CLARKEFIELD

EMPLOYMENT PROFILE & RETAIL ASSESSMENT

APD PROJECTS | APRIL 2020 (UPDATED IN MAY 2023)

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AUTHORS

Kurt Ainsaar, Senior Associate

Finn O'Donnell, Consultant

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L1 302-304 Barkly St, Brunswick VIC 3056

+61 3 9482 3888 urbanenterprise.com.au

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ACRONYMS

BIFT	Beveridge Interstate Freight Terminal
LQ	Location Quotient
NSSIP	Northern State Significant Industrial Precinct

GLOSSARY OF TERMS

Full Line Supermarket	A supermarket that is 3,000 sqm or more, typically, a national brand supermarket such as Coles or Woolworths and includes a full range of food and grocery items (e.g. delicatessen and bakery).
Large Neighbourhood Centre	A Large Neighbourhood Centre typically includes at least one full-line supermarket and up to 40 speciality shops. The gross lettable area is typically in the order of 10,000 to 15,000 sqm.
Local Centre	A Local Centre typically includes less than 5,000 sqm of gross lettable floorspace and generally includes less than 15 specialities.
Major Regional Centre	A Major Regional Centre typically incorporates at least one full line department store, one or more full line discount department stores, one or more supermarkets and approximately 150 speciality shops. The gross lettable area is typically in the order of 50,000 to 85,000 sqm.
Neighbourhood Centre	A Neighbourhood Centre typically includes a supermarket and up to 35 speciality shops, and has a gross lettable area between 5,000 and 10,000 sqm.
Regional Centre	A shopping centre typically incorporates one full line department store, a full line discount department store, one or more supermarkets and approximately 100 specialty shops. Total gross lettable area retail ranges between 30,000 and 50,000 square metres
Speciality Store	A non-major retail shop in a centre that specialises in a narrow range of merchandise with an emphasis on product knowledge and customer service. Shops usually range up to 400 sqm.

EXECUTIVE SUMMARY

CURRENT ECONOMIC & EMPLOYMENT PROFILE OF MACEDON RANGES SHIRE

- Macedon Range shire has an estimated resident population of 52,100, with approximately 24,000 employed persons, 15,500 local jobs and more than 5,300 businesses.
- The highest employing industries and economic strengths of the Shire are construction, health care, education, tourism, retail and hospitality.
- In Macedon Ranges Shire, common occupations held by employed persons are professionals (24%) and managers (16%). Underrepresented occupations include sales workers, machinery operators, drivers and labourers.
- The Shire's labour force are highly skilled and qualified, with a higher proportion of residents who have attained a bachelor degree, postgraduate degree and advanced diploma compared with Regional Victoria.
- 18% of the labour force have certificate level qualifications (i.e. apprenticeships and traineeships). These are typically affiliated with population-driven and business-related support services such as community services, administration and clerical services, human resources, sport, fitness and wellness, hospitality, hair and beauty.
- The Shire's job containment rate is approximately 44%, meaning that over half of working residents travel outside of the shire for work. The job containment rate decreased from 48% in the 2016 census, indicating that a higher proportion of workers commute out of the shire.
- A large proportion of jobs in 'white collar' sectors such as professional services, financial services and IT jobs are less available in Macedon Ranges Shire and are out-commuting to other municipalities. These types of jobs are one of the clear gaps in local employment provision.
- Employment areas are generally confined to the urban areas across the Shire's network of settlements. There is a lack of strategic employment land in the Shire, with the majority of industrial and commercial precincts concentrated to the urban areas.
- There are two regional industrial areas in the municipality; located in Kyneton and New Gisborne, with some smaller pockets of industrial zoned land in Romsey, Woodend, Lancefield and Riddells Creek.
- Industrial sites are mostly occupied by uses that service the resident population, including construction (homebuilding, gardening), manufacturing (materials) and automotive uses (auto repair and servicing).
- Commercial land uses and the business mix varies across townships, but generally include a mix of retail, hospitality, tourism uses, personal services and professional services.

CONCLUSION: EMPLOYMENT

At full development, the Clarkefield proposal would generate between 1,800 and 2,350 additional jobs (depending on the ultimate development yield). Whilst it is acknowledged that a proportion of jobs would commute out of the Shire to metropolitan and regional areas, the injection of employed residents would create local employment opportunities, particularly in population-driven industries such as retail, hospitality, construction, health and education. These industries align with the Shire's current employment profile and strengths.

The key employment gap in the Macedon Ranges is 'white collar' industries. A high proportion of the Shire's workforce are categorised as professionals, and are highly skilled and qualified, but professional-related industries are underrepresented in the Shire. It is acknowledged, however, that it is difficult to achieve decentralisation for certain sectors (e.g. professional, financial, insurance, technical services), as there will always be jobs that will be centralised to metropolitan areas. The key opportunity for Clarkefield is to attract and locate high-value jobs across home-based, micro, small and medium enterprise to support the growing population, business, visitor and agricultural base in the Shire and surrounding municipalities. The increased prevalence of remote working since the onset of the COVID-19 pandemic has enabled professional roles to be performed anywhere (including from home), and strengthens this opportunity for Clarkefield.

RETAIL ASSESSMENT

- There are approximately 1,600 jobs in the retail sector in Macedon Ranges Shire. The sector experienced an increase in retail jobs between 2016 and 2021 (+200 jobs).
- There are approximately 1,000 accommodation and food services jobs in the Shire, increasing by 240 jobs over the same period, indicating that the tourism and hospitality role is strengthening.
- Clarkefield's primary retail catchment includes the township itself, Riddells Creek and rural areas to the north, south and east of Clarkefield.
- Whilst it is acknowledged that Clarkefield would attract expenditure from outside of this catchment (including from non-locals and visitors), it is estimated that these areas would form part of the primary retail catchment area.
- The regional retail hierarchy shows that Craigieburn (major regional Centre) is the highest order retail centre, followed by Sunbury (regional centre), Wallan (large neighbourhood centre), Gisborne (large neighbourhood centre), Woodend (neighbourhood centre), Romsey (local centre) and Riddells Creek (local centre).
- Two ultimate development scenarios have been modelled for Clarkefield to estimate the scale of retail floorspace that could be supported.
  - Baseline scenario: District Town – 2,365 lots (as per the preliminary Development Plan);
  - Alternative scenario: Large District Town – 3,000 lots (assumes a higher residential density).
- For the baseline scenario, an estimated 6,000 sqm of retail floorspace could viably be supported in Clarkefield. For the alternative scenario, an estimated 8,000 sqm of retail floorspace could viably be supported in Clarkefield.

CONCLUSION: RETAIL

The retail role of a local catchment of Clarkefield's scale (~6,150-8,000 residents) could typically support a Neighbourhood Activity Centre (6,000-8,000sqm), which includes a supermarket (half or full-line), speciality retailers (e.g. bakery, butcher, etc), casual hospitality uses (e.g. cafes) and retail services (e.g. pharmacy, hair, beauty etc.)

Typically, a catchment population of approximately 8,000 residents is required to support a full-line supermarket (3,000+ sqm). The baseline development scenario for Clarkefield (approx. 6,150 residents) would fall short of the population trigger. However, given that the neighbouring townships of Riddells Creek would form part of Clarkefield's primary retail catchment and does not currently contain a full-line supermarket, there would be an opportunity for Clarkefield to support a full-line supermarket that services both Clarkefield and Riddells Creek. Combined, these areas would satisfy the typical resident threshold required to trigger the need for a full-line supermarket (i.e. in the order of 3,000+ sqm).

The alternative development scenario (approx. 8,000 residents) would reach the population threshold that would trigger the need for a full-line supermarket.

To not disrupt the retail hierarchy and potentially direct market share away from existing traders, it is acknowledged that the point at which Clarkefield nears full development is when the catchment could viably support another supermarket.

Beyond supermarket retailing, the retail and hospitality gaps in the southern part of the Shire and the clear opportunity for Clarkefield is to provide a high-quality hospitality offering that is targeted towards locals, non-locals (e.g. Sunbury, Craigieburn) and visitors (e.g. domestic and international). This would align with the existing tourism strengths of the Shire, particularly in townships to the north such as Woodend, Macedon and Kyneton. Improving the tourism product offering in the south of the municipality is a gap that Clarkefield could address.

1. BACKGROUND

1.1. ENGAGEMENT

Urban Enterprise was engaged by ADP Projects to prepare an economic and employment profile, and retail assessment for the Clarkefield proposal. The purpose of this assessment is to identify the current economic and employment strengths of Macedon Ranges Shire and the broader region, whilst assessing the potential employment outcome of the proposal, and the likely employment role that Clarkefield.

The retail assessment consider the current retail offering in the region, including the role and scale of nearby activity centres. The assessment also discusses the implications of the Clarkefield proposal on retail demand, and potential retail gaps that could be addressed by the development of Clarkefield.

The report was originally prepared in 2020. An update was completed in 2023 to include more recent data and research.

1.2. SCOPE OF WORK

The scope of this assessment includes the following:

Employment Profile

- Employment Land – Identify existing and planned employment areas in the region. At a high-level, identify the amount of land dedicated to employment, core land use types and business mix, key industries of employment.
- Employment/Economic Profile – Assess the current employment profile and employment growth (by industry) in the Shire. Quantify the ratio of jobs per household to calculate the expected jobs outcome for the Clarkefield proposal.
- Employment Growth – Based on the Clarkefield Development Information, estimate the labour force impact of the development (i.e. the number of jobs created).

Retail Assessment

- Retail Employment Profile – Identify the current number of retail jobs in Macedon Ranges Shire. Assess the change in persons employed in retail over time.
- Retail Catchment – Define a retail catchment area for Clarkefield. Consider the local resident catchment, location, transport connections and physical barriers (e.g. major roads, rail lines etc.).
- Retail Hierarchy – Identify and assess at a high-level the hierarchy of retail centres in the retail catchment areas. Comment on the location, role, retail mix and retail anchors.
- Implications for Retail Demand – Based on the estimated lot yield of the Clarkefield proposal, estimate the forecast population for the Clarkefield development and assess the implications for retail demand (i.e. future supportable floorspace).

2. EMPLOYMENT CONTEXT

2.1. INTRODUCTION

This section provides an overview of existing and planned employment areas in Macedon Ranges and the broader region, including northern metropolitan Melbourne.

2.2. STRATEGIC EMPLOYMENT LAND

Plan Melbourne (2017) is the long-term strategic planning document that is used to guide metropolitan Melbourne's growth to 2050. While Clarkefield and Macedon Ranges are located outside of metropolitan Melbourne, the Plan includes consideration of Melbourne's peri-urban areas and regional Victoria.

Figure 1 identifies the current and future employment land across metropolitan Melbourne. Overall, the majority of employment land in the northern metropolitan areas is concentrated to the Northern State Significant Industrial Precinct (NSSIP). Other notable locations for existing and future employment areas include the Melbourne Airport and nearby industrial and commercial areas in Tullamarine, Sunbury and Craigieburn activity centres, Merrifield, Mickleham and future employment areas such as the Beveridge Interstate Freight Terminal (BIFT).

Overall, Plan Melbourne identifies that the key industries for northern metropolitan Melbourne will be focused around health care and social assistance, education and training, retail, manufacturing, transport, freight, distribution and construction.

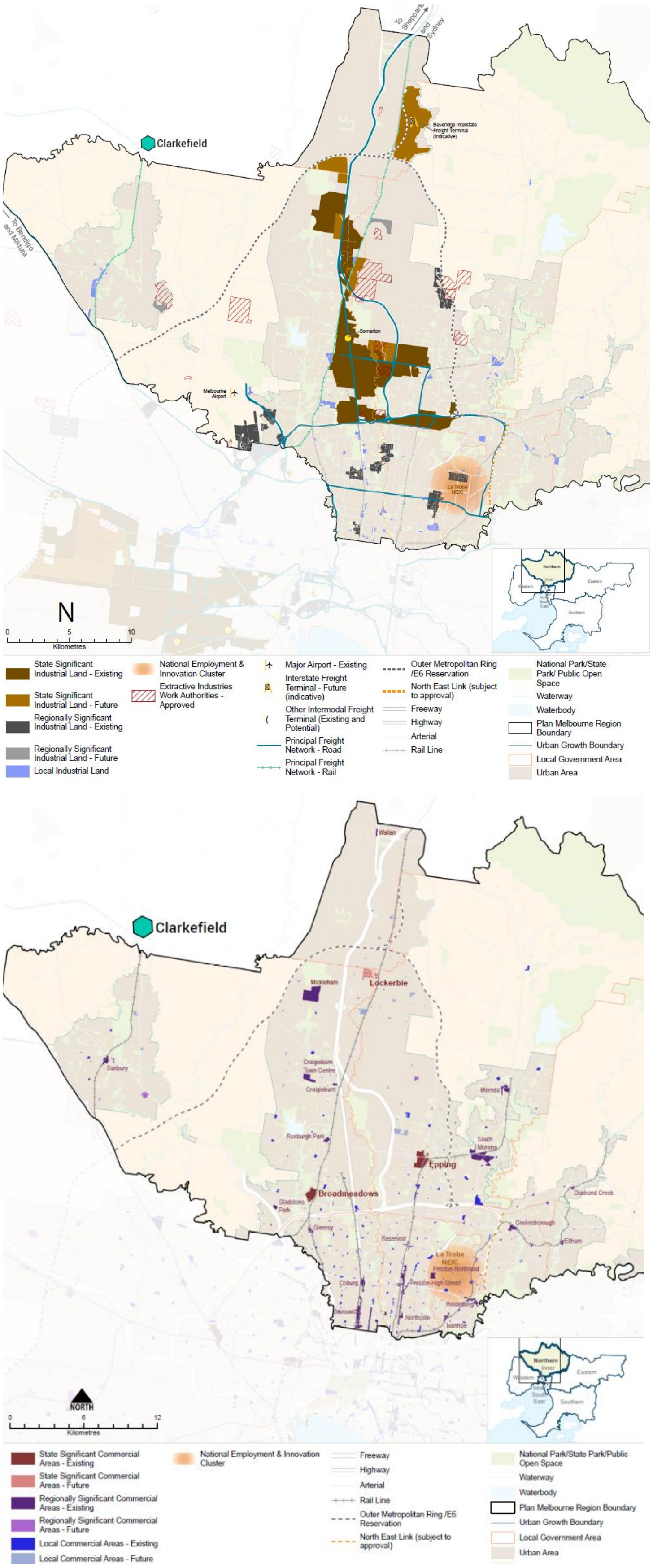
Whilst it is likely that a proportion of Clarkefield's working residents would out-commute of the Shire to service employment needs in areas such as the NSSIP, the development would also generate local employment opportunities that are contained to Macedon Ranges Shire, largely in population-driven services such as health, education, retail, hospitality and professional services.

F1. EMPLOYMENT LAND, PLAN MELBOURNE

Source: Plan Melbourne, 2017.

The Industrial and Commercial Land Use Plan (2019) prepared by the Department of Environment, Land, Water and Planning confirms the directions of Plan Melbourne, identifying the future location of industrial and commercial land in northern metropolitan Melbourne as the Northern State Significant Industrial Precinct, Beveridge Interstate Freight Terminal, Mickleham and Lockerbie, as identified in Figure 2.

F2. NORTHERN MELBOURNE INDUSTRIAL & COMMERCIAL LAND MAPS, 2019



Source: Draft Melbourne Industrial and Commercial Land Use Plan, 2019.

3. ECONOMIC PROFILE

3.1. OVERVIEW

This section provides an overview of the Macedon Ranges economy, identifying key employment areas, industry strengths, and a profile of jobs.

Macedon Range shire has an estimated resident population of 52,100, with approximately 24,000 employed persons, 15,500 local jobs and more than 5,300 businesses. The highest employing industries and economic strengths of the Shire are construction, health care, education, tourism, retail and hospitality.

T1. MACEDON RANGES ECONOMIC SNAPSHOT

	Population (ERP, 2022)	52,100
	Local Jobs (2021)	15,522
	Employed Persons (2021)	24,346
	Businesses (2022)	5,379
	Visitors (Ave. 2016 - 2019)	1.3 million per annum
	Highest employing industries (2021)	• Construction (3,239) • Health Care and Social Assistance (2,945) • Education and Training (2,554) • Public Administration and Safety (2,045) • Professional, Scientific and Technical Services (1,996)

Source: Australian Bureau of Statistics, Census of Population and Housing 2021 /Counts of Australian Businesses, 2022 / National Visitor Survey, TRA 2019.

3.2. ECONOMIC & EMPLOYMENT AREAS

In the Macedon Ranges, employment areas are generally confined to the urban areas across the shire's network of settlements. There is a lack of strategic employment land in the Shire, with the majority of industrial and commercial precincts concentrated to the urban areas.

Currently there are two regional industrial areas in the municipality, they are located in Kyneton and New Gisborne, with some smaller pockets of industrial zoned land in Romsey, Woodend, Lancefield and Riddells Creek. Industrial sites are generally occupied by uses that service the resident population, including construction (homebuilding, gardening), manufacturing (materials) and automotive uses (auto repair and servicing). Further north in Kyneton, industrial sites are also occupied by manufacturing and agriculture industrial uses.

Commercial land is located across the shire's network of activity centres. The commercial land use and business mix varies, but generally includes retail, hospitality, tourism uses, personal services and professional services. Beyond local commercial and industrial areas, Macedon Ranges also has comparative industry strengths in both agriculture and tourism, capitalising on the municipality's productive rural areas and natural assets. Primary agriculture activities in the Shire are livestock (sheep and beef), with some horticulture, viticulture, equine and agritourism.

3.3. THE TOURISM INDUSTRY

The visitor economy in Macedon Ranges contributes an estimated $456 million in output and supports 2,355 jobs, making it one of the most important industry sectors for the region.

Macedon Ranges attracts over 1.6 million visitors per annum. The majority of visitors are day trip visitors (65%), and the remaining 35% are overnight visitors. The majority of visitation is concentrated to the Kyneton and Woodend sub-regions, which together attract 68% of total visitation to Macedon Ranges.

The tourism strengths of the Shire are a mix of nature-based, history and heritage and arts and culture attractions, along with events, agritourism, and food and beverage (e.g. cafes, restaurants, wineries, breweries, fresh produce). Tourism product and attractions are dispersed across the Shire, but there is a clear concentration of product in the central and northern parts of the Shire, including Mount Macedon and Hanging Rock, as well as the tourism villages of Woodend, Macedon and Kyneton.

There is notably less tourism product in the southern part of the Shire around Gisborne, Riddells Creek and Clarkefield. The notable attraction in the south is viticulture and wineries, with a number of establishments located to the south of Gisborne and north of Riddells Creek. Importantly, there is an opportunity for the southern part of the municipality to further develop its tourism product and attract more visitation.

3.4. EMPLOYMENT PROFILE

The following section provides an assessment of the employment profile of Macedon Ranges Shire having regard to a range of indicators including labour force status by age group, unemployment rate, employment by industry, occupations and education attainment.

Data sets are benchmarked against Regional Victoria and Victoria where applicable.

3.4.1. LABOUR FORCE PARTICIPATION

The labour force participation rate refers to the proportion of the population aged 15 years and over that was employed or actively looking for work. Table 2 summarises labour force participation by age group in Macedon Ranges shire. The labour force status is comparable to other municipalities, with the overwhelming majority of employed persons aged between 18 and 60 years.

There is also a proportion of older cohorts who are considered to be semi-retirees, with 20% of employed persons aged between 60 and 69 years working part-time and a further 10% of employed persons aged between 70 and +80 years working part-time.

T2. LABOUR FORCE STATUS BY AGE GROUP, MACEDON RANGES SHIRE, 2021

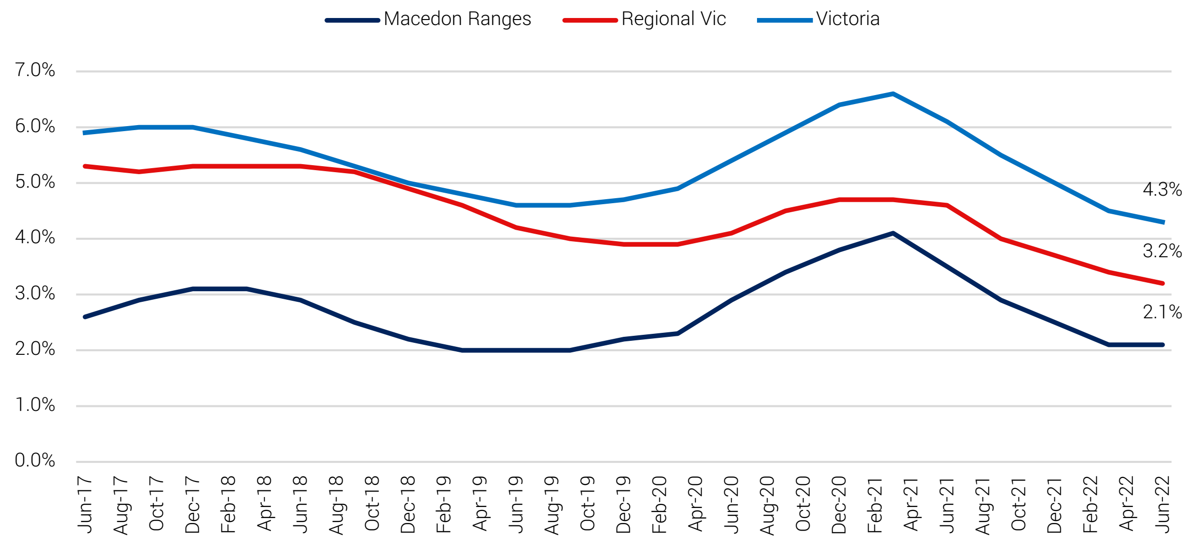
Age group (years)	Employed, worked full-time	Employed, worked part-time	Employed, away from work	Unemployed, looking for full-time work	Unemployed, looking for part-time work	Not in the labour force	Not stated	Not applicable
0-9 years	0%	0%	0%	0%	0%	0%	0%	100%
10-19 years	4%	15%	3%	0%	2%	20%	2%	53%
20-29 years	45%	26%	7%	2%	2%	12%	6%	0%
30-39 years	51%	25%	7%	1%	0%	12%	4%	0%
40-49 years	55%	25%	4%	1%	1%	9%	5%	0%
50-59 years	50%	24%	5%	1%	1%	14%	5%	0%
60-69 years	22%	20%	4%	1%	1%	47%	5%	0%
70-79 years	4%	8%	2%	0%	0%	80%	6%	0%
80 years and over	1%	2%	1%	0%	0%	86%	10%	0%
Total	**28%**	**17%**	**4%**	**1%**	**1%**	**25%**	**4%**	**20%**

Source: Labour force status, Census of Population and Housing, ABS, 2021.

3.4.2. UNEMPLOYMENT

As of June 2022, unemployment in Macedon Ranges Shire was at a record low of 2.1%, which is lower than Regional Victoria (3.2%) and Victoria (4.3%). Unemployment in Macedon Ranges Shire reached its peak in March 2021 with a rate of 4.1%. This can be attributed to the impact of the Covid-19 pandemic. Since then, unemployment has continued to decline.

F3. UNEMPLOYMENT RATE, MACEDON RANGES SHIRE, JUNE 2022



Source: National Skills Commission, Small Area Labour Markets, June quarter 2022, Rate of unemployment, Economy id 2022

3.4.3. EMPLOYMENT BY INDUSTRY

There are approximately 15,522 local jobs and approximately 24,000 employed persons in the shire. The industry sectors with the highest proportion of jobs in Macedon Ranges are mostly population-related services such as health care and social assistance (13%), education and training (11%) and retail trade (10%).

The number of jobs increased by nearly 3,000 between 2016 and 2021. Industries which experienced the highest employment growth in that time were health care, construction, public administration and safety, information media, accommodation and food services (tourism and hospitality), and education and training.

T3. NUMBER OF JOBS, MACEDON RANGES, 2016 AND 2021

Industry	2016		2021		Change 2016 - 21 (#)	Change 2016 - 21 (%)
Health Care and Social Assistance	1,565	12%	2,078	13%	+513	33%
Construction	1,140	9%	1,738	11%	+598	52%
Education and Training	1,409	11%	1,710	11%	+301	21%
Retail Trade	1,395	11%	1,602	10%	+207	15%
Accommodation and Food Services	1,040	8%	1,244	8%	+204	20%
Manufacturing	1,033	8%	1,116	7%	+83	8%
Public Administration and Safety	764	6%	1,080	7%	+316	41%
Professional, Scientific and Technical Services	722	6%	960	6%	+238	33%
Other Services	552	4%	651	4%	+99	18%
Agriculture, Forestry and Fishing	547	4%	646	4%	+99	18%
Transport, Postal and Warehousing	376	3%	452	3%	+76	20%
Administrative and Support Services	323	3%	403	3%	+80	25%
Financial and Insurance Services	407	3%	378	2%	- 29	-7%
Inadequately described or not stated	397	3%	372	2%	- 25	-6%
Arts and Recreation Services	278	2%	352	2%	+74	27%
Wholesale trade	198	2%	240	2%	+42	21%
Rental, Hiring and Real Estate Services	199	2%	197	1%	- 2	-1%
Information Media and Telecommunications	94	1%	180	1%	+86	91%
Electricity, Gas, Water and Waste Services	80	1%	115	1%	+35	44%
Mining	16	0%	8	0%	- 8	-50%
Total	**12,535**		**15,522**		**+2,987**	**24%**

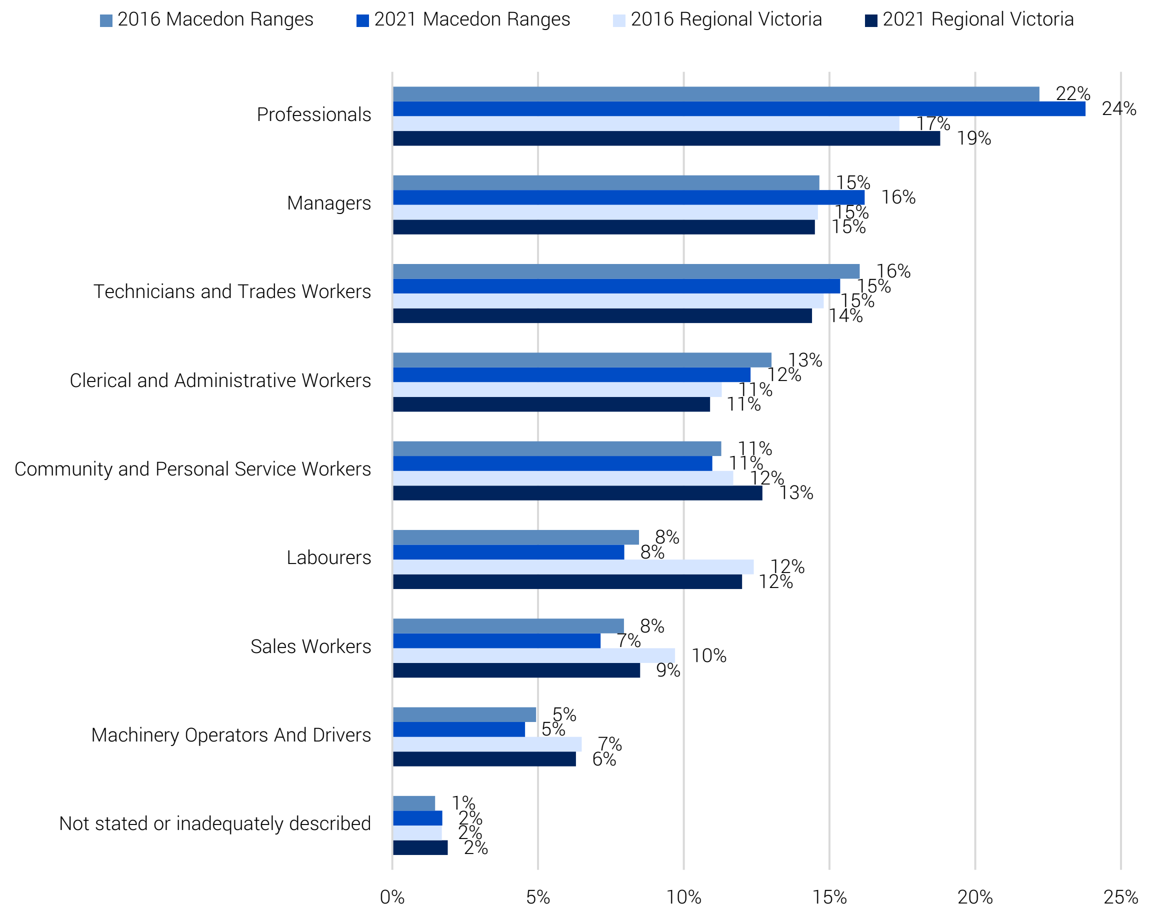
Source: Place of work, Census of Population and Housing, ABS, 2016 and 2021.

3.4.4. OCCUPATIONS

Figure 4 summarises the occupations of employed persons in Macedon Ranges Shire. A significant proportion of the labour force are employed in 'white collar' jobs, with 24% professionals and 16% managers.

Occupations that are underrepresented compared with Regional Victoria include sales workers, machinery operators, drivers and labourers. There is an opportunity for these jobs in Macedon Ranges Shire to increase over time, as the development of industrial precincts continues to materialise (e.g. Merrifield Estate, Melbourne Airport, Northern SSIP).

F4. OCCUPATION, MACEDON RANGES, 2016 TO 2021



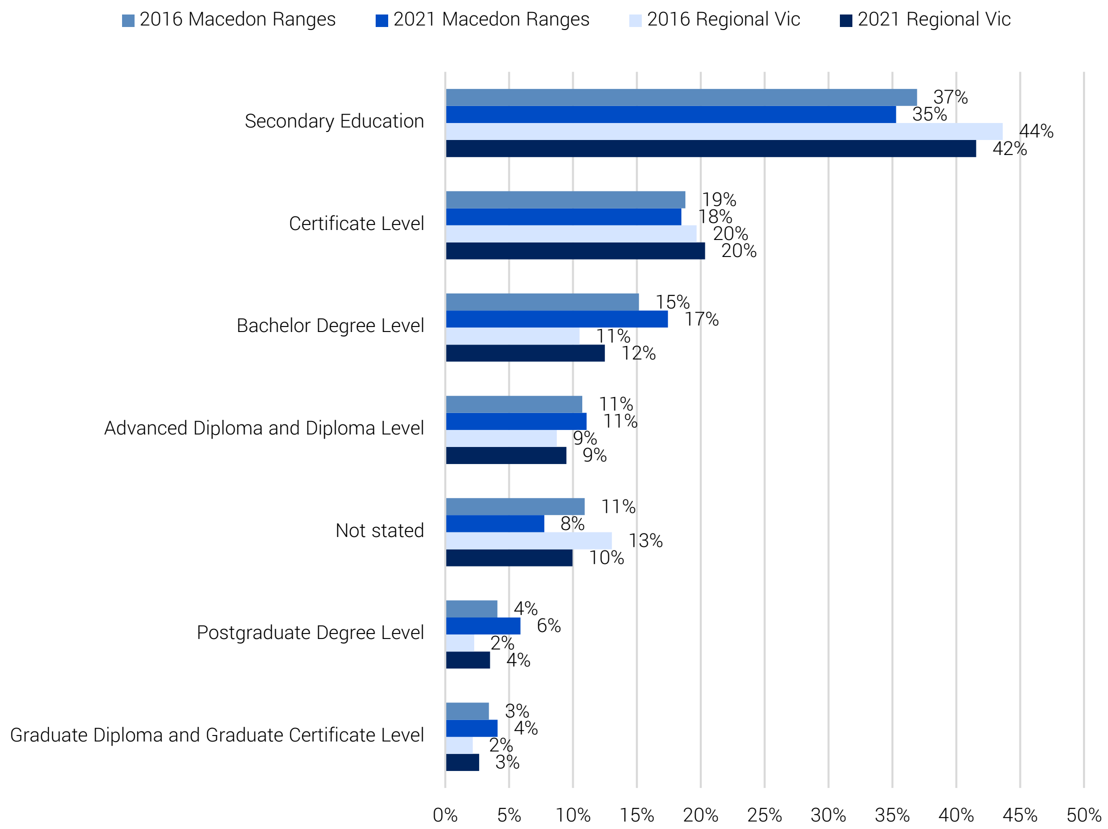
Source: Australian Bureau of Statistics, Census of Population and Housing 2016 and 2021.

3.4.5. EDUCATION ATTAINMENT

Residents of Macedon Ranges shire are skilled and qualified. There are a higher proportion of residents who have attained a bachelor degree, postgraduate degree and advanced diploma compared with Regional Victoria.

18% of residents have attained certificate level qualifications. These qualifications typically relate to apprenticeship and traineeship skills and qualifications. These qualifications lend themselves to population and business-related industries and support services such as community services, sport, fitness and wellness, hospitality, hair and beauty, administration and human resources.

F5. EDUCATION ATTAINMENT, MACEDON RANGES SHIRE, 2016 TO 2022



Source: Education attainment, Census of Population and Housing, ABS 2016 and 2021

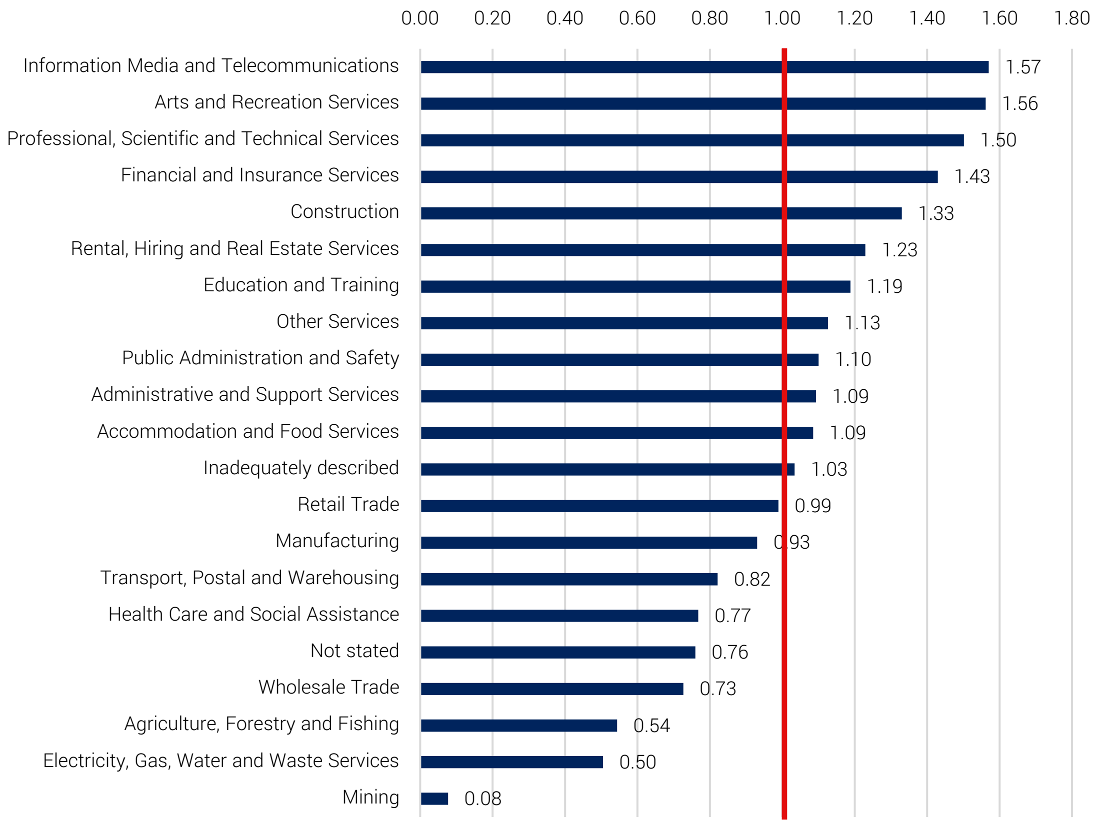
3.4.6. EMPLOYMENT SPECIALISATIONS

To understand the economic strengths and industry specialisations in Macedon Ranges Shire, relative employment comparisons can be made using the Location Quotient (LQ) technique. The LQ measures the proportion of employment in a particular industry relative to proportions in another region. The following LQ analysis compares Macedon Ranges with Regional Victoria. An industry value below 1 indicates a low proportion of employment within that industry compared with Regional Victoria. A value greater than 1 represents a higher proportion of employment and indicates a competitive advantage in that industry sector compared with Regional Victoria.

The LQ analysis in Figure 6 shows that Macedon Ranges has several industry strengths. These include information media and telecommunication, arts and recreation services, professional, scientific and technical services, financial services, construction, education and training, and rental, hiring and real estate services.

Conversely, Figure 6 shows that the shire is underrepresented for employment in ‘blue collar’ sectors such as manufacturing, transport, agriculture, electricity, gas, water and waste services. Given that the occupations held by the local workforce are aligned to these industries, it is apparent that these jobs are out-commuting and is one of the clear gaps in local employment provision.

F6. MACEDON RANGES, LOCATION QUOTIENT, 2021



Source: Place of Work. Census of Population and Housing, ABS, 2021.

3.4.7. JOURNEY TO WORK

The Shire's job containment rate is approximately 43%, meaning that over half of working residents travel outside of the shire for work. Table 4 indicates that the most significant out-commuting for employment occurs to the City of Melbourne (13%) and City of Hume (10%). This is likely due to the presence of Melbourne Airport and transport, logistics, distribution related uses in Tullamarine, as well as major activity centres in Sunbury and Craigieburn.

It is likely that professional and financial service related employment is out-commuting to inner metropolitan areas, including the City of Melbourne where a significant amount of employment is concentrated (approx. 480,000 jobs).

The Bendigo rail line and daily commuter services is a key facilitator for the centralisation of employment. However, a lower level of job containment is common for peri-urban areas due to the lower availability of strategic employment land and the scale of employment opportunities concentrated to central Melbourne.

T4. JOURNEY TO WORK, MACEDON RANGES SHIRE, 2021

Resident's Place of Work	%	Worker's Usual Residence	%
Macedon Ranges	43%	Macedon Ranges	71%
Melbourne	13%	Hume	8%
Hume	10%	Melton	3%
No Fixed Address (Vic.)	6%	Greater Bendigo	3%
Brimbank	4%	Mount Alexander	3%
Melton	2%	Hepburn	2%
Moonee Valley	2%	Mitchell	2%
Greater Bendigo	2%	Moorabool	1%
Wyndham	2%	Brimbank	1%
Mitchell	1%	Moonee Valley	1%

Source: Australian Bureau of Statistics, Census of Population and Housing 2021

3.4.8. EMPLOYMENT IMPACT OF CLARKEFIELD PROPOSAL

For the purpose of this assessment, there are two potential development outcomes that could materialise at Clarkefield:

- **Baseline scenario: District Town** – 2,365 lots as per the preliminary Development Plan;
- **Alternative scenario: Large District Town** – 3,000 lots.

In the Macedon Ranges, there is approximately 0.75 jobs per household. Applying this jobs ratio to the two Clarkefield development proposals would generate between 1,800 and 2,250 additional jobs.

Whilst it is acknowledged that a proportion of jobs would commute out of the Shire to metropolitan Melbourne and regional areas, the injection of employed residents would also generate local employment opportunities, particularly for population-driven services such as retail, hospitality, construction, health and education. These industries align with the Shire's local employment strengths.

The key employment gap is across 'white collar' industries. A high proportion of the Shire's workforce are categorised as professionals, and are highly skilled and qualified, but these types of jobs are underrepresented in the Shire, presenting an opportunity for Clarkefield. It is acknowledged, however, that it is difficult to achieve decentralisation for some employment types (e.g. professional, financial, insurance, technical services), as a proportion of jobs will always escape to metropolitan areas. The opportunity for Clarkefield should be focused around the establishment and development of these industries across home-based, micro, small and medium enterprise to support the growing population, business, visitor and agricultural base in the Shire and surrounding municipalities.

T5. NUMBER OF JOBS PER HOUSEHOLD

	Macedon Ranges
Number of Jobs per Occupied Household	0.75
Dwellings at Clarkefield (full-development)	2,365
Total Number of Jobs	**1,770**

Source: Place of Work. Census of Population and Housing, ABS, 2016, analysed by Urban Enterprise.

4. RETAIL ASSESSMENT

4.1. INTRODUCTION

This section provides an overview of retail in Macedon Ranges, including trends in retail employment, the current activity centre hierarchy, as well as the estimated retail catchment for Clarkefield and the implications for retail demand for the development proposal.

4.2. RETAIL EMPLOYMENT PROFILE

There are approximately 1,600 jobs in the retail sector in Macedon Ranges, with the sector experiencing an increase in retail jobs between 2016 and 2021 (+207 jobs).

There are also 1,244 accommodation and food services jobs in the Shire, increasing by 204 jobs over the same period; indicating that the tourism and hospitality role of the Shire is strengthening.

T6. NUMBER OF LOCAL JOBS IN RETAIL, 2016 AND 2021

Industry	2016	2021	Change 2016 to 2021 (#)	Change 2016 to 2021 (%)
Retail Trade	1,395	1,602	+207	15%
Accommodation and Food Services	1,040	1,244	+204	20%
Total	**2,435**	**2,846**	**411**	**17%**

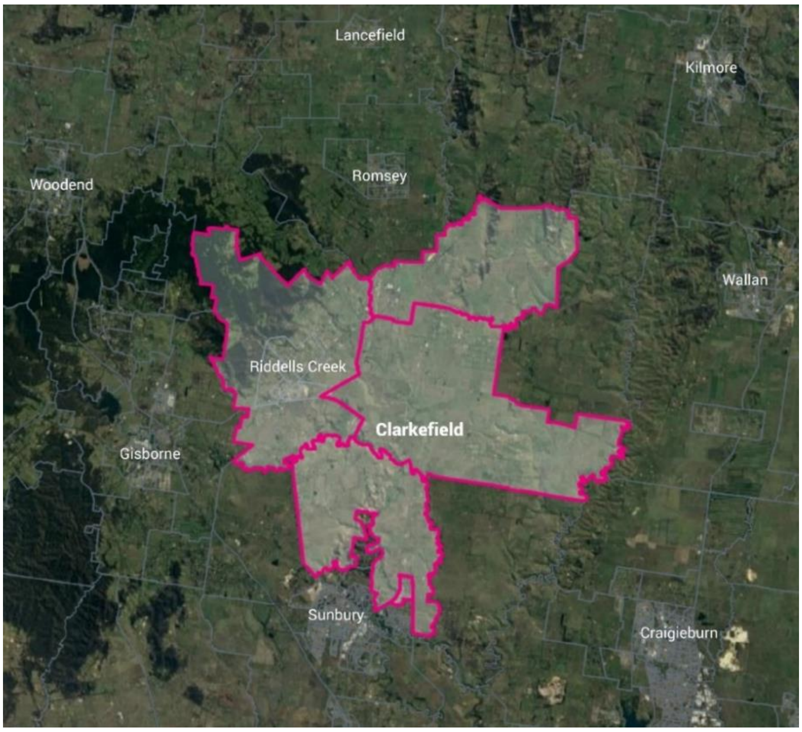
Source: Place of Work. Census of Population and Housing, ABS, 2016 and 2021.

4.3. CLARKEFIELD RETAIL CATCHMENT

Clarkefield's primary retail catchment is shown in Figure 8. The catchment includes the township itself, Riddells Creek and rural areas to the north, south and east of Clarkefield. Whilst it is acknowledged that Clarkefield would attract expenditure from outside of this catchment (including from non-locals and visitors), it is estimated that these local areas would form the primary retail catchment area.

Riddells Creek has an existing retail offering and would therefore be the primary retail centre for local residents of Riddells Creek. However, if Clarkefield provides a unique retail offer to Riddells Creek, then there is likely to be a portion of market share that is distributed across both centres.

F7. PRIMARY RETAIL CATCHMENT, CLARKEFIELD



Source: Urban Enterprise, 2020

REGIONAL RETAIL HIERARCHY

A retail hierarchy assesses the categorisation and order of retail centres in a given region having regard to the economic role, business/retail mix and the scale of each centre.

A retail hierarchy has been prepared for the region surrounding Clarkefield (see Table 7) in order to assess the current role and business mix of competing retail centres in proximity to Clarkefield, whilst also identifying potential retail and service gaps in the retail offering.

The retail hierarchy in Table 7 indicates the following:

- Craigieburn is classified as a major regional centre and is the highest order retail centre in the region, with a significant amount of occupied retail floorspace, multiple full-line supermarkets, discount department stores, national brand retailers and speciality stores. Craigieburn attracts shoppers from across the broader region, including northern metropolitan Melbourne and also throughout Macedon Ranges.
- Sunbury is classified as a regional centre and is the second largest activity centre in the region. Sunbury has a developing retail offering that is growing in-line with its resident population. Similar to Craigieburn, Sunbury has multiple full-line supermarkets, large format/bulky good retailers such as Bunnings and the Good Guys, as well as discount department stores (e.g. Target, Big W and Harris Scarfe).
- Gisborne and Wallan are classified as large Neighbourhood Centres, offering a mix of supermarkets retailing, speciality retail, personal services and casual hospitality/food services. These centres primarily cater to local residents and workers, with limited capacity to capture retail expenditure beyond supermarket speciality food items, retail services (e.g. pharmacy, hair & beauty, fitness), casual dining and take away.
- Woodend is classified as a Neighbourhood Centre. Woodend has notable strengths in hospitality and tourism, with high-quality restaurants, cafes and wine bars/breweries that appeal to both locals and visitors. Beyond Woodend, there are limited examples of high quality hospitality and tourism uses, particularly in the southern part of the Shire.
- Riddells Creek and Romsey are classified as Local Centres given that they include a small amount of occupied retail floorspace compared with townships such as Woodend, Gisborne and Wallan. Further, these townships do not currently have the resident population to support a full-line supermarket (e.g. 3,000+ sqm). Instead, they both include small supermarkets (e.g. Foodworks and IGA).

T7. REGIONAL RETAIL HIERARCHY

Township	Distance from Clarkefield	Category / Classification	Retail Role / Business Mix	Major Retailers
Craigieburn	28 km (27 mins)	Major Regional Centre	Major shopping precincts such as Craigieburn Plaza and Craigieburn Central include a mix of: - Full-line supermarkets - Large format, bulky goods - Discount department stores - Homemaker - National brand retailers - Speciality stores	Bunnings JB-HiFi Big W Target Coles, Woolworths, Aldi Rebel Sport
Sunbury	17 km (17 mins)	Regional Centre	- Full-line supermarkets - Large format, bulky goods - Discount department stores - Car dealerships - National brand retailers - Speciality stores	Target Big W Bunnings The Good Guys Coles, Woolworths, Aldi Harris Scarfe
Wallan	32 km (25 mins)	Large Neighbourhood Centre	- Full-line supermarket - Convenience supermarkets - Speciality stores - Retail services - Hospitality	Coles, Woolworths, Aldi Home, Timber and Hardware

Gisborne	19 km (17 mins)	Large Neighbourhood Centre	- Full-line supermarket - Convenience supermarkets - Speciality stores - Retail services - Hospitality	Coles Aldi (estimated completion in 2020) Foodworks, Supa IGA
Woodend	32 km (28 mins)	Neighbourhood Centre	- Full-line supermarket - Speciality stores - Retail services - Hospitality	Coles Target
Riddells Creek	11 km (10 mins)	Local Centre	- Convenience supermarket - Speciality stores - Hospitality	Foodworks
Romsey	16 km (14 mins)	Local Centre	- Convenience supermarket - Speciality stores - Hospitality	Supa IGA

Source: Urban Enterprise, 2020

4.4. IMPLICATIONS FOR RETAIL DEMAND

Two ultimate development scenarios have been modelled for Clarkefield to estimate the scale of retail floorspace that could be supported.

- **Baseline scenario: District Town** – 2,365 lots (as per the preliminary Development Plan);
- **Alternative scenario: Large District Town** – 3,000 lots (assumes a higher residential density).

The supportable retail floorspace that would be supported at full development of Clarkefield is summarised in Table 8.

For the baseline scenario, an estimated 6,000 sqm of retail floorspace could viably be supported in Clarkefield. For the alternative scenario, an estimated 8,000 sqm of retail floorspace could viably be supported in Clarkefield.

The retail role of a local catchment of this scale (~6,150-8,000 residents) could typically support a Neighbourhood Activity Centre (6,000-8,000sqm), which includes a supermarket (half or full-line), speciality retailers (e.g. bakery, butcher, etc), casual hospitality uses (e.g. cafes) and retail services (e.g. pharmacy, hair, beauty etc.)

T8. SUPPORTABLE RETAIL FLOORSPACE, BASELINE & ALTERNATIVE SCENARIO, CLARKEFIELD

Indicator	Baseline scenario: District Town	Alternative scenario: Large District Town
Ave Household Size	2.6	2.6
Number of Dwellings in Clarkefield	2,365	3,000-3,150
Estimated Population	6,150 residents	7,800-8,200 residents
Estimated supportable retail floorspace	**~6,000 sqm**	**~8,000 sqm**

Source: Place of Work. Census of Population and Housing, ABS, 2011 and 2016 and analyses by Urban Enterprise, 2020

Typically, a catchment population of at least 8,000 residents is required to support a full-line supermarket (i.e. 3,000+ sqm). The baseline development scenario for Clarkefield (approx. 6,150 residents) would fall short of the population trigger. However, given that the neighbouring townships of Riddells Creek would form part of Clarkefield's primary retail catchment and does not currently contain a full-line supermarket, there would be an opportunity for Clarkefield to support a full-line supermarket that services both Clarkefield and Riddells Creek. Combined, these areas would satisfy the typical resident threshold required to trigger the need for a full-line supermarket (i.e. in the order of 3,000+ sqm).

The alternative development scenario (approx. 8,000 residents) would reach the population threshold that would trigger the need for a full-line supermarket.

To not disrupt the retail hierarchy and potentially direct market share away from existing traders, it is acknowledged that the point at which Clarkefield nears full development is when the catchment could viably support another supermarket.

Beyond supermarket retailing, the retail and hospitality gaps in the southern part of the Shire and the clear opportunity for Clarkefield is to provide a high-quality hospitality offering that is targeted towards locals, non-locals (e.g. Sunbury, Craigieburn) and visitors (e.g. domestic and international). This would align with the existing tourism strengths of the Shire, particularly in townships to the north such as Woodend, Macedon and Kyneton. Improving the tourism product offering in the south of the municipality is a gap that Clarkefield could address.

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