



SGS Economics and Planning: Employment Land Needs Assessment for the Bentleigh, Carnegie, and Elsternwick Major Activity Centres

Report prepared for the City of Glen Eira

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Executive summary

Introduction

SGS Economics and Planning (SGS) has prepared this employment needs assessment for the City of Glen Eira (Council) to support the preparation of three Major Activity Centre structure plans (Bentleigh, Carnegie and Elsternwick). The assessment extends on previous employment analysis from 2018, based on more recent economic data and trends, including an initial understanding of the impacts of COVID-19 (as of January 2022). It also draws on additional information identified from Council's new Housing Strategy prepared during 2021.

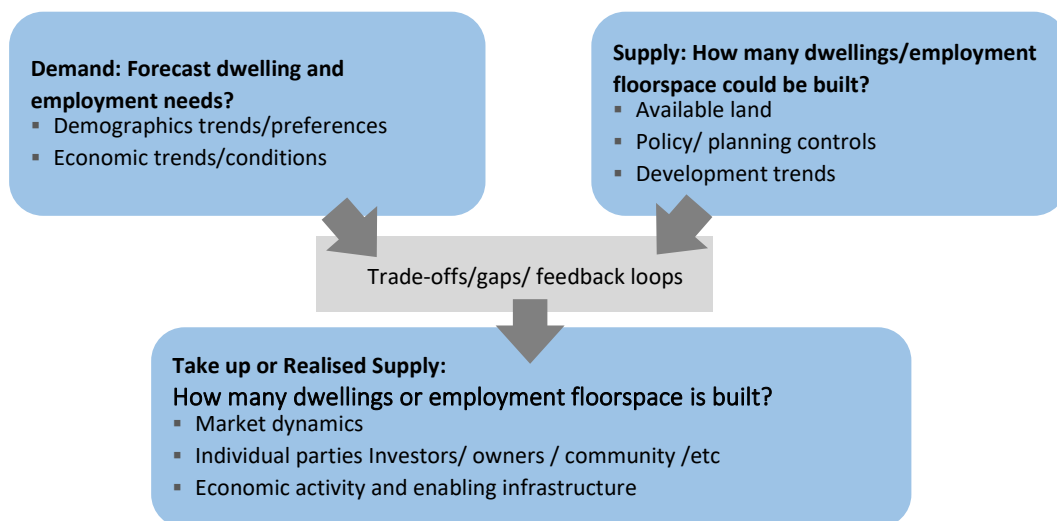
The employment needs assessment considers both retail and (non-retail) commercial needs in accordance with Planning Practice Note 58 - Structure planning for activity centres. It reviews baseline retail demand, per capita expenditure and floorspace demand ratios, and considers other research and indicators that may affect demand in light of COVID-19.

Approach to assessing Glen Eira's capacity to absorb employment growth

Assessing whether existing planning controls and the structure plans adequately cater to future development, requires an understanding of how much growth is anticipated, how much development is possible and, based on that, where is growth anticipated to occur (or be constrained).

These dynamics are summarised in the figure below and form the basis of the analysis approach.

DEMAND, SUPPLY AND CAPACITY APPROACH



Source: SGS Economics and Planning.

- *Demand* forecasts consider population and economic trends and drivers to determine employment floorspace requirements over a particular time period.
- *Capacity* is an (untimed) estimate of the quantum of housing and employment floorspace that could be accommodated in an area, based on existing planning controls and development trends.
- *Take up*, or 'realised supply,' is an estimate of the amount of capacity that could be taken up by demand over a particular time period.

Overall SGS considered employment floorspace demand and capacity across three broad types (Retail, retail services and commercial office).

Given the uncertainty in employment floorspace trends and the ability for the development market to potentially respond to constrained capacity SGS has considered two scenario for both demand and capacity as presented below.

DEMAND AND CAPACITY ANALYSIS SENSITIVITIES

		Capacity	
		Scenario C1: employment uses on ground floor and <u>50 percent</u> of the first floor	Scenario C2: employment uses on ground floor and <u>100 percent</u> of the first floor.
Demand	Scenario D1: business as usual commercial demand trends	D1/C1	D1/C2
	Scenario D2: increased working from home demand trends	D2/C1	D2/C2

Limitations and Interpretation

The retail and hospitality sector had been undergoing significant changes before COVID-19 and has been significantly impacted during the period. As a result, forecasts of the sector are currently uncertain and trends should be closely monitored over the next 2-5 years. The commercial services (office) sector has also been evolving and new hybrid working models presents uncertainty for space needs.

This uncertainty is likely to be reduced at a more aggregate sector or spatial scale as the growing population is still likely to create demand for goods and services – while the form of spaces will evolve. As a result, it will be important to support and allow flexibility with these evolving employment sectors.

In addition, capacity calculated in this study is a theoretical capacity based on average development assumptions aligned with what is permissible under planning controls. The assessment has not considered, if the development is feasible given current or future market conditions, if a landowner is willing to develop any individual site, or the likelihood of a planning permit being issued.

In reality, any one individual site will likely vary from this modelled capacity/development outcome and results should be interpreted at the precinct wide scale to inform strategic and structure planning.

Assessment findings

Overall the assessment has found there is a need for between 179,100 to 216,00 sqm of additional employment floorspace across the network of centres in Glen Eira. This demand is split between retail, retail services and commercial office needs. Around 30 per cent of this demand is located within the three Major Activity Centres - Bentleigh, Carnegie and Elsternwick.

Based on existing planning controls there is capacity for between 252,800 and 304,800 sqm of additional employment floorspace in Glen Eira under the current zones. The vast majority of this net capacity is through employment development above the ground floor, with there being relatively little net capacity at the ground floor across centres. Around 20 per cent of net capacity is located within the three Major Activity Centres of Carnegie, Elsternwick and Bentleigh.

Alignment of demand and capacity indicates there is not aggregate shortfall under any scenario across the whole network of centres. However, there are shortfalls for specific centres and for additional ground floor employment floorspace to support continued growth of retail needs.

This shortfall is largely addressed if there is increased employment capacity realised above the ground floor – highlighting a need for both policy and other supportive measures that would help realise that outcome.

Most centres have no or little additional (net) capacity at the ground floor. While there is demand for additional retail and retail services over the forecast period, it is unlikely a significant proportion of that would occupy first floor net capacity. In reality, the ground floor is likely occupied by a mix of retail, retail services and commercial uses (see Section 2) currently, and as demand for retail and retail services continues to increase a greater proportion of the ground floor floorspace will become occupied by these consumer facing businesses and commercial uses will increasingly shift to the first floor and above. This should be encouraged and can support greater activation of the street and centre.

The following provides an overview of the results under each scenario for the Major Activity Centres.

MAC BASELINE DEMAND (SCENARIO D1), NET CAPACITY AND SHORTFALL, SQM

Area		Bentleigh	Carnegie	Elsternwick
Existing (2021) floorspace	GF	44,900	59,400	79,200
	1+F	3,000	13,500	12,800
	Total	47,900	73,000	91,900
Additional floorspace demand (D1) 2021-2036	Retail	12,700	10,100	10,400
	Retail Services	2,400	2,900	4,400
	Commercial	7,600	5,900	8,900
	Total	22,700	18,900	23,700
Net capacity (C1)	GF	0	0	0
	1+F	20,900	22,300	8,300
	Total	20,900	22,300	8,300
	Surplus/Shortfall	-1,800	3,400	-15,400
Net capacity (C2)	GF	0	0	0
	1+F	44,700	46,100	26,900
	Total	44,700	46,100	26,900
	Surplus/Shortfall	22,100	27,200	3,200

Source: SGS Economics and Planning 2021. (Note: some figures may not sum due to rounding)

MAC REDUCED DEMAND (SCENARIO D2), NET CAPACITY AND SHORTFALL, SQM

Area		Bentleigh (sqm)	Carnegie (sqm)	Elsternwick (sqm)
Existing (2021) floorspace	GF	44,900	59,400	79,200
	1+F	3,000	13,500	12,800
	Total	47,900	73,000	91,900
Additional floorspace demand (D2) 2021-2036	Retail	12,700	10,100	10,400
	Retail Services	1,700	2,000	3,000
	Commercial	5,800	4,600	6,800
	Total	20,200	16,600	20,200
Net capacity (C1)	GF	0	0	0
	1+F	20,900	22,300	8,300
	Total	20,900	22,300	8,300
	Surplus/Shortfall	700	5,600	-11,900
Net capacity (C2)	GF	0	0	0
	1+F	44,700	46,100	26,900
	Total	44,700	46,100	26,900
	Surplus/Shortfall	24,600	29,500	6,600

Source: SGS Economics and Planning 2021. (Note: some figures may not sum due to rounding)

Policy implications

While the retail and office floorspace figures have been apportioned to 'ground floor' and 'first floor' for the purposes of delineating both need and supply, in practice and on a site-specific basis, this may not be the product that is produced. Commercial 1 Zone allows retail and commercial uses in any part of a building. This model has been prepared based on the likely outcome of retail typically at ground floor and an office typically above. However, the modelling or policy does not guarantee this outcome.

Likewise – commercial office capacity is only based on assumptions and although there may be adequate theoretical capacity, the current planning controls do not guarantee that the market will deliver office floorspace above the ground floor. Without specific areas for certain uses in the planning controls, the market will determine the land use mix within the zone provisions. Additionally, office land use competes with residential land use for priority due to land value and sales prices.

Redevelopment of existing floorspace could be possible through the redevelopment and consolidation of existing sites. This could push existing ground floor uses, such as offices or dance studios, onto the first floor of centres. This would then free up ground floor floorspace and encourage efficiencies through shared services.

Council currently has limited levers available to increase retail development. Design policies could indicate Council's intention, while not being enforceable when assessing planning applications. They may illustrate Council's intention when negotiating with developers over prospective developments. Any rezoning of land off the current retail strip, with the exception of logical inclusions at the edge of centres, should be discouraged, as this would shift activity outwards. There is also a significant amount of uncertainty for retail in the future, and a greater proportion of retailing activity being shifted online may result in a lower traditional retail floorspace requirement.

1. Introduction

1.1 Project context

In 2018, SGS Economics and Planning (SGS) was commissioned to review the *Activity Centre, Housing and Local Economy Strategy* (ACHLE Strategy) which was developed internally by the City of Glen Eira. The ACHLE Strategy was intended to be implemented via a Planning Scheme Amendment and guide future local planning and policy. As part of that review SGS prepared high level employment floorspace estimates (including retail and commercial needs) for all Activity Centres in the City of Glen Eira.

This report updates and extends on that previous work to support the preparation of three Major Activity Centre structure plans (Bentleigh, Carnegie and Elsternwick). This employment needs assessment is based on more recent economic data and trends, including an initial understanding of the impacts of COVID-19 (as of November 2021). It also draws on updated population and dwelling information identified in Council's new Housing Strategy, which was prepared during 2021 with support from SGS via a parallel engagement.

1.2 Report purpose and approach overview

The purpose of this report is to understand how much retail and commercial floor space will be needed within Glen Eira's activity centres (specifically focusing on the three Major Activity Centres - Bentleigh, Carnegie and Elsternwick), where/how should this be accommodated, and how this aligns with planned supply/capacity. The report has been prepared in accordance with '*Planning Practice Note 58 - Structure planning for activity centres*' to assist Council to plan for Carnegie, Elsternwick and Bentleigh Major Activity Centres.

To address this SGS has completed the following:

- **Demand assessment** of retail floorspace and (non-retail) commercial floorspace needs based on the latest economic trends and population projections for Glen Eira. This included a sensitivity around potential commercial floorspace requirements given uncertainties associated with working from home.
- **Capacity assessment** of employment floorspace based on current and proposed planning controls. This included a sensitivity around the amount of first floor floorspace available for employment uses.
- **Realisation, alignment and recommendations** compares demand and capacity to estimate likely take up for each centre. Any gaps and other recommendations are then highlighted to inform centre planning.

Modern employment uses increasingly operate on a continuum as they adapt to changing consumer needs and operational models. For the purposes of this assessment, we have considered three broad types:

- **Retail** – including retail shops (i.e. supermarket), hospitality (i.e. café)
- **Retail services** including hairdresser, local GPs, local art and recreation services
- **Commercial** – including professional service, real estate agents, accountants and other office-based firms

Additional information on the specific data sources, assumptions and method used is provided in Appendix A.

The following table provides an overview of the two demand and two capacity sensitivities:

TABLE 1 DEMAND AND CAPACITY ANALYSIS SENSITIVITIES

		Capacity	
		Scenario C1: employment uses on ground floor and <u>50 percent</u> of the first floor	Scenario C2: employment uses on ground floor and <u>100 percent</u> of the first floor.
Demand	Scenario D1: business as usual commercial demand trends	D1/C1	D1/C2
	Scenario D2: increased working from home demand trends	D2/C1	D2/C2

1.3 Limitations and interpretation of results

The retail and hospitality sector had been undergoing significant changes before COVID-19 and has been significantly impacted during the period (further discussed in Section 3.1). As a result, forecasts of the sector are currently uncertain and trends should be closely monitored over the next 2-5 years. The commercial services sector has also been evolving and new hybrid working models present uncertainty for office space needs.

This uncertainty is likely to be reduced at a more aggregate sector level (i.e. overall retail/commercial sector vs just cafes) or spatial scale (i.e. across all Glen Eira Centres vs one individual centre) as the growing population is still likely to create demand for goods and services – while the form of spaces will likely evolve. As a result, it will be important to support and allow flexibility across broad employment uses to allow for innovation and change, while still planning for sufficient employment space overall.

In addition, capacity calculated in this study is a theoretical capacity based on average development assumptions aligned with what is permissible under planning controls. The assessment has not considered, if the development is feasible given current or future market conditions, if a landowner is willing to develop any individual site, or the likelihood of a planning permit being issued.

In reality, any one individual site will likely vary from the modelled capacity/development outcome and results/assumptions should be interpreted at the precinct scale to inform strategic and structure planning.

2. Existing employment floorspace

The following section outlines the approach to estimating the existing level and distribution of employment floorspace within Glen Eira Activity Centres.

2.1 Existing employment floorspace within centres

A range of detailed data inputs was used to synthesise an up to date understanding of existing (as of 2021) employment floorspace within Glen Eira activity centres. The approach used is as follows:

- SGS has drawn on the **Geoscape** database which provides up-to-date information on the building footprint, height, floorspace and presence of residential uses for every property parcel.
- Ground floor (GF) and first floor and above (1+F) floorspace for non-residential parcels within commercial zones (C1Z, C2Z, MUZ) has been extracted for each activity centre within Glen Eira.
- To estimate the type of employment uses likely to occupy this floorspace, SGS has first considered the composition of jobs within each activity centre based the 2021 SGS Small Area Model (SAM) employment forecasts for 2021 (which is originally based of the 2016 Census employment).
 - **Retail** is aligned with the *Retail Trade and Accommodation and Food Services* industries
 - **Retail Services** is aligned with *Other Services*, (part-75%) *Arts and Recreation Services*, and (part-50%) *Health Care and Social Assistance*.
 - **Commercial** is aligned with *Information Media and Telecommunications, Financial and Insurance Services, Rental, Hiring and Real Estate Services, Professional, Scientific and Technical Services, Administrative and Support Services*, and (part-25%) *Arts and Recreation Services*
- Retail floorspace is then calibrated to align with floorspace audit data provided in the Blair Warman Economics (BWEC) Glen Eira Economic Analysis and Forecasting Study (February 2018). This report included an extensive audit (undertaken in 2016) of retail uses (including food, non-food and hospitality) for each activity centre within Glen Eira. 2016 audit data was extrapolated to 2021 based on the growth in retail floorspace demand.

Based on this approach, the following table presents the estimated existing employment floorspace across Glen Eira’s activity centres. The total employment floorspace is summarised by ground floor (GF) and first floor and above (1+F) floorspace; and by broad employment types.

Typically, we would expect retail and retail services to primarily occupy ground floor premise, while there may be some exceptions (i.e. a restaurant with first floor seating/function space, or a shop with first floor storage/showrooms, etc).

This highlights there is around **432,300 square metres** of employment floorspace across the 15 Major and Neighbourhood activity centres of Glen Eira. 88 per cent of employment floorspace is current at the ground floor. Around 169,000 square meters (or 39 per cent) is represented by retail uses with Retail Services and Commercial Services both representing around 30 per cent each.

Bentleigh, Carnegie and Elsternwick Major Activity Centres represent around 50 per cent of existing employment floorspace uses.

TABLE 2 EXISTING (2021) EMPLOYMENT FLOORSAPCE, SQM

Centre	GF	1+F	Total	Retail	Retail Services	Commercial	Total
Bentleigh	44,900	3,000	47,900	31,200	8,200	8,600	47,900
Carnegie	59,400	13,500	73,000	30,000	22,400	20,500	73,000
Elsternwick	79,200	12,800	91,900	31,000	28,500	32,400	91,900
Caulfield Junction	4,900	200	5,000	3,300	700	1,000	5,000
East Village	0	0	0	0	0	0	0
Alma Village	3,600	0	3,600	1,100	1,000	1,500	3,600
Caulfield Park	19,200	4,500	23,700	4,800	6,600	12,300	23,700
Caulfield South	49,800	5,000	54,800	12,800	23,300	18,800	54,800
East Bentleigh	22,400	0	22,400	10,400	5,800	6,200	22,400
Glen Huntly	23,600	900	24,400	13,100	5,500	5,900	24,400
Hughesdale	5,300	0	5,300	3,300	1,000	900	5,300
McKinnon	12,800	500	13,300	4,800	4,900	3,600	13,300
Moorabbin	17,100	4,800	21,900	4,400	7,800	9,700	21,900
Murrumbeena	14,500	600	15,100	5,300	5,600	4,200	15,100
Ormond	25,100	4,800	29,900	13,700	6,800	9,400	29,900
Total	381,800	50,500	432,300	169,100	128,100	135,000	432,300

Source: SGS Economics and Planning

3. Demand assessment

This section presents the retail and commercial floorspace demand approach and findings. Further detail on the method is provide in Appendix A.

3.1 Potential impacts of COVID on the retail and commercial sectors

This report was prepared during the COVID-19 pandemic and both the direct and lasting impacts were still unfolding and somewhat unknown - with limited detailed data available. However, through analysis of early economic indicators and trends some potential impacts relevant to Glen Eira centres are set out below.

Retail sector

- Forced closures from Melbourne’s extended lockdowns resulted in significant but varied impacts on retail and hospitality businesses during the COVID pandemic. Government support along with other changes to operations (i.e. increased online sales) provided some support for many businesses during the period. As a result, some sub-sectors actually saw significant growth in sales during the period (i.e. supermarkets, hardware, take-away food). However, many smaller businesses struggled and ultimately had to close.
- Structural changes in the retail sector from before the pandemic have likely been accelerated. For example, trends in online retail have effectively skipped forward 3-5 years, likely meaning reduced aggregate demand for physical retail floorspace. However, this will largely impact more traditional and commoditised retail shops and there will continue to be expanded opportunities for experience-based retailers with unique products and services – many of which are found in Glen Eira’s vibrant strip shopping areas. Those who are also able to access online communities and markets to expand their reach will benefit from this new retail landscape in particular – this could actually see broader online sales actually supporting local highly innovative retail floorspace/businesses.
- Broader trends in the commercial services sector (discussed below) could mean an increase in people working from home and remaining local during working hours. This will flow on to additional demand for local retail services which they would have otherwise consumed closer to their work (i.e. a lunch/coffee)

Commercial sector

- During the COVID pandemic much of the office-based workforce shifted to a working-from-home model for large periods of time as a result of various stay at home orders. While this impacted the sector very early in the pandemic, once technology and systems were in place, most office-based businesses have been able to continue to adapt and have remained relatively unaffected since.
- Hybrid working models were already emerging before the pandemic and this experience is likely to have accelerated that trend dramatically. Once restrictions are fully removed, it is likely most workers will still come back into a physical office some days, and will also continue to work from home some days. Where this new balance lands is currently uncertain. Furthermore, when people do attend an office it will increasingly be for a ‘purpose’ – a meeting, collaboratively addressing a complex/abstract problem, a desire to be in a quality environment. As a result, the nature of office spaces may change.

More flexible tenures and spaces, along with more co-working spaces may become preferred. This presents opportunities for suburban locations such as Glen Eira.

3.2 Retail floorspace demand

Retail floorspace is broadly defined as businesses in the following categories:

- Supermarkets and groceries,
- Specialty food and non-food store, and
- Hospitality (including cafes, restaurants and bars)

The SGS Retail expenditure model forecasts the local pool of retail expenditure based on Glen Eira population demographic forecasts (sourced from id consulting) and average per capita retail spending trends.

Existing local expenditure per capita by retail category is sourced from *MarketInfo* at ABS Statistical Area 1 (SA1) geography. *MarketInfo* derives local level expenditure data using the latest 2016 ABS Census and 2015-16 ABS Household Expenditure Survey. Is regarded as the industry benchmark regarding local expenditure trends.

SGS projected retail expenditure trends forward to 2036 using data from the ABS Retail Trade series for Victoria. The ABS Retail Trade series provides data on historical growth of real consumption by commodity category. These rates of growth are used to forecast change in real expenditure (i.e. excluding inflation).

SGS also accounts for the increasing online retail market share impacting the sector. Based on national level data from the ABS Retail Trade series SGS has assumed 8.5 percent of retail spend goes to online retailers.

Local population forecasts (sourced from id consulting) and local per capita expenditure forecasts are then combined to estimate the total amount of residential retail expenditure forecast in Glen Eira.

Resident expenditure is then aligned with the existing Glen Eira retail centre floorspace and information on retail catchments based on the BWEC report (February 2018). This indicates residents account for around 80 percent of activity centre retail spend, while the remaining 20 percent is retail spending by non-residents. These existing catchment market shares are held constant over the forecast period.

Glen Eira activity centre forecast retail floorspace demand is then allocated across the existing network of centres based on the relative size. Within this overall retail demand, East Village is separately accounted for with an additional 12,000 square metres in retail floorspace by 2036. This is the size proposed in the relevant Comprehensive Development Plan¹ and would make it fit well within the retail hierarchy (a broad retail offering but not competing with higher order centres).

Based on the above, it is estimated that there will be demand for a **total additional 71,300 square metres of retail floorspace to 2036 across Glen Eira's 15 activity centres.**

¹ <https://vpa-web.s3.amazonaws.com/wp-content/uploads/2021/04/East-Village-Comprehensive-Development-Plan-City-of-Glen-Eira-May-2020.pdf>

3.3 Retail services floorspace demand

Retail services is broadly defined as businesses in the following categories:

- Local health and social assistance services (i.e. GPs, osteopathy, etc)
- Local arts and recreation services (i.e. gym, local gallery, etc)
- Other services (i.e. hairdressers)

Demand for retail services was estimated drawing on the SGS Small Area Model (SAM) employment projections for selected industries (See Appendix A for further detail on SGS SAM). The industries included for retail services floorspace demand projections, and their employment to floorspace ratios (sqm), are listed below:

- Health Care and Social Assistance (1:30).
- Arts and Recreation Services (1:50).
- Other Services (1:50).

For the modelling, it was assumed that half of the floorspace from “Health Care and Social Assistance”, and “Arts and Recreation Services” and all “Other Services” floorspace functions as retail services.

By 2036, it is estimated that there will be demand for **an additional 41,395 sqm of retail services floorspace across Glen Eira.**

3.4 Commercial floorspace demand

Commercial services is broadly defined as office-based businesses (excluding retail and retail services).

SGS has forecast demand for commercial floorspace based on SGS Small Area Model (SAM) employment projections for selected industries. This focused on industries which would most likely create demand for office based floorspace within Glen Eira activity centres - as opposed to industrial, retail, retail service or other employment floorspace forms. Additionally, industries typically related to government employment were not included (such as public administration and education), as these are typically occurring on Public Use zoned land, or outside of activity centre assessment areas. The industries included for commercial floorspace demand projections, and their employment to floorspace ratios (square metres), are listed below:

- Information Media and Telecommunications (1:24).
- Financial and Insurance Services (1:19).
- Rental, Hiring and Real Estate Services (1:24).
- Professional, Scientific and Technical Services (1:22).
- Administrative and Support Services (1:25).

Applying these standard floorspace to job ratios to these industries yields an **additional demand of 103,277 square metres of commercial floorspace by 2036 across Glen Eira.**

3.5 Demand sensitivity

As highlighted in Section 1.3 and 2.1 there is some uncertainty around the future of employment floorspace needs due to both broader structural changes and the recent impacts of the COVID pandemic.

As a result, SGS has established a demand sensitivity (Scenario D2) which considers the impact of reduced commercial employment floorspace demand as a result of sustained higher levels of working from home post pandemic. This demand sensitivity gradually reduces the above job to floorspace ratios based on the assumption that 50 per cent of office workers continue to work 2 days per week from home and business respond by reduce floorspace requirements by 50 per cent in relation to this component of working from home drop in attendance and associated floorspace needs.

3.6 Employment floorspace demand results

The following table summaries additional employment floorspace demand by centre for 2021 to 2036 under the two demand scenarios. This highlights a need of between 179,100 and 216,000 square metres of additional employment floorspace is required across the activity centre network.

TABLE 3: ADDITIONAL EMPLOYMENT FLOORSPACE DEMAND (2021-2036), SQM

Centre	Baseline demand (Scenario D1)				Reduced demand (Scenario D2)			
	Retail	Retail Services	Commercial	Total	Retail	Retail Services	Commercial	Total
Bentleigh	12,700	2,400	7,600	22,700	12,700	1,700	5,800	20,200
Carnegie	10,100	2,900	5,900	18,900	10,100	2,000	4,600	16,600
Elsternwick	10,400	4,400	8,900	23,700	10,400	3,000	6,800	20,200
Caulfield Junction	2,000	11,500	1,500	15,000	2,000	7,900	1,200	11,100
East Village	12,000	3,700	41,500	57,200	12,000	2,500	31,800	46,400
Alma Village	400	500	2,300	3,100	400	300	1,700	2,400
Caulfield Park	1,600	1,200	6,700	9,600	1,600	800	5,200	7,600
Caulfield South	4,300	3,200	8,200	15,600	4,300	2,200	6,300	12,700
East Bentleigh	3,500	5,700	3,500	12,700	3,500	3,900	2,700	10,100
Glen Huntly	4,400	1,600	3,400	9,400	4,400	1,100	2,600	8,100
Hughesdale	1,100	200	600	1,800	1,100	100	400	1,700
McKinnon	1,600	800	1,700	4,100	1,600	500	1,300	3,400
Moorabbin	1,000	900	3,200	5,100	1,000	600	2,400	4,100
Murrumbeena	1,800	1,200	2,700	5,700	1,800	800	2,100	4,700
Ormond	4,600	1,400	5,500	11,500	4,600	900	4,300	9,800
Total	71,300	41,400	103,300	216,000	71,300	28,600	79,300	179,100

Source: SGS Economics and Planning, November 2021

While this provides an estimate of demand by employment floorspace type and location, as highlighted earlier in the report, it will be important to support and allow flexibility across broad employment uses to allow for innovation and change, while still planning for sufficient employment space across Glen Eira. In addition, typically we would expect retail and retail services to primarily occupy ground floor premise, while there may be some exceptions (i.e. a restaurant with first floor seating/function space, or a shop with first floor storage/showrooms, etc), particularly as the sector evolves.

4. Capacity assessment

This section assesses whether there is enough capacity for new retail and commercial development to support the floorspace demand established in Section 3.

4.1 Employment floorspace capacity

Employment floorspace capacity translates assumptions for relevant planning zones into theoretical floorspace capacity using a three step approach (further detailed in Appendix A).

Available Land

The capacity assessment starts with all property parcels within commercial zones (C1Z, C2Z, and MUZ). By nature, this excludes any roads/footpaths or other non-developable areas.

An available land assessment is then completed for all relevant property parcels. The available land assessment excludes very small lots, recently developed lots and lots with other specific limitations (i.e. individually significant heritage lots) and is consistent with the available land assessment completed by SGS for the new Glen Eira Housing Strategy. Lots with established multi-dwelling residential uses are also identified as unavailable for new employment floorspace development.

Development yield (total capacity)

For available lots a number of built form assumptions were applied to determine the development yield or total employment floorspace capacity. Built form employment modelling assumptions include:

- **Site coverage** –how much of the land a building would likely cover, is assumed to be 85 per cent.
- **Building efficiency** - how much of the building footprint is useable (i.e. accounting for services, lift areas, stairs, etc), is assumed to be 80 per cent of the total floorspace.
- **Usable floorspace for employment uses**
 - On the Ground Floor it is assumed an average of 70 per cent of the usable floorspace could be occupied by retail or commercial in mixed use developments.
 - On the first floor it is assumed an average of 50 per cent of the usable floorspace could be occupied by retail or commercial in mixed use developments.

These average precinct assumptions could vary on a lot by lot basis and represent an average across all new development within a given precinct.

Net capacity

Net capacity is the amount of additional employment floorspace capacity that is potentially available, after existing commercial floorspace has been accounted for. This is the amount of floorspace that could be realised to meet the additional employment demand needs by 2036.

This is calculated by comparing the total employment floorspace capacity less the existing employment floorspace. Where a centre's existing employment floorspace estimate is above the calculated total

employment floorspace capacity it is assumed there is no *additional* capacity (i.e. any new developments would be able to at least maintain the current level of employment floorspace).

As noted previously in this report, it would typically be assumed that ground floor capacity is predominately aligned with consumer facing employment uses (i.e. retail and retail services) while first floor uses is predominately aligned with commercial office based uses. However, there are circumstance where a development/ businesses might deviate away from this general split.

4.2 Capacity Sensitivity

The core employment floorspace capacity assumptions are based on typical development outcomes. Namely, predominately ground floor retail and employment uses with some developments having employment uses above the ground floor, but predominately residential apartments, particularly above the first floor. However, if there is sufficient market demand, the planning controls do allow for additional employment floorspace to be realised.

Therefore, a Capacity sensitivity (Scenario C2) assumes an average of all of the first floor is occupied by commercial uses, rather than just 50 per cent. All other assumptions regarding Site Coverage, Building Efficiency and Ground Floor uses remains consistent with the base capacity scenario.

4.3 Employment floorspace capacity results

Table 4 presents additional baseline demand (Scenario D1) versus net capacity for the two capacity scenario (Scenario C1 and C2) and the resulting surplus or shortfall. Table 5 presents the same for the reduced demand scenario (Scenario D2).

This analysis highlights that under all scenarios there is sufficient net employment floorspace capacity to address employment floorspace demand to 2036 across the Glen Eira centre network as a whole. However, there are localised, centre specific, shortfalls in net employment capacity. This is most acute under the baseline D1/C1 scenario where there are shortfalls across eight centres, including both Bentleigh and Elsternwick which has a employment floorspace shortfall of 1,800 and 15,400 square metres respectively. This shortfall is largely addressed if there is increased employment capacity realised above the ground floor – highlighting a need for both policy and other supportive measure that would help realise that outcome.

Most centres have no or little additional (net) capacity at the ground floor. While there is demand for additional retail and retail services over the forecast period, it is unlikely a significant proportion of that would occupy first floor net capacity. In reality, the ground floor is likely occupied by a mix of retail, retail services and commercial uses (see Section 2) currently, and as demand for retail and retail services continues to increase a greater proportion of the ground floor floorspace will become occupied by these consumer facing businesses and commercial uses will increasingly shift to the first floor and above. This should be encouraged and can support greater activation of the street and centre.

The results and their implications are discussed in the next chapter, Section 5.

TABLE 4: BASELINE DEMAND (SCENARIO D1), NET CAPACITY AND SHORTFALL, SQM

Centre	Baseline demand 2026-36 (Scenario D1)				Baseline Net Capacity (Scenario C1)				Full 1F Net Capacity (Scenario C2)			
	Retail	Retail Services	Commercial	Total	GF	1+F	Total	Surplus/Shortfall	GF	1+F	Total	Surplus/Shortfall
Bentleigh	12,700	2,400	7,600	22,700	0	20,900	20,900	-1,800	0	44,700	44,700	22,100
Carnegie	10,100	2,900	5,900	18,900	0	22,300	22,300	3,400	0	46,100	46,100	27,200
Elsternwick	10,400	4,400	8,900	23,700	0	8,300	8,300	-15,400	0	26,900	26,900	3,200
Caulfield Junction	2,000	11,500	1,500	15,000	0	2,600	2,600	-12,400	0	5,300	5,300	-9,700
East Village	12,000	3,700	41,500	57,200	12,000	154,100	166,100	109,000	12,000	154,100	166,100	109,000
Alma Village	400	500	2,300	3,100	0	1,400	1,400	-1,700	0	2,700	2,700	-400
Caulfield Park	1,600	1,200	6,700	9,600	0	4,400	4,400	-5,100	0	13,400	13,400	3,800
Caulfield South	4,300	3,200	8,200	15,600	0	23,900	23,900	8,200	0	51,500	51,500	35,900
East Bentleigh	3,500	5,700	3,500	12,700	0	11,100	11,100	-1,600	0	22,300	22,300	9,600
Glen Huntly	4,400	1,600	3,400	9,400	2,500	14,000	16,400	7,000	2,500	28,800	31,300	21,900
Hughesdale	1,100	200	600	1,800	0	2,100	2,100	200	0	4,200	4,200	2,300
McKinnon	1,600	800	1,700	4,100	700	7,700	8,400	4,400	700	15,900	16,600	12,500
Moorabbin	1,000	900	3,200	5,100	0	1,900	1,900	-3,200	0	5,100	5,100	0
Murrumbeena	1,800	1,200	2,700	5,700	0	5,900	5,900	200	0	12,000	12,000	6,300
Ormond	4,600	1,400	5,500	11,500	0	9,200	9,200	-2,300	0	20,600	20,600	9,100
Total	71,300	41,400	103,300	216,000	15,200	289,600	304,800	88,800	15,200	453,600	468,800	252,800

Source: SGS Economics and Planning 2021.

TABLE 5: REDUCED DEMAND (SCENARIO D2), NET CAPACITY AND SHORTFALL, SQM

Centre	Baseline demand 2026-36 (Scenario D2)				Baseline Net Capacity (Scenario C1)				Full 1F Net Capacity (Scenario C2)			
	Retail	Retail Services	Commercial	Total	GF	1+F	Total	Surplus/Shortfall	GF	1+F	Total	Surplus/Shortfall
Bentleigh	12,700	1,700	5,800	20,200	0	20,900	20,900	700	0	44,700	44,700	24,600
Carnegie	10,100	2,000	4,600	16,600	0	22,300	22,300	5,600	0	46,100	46,100	29,500
Elsternwick	10,400	3,000	6,800	20,200	0	8,300	8,300	-11,900	0	26,900	26,900	6,600
Caulfield Junction	2,000	7,900	1,200	11,100	0	2,600	2,600	-8,500	0	5,300	5,300	-5,800
East Village	12,000	2,500	31,800	46,400	12,000	154,100	166,100	119,800	12,000	154,100	166,100	119,800
Alma Village	400	300	1,700	2,400	0	1,400	1,400	-1,100	0	2,700	2,700	300
Caulfield Park	1,600	800	5,200	7,600	0	4,400	4,400	-3,200	0	13,400	13,400	5,800
Caulfield South	4,300	2,200	6,300	12,700	0	23,900	23,900	11,100	0	51,500	51,500	38,800
East Bentleigh	3,500	3,900	2,700	10,100	0	11,100	11,100	1,000	0	22,300	22,300	12,200
Glen Huntly	4,400	1,100	2,600	8,100	2,500	14,000	16,400	8,300	2,500	28,800	31,300	23,200
Hughesdale	1,100	100	400	1,700	0	2,100	2,100	400	0	4,200	4,200	2,500
McKinnon	1,600	500	1,300	3,400	700	7,700	8,400	5,000	700	15,900	16,600	13,200
Moorabbin	1,000	600	2,400	4,100	0	1,900	1,900	-2,200	0	5,100	5,100	1,000
Murrumbeena	1,800	800	2,100	4,700	0	5,900	5,900	1,200	0	12,000	12,000	7,300
Ormond	4,600	900	4,300	9,800	0	9,200	9,200	-600	0	20,600	20,600	10,800
Total	71,300	28,600	79,300	179,100	15,200	289,600	304,800	125,700	15,200	453,600	468,800	289,700

Source: SGS Economics and Planning 2021.

5. Implications and recommendations

This section outlines the results from the demand assessment in Section 3, and the capacity review in Section 4. It includes a discussion of the likely implications for structure planning in each of the three reviewed Major Activity Centres.

5.1 Major Activity Centres results overview

The table below, summaries the results of the employment demand and supply assessment for the three Major Activity Centres – Bentleigh, Carnegie and Elsternwick.

This indicates there is no additional ground employment floorspace capacity (typically for retail uses) across any of the three centres in any scenario, but there is net capacity on the first floor to support additional employment uses, particularly under the Scenario C1. As retail floorspace demand is likely to increase, even once accounting for an increased share of online expenditure and other structural shifts, it will be important to encourage commercial uses (or retail function that don't require direct street access) to better utilise above ground premises. This will unlock existing ground floor employment floorspace for new retail business and will enable centres to continue to grow and service both retail and non-retail employment needs without centres having to expand their physical footprint.

This is further highlighted under the Scenario C2 which considered a greater realisation of employment floorspace above ground. Under this scenario employment floorspace shortfalls are addressed for all three major centres.

TABLE 6: MAC BASELINE DEMAND (SCENARIO D1), NET CAPACITY AND SHORTFALL, SQM

Area		Bentleigh	Carnegie	Elsternwick
Existing (2021) floorspace	GF	44,900	59,400	79,200
	1+F	3,000	13,500	12,800
	Total	47,900	73,000	91,900
Additional floorspace demand (D1) 2021-2036	Retail	12,700	10,100	10,400
	Retail Services	2,400	2,900	4,400
	Commercial	7,600	5,900	8,900
	Total	22,700	18,900	23,700
Net capacity (C1)	GF	0	0	0
	1+F	20,900	22,300	8,300
	Total	20,900	22,300	8,300
	Surplus/Shortfall	-1,800	3,400	-15,400
Net capacity (C2)	GF	0	0	0
	1+F	44,700	46,100	26,900
	Total	44,700	46,100	26,900
	Surplus/Shortfall	22,100	27,200	3,200

Source: SGS Economics and Planning 2021. (Note: some figures may not sum due to rounding)

Assuming an increasing propensity in some sectors to work from home would likely mean that the need for certain types of commercial floorspace may decrease in future (Scenario D2). Given this assumption, there would not be a shortfall of capacity in either Carnegie or Elsternwick, but greater construction of above ground floorspace (see Scenario C2) would still be required in Elsternwick.

TABLE 7: MAC REDUCED DEMAND (SCENARIO D2), NET CAPACITY AND SHORTFALL, SQM

Area		Bentleigh (sqm)	Carnegie (sqm)	Elsternwick (sqm)
Existing (2021) floorspace	GF	44,900	59,400	79,200
	1+F	3,000	13,500	12,800
	Total	47,900	73,000	91,900
Additional floorspace demand (D2) 2021-2036	Retail	12,700	10,100	10,400
	Retail Services	1,700	2,000	3,000
	Commercial	5,800	4,600	6,800
	Total	20,200	16,600	20,200
Net capacity (C1)	GF	0	0	0
	1+F	20,900	22,300	8,300
	Total	20,900	22,300	8,300
	Surplus/Shortfall	700	5,600	-11,900
Net capacity (C2)	GF	0	0	0
	1+F	44,700	46,100	26,900
	Total	44,700	46,100	26,900
	Surplus/Shortfall	24,600	29,500	6,600

Source: SGS Economics and Planning 2021. (Note: some figures may not sum due to rounding)

5.2 Implications and recommendations

Scenario D2/C1 has been used as the basis for understanding implication for structure planning .

Considering the balance between the likely demand and indicative capacity for both commercial and retail floorspace in the centres, both **Bentleigh and Carnegie** have enough floorspace capacity to meet demand to 2036. For **Elsternwick**, the modelling suggests that there may be shortfalls in capacity to meet expected employment demand to 2036. Additional supportive policy measure, through the Structure Planning process, could ensure that additional above ground employment floorspace is adequately provided to support retail and commercial floorspace demand.

TABLE 8: 3 MAC SUMMARY (SCENARIO D2/C2)

Major Activity Centre	Ground Floor only (typically retail uses)	First Floor only (typically commercial uses)	Combined Ground and First Floor
Bentleigh	Shortfall	Extra Capacity	Surplus
Carnegie	Shortfall	Extra Capacity	Surplus
Elsternwick	Shortfall	Extra Capacity	Potential Shortfall

Source: SGS Economics and Planning 2021

Bentleigh MAC summary and recommendations

Retail and retail services

There is demand for an additional 12,800 sqm of retail floorspace and 1,700 sqm of retail services floorspace to 2036. There is no additional ground floor employment floorspace capacity in the Bentleigh MAC. However, this can be met with potential floorspace on the first floor of buildings across the MAC (either by existing ground floor commercial business relocating or by some retail components locating on the first floor). Considered together with commercial floorspace, there is a surplus of 700 sqm.

Commercial

There is demand for additional 5,800 square metres of commercial (office) floorspace to 2036. There is capacity to meet this demand via additional employment floorspace above the ground floor.

Carnegie MAC summary and recommendations

Retail and retail services

There is demand for an additional 10,100 sqm of retail floorspace and 2,000 sqm of retail services floorspace to 2036. The Carnegie MAC does not have additional ground floor retail floorspace capacity, but this can be met with potential floorspace on the first floor of buildings across the MAC. Considered together with commercial floorspace, there is a surplus of 5,600 sqm.

Commercial

There is demand for additional 4,600 square metres of commercial (office) floorspace to 2036. There is capacity to meet this demand via additional employment floorspace above the ground floor.

Elsternwick MAC summary and recommendations

Retail and retail services

There is demand for additional 10,400 sqm of retail floorspace and 3,000 sqm of retail services to 2036. There is no capacity for additional ground floor retail floorspace. However, if the surplus first floor and above capacity is used (directly or indirectly via existing ground floor commercial business relocating), under Scenario C1 (average of 50 per cent of first floor being employment), there would still be a shortfall of 11,900 sqm. Under Scenario C2 (average of all of first floor being employment), there would be a surplus and ability to meet retail demand using some surplus capacity.

Additional policy interventions to enable that shortfall to be made up through structure planning would ensure that this type of floorspace is adequately provided. Given the quantum of shortfall, this unmet demand may be accommodated through incremental redevelopment, site consolidation or larger projects over the next 15 years. This could include the provision of new capacity development floorspace at the edge of this activity centre. In addition, some remaining retail demand is likely to be met in other centres and enclosed shopping centres outside but nearby the LGA boundaries, including Chadstone, Chapel Street and Malvern.

Commercial

There is demand for additional 6,800 square metres of commercial (office) floor area to 2036. There is capacity to meet this demand via additional employment floorspace above the ground floor.

Policy implications

While the retail and office floorspace figures have been apportioned to 'ground floor' and 'first floor' for the purposes of delineating both need and supply, in practice and on a site-specific basis, this may not be the product that is produced. Commercial 1 Zone allows retail and commercial uses in any part of a building. This model has been prepared based on the likely outcome of retail typically at ground floor and an office typically above. However, the modelling or policy does not guarantee this outcome.

Likewise – commercial office capacity is only based on assumptions and although there may be adequate theoretical capacity, the current planning controls do not guarantee that the market will deliver office floorspace above the ground floor. Without specific areas for certain uses in the planning controls, the market will determine the land use mix within the zone provisions. Office land use competes with residential land use for priority due to land value and sales prices.

Redevelopment of existing floorspace could be possible through the redevelopment and consolidation of existing sites. This could push existing ground floor uses, such as offices or dance studios, onto the first floor of centres. This would then free up ground floor floorspace and encourage efficiencies through shared services.

Council currently has limited levers available to increase retail development. Design policies could indicate Council's intention, while not being enforceable when assessing planning applications. They may illustrate Council's intention when negotiating with developers over prospective developments. Any rezoning of land off the current retail strip, with the exception of logical inclusions at the edge of centres, should be discouraged, as this would shift activity outwards. There is also a significant amount of uncertainty for retail in the future, and a greater proportion of retailing activity being shifted online may result in a lower traditional retail floorspace requirement.

Planning beyond 2036

There is significant floorspace surplus in Bentleigh and Carnegie. Under Scenario D2/C1 the surplus is also greater than the amount of demand for the next 15 years – indicating the centres could continue to grow beyond this point.

While it is still recommended that additional floorspace be provided as noted above, Scenario D2/C2 results in a surplus of floorspace when both commercial and retail floorspace are combined. This demonstrates that there is sufficient opportunity and flexibility for the areas to grow and adapt beyond the 15-year time horizon in Elsternwick.

Appendix A: Analysis method

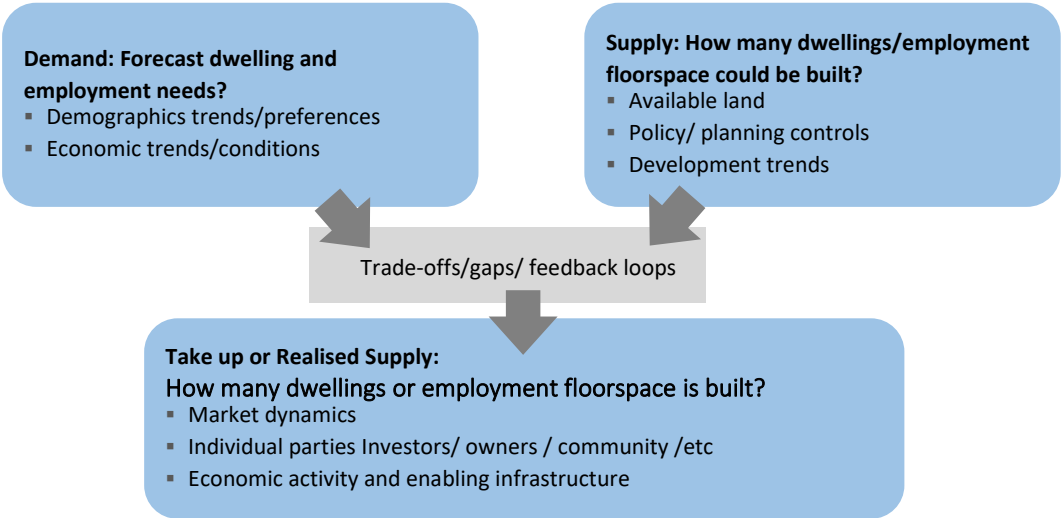
This section outlines the method for each stage of the demand, supply and capacity assessment.

Method Overview

The following provides an overview of the analysis approach used.

- **Demand assessment** of retail floorspace and (non-retail) commercial floorspace needs based on the latest economic trends and population projections for Glen Eira. This included a sensitivity around potential commercial floorspace requirements given uncertainties associated with working from home.
- **Capacity assessment** of employment floorspace based on current and proposed planning controls. This included a sensitivity around the amount of first floor floorspace available for employment uses.
- **Realisation, alignment and recommendations** compares demand and capacity to estimate likely take up for each centre. Any gaps and other recommendations are then highlighted to inform centre planning.

FIGURE 1: DEMAND, CAPACITY AND TAKE UP APPROACH



Source: SGS Economics and Planning, 2021.

Modern employment uses increasingly operate on a continuum as they adapt to changing consumer needs and operational models. For the purposes of this assessment, we have considered three broad types:

- **Retail** – including retail shops (i.e. supermarket), hospitality (i.e. café)
- **Retail services** including hairdresser, local GPs, local art and recreation services
- **Commercial** –including professional services, real estate agents, accountants and other office-based firms

SGS Small Area Model (SAM) and floorspace needs

The demand for commercial and retail services floorspace is established using the SGS Small Area Model, which provides employment forecasts at a fine grain geography.



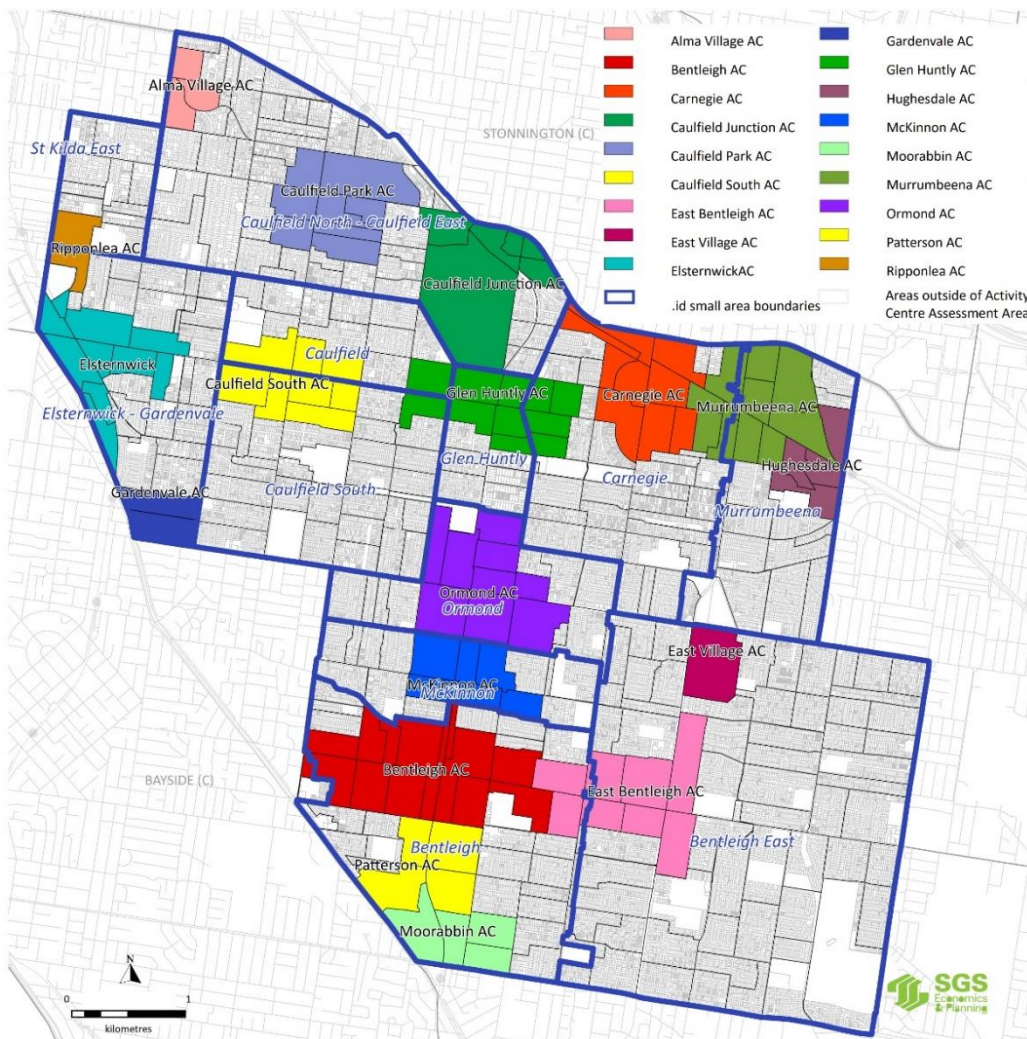
SGS SAM creates a suite of forecast variables which are:

- Estimated using a combination of ‘top-down’ and ‘bottom-up’ methodologies, ensuring that macroeconomic drivers are integrated with micro spatial data and trends
- Disaggregated to a fine-grain spatial scale, allowing for custom geographies to be defined based on the scope of analysis, such as an activity centre or renewal precinct

One of SAM’s key outputs is employment by industry, by location of the job. This is the key input for forecasting demand for commercial and retail services floorspace.

The SAM zones that are used to define each activity centre assessment area are an approximation of the core of employment activity within each centre, and do not reflect specific or articulated activity centre boundaries. The relevant geographies for this assessment (activity centre assessment areas, remainder areas, .id small area boundaries and SAM zone boundaries) are shown in Figure 2.

FIGURE 2: RELATIONSHIP BETWEEN SAM ZONES, ACTIVITY CENTRES AND SUBURBS



Source: SGS Economics and Planning, 2021.

Employment floorspace capacity

Capacity is a measure of how much housing or employment floorspace could (theoretically) be built under current planning controls (including structure plans) if all opportunities were fully realised.

It is a theoretical assessment of the maximum number of dwellings, and maximum amount of employment floorspace that could be developed and is intended to be indicative for planning, rather than absolute.

Realising theoretical capacity requires all existing opportunities to be fully realised. It does not consider market feasibility, or an owner's willingness to develop.

The first step of capacity modelling is identifying all the land available for development. The second step is applying potential yield assumptions to available land to assess how much additional housing or employment floorspace could be developed. These steps are described below.

Available land

Available land represents all land that has the potential to generate additional housing and or employment floor space supply for Glen Eira. This does not mean that it is necessarily feasible or that property owners are ready or willing to develop these sites. Typically, only a small portion of available lots are likely to be developed in any one year.

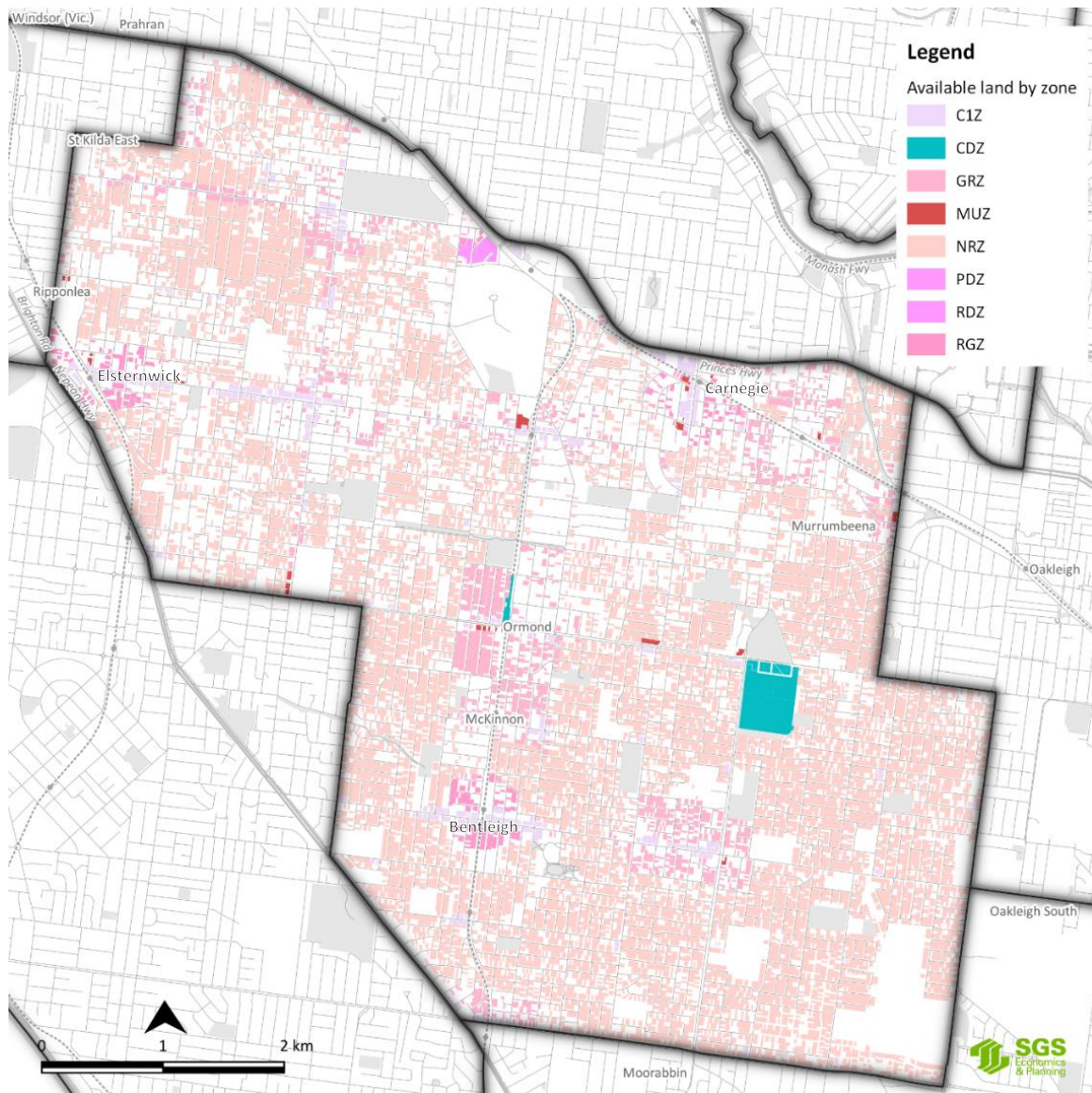
Net land area, is defined as all land that is able to be developed for commercial and retail purposes, was derived by taking all applicable zones in the Glen Eira LGA that could have the capacity for providing additional floorspace, including:

- Commercial 1 Zone (C1Z)
- Commercial 2 Zone (C2Z)
- Mixed Use Zone, schedule 1 (MUZ1 – Glen Eira Mixed Use Areas)
- Mixed Use Zone, schedule 2 (MUZ2 – Land at 136-138 and 140-146 Glen Eira Road, Elsternwick)
- Mixed Use Zone, schedule 3 (MUZ3 – Land at 641-685 North Road, Ormond).

Available land is then calculated by excluding lots with site-specific limitations (e.g., individual heritage significance) from net land area using Council's rates database and DELWP's Housing Development Data.

The map below (Figure 3) shows all available land by zone, which has excluded land subject to constraints.

FIGURE 3. ALL AVAILABLE LAND



Source: SGS Economics and Planning, 2021.

Development yield (total Capacity)

Using the outputs of the lot level available land analysis, a series of yield and built form assumptions based on both prescriptive controls (i.e., heights, setbacks), the planning intent of each zone (i.e., employment at ground floor and mixed use) or the planning intent of structure/framework plans were applied.

Assumed building typologies are translated into floorspace development ratios which are then applied to the available land parcel areas. This includes assumptions around site coverage, building efficiency and share of floorspace allocated to employment uses.

Appendix B: Existing employment by industry

Table 9, Table 10, and Table 11 summarise SGS developed SAM forecasts for employment by industry for 2021, 2031 and 2036 by centres in Glen Eira.

TABLE 9: EMPLOYMENT BY INDUSTRY 2021: ACTIVITY CENTRE

Centre Division	Agriculture, Forestry and Fishing	Mining	Manufacturing	Electricity, Gas, Water and Waste Services	Construction,	Wholesale Trade	Retail Trade	Accommodation and Food Services	Transport, Postal and Warehousing	Information Media and	Financial and Insurance Services	Rental, Hiring and Real Estate Services	Professional, Scientific and	Administrative and Support Services	Public Administration and Safety	Education and Training	Health Care and Social Assistance	Arts and Recreation Services	Other Services	Total
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
Alma Village	0	0	7	0	38	19	18	20	12	7	8	49	94	29	2	12	103	7	24	449
Ripponlea	0	0	4	0	18	1	9	7	0	48	2	4	24	5	0	23	22	1	9	177
Caulfield Park	7	0	13	0	92	28	64	76	16	2	68	58	273	115	14	83	253	23	44	1,228
Caulfield Junction	1	0	6	0	110	0	114	215	44	3	13	4	46	30	28	1,434	32	363	17	2,461
Elsternwick	0	0	56	0	119	91	667	488	41	202	163	75	346	67	19	465	399	61	223	3,482
Gardenvale	0	0	3	0	25	13	63	23	8	0	13	19	97	21	5	67	122	9	23	513
Caulfield South	0	0	81	0	164	83	174	147	269	13	54	82	357	36	669	226	508	43	168	3,074
Glen Huntly	0	0	8	3	102	12	229	67	23	4	16	18	183	24	11	39	161	32	59	992
Ormond	0	0	29	0	142	64	195	224	60	12	35	46	240	71	16	318	226	21	62	1,762
Carnegie	0	0	58	4	166	127	533	298	48	9	75	117	264	41	106	188	476	50	121	2,680
Murrumbeena	5	1	32	0	87	32	120	128	11	7	27	10	134	27	37	123	224	17	63	1,084
McKinnon	0	0	6	5	71	14	27	47	4	6	17	5	85	16	4	44	144	10	41	545
Bentleigh	0	0	71	0	252	38	718	318	57	14	145	140	306	64	61	166	523	31	130	3,033
Patterson	0	0	7	3	99	25	88	40	7	7	10	9	90	31	210	98	154	17	34	930
East Bentleigh	0	0	70	0	86	85	133	86	59	6	27	16	157	35	21	48	236	162	59	1,287
Moorabbin	0	0	5	4	104	43	113	52	14	5	28	11	155	36	288	10	191	18	28	1,103
Hughesdale	2	0	5	0	19	5	3	14	2	1	4	0	21	13	2	5	32	1	11	140
East Village	0	0	294	0	78	282	234	104	31	53	32	26	138	111	9	72	284	15	105	1,868

Source: SGS SAM Model Employment forecasting 2021

TABLE 10: EMPLOYMENT BY INDUSTRY 2031: SUBURBS

Centre Division	Agriculture, Forestry and Fishing	Mining	Manufacturing	Electricity, Gas, Water and Waste Services	Construction,	Wholesale Trade	Retail Trade	Accommodation and Food Services	Transport, Postal and Warehousing	Information Media and Telecommunications	Financial and Insurance Services	Rental, Hiring and Real Estate Services	Professional, Scientific and Technical Services	Administrative and Support Services	Public Administration and Safety	Education and Training	Health Care and Social Assistance	Arts and Recreation Services	Other Services	Total
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
Alma Village	0	0	8	0	45	25	20	23	13	7	10	55	131	41	3	16	132	8	26	564
Ripponlea	0	0	5	0	22	1	10	8	0	53	3	4	34	7	0	30	28	1	10	216
Caulfield Park	6	0	15	0	109	35	74	90	17	2	83	65	380	160	21	109	324	27	48	1,567
Caulfield Junction	1	0	7	0	132	0	132	254	47	3	15	5	64	42	42	1,885	41	432	18	3,121
Elsternwick	0	0	65	0	141	117	773	577	44	224	199	83	482	94	28	612	512	73	243	4,266
Gardenvale	0	0	4	0	30	17	73	27	9	0	16	21	134	30	7	88	156	11	25	650
Caulfield South	0	0	93	0	195	107	202	174	288	14	66	91	497	50	993	297	651	51	183	3,953
Glen Huntly	0	0	10	3	122	16	266	80	25	4	20	20	254	33	16	51	207	38	64	1,228
Ormond	0	0	33	0	169	82	226	265	64	13	43	51	334	100	24	418	290	26	68	2,205
Carnegie	0	0	68	4	198	163	618	352	52	10	91	130	367	57	157	247	611	60	132	3,314
Murrumbeena	5	1	36	0	103	41	139	151	12	8	33	11	186	38	54	161	288	20	68	1,356
McKinnon	0	0	7	6	85	18	31	55	4	7	20	6	119	22	6	57	185	11	44	683
Bentleigh	0	0	82	0	300	49	833	376	61	15	177	156	425	89	90	219	672	37	141	3,721
Patterson	0	0	8	3	118	32	102	48	7	7	12	9	125	43	312	129	198	20	37	1,213
East Bentleigh	0	0	80	0	102	109	154	102	63	7	34	17	219	49	31	63	303	193	64	1,591
Moorabbin	0	0	5	5	123	55	131	61	15	6	34	12	215	50	428	13	245	22	30	1,450
Hughesdale	1	0	6	0	23	7	4	16	2	1	5	0	29	18	2	6	41	1	12	176
East Village	0	0	124	0	120	118	438	223	18	56	77	67	274	171	17	376	773	34	106	2,993

Source: SGS SAM Model Employment forecasting 2021.

TABLE 11: EMPLOYMENT BY INDUSTRY 2036: SUBURBS

Centre <i>Division</i>	Agriculture, Forestry and Fishing	Mining	Manufacturing	Electricity, Gas, Water and Waste Services	Construction,	Wholesale Trade	Retail Trade	Accommodation and Food Services	Transport, Postal and Warehousing	Information Media and Telecommunications	Financial and Insurance Services	Rental, Hiring and Real Estate Services	Professional, Scientific and Technical Services	Administrative and Support Services	Public Administration and Safety	Education and Training	Health Care and Social Assistance	Arts and Recreation Services	Other Services	Total
<i>Division</i>	<i>A</i>	<i>B</i>	<i>C</i>	<i>D</i>	<i>E</i>	<i>F</i>	<i>G</i>	<i>H</i>	<i>I</i>	<i>J</i>	<i>K</i>	<i>L</i>	<i>M</i>	<i>N</i>	<i>O</i>	<i>P</i>	<i>Q</i>	<i>R</i>	<i>S</i>	
Alma Village	0	0	8	0	50	27	22	25	13	8	11	59	149	46	4	18	148	9	26	622
Ripponlea	0	0	5	0	24	1	11	9	0	57	3	4	38	8	0	33	32	1	11	236
Caulfield Park	6	0	16	0	120	38	79	98	18	2	90	69	434	183	25	119	362	30	50	1,739
Caulfield Junction	1	0	7	0	145	0	141	278	49	3	17	5	73	47	49	2,062	46	478	19	3,421
Elsternwick	0	0	67	0	156	127	821	630	45	239	217	89	550	107	33	669	571	81	249	4,648
Gardenvale	0	0	4	0	33	19	78	29	9	0	18	22	153	34	9	97	174	12	26	717
Caulfield South	0	0	95	0	215	116	215	190	296	15	72	98	567	56	1,166	325	727	57	187	4,397
Glen Huntly	0	0	10	3	135	17	282	87	26	4	22	21	290	38	19	56	230	42	66	1,348
Ormond	0	0	34	0	186	89	240	289	66	14	47	54	381	113	29	458	324	28	69	2,421
Carnegie	0	0	69	4	218	176	656	384	53	11	100	139	419	65	185	270	681	66	135	3,630
Murrumbeena	5	1	37	0	114	44	148	165	12	8	36	12	212	43	64	176	321	22	70	1,492
McKinnon	0	0	7	6	94	19	33	61	4	7	22	6	136	25	7	63	206	13	45	753
Bentleigh	0	0	83	0	331	53	884	410	63	16	194	166	486	101	106	239	749	41	145	4,067
Patterson	0	0	9	3	131	35	108	52	8	8	13	10	142	49	367	142	221	22	38	1,358
East Bentleigh	0	0	82	0	113	118	163	111	65	7	37	18	250	56	36	69	338	214	66	1,744
Moorabbin	0	0	5	5	136	60	139	66	16	6	37	13	246	56	503	14	274	24	31	1,630
Hughesdale	1	0	6	0	26	7	4	18	2	1	6	0	34	21	3	7	45	1	12	194
East Village	0	0	107	0	144	74	547	262	14	59	104	86	377	196	20	618	997	48	110	3,762

Source: SGS SAM Model Employment forecasting 2021.

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