year ending June | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|
| 2014 | 43.2 | 10.7 | 8.8 | 17.3 | 4.6 | 7.5 | 2.5 | **94.7** |
| 2017 | 46.4 | 11.6 | 9.3 | 18.3 | 4.9 | 8.1 | 2.7 | **101.3** |
| 2021 | 51.0 | 12.8 | 10.1 | 19.7 | 5.4 | 9.0 | 3.0 | **110.9** |
| 2026 | 58.3 | 14.9 | 11.2 | 21.9 | 6.1 | 10.3 | 3.3 | **126.0** |
| 2031 | 66.3 | 17.1 | 12.4 | 24.3 | 6.8 | 11.8 | 3.7 | **142.4** |
| 2036 | 76.2 | 19.9 | 13.9 | 27.2 | 7.7 | 13.7 | 4.2 | **162.8** |
| 2041 | 87.0 | 23.0 | 15.5 | 30.3 | 8.7 | 15.7 | 4.8 | **185.0** |
| Average annual growth ($M) | | | | | | | | |
| 2014-2041 | 1.6 | 0.5 | 0.2 | 0.5 | 0.2 | 0.3 | 0.1 | **3.3** |
| Average annual growth (%) | | | | | | | | |
| 2014-2041 | 2.6% | 2.9% | 2.1% | 2.1% | 2.4% | 2.8% | 2.4% | **2.5%** |

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

*Table A2.3*

**Western region - retail expenditure by category ($M), 2014-2041***

| Year ending June | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|
| 2014 | 20.3 | 5.2 | 4.3 | 7.9 | 2.3 | 3.6 | 1.2 | **44.8** |
| 2017 | 21.0 | 5.4 | 4.4 | 8.1 | 2.3 | 3.7 | 1.2 | **46.1** |
| 2021 | 22.0 | 5.7 | 4.5 | 8.3 | 2.4 | 3.9 | 1.3 | **48.1** |
| 2026 | 23.7 | 6.2 | 4.7 | 8.7 | 2.6 | 4.2 | 1.3 | **51.4** |
| 2031 | 25.8 | 6.9 | 5.0 | 9.2 | 2.8 | 4.7 | 1.4 | **55.7** |
| 2036 | 28.4 | 7.6 | 5.3 | 9.9 | 3.0 | 5.1 | 1.6 | **61.0** |
| 2041 | 31.2 | 8.5 | 5.7 | 10.6 | 3.3 | 5.7 | 1.7 | **66.7** |
| Average annual growth ($M) | | | | | | | | |
| 2014-2041 | 0.4 | 0.1 | 0.1 | 0.1 | 0.0 | 0.1 | 0.0 | **0.8** |
| Average annual growth (%) | | | | | | | | |
| 2014-2041 | 1.6% | 1.8% | 1.1% | 1.1% | 1.3% | 1.7% | 1.3% | **1.5%** |

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

## Retail floorspace potential

The following Tables A2.4 – A2.6 provide an estimate of the expenditure currently generated by Moorabool residents and retained within each region, which has been calculated based on the results of the telephone survey, as outlined in *Appendix 1*.

### Table A2.4

**Bacchus Marsh region - estimated retail expenditure retained and captured ($M), 2014***
**(Current situation)**

| | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | Total retail |
|---|---|---|---|---|---|---|---|---|
| Retail expenditure by Bacchus Marsh residents | 115.2 | 28.6 | 24.8 | 45.1 | 12.7 | 19.6 | 6.7 | **252.7** |
| Retained expenditure within Moorabool Shire (%)** | 75% | 65% | 30% | 20% | 25% | 50% | 65% | **55%** |
| Retained expenditure within Moorabool Shire | 86.4 | 18.6 | 7.4 | 9.0 | 3.2 | 9.8 | 4.4 | **138.8** |
| Retained expenditure directed within Bacchus Marsh region (%)** | 97% | 99% | 100% | 100% | 100% | 100% | 100% | **98%** |
| Retained expenditure directed within Bacchus Marsh region | 83.9 | 18.3 | 7.4 | 9.0 | 3.2 | 9.8 | 4.4 | **136.0** |
| Estimated expenditure directed from Central (Ballan) region | 12.0 | 2.0 | 1.5 | 2.0 | 0.0 | 1.0 | 0.3 | **18.8** |
| Estimated expenditure directed from Western region | 2.0 | 0.2 | 0.4 | 0.2 | 0.1 | 0.5 | 0.2 | **3.6** |
| **Total Moorabool Shire expenditure retained within Bacchus Marsh region** | **97.9** | **20.5** | **9.4** | **11.2** | **3.3** | **11.3** | **4.9** | **158.4** |
| Demand from beyond Moorabool Shire (%) | 10% | 25% | 5% | 5% | 5% | 5% | 10% | **11%** |
| **Total expenditure directed to retail facilities within the Bacchus Marsh region** | **108.8** | **27.5** | **9.9** | **11.8** | **3.5** | **11.9** | **5.4** | **178.6** |

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

### Table A2.5

**Central (Ballan) region - estimated retail expenditure retained and captured ($M), 2014***
**(Current situation)**

| | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | Total retail |
|---|---|---|---|---|---|---|---|---|
| Retail expenditure by Central (Ballan) residents | 43.2 | 10.7 | 8.8 | 17.3 | 4.6 | 7.5 | 2.5 | **94.7** |
| Retained expenditure retained within Moorabool Shire (%)** | 50% | 45% | 25% | 20% | 20% | 25% | 35% | **38%** |
| Retained expenditure retained within Moorabool Shire | 21.6 | 4.8 | 2.2 | 3.5 | 0.9 | 1.9 | 0.9 | **35.8** |
| Retaine expenditure directed within Central (Ballan) region (%)** | 44% | 58% | 32% | 42% | 100% | 47% | 66% | **47%** |
| Retained expenditure directed within Central (Ballan) region | 9.6 | 2.8 | 0.7 | 1.5 | 0.9 | 0.9 | 0.6 | **17.0** |
| Estimated expenditure directed from Bacchus Marsh region | 2.5 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | **2.8** |
| Estimated expenditure directed from Western region | 0.7 | 0.1 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | **1.0** |
| **Total Moorabool Shire expenditure retained within Central (Ballan) region** | **12.8** | **3.2** | **0.7** | **1.7** | **0.9** | **0.9** | **0.6** | **20.8** |
| Demand from beyond Moorabool Shire (%) | 10% | 50% | 5% | 5% | 5% | 5% | 5% | **19%** |
| **Total expenditure directed to retail facilities within the Central (Ballan) region** | **14.2** | **6.4** | **0.7** | **1.7** | **1.0** | **1.0** | **0.6** | **25.7** |

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

### Table A2.6

**Western region - estimated retail expenditure retained and captured ($M), 2014***
**(Current situation)**

| | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | Total retail |
|---|---|---|---|---|---|---|---|---|
| Retail expenditure by Western residents | 20.3 | 5.2 | 4.3 | 7.9 | 2.3 | 3.6 | 1.2 | **44.8** |
| Retained expenditure retained within Moorabool Shire (%)** | 20% | 15% | 10% | 5% | 30% | 15% | 15% | **16%** |
| Retained expenditure retained within Moorabool Shire | 4.1 | 0.8 | 0.4 | 0.4 | 0.7 | 0.5 | 0.2 | **7.1** |
| Retaine expenditure directed within Western region (%)** | 34% | 68% | 0% | 0% | 85% | 0% | 0% | **35%** |
| Retained expenditure directed within Western region | 1.4 | 0.5 | 0.0 | 0.0 | 0.6 | 0.0 | 0.0 | **2.5** |
| Estimated expenditure directed from Bacchus Marsh region | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | **0.0** |
| Estimated expenditure directed from Central (Ballan) region | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | **0.0** |
| **Total Moorabool Shire expenditure retained within Western region** | **1.4** | **0.5** | **0.0** | **0.0** | **0.6** | **0.0** | **0.0** | **2.5** |
| Demand from beyond Moorabool Shire (%) | 10% | 10% | 0% | 0% | 5% | 0% | 0% | **9%** |
| **Total expenditure directed to retail facilities within the Western region** | **1.5** | **0.6** | **0.0** | **0.0** | **0.6** | **0.0** | **0.0** | **2.7** |

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

Table A2.7 following estimates the amount of expenditure generated by Moorabool residents that could be reasonably be retained within the Bacchus Marsh region, assuming that the facilities and infrastructure within Bacchus Marsh and Ballan are upgraded and the centres continue to be vibrant. A guideline retail floorspace provision is estimated based on these assumptions.

Table A2.8 then compares the current retail floorspace supply in Bacchus Marsh with the estimated guideline retail floorspace provision to detail an under or over-provision of floorspace for each retail category (as defined above) in Bacchus Marsh.

Table A2.9 projects the guideline retail floorspace provision over the forecast period based on the estimated population growth.

## Bacchus Marsh region

### Table A2.7

**Bacchus Marsh region - guideline retail floorspace provision ($M), 2014***

| | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|
| Retail expenditure by Bacchus Marsh residents | 115.2 | 28.6 | 24.8 | 45.1 | 12.7 | 19.6 | 6.7 | **252.7** |
| Retained expenditure within Moorabool Shire (%)** | 90% | 75% | 50% | 50% | 50% | 75% | 80% | **74%** |
| Retained expenditure within Moorabool Shire | 103.7 | 21.4 | 12.4 | 22.5 | 6.4 | 14.7 | 5.4 | **186.5** |
| Retained expenditure directed within Bacchus Marsh region (%)** | 100% | 99% | 100% | 100% | 100% | 100% | 100% | **100%** |
| Retained expenditure directed within Bacchus Marsh region | 103.2 | 21.2 | 12.4 | 22.5 | 6.4 | 14.7 | 5.4 | **185.7** |
| Estimated expenditure directed from Central (Ballan) region | 8.0 | 3.0 | 2.9 | 3.0 | 1.0 | 2.5 | 0.3 | **20.7** |
| Estimated expenditure directed from Western region | 2.0 | 0.2 | 0.4 | 0.2 | 0.1 | 0.5 | 0.2 | **3.6** |
| **Total Moorabool Shire expenditure retained within Bacchus Marsh region** | **113.2** | **24.3** | **15.7** | **25.7** | **7.5** | **17.7** | **5.9** | **210.0** |
| Demand from beyond Moorabool Shire (%) | 10% | 25% | 5% | 5% | 5% | 5% | 10% | **11%** |
| **Total potential expenditure directed to retail facilities within the Bacchus Marsh region** | **125.7** | **32.6** | **16.5** | **27.1** | **7.9** | **18.6** | **6.6** | **235.0** |
| RTD ($/sq.m) | 9,000 | 6,000 | 4,000 | 3,500 | 5,000 | 6,000 | 4,000 | **6,251** |
| **Guideline f/s provision (sq.m)** | **13,971** | **5,439** | **4,136** | **7,739** | **1,573** | **3,100** | **1,641** | **37,599** |

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

### Table A2.8

**Bacchus Marsh - guideline retail floorspace provision (sq.m), 2014***

| | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|
| Current* | 10,750 | 4,620 | 3,250 | 3,550 | 600 | 1,820 | 1,790 | **26,380** |
| Potential | 13,971 | 5,439 | 4,136 | 7,739 | 1,573 | 3,100 | 1,641 | **37,599** |
| **Difference** | **-3,221** | **-819** | **-886** | **-4,189** | **-973** | **-1,280** | **149** | **-11,219** |

**Based on floorspace survey conducted in September 2014*
*Source: AFS; MarketInfo; MacroPlan Dimasi*

### Table A2.9

**Bacchus Marsh - guideline retail floorspace provision (sq.m), 2014-2041***

| Year ending June | **Est. population** | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|---|
| **Current** | | **10,750** | **4,620** | **3,250** | **3,550** | **600** | **1,820** | **1,790** | **26,380** |
| 2014 | **20,280** | 13,971 | 5,439 | 4,136 | 7,739 | 1,573 | 3,100 | 1,641 | **37,599** |
| 2017 | **22,280** | 15,386 | 5,990 | 4,555 | 8,523 | 1,733 | 3,414 | 1,807 | **41,408** |
| 2021 | **24,920** | 17,357 | 6,757 | 5,139 | 9,616 | 1,955 | 3,852 | 2,038 | **46,714** |
| 2026 | **27,820** | 19,679 | 7,661 | 5,826 | 10,902 | 2,216 | 4,367 | 2,311 | **52,963** |
| 2031 | **30,670** | 21,996 | 8,563 | 6,512 | 12,185 | 2,477 | 4,881 | 2,583 | **59,198** |
| 2036 | **33,270** | 24,200 | 9,421 | 7,165 | 13,406 | 2,725 | 5,371 | 2,842 | **65,130** |
| 2041 | **35,870** | 26,434 | 10,290 | 7,826 | 14,644 | 2,977 | 5,866 | 3,104 | **71,141** |
| RTD ($/sq.m) | | 9,000 | 6,000 | 4,000 | 3,500 | 5,000 | 6,000 | 4,000 | **6,251** |

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

The following Tables A2.10 – A2.12 and A2.13 – A2.15 detail the same information for the Central (Ballan) and Western regions respectively.



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## Central (Ballan) region

### Table A2.13

| Central (Ballan) region - guideline retail floorspace provision ($M), 2014* | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|
| Retail expenditure by Central (Ballan) residents | 43.2 | 10.7 | 8.8 | 17.3 | 4.6 | 7.5 | 2.5 | **94.7** |
| Retained expenditure retained within Moorabool Shire (%)** | 75% | 65% | 50% | 40% | 50% | 65% | 70% | **63%** |
| Retained expenditure retained within Moorabool Shire | 32.4 | 7.0 | 4.4 | 6.9 | 2.3 | 4.9 | 1.8 | **59.7** |
| Retaine expenditure directed within Central (Ballan) region (%)** | 75% | 57% | 34% | 57% | 57% | 49% | 83% | **65%** |
| Retained expenditure directed within Central (Ballan) region | 24.4 | 4.0 | 1.5 | 3.9 | 1.3 | 2.4 | 1.5 | **39.0** |
| Estimated expenditure directed from Bacchus Marsh region | 0.5 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | **0.8** |
| Estimated expenditure directed from Western region | 0.7 | 0.1 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | **1.0** |
| **Total Moorabool Shire expenditure retained within Central (Ballan) region** | **25.6** | **4.3** | **1.5** | **4.1** | **1.3** | **2.4** | **1.5** | **40.8** |
| Demand from beyond Moorabool Shire (%) | 10% | 50% | 5% | 5% | 5% | 5% | 10% | **16%** |
| **Total expenditure directed to retail facilities within the Central (Ballan) region** | **28.5** | **8.7** | **1.6** | **4.3** | **1.4** | **2.5** | **1.6** | **48.7** |
| RTD ($/sq.m) | 9,000 | 6,000 | 4,000 | 3,500 | 5,000 | 6,000 | 4,000 | **6,611** |
| **Guideline f/s provision (sq.m)** | **3,163** | **1,446** | **398** | **1,238** | **278** | **425** | **411** | **7,359** |

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

### Table A2.14

| Central (Ballan) - guideline retail floorspace provision (sq.m), 2014* | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|
| Current* | 1,480 | 1,080 | 340 | 920 | 130 | 80 | 240 | **4,270** |
| Potential | 3,163 | 1,446 | 398 | 1,238 | 278 | 425 | 411 | **7,359** |
| **Difference** | **-1,683** | **-366** | **-58** | **-318** | **-148** | **-345** | **-171** | **-3,089** |

**Based on floorspace survey conducted in September 2014*
*Source: AFS; MarketInfo; MacroPlan Dimasi*

### Table A2.15

| Central (Ballan) - guideline retail floorspace provision (sq.m), 2014-2041* Year ending June | **Est. population** | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|---|
| **Current** | | **1,480** | **1,080** | **340** | **920** | **130** | **80** | **240** | **4,270** |
| 2014 | **7,350** | 3,163 | 1,446 | 398 | 1,238 | 278 | 425 | 411 | **7,359** |
| 2017 | **7,710** | 3,484 | 1,593 | 438 | 1,363 | 306 | 468 | 453 | **8,104** |
| 2021 | **8,190** | 3,930 | 1,797 | 494 | 1,538 | 345 | 528 | 511 | **9,143** |
| 2026 | **8,940** | 4,456 | 2,037 | 560 | 1,743 | 391 | 599 | 579 | **10,366** |
| 2031 | **9,690** | 4,980 | 2,277 | 626 | 1,949 | 437 | 669 | 647 | **11,586** |
| 2036 | **10,640** | 5,479 | 2,505 | 689 | 2,144 | 481 | 736 | 712 | **12,747** |
| 2041 | **11,590** | 5,985 | 2,736 | 753 | 2,342 | 526 | 804 | 778 | **13,923** |
| RTD ($/sq.m) | | 9,000 | 6,000 | 4,000 | 3,500 | 5,000 | 6,000 | 4,000 | **6,611** |

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

## Western region

### Table A2.16

| Western region - guideline retail floorspace provision ($M), 2014* | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|
| Retail expenditure by Western residents | 20.3 | 5.2 | 4.3 | 7.9 | 2.3 | 3.6 | 1.2 | **44.8** |
| Retained expenditure retained within Moorabool Shire (%)** | 25% | 15% | 10% | 5% | 30% | 20% | 20% | **19%** |
| Retained expenditure retained within Moorabool Shire | 5.1 | 0.8 | 0.4 | 0.4 | 0.7 | 0.7 | 0.2 | **8.3** |
| Retaine expenditure directed within Western region (%)** | 47% | 68% | 0% | 0% | 85% | 25% | 25% | **45%** |
| Retained expenditure directed within Western region | 2.4 | 0.5 | 0.0 | 0.0 | 0.6 | 0.2 | 0.1 | **3.7** |
| Estimated expenditure directed from Bacchus Marsh region | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | **0.0** |
| Estimated expenditure directed from Central (Ballan) region | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | **0.0** |
| **Total Moorabool Shire expenditure retained within Western region** | **2.4** | **0.5** | **0.0** | **0.0** | **0.6** | **0.2** | **0.1** | **3.7** |
| Demand from beyond Moorabool Shire (%) | 10% | 10% | 0% | 0% | 5% | 0% | 0% | **9%** |
| **Total expenditure directed to retail facilities within the Western region** | **2.6** | **0.6** | **0.0** | **0.0** | **0.6** | **0.2** | **0.1** | **4.1** |
| RTD ($/sq.m) | 9,000 | 6,000 | 0 | 0 | 5,000 | 0 | 0 | **7,938** |
| **Guideline f/s provision (sq.m)** | **294** | **98** | **n.a.** | **n.a.** | **123** | **n.a.** | **n.a.** | **515** |

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

### Table A2.17

| Western - guideline retail floorspace provision (sq.m), 2014* | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|
| Current** | 300 | 100 | 0 | 0 | 160 | 0 | 0 | **560** |
| Potential | 294 | 98 | 0 | 0 | 123 | 30 | 15 | **560** |
| **Difference** | **6** | **2** | **0** | **0** | **37** | **-30** | **-15** | **0** |

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

### Table A2.18

Western - guideline retail floorspace provision (sq.m), 2014-2041*

| Year ending June | **Est. population** | FLG | Food catering | Apparel | Household goods | Leisure | General retail | Retail services | **Total retail** |
|---|---|---|---|---|---|---|---|---|---|
| **Current** | | **300** | **100** | **0** | **0** | **160** | **0** | **0** | **560** |
| 2014 | **3,550** | 294 | 98 | 0 | 0 | 123 | 30 | 15 | **560** |
| 2017 | **3,580** | 324 | 108 | 0 | 0 | 135 | 33 | 16 | **617** |
| 2021 | **3,620** | 365 | 122 | 0 | 0 | 153 | 37 | 19 | **696** |
| 2026 | **3,720** | 414 | 138 | 0 | 0 | 173 | 42 | 21 | **789** |
| 2031 | **3,870** | 463 | 154 | 0 | 0 | 194 | 47 | 23 | **881** |
| 2036 | **4,070** | 509 | 170 | 0 | 0 | 213 | 52 | 26 | **970** |
| 2041 | **4,270** | 556 | 185 | 0 | 0 | 233 | 57 | 28 | **1,059** |
| RTD ($/sq.m) | | 9,000 | 6,000 | 4,000 | 3,500 | 5,000 | 6,000 | 4,000 | **7,303** |

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

# Appendix 3 – Reference Documents

Below is a list of resources referenced in the preparation of the Moorabool Retail Strategy:


- David Lock & Associates, 2014, "*Moorabool Amendment C51*".
- David Lock & Associates, 2011, "*Bacchus Marsh Activity Centre Structure Plan*".
- David Lock & Associates, 2009, "*Bacchus Marsh Central Area Structure Plan: Context and Issues Paper*".
- Essential Economics, 2001, "*A Strategy for Retail Business Development in Bacchus Marsh Town Centre*".
- Essential Economics, 2001, "*A Strategy for Retail Business Development in Ballan*".
- Essential Economics, 2008, "*Bacchus Marsh Retail and Commercial Assessment: Input into Bacchus Marsh Structure Plan*".
- Essential Economics, 2013, "*Retailing in Rural Municipalities of Victoria*".
- MacroPlan Dimasi, 2012, "*West Maddingley, Vic. Woolworths Supermarket Assessment*".
- Moorabool Shire Council, 2013, "*Ballan Structure Plan*".
- Moorabool Shire Council, 2011, "*Gordon Structure Plan 2011*".
- Moorabool Shire Council, 2014, "*Moorabool Planning Scheme*".
- Moorabool Shire Council, 2014, "*Bacchus Marsh Housing Strategy 2011 – 2041: Context Report*".
- Moorabool Shire Council, 2014, "*Key Priority Projects*".
- Municipal Association of Victoria, 2013, "*Rural Retail Handbook*".
- O'Brien Traffic, 2014, "*Proposed Bunnings Warehouse and Bulky Goods Development*".
- Pitney Bowes MapInfo (MacroPlan Dimasi), 2009, "*Bacchus Marsh Retail Centre: Market Potential and Economic Impact Assessment*".
- Planning Panels Victoria, 2014, "*Panel Report: Moorabool Planning Scheme Amendment C53*".
- Planning Panels Victoria, 2014, "*Panel Report: Amendment C51 Bacchus Marsh Activity Centre*".
- SGS, 2006, "*Growing Moorabool. Economic Development Strategy and Action Plan*".
- Simon McArthur and Associates, 2013,*"Destiantion Management Plan 2013-2018"*.
- The Buchan Group, 2014, "*Bacchus Marsh Village Shopping Centre Redevelopment: Town Planning Application*".
- Tim Nott, 2008, "*Bacchus Marsh Town Centre Investment Attraction Strategy*".
- Traffix Group, 2011, "*Proposed West Maddingley Residential Growth Area: Traffic Engineering Assessment of Impacts on Surrounding Road Network*".
- Urban Enterprise, 2014, "*Moorabool West Small Towns Residential Assessment*".
- Victorian Government, 2014, "*Central Highlands Regional Growth Plan*".

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