FOOTSCRAY RETAIL STUDY

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DEPARTMENT OF PLANNING AND COMMUNITY DEVELOPMENT AND MARIBYRNONG CITY COUNCIL
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GLOSSARY

TERM	ACRONYM	DEFINITION
Bulky Goods	**BG**	Large format retailing, generally comprising hardware, whitegoods, furniture and other large showroom-based uses.
Commercial, Professional and Community Services	**CPC**	Encompasses office-based uses such as accountants, lawyers, employment agencies, real estate agents and so forth, as well as a range of community services such as neighbourhood houses, youth centres and Centrelink.
Department of Industry, Innovation and Regional Development	**DIIRD**	State Government department responsible for economic development and investment policy.
Department of Planning and Community Development	**DPCD**	State Government department responsible for planning and urban development, formed in mid 2007.
Department of Sustainability and Environment	**DSE**	State Government department responsible for planning until mid 2007.
Department Store		A regional retail store type, which offers the widest range of discretionary household goods. Examples include Myer and David Jones.
Department Store Type Merchandise	**DSTM**	An estimate of the proportion of non-food retail goods trade for which department stores and discount department stores actively compete.
Discount Department Store	**DDS**	A sub-regional retail store type, which offers a wide range of discretionary household goods. Examples include Big W, Forges, Kmart and Target.
Escape Expenditure		Refers to trade drawn from the main trade area of the Footscray Central Activities District (FCAD) and spent outside the FCAD, which would be bound to the FCAD if it offered a more attractive choice of destination.

Term	Acronym	Definition
Estimated Resident Population	**ERP**	The Estimated Resident Population (ERP) is the official population measure of Australia, for Local Government areas. The ERP is estimated at June 30 in each year based on annual dwelling unit approvals. Significant changes in the age of the population and local economy are also considered to adjust the estimates in line with births, deaths and migration, in between June 30 and Census night in early August. The ERP is also adjusted to take into account the number of residents overseas on Census night and those who were not counted in the Census (DPCD 2007).
Footscray Central Activities District	**FCAD**	One of six Central Activities Districts (CAD) identified in Melbourne@5 Million to be the focus of a substantial proportion of future employment growth and public investment. Each CAD, including the FCAD, will provide: • significant Melbourne CAD type jobs and commercial services; • a strong and diverse retail sector; • specialised goods and services drawing on a large regional catchment; • significant opportunities for housing redevelopment in and around the CAD; • high levels of accessibility for walking, cycling, public transport or car by being located at junctions in the Principal Public Transport Network; • vibrant centres of community activity with a range of public facilities.
Food, Groceries and Liquor *	**FGL**	Specific type of retail activity, encompassing supermarkets, fresh food stores and liquor outlets.
Gross Leasable Area	**GLA**	Measure of floorspace, which includes only the area used for sales, service provision or other profitable activity. Does not include storage areas, amenities and so forth.
Household Goods *	**HHG**	Specific type of retail activity, encompassing (a portion of) discount department store and department store trade, clothing, fabric and footwear, homewares, manchester, newsagents, pharmacies, bookstores, antiques and so forth.
In-bound Expenditure		Refers to trade drawn from outside the defined catchment area that is spent in the FCAD.

TERM	ACRONYM	DEFINITION
Main Trade Area	**MTA**	The main catchment of the FCAD, comprising the six postcode areas of Footscray (3011), Maidstone, Footscray West and Brooklyn (3012), Yarraville (3013), Braybrook (3019), Maribyrnong (3032) and Sunshine (3020). The MTA is the area that generates most of the weekly and daily food and groceries trade in the FCAD.
Major Retail Attractors		Significant retail anchor stores including department stores, discount department stores and supermarkets.
Market Share		Refers to the proportion of resident-based retail expenditures in defined geographic areas bound to the FCAD or other defined destinations.
Melbourne Central Activities District		The Melbourne CAD is the largest centre of activity in the State, providing a focus for metropolitan Melbourne. With the most intense concentration of development offering a wide range of services and functions, the Melbourne CAD offers a range of services and functions including commercial, retail, housing, highly specialised personal services, education, government and tourism facility. The Melbourne CAD is the focus for infrastructure and investment of State and national significance, as well as providing the central hub for State public transport services that radiate out into the suburbs from the Melbourne CAD.
Other Household Goods	**OHHG**	Refers to a specific type of household goods including daily items such as newspapers and pharmaceuticals, as well as discretionary items such as CDs, books and homewares. Unlike Household Goods, this classification excludes clothing, footwear and fabric, department and discount department stores and specialised retail goods.
Retail Commercial Floorspace		Refers to the provision of: • food, groceries and liquor; • household goods; • bulky goods; • retail services; • commercial and professional services; • trade supplies and services; • vacant floorspace (normally capable of use as retail-commercial floorspace). NOTE: Retail Commercial Floorspace encompasses a wider range of uses than Shopfront Floorspace.

Term	Acronym	Definition
Retail Floorspace *		Refers specifically to retail goods and services, including food, groceries and liquor, household goods and services such as dry cleaners, hairdressers, newsagents and post offices.
Retail Services *		These encompass a range of commercial services available to the public and conducted from a shopfront environment.
Retail Turnover Density	**RTD**	Is a measure of the productivity ($) of retail floorspace being the ratio of annual retail turnover to GLA. Various commodity groups and store types have characteristic and distinctive RTD requirements.
Secondary Trade Regions	**STR**	A small, but significant, proportion of residents in the STR tend to use the FCAD as their regular shopping destination for weekly needs and some discretionary needs.
Shopfront Floorspace		Refers to floorspace utilised for goods and services sold from a ground-floor active shopfront and encompasses food, groceries and liquor, household goods, bulky goods and retail services floorspace.

* Refer Appendix A for full classification of store types comprising each of these categories.

EXECUTIVE SUMMARY

1 INTRODUCTION

The Footscray Retail Study (the Study) was commissioned by Maribyrnong City Council (MCC) and the Department of Planning and Community Development (DPCD) in 2008. The purpose of the Study is to understand the issues affecting the current retail performance of the Footscray Central Activities District (the FCAD), to assess its future potential for growth, improvement and change and to establish a strategy for the revitalisation of the FCAD.

The following parts comprise the Study.

- Introduction - provides a functional analysis of the FCAD; describes the market research used in the Study and identifies the FCAD catchment.
- Economic Assessment - provides the primary economic research and analysis of the FCAD.
- Implementation Framework - provides a framework for the FCAD that will guide its revitalisation.

Figure 1: The Study Area

1.1 Functional Analysis

The FCAD is located approximately 7 kilometres west of the Melbourne Central Activities District (CAD), on the western side of the Maribyrnong River.

In retailing terms, the FCAD was the pre-eminent regional centre serving Melbourne's western suburbs in the first half of the twentieth century extending through to the 1970's. The development of several other major centres within close proximity to the FCAD has caused in a shift in the retail role and function of the FCAD from the pre-eminent or primary retail centre (as the only centre in the region with multiple discount department stores) to a centre with a more limited retail function. Particular developments impacting upon the higher-order retail function of the FCAD include:

- Highpoint Shopping Centre (Highpoint), located approximately 4 kilometres north west of the FCAD;
- Sunshine Marketplace and Sunshine Plaza, located approximately 7 kilometres west of the FCAD;
- Altona Gate Shopping Centre, located at Altona North, approximately 7 kilometres south west of the FCAD.

In activity terms, the FCAD has a regional role for certain activities such as medical and banking services - with virtually all of the major banks present in the FCAD - and a sub-regional-district role for retail trade. In grocery retailing, the sole national chain represented is Coles with a mid-sized supermarket. The FCAD's department / discount department store representation was limited at the time of the survey (December 2008) to Forges and Kmart. A key characteristic of the FCAD's retail structure is the significant absence of national chain representation, particularly in discretionary goods such as clothing, footwear and accessories, but extending through to jewellery, furniture and furnishings.

The FCAD's retail stores and services are located as follows (refer Figure 3).

- Several of the FCAD's key attractors are located in the south west, focussed around Paisley Street between French and Albert Streets and in Albert Street, south of Paisley Street (Forges, Coles, Kmart, Savers).
- The Footscray Market located in the south east of the FCAD forms a separate attractor.
- A third cluster of activities in the northern sector of the FCAD is formed by Little Saigon Market comprising a supermarket and a number of specialty stores north of Byron Street between Nicholson and Leeds Streets.
- Paisley Street is a low amenity shopping street between Nicholson and Leeds Street.
- Leeds Street and Hopkins Street (between Nicholson Street and Leeds Street), together with Nicholson Street, are mixed activity streets accommodating financial services, cafes and restaurants and household goods stores. Low amenity, mixed activities extend along Barkly Street, west of Nicholson Street.

Paisley Street west of French Street, while not part of the retail area of the FCAD, is particularly significant in terms of the FCAD's broader regional role. It is one of the major medical and community services precincts in the region. Other key elements closely related to the retail-commercial areas of the FCAD include the following.

- The Footscray railway station precinct. This is a major public transport interchange servicing Melbourne's western region.
- Victoria University (including the Nicholson Campus immediately south of the FCAD and the Footscray Park campus on the north side of Ballarat Road).

- The Maribyrnong Riverside redevelopment area, including areas north of Hopkins Street.
- A residential precinct to the north and south of the FCAD with developments now at the edge of the shopping and commercial precincts.

1.2 Market Research

The following market research was completed for the Study.

- Identification of land use and floorspace in the FCAD for use in the functional analysis and assessment of retail floorspace requirements for the FCAD.
- In-home telephone surveys and in-centre surveys to determine the FCAD catchment, patterns in the FCAD market share and other centres visited by patrons of the FCAD.
- Consultation with FCAD landowners, businesses, traders and tenants to provide an understanding of the issues affecting retailing in the FCAD.
- Tenancy inventories of the major shopping centres in Melbourne's western suburbs to aid the understanding of the FCAD market share and the competitive environment in which the FCAD exists.
- Floorspace inventory for supermarkets in the shopping centres within the FCAD main trade area (MTA) and secondary trade regions (STR) to enable the development of a 'gravity model' of shopper behaviour for the FCAD.

1.3 Catchment

The FCAD catchment (refer Figures 4 and 5) is comprised of five main components - one MTA and four STR (inner east, north, north west and south west). The FCAD also draws a level of trade from beyond the MTA and STR due to activities such as employment and study.

The in-centre surveys indicate that a relatively high proportion of visitors to the FCAD from the STR visit for food, groceries and liquor shopping purposes, which is not a typical attribute of other activity centres.

2 ECONOMIC ASSESSMENT

The economic assessment describes the potential retail floorspace of the FCAD in the period from 2008 to 2031 in terms of two scenarios.

- **Scenario One**: based on current trading patterns and market shares, determined by detailed in-home surveys within MCC and in-centre surveys carried out over a typical trading period.
- **Scenario Two**: based on potential trading patterns and market shares, determined by a gravity model of consumer preferences of people living in suburbs surrounding the FCAD, where it is assumed individual choices of shopping destination are based on proximity and retail offer.

The difference between the results produced for each scenario provides an indication of the opportunity to improve the performance of the FCAD.

2.1 Calculation of Future Floorspace Requirements

There are a number of factors that influence the demand for retail floorspace in the FCAD, including the following.

- Population trends in the MTA and STR.
- Changing patterns of personal retail expenditure.
- Current and projected patterns of in-bound expenditure.
- Current and projected patterns of escape expenditure.
- Current and projected productivity requirements for retail commercial floorspace.
- Retail commercial floorspace supply.

The calculation of future retail goods floorspace is estimated by an expenditure method for Scenarios One and Two described above.

The calculation of future retail services floorspace is estimated by a per capita provision method utilising the following three net effective supporting population estimates.

- **Estimate One**: assumes the proportion of the MTA and STR residents currently visiting the FCAD to go to the supermarket utilise the retail services in the FCAD.
- **Estimate Two**: assumes the proportion of the MTA and STR residents currently visiting the FCAD for specialty food goods utilise the retail services in the FCAD.
- **Estimate Three**: assumes the proportion of the MTA residents who would visit the FCAD for food, groceries and liquor shopping utilise the retail services in the FCAD, with some additional in-bound trade from people living outside the MTA.

2.2 Population Growth in the FCAD Catchment Area

From 2006 to 2031, the population of the FCAD:

- MTA is estimated to increase by over 30 percent, with almost a third of the total increase in Maribyrnong;
- STR is estimated to increase by over 45 percent, with the inner east STR experiencing the highest increase.

The above population increases in the FCAD MTA and STR will not necessarily translate into significant additional floorspace requirements for the FCAD as other factors, such as trading patterns, will influence the market share of the FCAD.

2.3 Changing Personal Expenditure Profiles in the FCAD Catchment Area

The level of personal expenditure on retail goods in the FCAD MTA varies significantly (from approximately $8,800 to $13,100 per person per annum). A number of areas (Footscray, Maidstone, West Footscray, Brooklyn and Braybrook) within the FCAD MTA have lower retail expenditure profiles than the average Melbourne Statistical Division (MSD) profile however, these are counter-balanced by areas (Yarraville and Maribyrnong) that have higher than the average MSD profile. The diversity of retail expenditure profiles indicates that the MTA contains a wide range of consumer expectations, values and preferences.

The progressive gentrification of the MCC, particularly in Yarraville and Maribyrnong as demonstrated by the retail expenditure profiles, may generate higher levels of personal expenditure on retail goods in the FCAD MTA. This will not necessarily translate into significant additional floorspace requirements for the FCAD unless the FCAD provides the retail goods and services, support / ancillary activities and amenity levels expected by the changing population.

2.4 Trading Patterns and Potential Market Shares

The FCAD has an existing catchment trading pattern and market share that does not reflect a typical activity centre.

The 'typical' catchment trading pattern of activity centres has been illustrated through telephone surveys across metropolitan Melbourne. The catchment of a typical sub-regional activity centre is described below, with three identifiable catchment component areas.

- A primary catchment area where the majority of residents do most of their daily, weekly and discretionary shopping in the centre, which represents approximately 70 percent of total food, groceries and liquor expenditure in the centre.
- A secondary catchment area where some residents do some of their weekly shopping and most of their discretionary shopping in the centre, which comprises 20 to 25 percent of total food, groceries and liquor expenditure in the centre.
- A tertiary catchment area where a small proportion of residents shop infrequently in the centre, representing 5 to 10 percent of food, groceries and liquor expenditure in the centre.

The primary and secondary catchments of a typical sub-regional activity centre form the MTA.

In comparison, approximately 52 percent of the total food, groceries and liquor expenditure in the FCAD comes from the MTA, while approximately 46 percent comes from the STR.

In addition, the in-home telephone surveys reveal the low market shares achieved by the FCAD in the MTA. This is particularly the case in relation to expenditure for supermarkets and other household goods, where the current market share of the FCAD is less than half of the potential market share.

It is concluded that the FCAD is currently out-competed by other activity centres in the region, which have captured expenditure from the FCAD MTA that would otherwise be bound to the FCAD. With high levels of expenditure escaping the FCAD MTA, there is a need to counter these existing market trends by making the FCAD more attractive relative to the activity centres currently servicing the MTA in order to lift market shares.

2.5 Current and Projected Turnover Levels

A comparison of the estimated total retail sales increase over the period 2008 / 09 to 2030 / 31 under Scenarios One and Two reveals that a higher (by $3.7 million) level of total retail goods sales will be achieved under Scenario Two and in particular, in relation to supermarkets (additional $5.4 million in sales under Scenario Two) and other household goods (additional $6.9 million in sales under Scenario Two).

Retail Turnover Densities (RTD) provide a measure for the performance of retail floorspace on the basis of sales per square metre of gross leasable area (GLA) The RTD for the FCAD under Scenarios One and Two have been calculated and compared to the industry accepted benchmarks and those of Highpoint. The conclusions are as follows.

- Under Scenario One, the current RTD for supermarket and other household goods floorspace in the FCAD are well below the industry accepted benchmarks.
- Under Scenario Two, the potential RTD for supermarket and other household goods floorspace in the FCAD would increase however, the potential RTD for specialty food goods, take away food, cafe, restaurant and bulky goods floorspace would decrease.
- The FCAD has approximately 30 percent of the turnover of Highpoint but more than 60 percent of the retail goods floorspace.
- The RTD of supermarket and other household goods floorspace in the FCAD needs be improved to support the requirements of major retailers and to attract the national brand speciality stores, which will increase market share in the MTA.
- To 'recapture' market share from within the MTA, the FCAD needs to establish itself as the preferred destination for a diversity of weekly goods and services. Improved facilities, amenity and retail offer are required to make the FCAD more convenient, accessible and user-friendly than alternative centres servicing the MTA.

2.6 Supportable Retail Floorspace for 2008 to 2031

In order to assess the future supportable retail goods floorspace in the FCAD for 2008 to 2031, the industry accepted (sustainable) benchmarks for RTD have been applied to the forecast sales under Scenarios One and Two, resulting in different estimates of the future retail goods floorspace requirements for the FCAD. It is concluded that the level of supportable retail goods floorspace in the FCAD under Scenarios One and Two is significantly less than the existing level of provision. With over 22,000 square metres of excess retail goods floorspace, the FCAD will continue to trade well below industry accepted, sustainable benchmarks, which will influence the types of tenants likely to establish in the FCAD and its relevance to key segments of the MTA population.

The supportable retail services floorspace in the FCAD for 2008 to 2031 has also been assessed using three different estimates of the current and forecast net effective supporting population of the FCAD. The net effective supporting population is the number of people from the MTA, STR and beyond who visit the FCAD on a regular basis. It is concluded that between approximately 7,500 to 12,000 square metres of additional retail services floorspace will be required by 2031.

As retail goods and services both operate from shopfront floorspace, the future floorspace for the FCAD is considered in terms of net additional shopfront floorspace. It is concluded that much of the additional retail services floorspace required by 2031 will be met by existing shopfront floorspace in the FCAD however, there will still be an oversupply of shopfront floorspace in 2031, even if the FCAD increases its market share in the MTA.

2.7 Conclusion

To 'recapture' market share from within the MTA, the FCAD needs to establish itself as the preferred destination for a diversity of weekly goods and services. Improved facilities, amenity and retail offer are required to make the FCAD more convenient, accessible and user-friendly than alternative centres servicing the MTA.

The FCAD cannot rely on expenditure from the STR. As activity centres in the STR improve their retail offer and better meet the needs of residents, it is likely that the market share of the FCAD from the STR will fall over time. An active policy of consolidation and regeneration must be adopted to improve the performance of the FCAD by recapturing expenditure from the MTA.

The existing provision of shopfront floorspace in the FCAD reflects its earlier role and dominance in the region and cannot be justified by current trading conditions, hence an active policy of consolidation must be adopted. A sustainable retail future for the FCAD and the foundations for a process of re-investment and revitalisation will need to be based on the development of a defined niche required by residents in the MTA. The recommended niche is food, groceries and liquor sales, convenience household goods and retail services.

3 IMPLEMENTATION FRAMEWORK

The Implementation Framework outlines the preferred role and structure for retail development in the FCAD. The vision statement is as follows.

> "*The FCAD will be seen as a modern, dynamic and attractive retail and services centre with a recognised regionally competitive offer in food, groceries and day-to-day household goods with a unique and cosmopolitan environment reflecting the diverse cultures of Melbourne's inner west.*'

The above vision is to be achieved by the implementation of a retail framework plan derived from the following principles.

- Focussing on a defined niche required by residents in the MTA. The recommended niche is food, groceries and liquor sales, convenience household goods and retail services.
- Redeveloping / refurbishing the major attractors in the FCAD, in particular, the Forges store site and Footscray Market.
- Linking the major attractors with a recognised shopping street.
- Focussing the existing investor interest in the FCAD.

The retail framework plan comprises the following key elements essentially grouped into an eastern and western cluster connected by an east-west pedestrian spine supported by north-south pedestrian links (refer Figure 10).

- The redevelopment of the Footscray Market to comprise a galleria system and a market hall.
- The redevelopment of the Forges store site and selected adjoining properties to provide a new discount department store (to be operated by Forges or a new national operator) and supermarket.
- The refurbishment of Footscray Plaza.
- A new supermarket-based development south of Paisley Street.
- The revitalisation of Maddern Square as an urban plaza with active edges comprising restaurants and specialty stores and services.
- Extensive provision for new specialty stores and services along the east-west pedestrian spine connecting the western and eastern clusters and along the supporting north-south pedestrian links.
- The construction of new car parking stations that could be co-located with the supermarket and discount department store developments in the western cluster and / or the redevelopment of the existing car parks at French Street and Irving Street.

The management framework recommends a range of actions and programs to effect the implementation of the retail framework plan for the FCAD.

PART A: INTRODUCTION

1 INTRODUCTION

The Footscray Retail Study (the Study) was commissioned by Maribyrnong City Council (MCC) and the Department of Planning and Community Development (DPCD) in 2008. The purpose of the Study is to understand the issues affecting the current retail performance of the Footscray Central Activities District (the FCAD), to assess its future potential for growth, improvement and change and to establish a strategy for the revitalisation of the FCAD.

The following parts comprise the Study.

- Introduction - provides a functional analysis of the FCAD; describes the market research used in the Study and identifies the FCAD catchment.
- Economic Assessment - provides the primary economic research and analysis of the FCAD.
- Implementation Framework - provides a framework for the FCAD that will guide its revitalisation.

Figure 1: The Study Area

2 FCAD FUNCTIONAL ANALYSIS

2.1 CONTEXT

The FCAD is located approximately 7 kilometres west of the Melbourne Central Activities District (CAD), on the western side of the Maribyrnong River (refer Figure 2).

Retailing activity has a long association with Footscray. Footscray's location at the confluence of major regional roads (Ballarat Road and Geelong Road) and two major regional railway lines, ensured its development as a regional retailing services and commercial centre.

Footscray was recognised as a regional centre in the Melbourne and Metropolitan Board of Works Plan (1954) and was a designated district centre in the development of metropolitan policy during the late 1970's and 1980's. The current designations of Footscray, first as a transit city in Melbourne 2030 (2002) and more recently as a CAD, is a testament to Government recognition of its public transport accessibility and a reflection of wider aspirations for Footscray to develop as a commercial, retailing, administrative and diversified services centre of metropolitan significance.

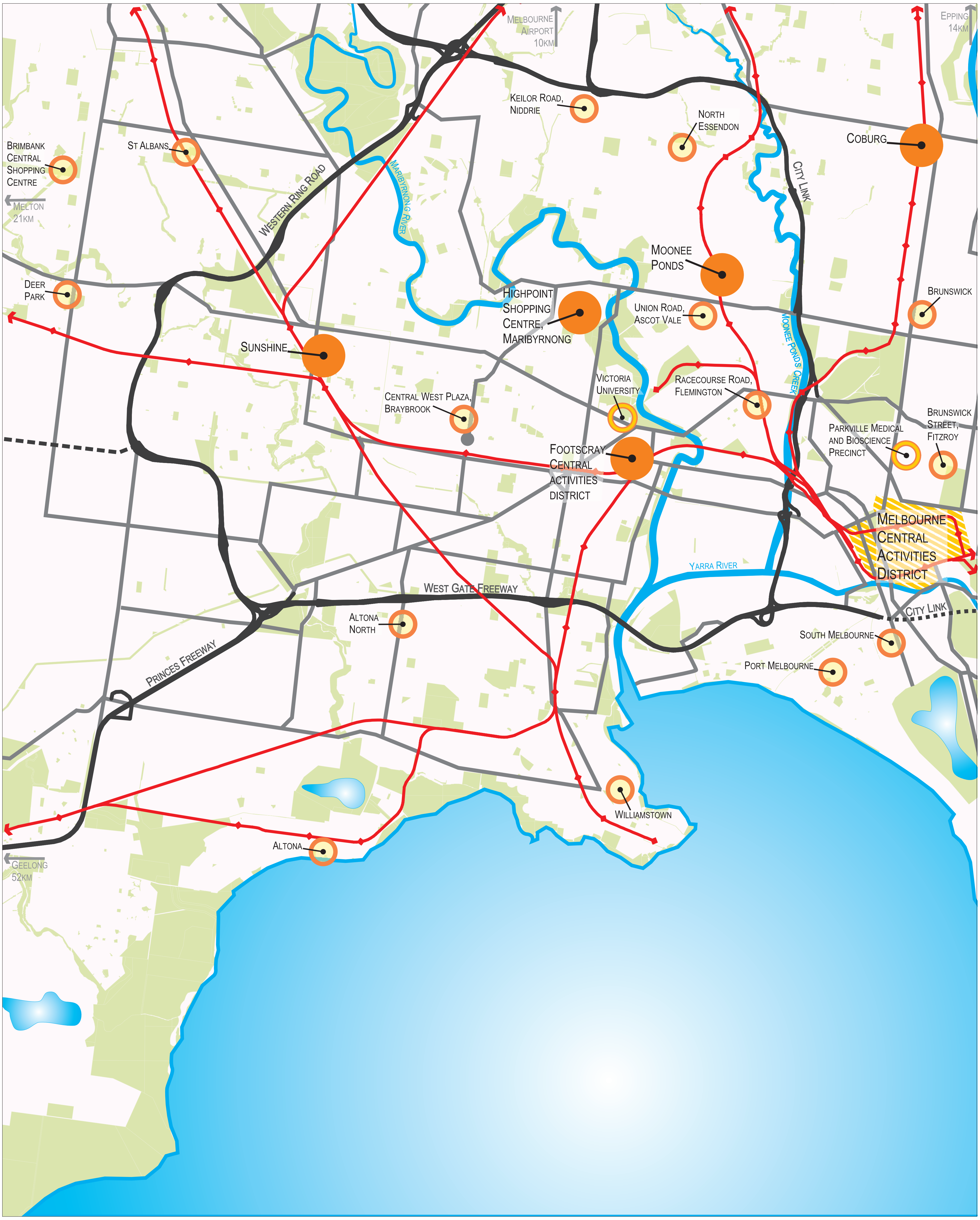
In retailing terms, the FCAD was the pre-eminent regional centre serving Melbourne's western suburbs in the first half of the twentieth century extending through to the 1970's. The development of several other major centres within close proximity to the FCAD has caused in a shift in the retail role and function of the FCAD from the pre-eminent or primary retail centre (as the only centre in the region with multiple discount department stores) to a centre with a more limited retail function. Particular developments impacting upon the higher-order retail function of the FCAD include:

- Highpoint Shopping Centre (Highpoint), located approximately 4 kilometres north west of the FCAD;
- Sunshine Marketplace and Sunshine Plaza, located approximately 7 kilometres west of the FCAD;
- Altona Gate Shopping Centre, located at Altona North, approximately 7 kilometres south west of the FCAD.

2.2 CURRENT ROLE AND TENANCY STRUCTURE

The importance of retailing in establishing an attractive sense of place and high-amenity public realm setting are well recognised in many existing Government policy documents, recognising the significance of small scale specialty stores and their finely-grained shopfronts in creating a sense of activity along street frontages. The role of major retail stores (supermarkets, discount department stores and department stores) in generating the main source of activity is generally less well recognised.

FIGURE 2 : REGIONAL CONTEXT



LEGEND

Melbourne CAD	Specialised Activity Centre	Rivers	Open space
Principal Activity Centre	Rail line and stations	Freeways and tollways	Urban area
Major Activity Centre	Significant water bodies	Primary arterial roads	

SCALE: 0 1 2 4km

North

Maribyrnong City Council

Major retail stores have the most significant role in retail planning, as they draw the majority of customers into a centre on a regular basis, forming the basis of its market share. The performance and viability of these major stores has a significant impact on the amount of specialty retail floorspace that can be supported and the sustainability of trading levels in any centre. Furthermore, the positioning of the major retail stores within a centre can impact upon the performance of specialty retail stores by generating higher levels of pedestrian traffic along particular paths or routes where the specialty stores can enjoy higher levels of trade. In the context of internal malls, the relationship between major stores and specialty retailers is optimised by creating prime retail spaces where major retail stores are placed at either end of a pedestrian space, which is lined with specialty stores. Ultimately, these centres are highly successful retail developments because their design maximises the level of retail expenditure in the centre.

In activity terms, the FCAD has a regional role for certain activities such as medical and banking services and a sub-regional-district role for retail trade.

The FCAD's major retail attractors are shown in Table 1.

It can be seen that the only sector in which the FCAD is comprehensively represented by national chains is in the banking sector, with virtually all of the major banks present in the FCAD. In grocery retailing, the sole national chain represented is Coles with a mid-sized supermarket. The FCAD's department / discount department store representation was limited at the time of the survey (December 2008) to Forges and Kmart.

Forges' recent announcement that it would be closing its Footscray store will bring this representation to a single discount department store (compared to four department / discount department stores at Highpoint, three at Werribee Plaza and two at Sydenham and Sunshine).

A key characteristic of the FCAD's retail structure is the significant absence of national chain representation, particularly in discretionary goods such as clothing, footwear and accessories, but extending through to jewellery, furniture and furnishings.

A detailed analysis of stores and services across eleven centres in the western and north western suburbs found that:

- in relation to the provision of clothing, footwear and accessories stores, the FCAD was represented by just the 2 national chain tenancies (compared to 165 for Highpoint, 58 for Werribee Plaza and 37 for Sydenham);
- in relation to jewellery stores, the FCAD had no national chain representation (compared to 16 for Highpoint, 7 for Sydenham and 7 for Werribee Plaza);
- in relation to furniture and furnishings, the FCAD had no representation by national chains (compared to 11 stores at Highpoint, 9 stores at Sydenham and 3 at Werribee Plaza);
- the same picture emerged in relation to giftware and specialty homeware stores, sports and leisure stores, books and stationary, retailing and toys and games stores. In all of these sectors, the FCAD had no representation in terms of national chain stores (compared to 46 stores for Highpoint, 13 stores for Sydenham, 8 stores for Werribee Plaza, 4 stores for Point Cook Town Centre and 4 stores for Melton).

Table 1: Major Tenants

Major Tenant	Floorspace m² GLA
National Chain Tenants	
Food, Groceries and Liquor	
Bakers Delight	88
Coles	1,544
Liquorland	110
Subway	100
Department and General Stores	
Forges	8,096
Kmart	8,167
Mini-Majors	
Savers	2,503
Pharmacies	
Chemist Warehouse	1,728
Priceline	356
Other Services	
Australia Post	370
Centrelink	1,328
Electrical Goods	
Godfrey's	252
Retravision	1,748
Banks	
ANZ	273
Bendigo Bank	340
Commonwealth Bank	335
Westpac	330
Subtotal: National Chain Tenants	27,668
Key Local Tenants	
Footscray Market	3,409
Little Saigon Market	909
Subtotal: Key Local Tenants	4,318
TOTAL MAJOR TENANTS	31,986

The fundamental characteristic of the FCAD of a near absence of national chain stores (including franchises) across numerous retail sectors is profound. Its functional structure in terms of national major stores is elemental and this together with the dearth of national chain or franchise stores has significant ramifications which impact on the spatial structure of the FCAD and its competitiveness for market share.

Thus, in order to effectively plan the future development of the FCAD, there is a need to:

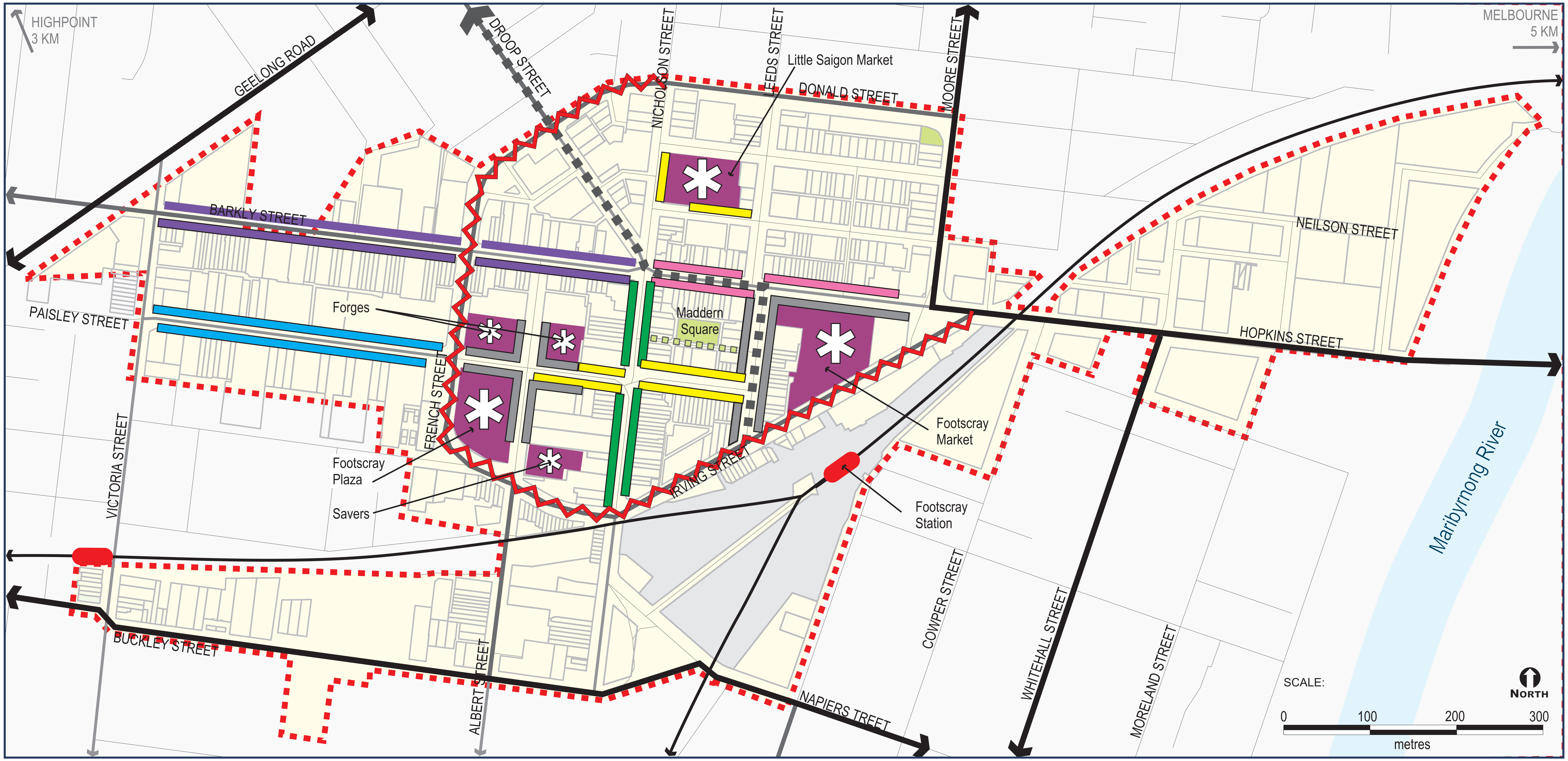
- **optimise the market shares and performance of the major retail stores;**
- **establish whether there is potential for any further major store development in the FCAD;**
- **identify the potential for additional retail goods and services floorspace, in order to provide guidance to the development of additional shopfront floorspace in the FCAD.**

2.3 SPATIAL STRUCTURE, RETAIL-COMMERCIAL AREA

The FCAD's retail stores and services are located as follows (refer Figure 3).

- Several of the FCAD's key attractors are located in the south west, focussed around Paisley Street between French and Albert Streets and in Albert Street, south of Paisley Street (Forges, Coles, Kmart, Savers).
- The Footscray Market located in the south east of the FCAD forms a separate attractor.
- A third cluster of activities in the northern sector of the FCAD is formed by Little Saigon Market comprising a supermarket and a number of specialty stores north of Byron Street between Nicholson and Leeds Streets.
- Paisley Street is a low amenity shopping street between Nicholson and Leeds Street.
- Leeds Street and Hopkins Street (between Nicholson Street and Leeds Street), together with Nicholson Street, are mixed activity streets accommodating financial services, cafes and restaurants and household goods stores. Low amenity, mixed activities extend along Barkly Street, west of Nicholson Street.

FIGURE 3 : RETAIL ENVIRONMENT



Major Attractor
Very Poor Amenity - Low Level Shopping Environment
Moderate Activity Street - Low Amenity
High Amenity - Low Activity
Non - Shopping Street
Study Area
Potential Restaurant Precinct
Medical & Community Services Precinct
Low Amenity Mixed Use Commercial Environment
Reserve / Public Land
Train Line
Tram Line

The immediate surrounds of several of the major attractors are almost devoid of any appreciable level of complementary retail activity (the street entry areas to Coles, Kmart and Forges in the south west of the FCAD and the Hopkins Street frontage of the Footscray Market; refer to Photographs 1, 2, 3 and 4).

Photograph 1

Forges store external environment

Photograph 2

Footscray Plaza main street address

Photograph 3

Metro West entry area opposite Footscray Plaza

Photograph 4

Leeds Street shopfront

The surrounds of Little Saigon Market are an exception. The street front to the Little Saigon Market is active on both the southern and Nicholson Street frontages.

There is no regionally recognised shopping street in the FCAD that is of a consistent shopfront quality and is highly active (Puckle Street at Moonee Ponds is an example of this type of street).

The Nicholson Street Mall has had major public investment and the public realm is of high quality. However, the Nicholson Street Mall has not attracted national retail stores. It is comprised of neighbourhood level retail stores, cafes, take away food stores and financial services (refer to Photograph 5).

Photograph 5

Nicholson Street Mall

2.4 SUPPORTING PRECINCTS

Paisley Street west of French Street, while not part of the retail area of the FCAD, is particularly significant in terms of the FCAD's broader regional role. It is one of the major medical and community services precincts in the region. Other key elements closely related to the retail-commercial areas of the FCAD include the following.

- The Footscray railway station precinct. This is a major public transport interchange servicing Melbourne's western region.
- Victoria University (including the Nicholson Campus immediately south of the FCAD and the Footscray Park campus on the north side of Ballarat Road).
- The Maribyrnong Riverside redevelopment area, including areas north of Hopkins Street.
- A residential precinct to the north and south of the FCAD with developments now at the edge of the shopping and commercial precincts.

2.5 SUMMARY

In summary, the scale of the FCAD's retail commercial areas is extensive. The key issue is the near absence of recognised national chain and franchise retail stores and services in the main shopping streets. Their absence is directly reflected in the FCAD in several ways:

- low pedestrian densities (this is by observation and may need to be measured as part of monitoring progress in the revitalisation of the FCAD);
- low levels of reinvestment in stores and a resultant poor quality environment;
- low levels of activity in the shopping streets.

It is noted that the national major chain stores are reduced to an elemental representation in the south west of the FCAD with no relationship to any quality shopping street or arcade system.

Each of three attractor clusters - the south west, Footscray Market and Little Saigon Market - does have a core of regular trade but the flow-on effect of these clusters is minimal as there are no high quality shopping streets that connect to these clusters. The clusters may be fairly described as islands of moderate activity, widely separated by poor amenity - low activity streets that would not be recognised as regional shopping streets in any other centre in metropolitan Melbourne, given the near total absence of national chain and franchise stores and services.

3 APPLICATION OF MARKET RESEARCH IN THE STUDY PROCESS

The Study is based on the application of extensive market research. The following surveys were undertaken for the Study.

- Land use and floorspace surveys of the FCAD (undertaken by Collie Pty Ltd, July - August, 2008). The floorspace information was used in the assessment of retail floorspace requirements for the FCAD. The land use information was used for a spatial functional analysis of the FCAD.

- In-home telephone surveys undertaken by Sweeney Research (refer Appendix B). The purpose of the telephone survey was to obtain detailed information on patterns of market share in the FCAD's main trade area (MTA). Cluster sampling was applied for four suburban areas within the MTA of the FCAD. The resultant surveys had the capability of being analysed as freestanding samples for each suburb, comparatively to assess differences between suburbs and conjointly to develop a picture of the whole of the area. The four suburban areas used were:
  - Footscray / Seddon (postcode 3011);
  - Brooklyn / Kingsville (postcode 3012);
  - Yarraville (postcode 3013);
  - Maribyrnong (postcode 3032).

  The conjoint sample size was 244 net valid responses.

- In-centre surveys were undertaken in the FCAD by Collie Pty Ltd in September 2008 (refer Appendix C). The survey interviewed 380 participants to obtain information on patronage patterns to the FCAD for shopping, work and other purposes. The in-centre survey also provided information on shopping centre catchments, other centres shopped by patrons and preferences for improvements to the FCAD.

- A detailed inventory was compiled of tenancies in major centres in Melbourne's western suburbs. The centres surveyed were:
  - Altona (Pier Street);
  - Altona Gate Shopping Centre;
  - Footscray;
  - Highpoint;
  - Melton (Woodgrove Shopping Centre);
  - Moonee Ponds;
  - Point Cook Town Centre;
  - Sunshine;
  - Sydenham (Watergardens);
  - Werribee Plaza Shopping Centre;
  - Williamstown.

The purpose of the tenancy inventory was to provide a more detailed understanding of patterns of market share and the competitive environment in which the FCAD is placed.

- Floorspace was obtained for supermarkets in shopping centres within the main trade area (MTA) and secondary trade regions (STR) of the FCAD, together with research on network travel distances from each of the supermarkets to the centroids of each of the suburbs that make up the FCAD's MTA and STR. The centres for which supermarkets were surveyed were:
    - Altona (Pier Street);
    - Altona Gate;
    - Ascot Vale;
    - Braybrook Shopping Centre;
    - Central West Plaza;
    - Footscray;
    - Highpoint;
    - Moonee Ponds;
    - Newmarket;
    - Seddon;
    - Sunshine;
    - Williamstown;
    - Yarraville.

  The in-home telephone surveys indicated that convenience was the major factor in supermarket choice. The purpose of the floorspace inventory for supermarkets in the FCAD's MTA and STR was to enable a 'gravity model' of shopping behaviour to be developed for the FCAD. The gravity model calculates the sales that could be generated if minimisation of the distance to the nearest supermarket was the sole criterion in choice of supermarket and activity centre.

- Consultation, including with landowners in the FCAD, to ascertain key issues, opportunities and potential approaches for the revitalisation of retailing in the FCAD (refer Appendix D).

It is important to note that the component sets of information obtained through surveys and research as identified above were interrelated in a systematic process to provide:

- an assessment of the role, structure and function of retailing in the FCAD;
- an assessment of the retail performance of the FCAD relative to industry accepted benchmarks of retail performance;
- estimates of current and projected retail floorspace requirements for the FCAD;
- a detailed evaluation of the FCAD's retail context for the purposes of preparing a retail framework plan;
- identification of potential retail sectors to target in the development of a retail framework plan.

Several sets of analytical and qualitative outcomes were prepared from systematic analyses of survey and workshop information interrelated with the following.

- Customised retail expenditure profiles prepared for defined suburban areas in the FCAD's MTA and STR. The information was obtained from Marketinfo, a Brisbane based consultancy which provides specialised expenditure information for the retail industry throughout Australia.
- Projections of households and population at the small area level for the FCAD's MTA and STR. The forecasts were part of information prepared by ID Consulting for MCC and other municipalities.

The survey and research information sets, which were utilised to provide the above assessments of the FCAD's role, retail structure and environment, together with an understanding of its wider competitive environment were brought together in a context statement drawn from a strengths, weaknesses, opportunities and threats (SWOT) analysis of the FCAD for retail and services trade. To this information were added retail and strategic development principles, based on the professional experience and judgment of the Consultants, for the preparation of a retail framework plan and management framework for the FCAD.

In summary, the market research, surveys and consultation form foundational and integral components of the analysis and key findings relating to the current state of retailing and services and future prospects in the FCAD and provided the basis for the preparation of the retail framework plan and the management framework.

4 FCAD CATCHMENT

The existing catchment of the FCAD has been determined according to patterns of regular visitation to the FCAD, based on in-home telephone surveys (Sweeney Research, commissioned by Collie Pty Ltd in July 2008) and in-centre surveys (Collie Pty Ltd, September 2008).

The existing FCAD catchment is comprised of five distinctive components (refer Figure 4).

- A sub-regional or district-level MTA, which covers six postcode areas that encompass the suburbs of Footscray, Maidstone, West Footscray, Brooklyn, Kingsville, Yarraville, Maribyrnong, Braybrook and Sunshine (refer Figure 5).

- Four STR, which extend across the metropolitan area.
    - The inner east STR: comprising parts of the Statistical Local Areas (SLA) of Melbourne - Inner; Melbourne - Southbank-Docklands; Melbourne - Remainder; Moonee Valley - Essendon; Moreland - Brunswick; Port Phillip - West; Yarra - North and Yarra - Richmond.
    - The north STR: comprising parts of the SLA of Brimbank - Keilor; Hume - Broadmeadows; Maribyrnong; Moonee Valley - Essendon; Moonee Valley - West; Moreland - Brunswick; Moreland - Coburg and Moreland - North.
    - The north west STR: comprising parts of the SLA of Brimbank - Keilor; Brimbank - Sunshine; Melton - East and Moonee Valley - West.
    - The south-west STR: comprising parts of the SLA of Hobsons Bay - Altona; Hobsons Bay - Williamstown; Wyndham - North; Wyndham - South and Wyndham - West.

For the purposes of the analysis undertaken for the Study, the MTA is defined as the primary area that the FCAD draws its day-to-day trade from, particularly to access food, groceries and liquor items and a range of services. The STR are also a source of regular trade for the FCAD however, in comparison to the MTA, a much smaller proportion of residents within the STR visit the FCAD.

The results of the in-centre surveys indicate that a relatively high proportion of visitors to the FCAD from the STR visit for food, groceries and liquor shopping purposes, which is not a typical trading attribute of other activity centres. The differences between the existing FCAD catchment and the typical trading catchment of activity centres are discussed in Section 10 of the Study.

The in-centre surveys also reveal that the family background of visitors to the FCAD is an important characteristic of the FCAD's local and regional functionality. In the 2006 Census of Population and Housing, approximately 16 percent of the population in MCC were of Chinese or Vietnamese ancestry however, more than 50 percent of the shopping visitors to the FCAD were of Asian ancestry, with approximately 47 percent from the MTA and 45 per cent from the STR.

In contrast, of the shopping visitors to the FCAD whose parents were born in Australia, approximately 70 per cent were from the MTA and 26 per cent were from the STR. This indicates that these populations are differentially attracted into the FCAD and to the extent that the FCAD does play a regional role, this is achieved in large part by support from Asian communities. The extent to which this support can be maintained or consolidated will have a significant impact on the future trading levels in the FCAD.

It should also be noted that in addition to the MTA and STR, the FCAD also draws a level of trade from beyond the defined catchment area. Social networks, tourism, employment, study and other non-retail activities also provide a source of trade for the FCAD, thus a level of inbound expenditure from outside the defined catchment area has been calculated into the analysis presented in the Study.

FIGURE 4 : MAIN TRADE AREA AND SECONDARY TRADE REGIONS

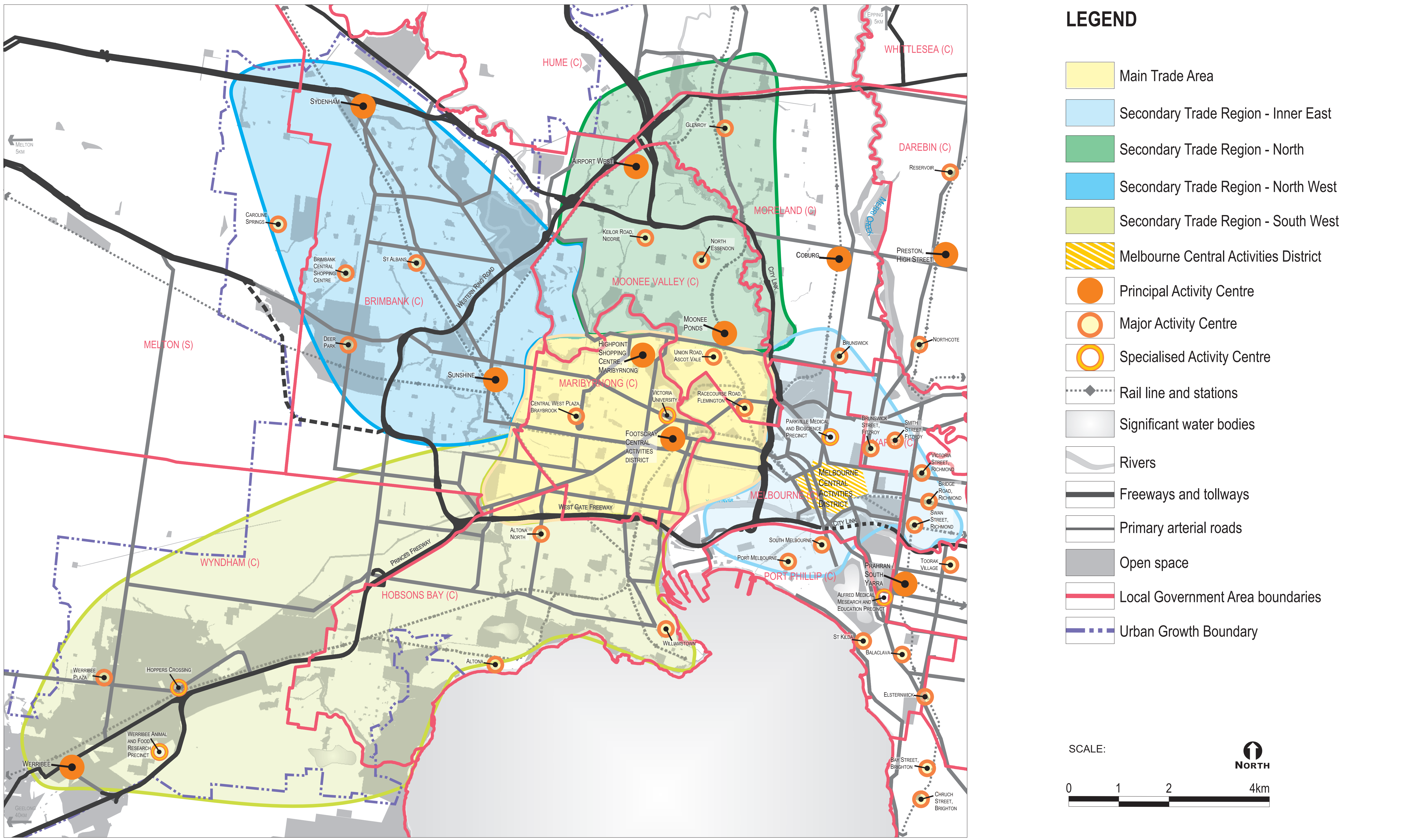
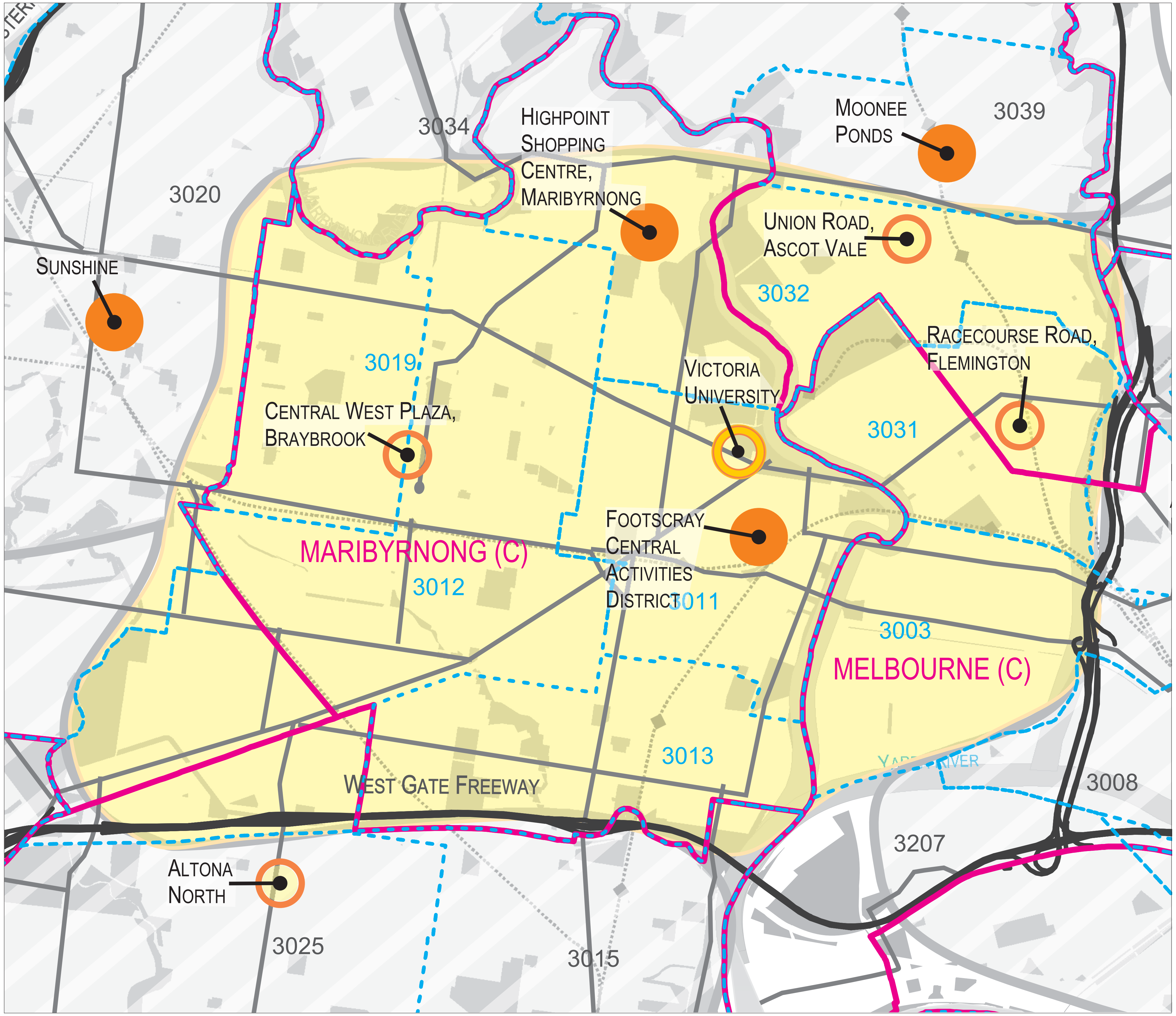


FIGURE 5 : MAIN TRADE AREA - POSTCODE COMPONENT AREAS



LEGEND

- Main Trade Area
- Surrounding Secondary Trade Regions
- Principal Activity Centre
- Major Activity Centre
- Specialised Activity Centre
- Rail line and stations
- Significant water bodies
- Rivers
- Freeways and tollways
- Primary arterial roads
- Open space
- Local Government Area boundaries
- Postal Areas

SCALE:

0 1 2km

North

PART B: ECONOMIC ASSESSMENT

5 INTRODUCTION

A key component of the background research for the Study is the economic assessment. It provides a sound analytical basis for guiding future floorspace development and improving retail trade conditions in the FCAD by establishing a series of quantitative measures for the current performance of FCAD relative to industry accepted benchmarks, other centres and typical trading patterns.

The following sections outline the results of a comprehensive market assessment of potential retail floorspace for the FCAD over the period from 2008 to 2031 in terms of two scenarios.

- **Scenario One**: based on current trading patterns and market shares, determined by detailed in-home surveys within MCC and in-centre surveys carried out over a typical trading period.
- **Scenario Two**: based on potential trading patterns and market shares, determined by a gravity model of consumer preferences of people living in suburbs surrounding the FCAD, where it is assumed individual choices of shopping destination are based on proximity and retail offer.

It is important to recognise that the assessments of potential retail floorspace are only intended to provide a guide for the current and likely future state of the market.

The differences between the results produced for each scenario provide an indication of the opportunities to strengthen the performance of the FCAD, which will inform the preparation of a retail framework plan to guide retail development in the FCAD over the longer term.

6 DETERMINANTS OF FUTURE RETAIL FLOORSPACE DEMAND

There are a number of factors that influence the demand for retail floorspace in the FCAD, including the following.

- The current and projected population of the MTA and STR.
- Changing patterns of personal retail expenditure over time.
- The number of people from outside (including from the STR) the MTA who visit the FCAD to purchase retail goods and services.
- Current and projected patterns of in-bound expenditure, that is, expenditures by resident households to the FCAD from areas outside the catchment of the FCAD.
- Current and projected patterns of escape expenditure to other centres, which would otherwise be bound to the FCAD.
- Current and projected productivity requirements for retail floorspace measured as annual turnover ($) per square metre of gross leasable area (GLA).
- The existing and projected supply and structure of retail goods and services floorspace in the FCAD.

Table 2 provides a summary of the influence of each factor on the determination of retail floorspace requirements for the FCAD.

Table 2: Determinants of Retail and Commercial Floorspace

Factor	Impacts on Retail and Commercial Floorspace Demand	Assessment Undertaken	Operating Assumptions in the Floorspace Demand Projections
Population trends in the MTA and STR	The FCAD draws the majority of its trade from the MTA. Population trends within the catchment, that is population growth and decline, has implications on the viability of existing activity centres and future floorspace demand. Over long periods of time, population growth is a significant factor that will generate additional demand for retail and commercial floorspace.	ID Consulting population projections were used in the assessment of future growth in the MTA, based on small area (postcode) boundaries (refer Appendix E, Table Set A). The Department of Sustainability and Environment (DSE), *Victoria in Future* (2004) population projections were used in the assessment for the STR (refer Appendix E, Table Set F).	It is assumed that the population projections prepared by ID Consulting and DSE will be achieved.
Changing patterns of personal retail expenditure	Future retail floorspace requirements are determined by the number of residents in the catchment and the level of personal retail expenditure generated by residents.	Retail goods expenditure profiles for household residents in the MTA and STR were prepared for the periods June 2011, 2021 and 2031 (refer Appendix E, Table Set B and Table Set G). The profile represents the estimated (June 2006) and projected (2011, 2021 and 2031) personal expenditure on retail goods within the catchment area.	Refer to Appendix E, Table Set B and Table Set G.

Factor	Impacts on Retail and Commercial Floorspace Demand	Assessment Undertaken	Operating Assumptions in the Floorspace Demand Projections
Current and projected patterns of in-bound expenditure	Given the existing trading patterns of the FCAD, in-bound expenditure, that is retail trade that is drawn from outside the MTA, will generate demand for retail goods and services and consequently, demand for retail floorspace.	Current estimates of the proportion of in-bound expenditure were made on the basis of in-home telephone surveys and in-centre surveys. The information is reflected as 'market share' analysis for the MTA in Appendix E, Table Set D and for the STR in Appendix E, Table Set J. In modelling a potential future scenario for the FCAD, an estimate was made for the level of in-bound expenditure on the basis of typical trading patterns of other well-performing centres.	It is assumed that the sample of respondents to the in-home surveys and the in-centre surveys were representative of the expenditure profile of the broader catchment.
Current and projected patterns of escape expenditure	Escape expenditure represents the expenditures of household residents in the MTA bound to activity centres other than the FCAD, which would be bound to the FCAD if it offered a more attractive choice of retail destination. Escape expenditure reduces demand for retail goods and services in the FCAD and increases demand for retail goods in other centres in the MTA.	Levels of current and projected escape expenditure from the MTA were determined by the Consultants on the basis of the in-home survey results (refer Appendix E, Table Set E). An alternate expenditure scenario was also assessed, utilising a gravity index that establishes the propensity of individuals to travel to the FCAD compared to other centres in the MTA (refer Appendix E, Table Set R).	It is assumed that the sample of respondents to the in-home surveys and the in-centre surveys were representative of the expenditure profile of the broader catchment. Using the gravity model, it is assumed that people choose their shopping destination on the basis of the retail offer and the distance to home.

Factor	Impacts on Retail and Commercial Floorspace Demand	Assessment Undertaken	Operating Assumptions in the Floorspace Demand Projections
Current and projected productivity requirements for retail commercial floorspace	Retail productivity (measured as retail turnover densities (RTD) or annual turnover per square metre of GLA) is a measure of returns to traders and indicates the economic sustainability of retail and commercial tenancies.	Assessments of actual and required RTD for the 2007 / 08 period were made based on the current retail system in the FCAD. The Consultants also projected RTD requirements for the periods 2010 / 11, 2020 / 21 and 2030 / 31 based on projected growth from sustainable RTD levels.	Sustainable RTD were projected for the periods 2010 / 11, 2020 / 21 and 2030 / 31 based on assumed real rates of RTD growth per annum.
Retail commercial floorspace supply	To determine future demand, the existing retail goods and services floorspace in the FCAD must be quantified. Recommendations for future retail goods and services floorspace allocations are based on what is required in addition to the existing supply (that is net additional floorspace).	A detailed inventory of the existing retail floorspace supply (as at 2008) was undertaken by the Consultants for all properties used for retail-commercial purposes, as identified in the MCC rates database (refer Appendix E, Table Set M).	

7 CALCULATION OF FUTURE FLOORSPACE REQUIREMENTS

The calculation of future floorspace requirements for retail goods and services in the FCAD requires the use of two methods.

1. **Expenditure method**: where future retail goods floorspace is estimated on the basis of population growth, changes in personal expenditure patterns, total sales within the MTA and the RTD requirements of retailers.
2. **Per capita provision method**: where future retail services floorspace is estimated on the basis of average demand for floorspace per person, influenced by growth trends in the provision of retail services, the level of population growth within the MTA and the additional population outside the MTA who utilise the FCAD to access retail services.

7.1 EXPENDITURE METHOD: FORECASTING FUTURE RETAIL GOODS FLOORSPACE REQUIREMENTS

The expenditure method was utilised to calculate the future retail goods floorspace requirements for the FCAD including food, groceries and liquor, household goods and bulky goods. Two different market share structures were applied in the analysis, producing two different scenarios for the future development of retail goods floorspace in the FCAD.

- **Scenario One** provides future floorspace projections on the basis of the current visitation patterns to the FCAD, determined according to the results of the in-centre survey and the in-home telephone survey. These two surveys revealed a pattern of visitation to the FCAD by residents from across the MTA as well as indicating significant levels of visitation from several STR, which extend from the south west to the inner east. The future floorspace requirements were then calculated for the FCAD on the basis of existing market shares for the MTA and STR and the level of expenditure generated by residents in these trade areas.
- **Scenario Two** provides future floorspace projections for the FCAD on the basis of typical trading patterns of activity centres, using a gravity model. The gravity model assumes people living in local neighbourhoods make choices about their destination centre according to the distance to each centre and its retail offer. The analysis was completed for six neighbourhoods within the MTA, resulting in market shares and levels of expenditure bound to the FCAD different from Scenario One. A level of in-bound expenditure was also assumed for areas outside the MTA.

7.1.1 Scenario One: Assessing Future Floorspace Demand on the Basis of Current Trading Patterns

The methodology utilised in producing the Scenario One assessment of future retail goods floorspace requirements for the FCAD is outlined below.

- **Estimates of MTA Population, Expenditure and Sales**
    - Assessment of the existing and future population of the MTA by postcode area by five-year periods from 2006 to 2031, as well as 2008 (refer Appendix E, Table Set A).
    - Forecasting of personal expenditure profiles for individuals living in the MTA by five-year periods from 2006 to 2031, based on assumed compound growth rates from end June 2007 (refer Appendix E, Table Set B).
    - Calculation of total MTA expenditure on retail goods by five-year periods from 2006 to 2031, including estimates for 2008 (refer Appendix E, Table Set C).
    - Estimation of market shares for the FCAD in the MTA by postcode area for 2008, on the basis of in-home telephone survey results (refer Appendix E, Table Set D).
    - Forecasting of total MTA expenditure bound to the FCAD by five-year periods from 2006 to 2031, including estimates for 2008 (refer Appendix E, Table Set E).

- **Estimates of STR Population, Expenditure and Sales**
    - Assessment of the existing and future population of the STR by region by five-year periods from 2006 to 2031, as well as 2008 (refer Appendix E, Table Set F, Table F.4).
    - Forecasting of personal expenditure profiles for individuals living in the STR by five-year periods from 2006 to 2031, based on assumed compound growth rates from end June 2007 (refer Appendix E, Table Set G).
    - Calculation of total STR expenditure on retail goods by five-year periods from 2006 to 2031, including estimates for 2008 (refer Appendix E, Table Set H).
    - Estimation of market shares for the FCAD in each STR for 2008 on the basis of in-centre survey results (refer Appendix E, Table Set J).
    - Forecasting of total STR expenditure bound to the FCAD by five-year periods from 2006 to 2031, including estimates for 2008 (refer Appendix E, Table Set K).

- **Assessment of Current and Future Performance based on Current Trading Patterns**
    - Calculation of total sales in the FCAD from the MTA, STR and beyond the catchment areas by five-year periods from 2006 to 2031, including estimates for 2008 (refer Appendix E, Table Set L).
    - Identification of the existing floorspace supply (refer Appendix D, Table M.1).
    - Projections of RTD, utilising current (2008) and industry accepted, sustainable benchmarks as base figures, to produce forecasts by ten-year periods from 2011 to 2031, as well as for 2008 (refer Appendix E, Tables M.2, M.3 and M.4).

- ○ Application of the two forecast RTD to the total sales in the FCAD to determine the total supportable retail goods floorspace for the FCAD for 2011, 2021 and 2031 (refer Appendix E, Tables N.1 and N.2).
- ○ Calculation of the supportable Department Store Type Merchandise (DSTM) floorspace in the FCAD according to forecast sustainable RTD (refer Appendix E, Table N.3 and Section 7.1.3 for details of methodology).
- ○ Calculation of the net additional floorspace requirements for retail goods for 2008 to 2031, (refer Appendix E, Table N.4) taking into consideration existing levels of provision (refer Appendix E, Table M.1) and floorspace dedicated to major retail attractors (supermarkets and discount department stores).

7.1.2 Scenario Two: Assessing Future Floorspace Demand on the Basis of Typical Trading Patterns

The methodology utilised in producing the Scenario Two assessment of future retail goods floorspace requirements for the FCAD is outlined below.

- Application of a gravity model of consumer choice to assess typical market share trends for the FCAD for each of the six postcode areas in the MTA by:
  - ○ calculating the network distance from the population centroid of each postcode area to each activity centre within the MTA;
  - ○ assessing the total floorspace devoted to major retail stores (supermarkets and discount department stores) in activity centres within the MTA;
  - ○ calculating the 'gravity index' or propensity of residents to visit the activity centre by dividing the floorspace by distance travelled to produce a first estimate of market share;
  - ○ re-estimating the market share, assuming a level of supermarket or DSTM expenditure occurs outside the FCAD MTA.

- Forecasting of total MTA expenditure bound to the FCAD by five-year periods from 2006 to 2031, including estimates for 2008 (refer Appendix E, Table Set R).

- Calculation of total sales in the FCAD from the MTA and beyond the MTA (assuming a typical level of in-bound expenditure) by five-year periods from 2006 to 2031, including estimates for 2008 (refer Appendix E, Table R.8).

- Projections of RTD, utilising current (2008) and industry accepted, sustainable benchmarks as base figures, to produce forecasts by ten-year periods from 2011 to 2031, as well as for 2008 (refer Appendix E, Tables S.2 and S.3).

- Application of the two forecast RTD to the total sales in the FCAD, to determine the total supportable retail goods floorspace for the FCAD for 2011, 2021 and 2031 (refer Appendix E, Tables T.1 and T.2).

- Calculation of the supportable DSTM floorspace in the FCAD according to forecast sustainable RTD (refer Appendix E, Table T.3 and Section 7.1.3 for details of methodology).

- Calculation of the net additional floorspace requirements for retail goods for 2008 to 2031, (refer Appendix E, Table T.4) taking into consideration existing levels of provision (refer Appendix E, Table M.1) and floorspace dedicated to major retail attractors (supermarkets and discount department stores).

7.1.3 Calculating Department Store Type Merchandise

To establish demand for discount department stores in the FCAD, the level of trade in DSTM was assessed according to each of the above market share scenarios (refer Appendix E, Tables N.3 and T.3) by:

- calculating the proportion of household goods and bulky goods expenditure bound to the FCAD that would be spent in discount department stores for 2008 and by ten-year periods to 2031;
- estimating the maximum potential DSTM sales at the FCAD on the basis of current floorspace and the RTD achieved for the Kmart store;
- estimating the existing conjoint market share for discount department stores in the FCAD (that is the proportion of total DSTM expenditure in the FCAD spent in discount department stores) for 2008;
- forecasting the future conjoint market share for discount department stores from 2008 levels;
- forecasting the maximum potential DSTM sales in the FCAD for 2011, 2021 and 2031;
- forecasting sustainable RTD for discount department stores for 2008 and by ten-year periods to 2031;
- applying the forecast RTD to the forecast maximum potential DSTM sales in the FCAD to determine sustainable levels of discount department store floorspace for 2008, 2011, 2021 and 2031.

7.2 PER CAPITA PROVISION METHOD: FORECASTING FUTURE RETAIL SERVICES FLOORSPACE REQUIREMENTS

In addition to retail goods floorspace, forecasts were also prepared for retail services to provide a total estimate of retail shopfront floorspace requirements. The requirements for retail services have been calculated by utilising a per capita provision rate method for three net effective supporting population estimates. The net effective supporting population is the number of people who utilise the FCAD for everyday goods and services, calculated by multiplying assumed market shares by the catchment population.

Three estimates of future retail services floorspace requirements for the FCAD have been produced using different net effective supporting population estimates.

- **Estimate One**: assumes the proportion of the MTA and STR residents currently visiting the FCAD to go to the supermarket utilise retail services in the FCAD. This estimate is based on supermarket market shares determined in the retail goods analysis described in Section 7.1.1.

- **Estimate Two**: assumes the proportion of the MTA and STR residents currently visiting the FCAD for specialty food goods utilise retail services in the FCAD. This estimate is based on specialty food market shares determined in the retail goods analysis described in Section 7.1.1.
- **Estimate Three**: assumes the proportion of the MTA residents who would visit the FCAD for food, groceries and liquor shopping also utilise retail services in the FCAD, with some additional in-bound trade from people living outside the MTA. This estimate is based on the gravity-indexed market shares determined in the retail goods analysis described in Section 7.1.2.

The following methodology was utilised in calculating the future retail services floorspace requirements for the FCAD.

- Calculation of the net effective supporting population for the FCAD according to each of the estimates described above (refer Appendix E, Table V.6).
- Calculation of the rate of floorspace provision per capita as at 2008 and forecasting of future per capita provision rates by five-year periods from 2011 to 2031 for each of the estimates described above (refer Appendix E, Table V.7).
- Assuming a balance of supply and demand at 2008, calculation of the future retail services floorspace requirements by five-year periods from 2011 to 2031, on the basis of the net effective supporting population and the rate of floorspace provision per capita (refer Appendix E, Table V.8).
- Calculation of the net additional retail services floorspace requirements from 2008 levels of provision for 2008 to 2031 (refer Appendix E, Table V.9).

7.3 SUMMARY

The results of the analysis undertaken for the two future retail goods floorspace scenarios and three future retail services floorspace estimates are outlined in the following sections of the Study.

8 POPULATION GROWTH IN THE FCAD CATCHMENT AREA

In preparing the future floorspace requirements for the FCAD, population forecasts for the MTA and the STR were obtained and prepared.

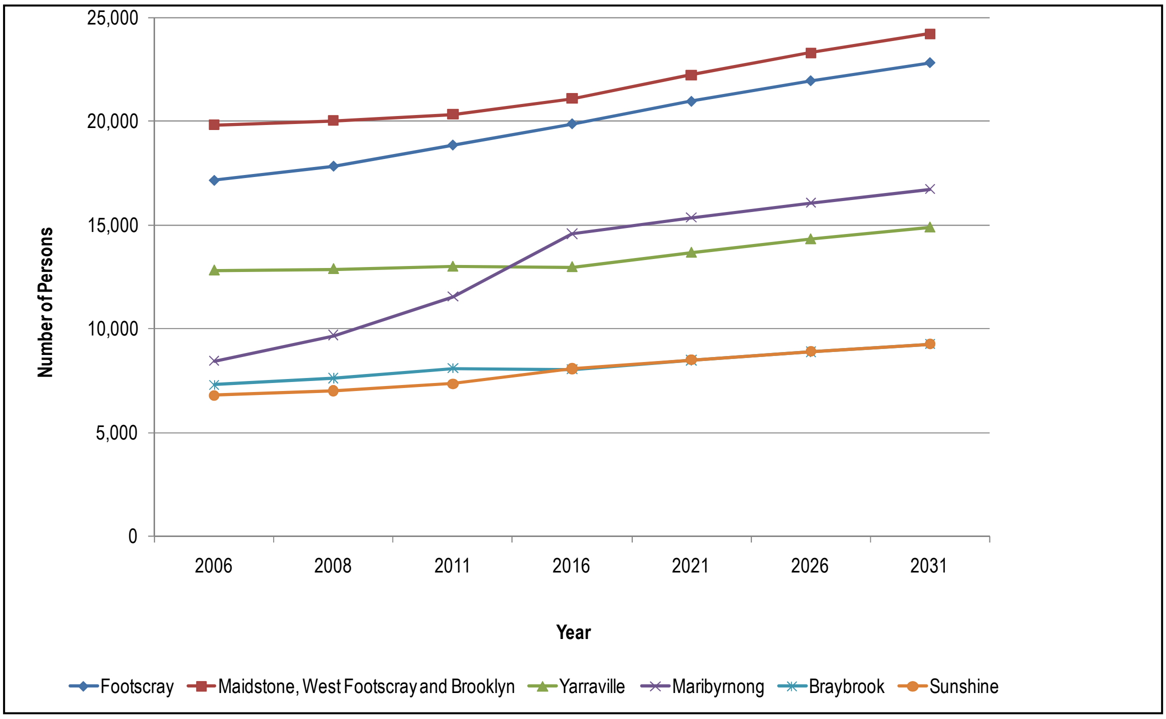
8.1 MTA POPULATION GROWTH

For the MTA, the forecasting process involved two major elements:

- reviewing population projections prepared for small area neighbourhoods (generally consistent with postcode areas) for 2006 to 2016;
- updating forecasts for small area neighbourhoods on the basis of the *Victoria In Future* (VIF 2004) projected growth rates for the SLA.

The analysis shows that from 2006 to 2031, the FCAD MTA will grow by approximately 25,000 residents, representing a population increase of over 30 percent (refer Appendix E, Table A.1). Almost a third of total growth is expected to occur in Maribyrnong, with the Estimated Resident Population (ERP) anticipated to nearly double over the forecast period. Footscray is also expected to undergo significant growth during the forecast period, with an increase in the ERP of over 5,500 persons (refer Figure 6).

Figure 6: FCAD MTA Population Growth from 2006 to 2031



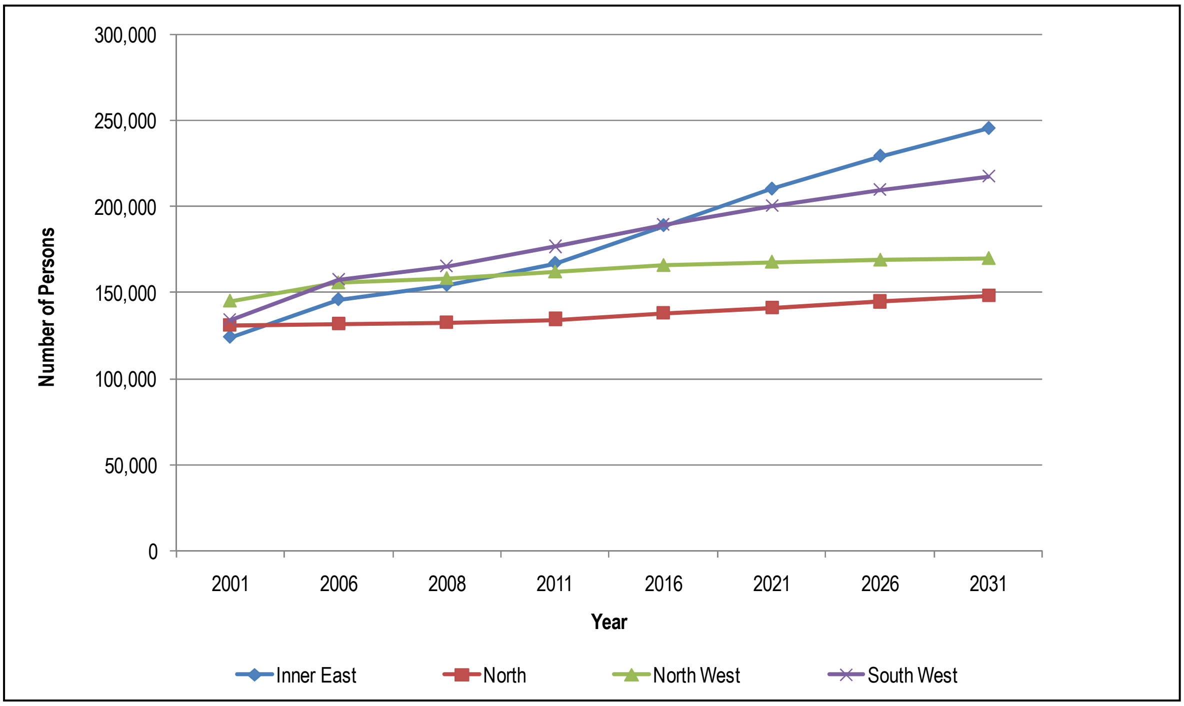
8.2 STR POPULATION GROWTH

For the STR, the forecasting process involved four major elements (refer Appendix E, Table Set F):

- reviewing population projections prepared for the SLA in the FCAD STR for 2006 to 2031 utilising the VIF 2004 projections;
- calculating the forecast rate of change in the ERP for each SLA in the FCAD catchment area;
- estimating the proportion of each SLA within the FCAD catchment area by utilising historic Census Collection District (CCD) population data (average 250 households per CCD);
- deriving an ERP for the part of the SLA located within the FCAD catchment area by forecasting 2001 actual population with the growth rates of the VIF 2004 projections.

The analysis shows that from 2006 to 2031, the FCAD STR will grow by over 240,000 residents, representing a population increase of over 45 percent. The inner east STR is expected to experience the highest level of population growth, increasing from approximately 125,000 to 245,000 persons from 2001 to 2031 (refer Figure 7). It should be noted that the inner east STR includes Docklands, the Melbourne CAD and a number of other inner city suburbs experiencing high levels of gentrification and higher-density residential development. The second largest population growth is the south west STR, which covers a significant part of the Wyndham growth area and is expected to grow from approximately 135,000 to 217,000 persons from 2001 to 2031.

Figure 7: FCAD STR Population Growth from 2006 to 2031



8.3 SUMMARY

While the population of the FCAD MTA and particularly the STR is expected to grow significantly over the forecast period, the growth in total resident population will not necessarily translate into significant additional retail floorspace requirements for the FCAD. The trading patterns of the FCAD, in terms of its relative attractiveness to these catchment areas compared to other activity centres, will determine its market share. Other key influences on the market share of the FCAD include:

- the number of people within each catchment area who visit and shop at the FCAD for different types of retail goods;
- the proportion of individual total spend on particular goods and services that is spent in the FCAD.

The trading patterns of the FCAD and its market share are discussed in Section 10.

9 CHANGING PERSONAL EXPENDITURE PROFILES IN THE FCAD CATCHMENT AREA

In addition to population growth, the second major driver of floorspace demand is growth in real expenditure on retail goods. In order to establish the total catchment expenditure and forecast the future retail sales in-bound to the FCAD, there is a need to review personal expenditure profiles for persons living in the FCAD catchment. Personal expenditure profiles have been forecast for 2006 to 2031 (at 2006 / 07 prices) for a range of retail goods by commodity type and recognise the different spending patterns of different parts of the catchment area.

9.1 CURRENT MTA EXPENDITURE PROFILES

The postcode areas within the FCAD MTA vary significantly in terms of the level of retail expenditure per person per annum. Of the six postcode areas within the MTA, the average total retail spend ranges from approximately $8,800 to $13,100 per person per annum in 2008, emphasising the differences in the level of affluence of neighbourhoods within the MTA (refer Table 3).

Key observations include the following.

- Braybrook varies the most from the average expenditure profile of MCC, with residents spending approximately 30 percent less on total retail goods than the average for the Local Government Area (LGA) (refer Table 4).
- The Maidstone, West Footscray and Brooklyn postcode area also varies from the expenditure profile of MCC, with residents spending approximately 3 percent less on total retail goods than the LGA average (refer Table 4).
- Yarraville and Maribyrnong (suburb) significantly elevate the average expenditure profile of MCC, as residents spend approximately 11 percent more on retail goods than the LGA average (refer Table 4).
- Across the Melbourne Statistical Division (MSD), on average, residents spend over 5 percent more on total retail goods than the LGA average (refer Table 4).
- Despite lower than average expenditure profiles, residents of Braybrook, Maidstone, West Footscray and Brooklyn all spend more than $4,100 per person per annum on packaged food, groceries and liquor (refer Table 3).
- Residents of Yarraville and Maribyrnong typically spend significantly more on other household goods, bulky goods and take away food, cafes and restaurants, which is typical of more affluent demographics, than other parts of MCC (refer Table 3).
- Residents of Footscray purchase more take away food, cafe and restaurant food than the MSD average (refer Table 5), in contrast to below-average purchases of packaged food, groceries and liquor, which reflects social preferences and values.
- In addition to Maidstone, West Footscray, Brooklyn and Braybrook, on average, residents of Footscray also spend less on retail goods per annum than the MSD (refer Table 5).

Table 3: Comparison of Per Capita Retail Expenditure Profiles for Postcodes within MCC ($ per annum at 2006 / 07 prices)

Retail Goods	Per Capita Retail Expenditure Profiles ($ per annum at 2006 / 07 prices)							
	Footscray 3011	Maidstone / West Footscray / Brooklyn 3012	Yarraville 3013	Braybrook 3019	Maribyrnong 3032	MCC Average	MSD	Victoria
Packaged food, groceries and take home liquor	4,699	4,699	5,110	4,124	4,967		4,856	
Take away food, cafes and restaurants	2,050	1,806	2,189	1,188	2,291		2,001	
Food, groceries and liquor	**6,752**	**6,498**	**7,290**	**5,296**	**7,251**	**6,617**	**6,854**	**6,657**
Other household goods	**2,873**	**2,653**	**3,234**	**1,982**	**3,312**	**2,811**	**3,089**	**3,033**
Bulky goods	**2,191**	**2,055**	**2,537**	**1,509**	**2,503**	**2,159**	**2,341**	**2,338**
Total Retail Goods	**11,817**	**11,206**	**13,061**	**8,787**	**13,066**	**11,587**	**12,284**	**12,029**

Table 4: Variation of Per Capita Retail Expenditure Profiles for Postcodes within MCC from the MCC Average ($ per annum at 2006 / 07 prices)

Retail Goods	Variation from the MCC Profile							
	Footscray 3011	Maidstone / West Footscray / Brooklyn 3012	Yarraville 3013	Braybrook 3019	Maribyrnong 3032	MCC Average	MSD	Victoria
Food, groceries and liquor	**2.00**	**-1.84**	**9.22**	**-24.94**	**8.74**	**N/A**	**3.45**	**0.59**
Other household goods	**2.17**	**-5.96**	**13.09**	**-41.80**	**15.13**	**N/A**	**9.00**	**7.33**
Bulky goods	**1.47**	**-5.05**	**14.91**	**-43.13**	**13.74**	**N/A**	**7.78**	**7.66**
Total Retail Goods	**1.94**	**-3.40**	**11.28**	**-31.87**	**11.32**	**N/A**	**5.67**	**3.67**

Table 5: Variation of Per Capita Retail Expenditure Profiles for Postcodes within MCC from the MSD Average ($ per annum at 2006 / 07 prices)

Retail Goods	Variation from MSD Profile							
	Footscray 3011	Maidstone / West Footscray / Brooklyn 3012	Yarraville 3013	Braybrook 3019	Maribyrnong 3032	MCC Average	MSD	Victoria
Packaged food, groceries and take home liquor	-3.33	-3.34	4.97	-17.76	2.24			
Take away food, cafes and restaurants	2.37	-10.82	8.59	-68.42	12.66			
Food, groceries and liquor	**-1.51**	**-5.48**	**5.98**	**-29.41**	**5.47**	**-3.58**	**N/A**	**-2.96**
Other household goods	**-7.52**	**-16.44**	**4.49**	**-55.84**	**6.73**	**-9.90**	**N/A**	**-1.84**
Bulky goods	**-6.84**	**-13.91**	**7.73**	**-55.20**	**6.47**	**-8.43**	**N/A**	**-0.12**
Total Retail Goods	**-3.96**	**-9.62**	**5.95**	**-39.80**	**5.98**	**-6.01**	**N/A**	**-2.13**

9.2 FORECAST EXPENDITURE PROFILES

Expenditure profiles have been forecast for the MTA and the STR for 2006 to 2031 (at 2006 / 07 prices; refer Appendix E, Table Sets B and G, respectively). These profiles allow for a level of real growth in personal expenditure per annum however, will be influenced by changing population demographics over time.

Since the early 1990's there has been a progressive gentrification process occurring in Yarraville and Maribyrnong. Increasing numbers of more affluent households are moving into MCC due to its proximity to the Melbourne CAD, wide range of services and relative housing affordability. Over time, there is likely to be increasing pressure for other parts of MCC to change as new, more affluent households establish in the LGA.

While gentrification may increase the personal expenditure of residents in the MTA of the FCAD, subsequently generating higher levels of expenditure on retail goods and services, it may not have a significant influence on demand for retail floorspace. Ultimately, further gentrification of suburbs surrounding the FCAD may lead to further reduction of the market share of the FCAD if it does not provide a retail and social experience that meets the needs, expectations and values of the new demographic.

9.3 SUMMARY

The levels of personal expenditure on retail goods in the FCAD MTA vary significantly according to the level of affluence of communities in different postcode areas surrounding the FCAD. A number of areas within the FCAD MTA have lower retail expenditure profiles than the average MSD profile however, these are counter-balanced by areas that have higher than average MSD expenditure profiles. The diversity of expenditure profiles indicates that the MTA contains a wide range of consumer expectations, values and preferences, with people requiring different types of retail goods and services in terms of quantity, price and quality, as well as requiring different supporting or ancillary activities (such as cafes and personal services) and amenity levels (particularly for those for whom price is not the principal driver of choice). These elements will also influence trading patterns and market shares, as groups of the population with different levels of affluence are likely to have vastly different consumer preferences.

10 TRADING PATTERNS AND POTENTIAL MARKET SHARES

The FCAD has an existing catchment and trading pattern that does not reflect a typical activity centre with a very different visitation pattern and very low market shares.

10.1 COMPARISON OF FCAD CATCHMENT SHAPE AND VISITATION PATTERNS

The shape of the FCAD catchment and current market share structure is unique and results from a number of factors, including its geographical location. The Maribyrnong River provides a physical barrier that limits access from the north and east, as do the railway lines and West Gate Freeway, which have limited crossing points to the south and south west.

The competitiveness of the FCAD regional context is also a significant influence on its current trading patterns, due to the proximity of the FCAD to the Melbourne CAD and three Principal Activity Centres – Highpoint, Moonee Ponds and Sunshine. In combination with the development of several highly successful Major and Neighbourhood Activity Centres, the development potential of the FCAD has gradually been absorbed by other activity centres as new supermarkets and discount department stores have been established in other locations that offer a higher level of amenity, convenience and a preferred range of goods and services for local consumer markets.

The FCAD catchment is significantly different from a typical activity centre trade catchment as, in general, the catchments of activity centres in metropolitan Melbourne radiate from the centre with an ellipse or 'cigar shaped' form. For these centres, the greatest proportion of centre visitation (and expenditure) occurs from areas on the outlying side of the catchment from the centre. In contrast, the existing catchment for the FCAD could be described as a flower, with a central MTA and several outlying parts (the STR; refer Figure 4).

The 'typical' catchment trading pattern of activity centres has consistently been illustrated through telephone surveys across metropolitan Melbourne. For the purposes of comparison to the FCAD, the catchment of a typical sub-regional activity centre is described below, with three identifiable catchment component areas.

- A primary catchment area where the majority of residents do most of their daily, weekly and discretionary shopping in the centre, which represents approximately 70 percent of total food, groceries and liquor expenditure in the centre.
- A secondary catchment area where some residents do some of their weekly shopping and most of their discretionary shopping in the centre, which comprises 20 to 25 percent of total food, groceries and liquor expenditure in the centre.
- A tertiary catchment area where a small proportion of residents shop infrequently in the centre, representing 5 to 10 percent of food, groceries and liquor expenditure in the centre.

For a typical sub-regional activity centre, the primary and secondary catchments form the MTA. The primary catchment area will be centred upon a local neighbourhood, with market shares falling away towards the edge of the catchment area.

In contrast, an analysis of the current source of trade for the FCAD shows that a limited proportion of trade is drawn from the MTA with approximately 52 percent of total food, groceries and liquor sales generated by residents who live in close proximity to the FCAD. There is a high level of reliance on the STR for trade in the FCAD with approximately 46 percent of total food, groceries and liquor sales generated by areas outside the MTA (refer Table 6 and Appendix E, Table L.5).

Table 6: Current Source of Trade for the FCAD

Major Commodity Group	Retail Sales in the FCAD by Source of Trade by Commodity Group							
	Main Trade Area		Secondary Trade Regions		Beyond Catchment		Total Sales	
	Turnover ($ Million) *	Proportion of Total Sales (%)	Turnover ($ Million) *	Proportion of Total Sales (%)	Turnover ($ Million) *	Proportion of Total Sales (%)	Turnover ($ Million) *	Proportion of Total Sales (%)
Food, groceries and liquor								
Supermarket	32.6	76.9	9.6	22.7	0.2	0.5	42.4	100.0
Other food specialty stores	14.7	43.8	18.2	54.3	0.7	2.0	33.5	100.0
Subtotal: Food, groceries and packaged liquor	42.5	59.7	27.8	39.1	0.9	1.2	71.1	100.0
Take away food, cafes and restaurants	24.8	43.4	31.2	54.7	1.1	2.0	57.1	100.0
Subtotal: Food, groceries and liquor	67.2	52.4	59.0	46.0	2.0	1.6	128.3	100.0
Other household goods	17.1	34.7	31.7	64.3	0.5	1.0	49.3	100.0
Bulky goods	10.7	46.9	11.9	52.2	0.2	1.0	22.8	100.0
TOTAL: RETAIL GOODS	95.1	47.4	102.6	51.2	2.7	1.3	200.4	100.0

10.2 MARKET SHARE PROFILE

Typically, activity centres have a market share structure where residents of surrounding local areas will choose their destination centre on the basis of the distance travelled (and its convenience) and the range of goods and services available. Where the range of goods and services is more limited or where it does not match the needs or preferences of the people living in close proximity to the centre, the market shares of the centre falls as they choose to do their shopping elsewhere.

The market share information obtained from the in-home telephone surveys reveals the following in relation to the consumer preference for the FCAD and other activity centres in the MTA.

- For supermarket shopping, the FCAD is ranked third in the MTA behind Yarraville and Highpoint.
- The FCAD is ranked first in the MTA for dining out, which indicates an established preference for the FCAD as a restaurant area.
- The FCAD has a marginal role in the MTA for discretionary purchases such as clothing, footwear, furniture and large household goods. The dominance of Highpoint / Maribyrnong Homemaker Centre for these discretionary purchases is significant and reflects the supply of the national major stores and franchises at this activity centre. It reinforces that Highpoint's position in the MTA is dominant and entrenched and indicates that the FCAD is not in a position to develop a competitive offer for discretionary purchases at present or in the foreseeable future.

The existing market shares for the postcode component areas of the FCAD's MTA are very low (refer Table 7 and Appendix E, Table D.1), with maximum market shares for expenditure of approximately:

- 28 percent for supermarkets;
- 51 percent of other specialty food stores;
- 33 percent of take away food, cafes and restaurants;
- 21 percent of other household goods;
- 11 percent of bulky goods.

Table 7: Current Market Share Structure of the FCAD

Major Commodity Group	Estimated Market Share by Postcode in the MTA Percent of Expenditure Bound to the FCAD					
	Footscray 3011	Maidstone, West Footscray and Brooklyn 3012	Yarraville 3013	Braybrook 3019	Maribyrnong 3032	Sunshine 3020
Food, groceries and liquor						
Supermarket	*28.1*	*10.8*	*9.6*	*5.0*	*4.2*	*2.0*
Other food specialty stores	*50.6*	*10.8*	*9.6*	*5.0*	*4.2*	*2.0*
Subtotal: Food, groceries and packaged liquor	29.8	10.8	9.6	5.0	4.2	2.0
Take away food, cafes and restaurants	33.3	16.2	15.4	8.0	8.5	5.0
Subtotal: Food, groceries and liquor	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Other household goods	**20.5**	**2.9**	**10.0**	**7.0**	**0.0**	**2.0**
Bulky goods	**11.1**	**7.1**	**7.5**	**5.0**	**1.7**	**2.0**
TOTAL: RETAIL GOODS	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**

To provide a comparative development scenario for the FCAD, a gravity model was applied to each of the postcode component areas of the MTA to determine the propensity of residents to visit different activity centres within the region. The gravity model provides a gravity index for each activity centre on the basis of the retail composition (square metres GLA) in terms of the major retail attractors (supermarkets, discount department stores and department stores) divided by the distance to travel to each centre from each postcode area. The gravity index can then be converted into a market share for the FCAD, providing an indicator of its performance if it operated as a typical sub-regional centre.

The gravity-indexed market shares for the FCAD (refer Table 8 and Appendix E, Table Q.1) are significantly higher in general than the market shares currently achieved by the FCAD, with maximum market shares for expenditure of approximately:

- 67 percent for supermarkets;
- 67 percent of other specialty food stores;
- 33 percent of take away food, cafes and restaurants;
- 52 percent of other household goods;
- 11 percent of bulky goods.

Table 8: Potential Market Share Structure of the FCAD

Major Commodity Group	Estimated Market Share by Postcode Component Area of the MTA Percent of Expenditure Bound to the FCAD					
	Footscray 3011	Maidstone, West Footscray and Brooklyn 3012	Yarraville 3013	Braybrook 3019	Maribyrnong 3032	Sunshine 3020
Food, groceries and liquor ^						
Supermarket	*67.1*	*17.8*	*28.9*	*10.1*	*5.8*	*6.0*
Other food specialty stores	*67.1*	*17.8*	*28.9*	*10.1*	*5.8*	*6.0*
Subtotal: Food, groceries and packaged liquor	67.1	17.8	28.9	10.1	5.8	6.0
Take away food, cafes and restaurants	33.3	16.2	15.4	8.0	8.5	5.0
Subtotal: Food, groceries and liquor	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Other household goods ^^	**52.0**	**21.1**	**34.7**	**13.9**	**1.6**	**8.7**
Bulky goods	**11.1**	**7.1**	**7.5**	**5.0**	**1.7**	**2.0**
TOTAL: RETAIL GOODS	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Column	(1)	(2)	(3)	(4)	(5)	(6)

* Applying a gravity model to determine the propensity of residents to visit each centre based on retail offer (floor area) divided by distance to centre from each small area.

^ Refer Table Set P, Tables P.1 - P.6: Estimate 2 of Market Share for Footscray

^^ Refer Table Set P, Tables P.7 - P.12: Estimate 2 of Market Share for Footscray

10.3 SUMMARY

The current trading patterns of the FCAD show that it has a more limited relationship with the MTA than typical activity centres. With a high level of reliance on the STR for sales and significant levels of under-trading in the MTA, the FCAD has less than half the market share in the MTA that it should have for traditional retail activity, particularly for supermarket and discount department store shopping (refer Table 9).

The analysis demonstrates that the FCAD is currently out-competed by other activity centres in the region, which have captured expenditure from the FCAD MTA that would otherwise be bound to the FCAD. With high levels of expenditure escaping the FCAD MTA, there is a need to counter these existing market trends by making the FCAD more attractive relative to centres currently servicing the MTA, in order to lift market shares.

In the case of many activity centres, the market shares within their MTA can be elevated by introducing new major retail attractors, which add a new incentive or 'magnet' that draws people to the centre. The potential for these new major stores is driven by growth in sales (otherwise known as centre turnover) in order to support the addition of new floorspace. Supermarkets, discount department stores and department stores must all be able to achieve sustainable RTD and generate particular levels of annual sales to justify rent values in new developments or to fund site acquisition to make the development viable. In combination with market shares, the existing centre turnover and supply of retail floorspace are key determinants of the potential for new major store development. The existing and potential retail trade in the FCAD is examined in Section 11 and the findings of the analysis, in terms of supportable retail floorspace in the FCAD, is outlined in Section 12.

Table 9: Current Market Share as a Percentage of the Potential Market Share in the FCAD

Major Commodity Group	Estimated Market Share by Postcode Component Area of the MTA Percent of Expenditure Bound to the FCAD					
	Footscray 3011	Maidstone, West Footscray and Brooklyn 3012	Yarraville 3013	Braybrook 3019	Maribyrnong 3032	Sunshine 3020
Food, groceries and liquor						
Supermarket ^	*41.8%*	*60.5%*	*33.2%*	*49.6%*	*73.0%*	*33.3%*
Other food specialty stores	*75.4%*	*60.5%*	*33.2%*	*49.6%*	*73.0%*	*33.3%*
Average: Food, groceries and packaged liquor	N/A	N/A	N/A	N/A	N/A	N/A
Take away food, cafes and restaurants	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average: Food, groceries and liquor	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Other household goods	**39.4%**	**13.6%**	**28.8%**	**50.2%**	**0.0%**	**23.0%**
Bulky goods	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
AVERAGE: RETAIL GOODS	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**

* Applying a gravity model to determine the propensity of residents to visit each centre based on retail offer (floor area) divided by distance to centre from each small area.
^ Refer Table Set P, Tables P.1 - P.6: Estimate 2 of Market Share for Footscray
^^ Refer Table Set P, Tables P.7 - P.12: Estimate 2 of Market Share for Footscray

11 CURRENT AND PROJECTED TURNOVER LEVELS

In order to assess the future turnover of the FCAD, the market share estimates were applied to estimates of total expenditure generated within the FCAD catchment. Two scenarios for future turnover were produced - one for existing market shares and one based on the gravity-indexed (potential) market shares for the FCAD. These scenarios produce significantly different RTD estimates for the current levels of trade, which provides an indication of how the FCAD trades relative to industry standards.

11.1 SALES GROWTH IN THE FCAD

Under **Scenario One**, where current trading patterns continue, it is estimated that the FCAD will draw approximately 48 percent of total retail goods sales from the MTA, with over 50 percent drawn from the STR.

The total sales (at 2006 / 07 constant prices) are estimated to increase over the period 2008 / 09 to 2030 / 31 under Scenario One (refer Appendix E, Table L.4) by:

- $42.3 million for total retail goods, representing growth of over 20 percent;

- $15.7 million for food, groceries and liquor, representing growth of over 12 percent and comprising:
  - $5.2 million for supermarkets;
  - $4.1 million for specialty food goods;
  - $7.0 million for takeaway food, cafes and restaurants;

- $13 million for other household goods, representing growth of over 25 percent;

- $13.5 million for bulky goods, representing growth of over 56 percent.

Under **Scenario Two**, where future sales have been estimated on the basis of typical trading patterns and the gravity-indexed market share, it is estimated that the FCAD will draw between 70 and 95 percent of total retail goods sales from within the MTA, varying according to different commodity or floorspace types.

The total sales (at 2006 / 07 constant prices) are estimated to increase over the period 2008 / 09 to 2030 / 31 under Scenario Two (refer Appendix E, Table R.8) by:

- $46 million for total retail goods, representing growth of approximately 20 percent;

- $17.8 million for food, groceries and liquor, representing growth of over 12 percent and comprising:
  - $10.6 million for supermarkets;
  - $3.3 million for specialty food goods;
  - $3.8 million for takeaway food, cafes and restaurants;

- $19.9 million for other household goods, representing growth of over 26 percent;

- $8.3 million for bulky goods, representing growth of approximately 56 percent.

The analysis demonstrates that significantly higher levels of total retail goods sales will be produced for the FCAD as a whole and particularly for major retail stores under Scenario Two, if the FCAD can 'recapture' market share in the MTA. In particular, Scenario Two produces significantly higher sales results for:

- supermarkets, generating an additional $5.4 million in sales than Scenario One, representing over 200 percent of sales at current trading levels;
- other household goods, generating an additional $6.9 million in sales than Scenario One, representing approximately 150 percent of sales at current trading levels.

11.2 RTD

RTD provide a measure for the performance of retail floorspace on the basis of sales per square metre of trading floor area (GLA). In order to assess the existing performance of the FCAD, the RTD have been calculated for 2008 utilising current floorspace and an estimate of in-centre trade (Scenario One). The existing RTD for the FCAD can be compared to other activity centres, such as Highpoint, to provide an indication of the relative retail role and performance of the FCAD. It also provides a useful indicator for the extent to which the FCAD trading levels are sustainable in terms of industry accepted benchmarks.

11.2.1 Industry Accepted, Sustainable RTD

Industry accepted RTD are generally of the same order of scale as the following estimates:

- $8,000 per square metre of supermarket floorspace;
- $4,500 per square metre of specialty food goods floorspace;
- $4,500 per square metre of take away food, cafe and restaurant floorspace;
- $3,500 per square metre of other household goods floorspace;
- $3,500 per square metre of bulky goods floorspace;
- $2,500 per square metre of discount department store floorspace.

Where these RTD can be achieved, the level of floorspace provision is generally sustainable and the retail offer and function of an activity centre will be maintained and enhanced over time.

Where significant variations occur from these RTD, the following issues can arise.

- Where centres achieve higher levels of trade, there is often a need to establish additional floorspace to ensure existing floorspace does not overtrade and the range of goods and services offered can be optimised. Overtrading is an issue where the level of visitation and expenditure detracts from the quality and amenity of the centre environment, as well as its accessibility and supply of goods and services to its catchment.
- Where centres achieve lower levels of trade, there may be a risk that stores close due to low sales levels creating higher vacancy rates, or alternatively, lead to the dominance of a much wider range of lower-quality stores that do not necessarily meet the needs, values or expectations of its catchment population.

11.2.2 Assessment of Current RTD

The current RTD for the FCAD have been assessed on the basis of the Scenario One estimates of retail goods sales at 2008 (refer Appendix E, Tables M.2 and M.4), which indicate that the FCAD has RTD of approximately:

- $2,700 per square metre, as an average for all retail goods floorspace;
- $5,100 per square metre of supermarket floorspace, which represents 64 percent of the industry accepted benchmark;
- $4,450 per square metre of specialty food goods floorspace, generally consistent with the industry accepted benchmark;
- $4,070 per square metre of take away food, cafe and restaurant floorspace, which represents 90 percent of the industry accepted benchmark;
- $1,290 per square metre of other household goods floorspace, which represents just 37 percent of the industry accepted benchmark;
- $3,550 per square metre of bulky goods floorspace, generally consistent with the industry accepted benchmark;
- $2,140 per square metre of discount department store floorspace, which represents 86 percent of the industry accepted benchmark.

The results for current RTD indicate that the FCAD cannot support the existing floorspace, with unsustainable RTD being achieved for a number of commodity or floorspace types. Of particular concern are the levels of turnover for supermarkets and other household goods stores, which are well below the industry accepted benchmarks. Ultimately, the need to increase RTD for these stores will absorb the future floorspace potential generated by additional sales from population growth within the FCAD catchment, unless the FCAD market shares can be elevated significantly.

11.2.3 Assessment of Potential RTD

The potential RTD for the FCAD have been assessed on the basis of the Scenario Two estimates of retail goods sales at 2008 (refer Appendix E, Tables S.1 and S.3). Assuming the market share of the FCAD increases significantly in the MTA, the FCAD could have RTD of approximately:

- $3,120 per square metre, as an average for all retail goods floorspace, which is approximately 16 percent above current trading levels;
- $10,460 per square metre of supermarket floorspace, which is 105 percent above current trading levels;
- $1,930 per square metre of other household goods floorspace, which is 50 percent above current trading levels;
- $2,140 per square metre of discount department store floorspace, which represents 86 percent of industry accepted benchmarks.

For a number of commodity or floorspace types, the RTD for Scenario Two actually produce lower turnover estimates than Scenario One. The results indicate that the FCAD actually achieves higher levels of trade for specialty food goods, take away food, cafe, restaurant and bulky goods floorspace at current trading levels. Ultimately, for specialty store operators and businesses requiring relatively small (generally less than 100 square metres) floorspace, the decision to operate a business in the FCAD will be based on individual expectations of profit levels and the cost of their overheads. To attract national brand specialty stores or support the requirements of major retailers and attractors, which will increase market share in the MTA however, there is a need to improve the RTD for these store types to better match the RTD outlined for Scenario Two.

11.2.4 Comparison of the FCAD and Highpoint Shopping Centre

For comparative purposes, the centre turnover and RTD for the FCAD have been considered with those for Highpoint.

Footscray Plaza accommodates the two national brand major retail attractors in the FCAD. In 2005[1], Footscray Plaza had:

- total turnover of $33.5 million;
- a Kmart store of 8,170 square metres;
- a Coles supermarket of 3,550 square metres;
- specialty stores of approximately 860 square metres.

[1] Property Council of Australia, 2006: *Shopping Centre Directory, Victoria and Tasmania 2006*, Victoria. Data collected from November 2005 to February 2006. Sales figures quoted are for Moving Annual Turnover, thus the period when performance was measured for Footscray Plaza was the twelve months preceeding December 2005.

It is estimated that Footscray Plaza had RTD of:

- $2,660 per square metre, as an average for all retail goods floorspace;
- $1,970 per square metre of discount department store floorspace;
- $4,270 per square metre of supermarket floorspace;
- $2,630 per square metre of specialty store floorspace.

Highpoint, as the Principal Activity Centre providing the highest order retail function of activity centres in western Melbourne, had a significantly different trading profile. In 2005[2], Highpoint had:

- total turnover of $650 million;
- a Myer store of 20,070 square metres;
- a Target store of 8,300 square metres;
- a Big W store of 8,160 square metres;
- a Harris Scarfe store of 3,000 square metres;
- a Target Home store of 2,290 square metres;
- a Safeway supermarket of 3,420 square metres;
- specialty stores of approximately 42,090 square metres.

It is estimated that Highpoint had RTD of:

- $7,400 per square metre, as an average for all retail goods floorspace;
- $6,300 per square metre of discount department store and department store floorspace;
- $10,000 per square metre of supermarket floorspace;
- $8,400 per square metre of specialty store floorspace.

These results clearly indicate that the major retail stores in the FCAD, which are accommodated in Footscray Plaza, experience significantly lower levels of trade than Highpoint, offering approximately:

- 36 percent of the RTD achieved by Highpoint as an average for all retail goods floorspace;
- 31 percent of the RTD achieved by Highpoint for discount department store and department store floorspace;
- 42 percent of the RTD achieved by Highpoint for supermarket floorspace;
- 31 percent of the RTD achieved by Highpoint for specialty retail floorspace.

At current trading levels, the FCAD will have estimated sales of $203.6 million in 2008, spread across 75,700 square metres of retail goods floorspace, with an average RTD of $2,700 per square metre. In contrast, Highpoint has an estimated moving annual turnover of $710.4 million in 2006[3], spread across 120,800 square metres of retail floorspace, with an average RTD of $6,620 per square metre of floorspace. In effect, the FCAD has approximately 30 percent of the turnover of Highpoint however, has more than 60 percent of the retail goods floorspace.

[2] Property Council of Australia, 2006: *Shopping Centre Directory, Victoria and Tasmania 2006*, Victoria. Data collected from November 2005 to February 2006. Sales figures quoted are for Moving Annual Turnover, thus the period when performance was measured for Highpoint was the twelve months preceding February 2006

[3] Rillage Publishing, 2007: *Shopping Centre News*, Volume 25 Number 1 2007. Page 36. Information for the period from 1st January 2006 to 31st December 2006.

The FCAD clearly cannot compete with Highpoint for retail tenants or major national brands, as the level of trade in the current environment does not achieve industry accepted benchmarks or provide a comparatively profitable retail setting in which to establish a business. Potential retail tenants must already be represented at Highpoint and require a second site within the region where they are happy to accept lower turnover levels to increase their representation in the area or specifically provide a niche product range and low-overhead business model that can successfully operate in markets with lower turnover levels.

11.3 SUMMARY

There will be a net increase in total retail goods sales in the FCAD over time for both future turnover scenarios, driven by population growth and growth in real expenditure on personal retail goods. It should be noted however, that the Scenario One estimate of sales draws trade from a much broader catchment area, comprising the MTA, the STR and in-bound trade from outside these defined catchments. In contrast, the Scenario Two estimate of sales is based on only part of the defined catchment area (the MTA) plus in-bound trade from outside the MTA.

The differences in the catchment trading patterns emphasise the inefficiencies in the current performance of the FCAD. These patterns indicate that the areas in the immediate surrounds of the FCAD contribute a much smaller proportion of sales (and therefore contribute less to the economic sustainability of the FCAD) than is typical of other activity centres, leading to a heavy reliance on drawing expenditure from areas further away. As centres in the STR improve their retail offer and better meet the needs of residents currently visiting the FCAD, it is likely that the market shares for the FCAD will fall over time. Ultimately, improvements to centres serving the STR are likely to undermine the sustainability of turnover levels in the FCAD, requiring the FCAD to 'recapture' sales within the MTA to maintain turnover levels.

The analysis of RTD clearly indicates that the FCAD is currently trading well below industry accepted benchmarks for turnover and below the levels that could be achieved if its market share within the FCAD MTA could be increased to reflect the typical trading patterns of activity centres. In order to 'recapture' market share from within the MTA, the FCAD needs to establish itself as the centre that is the preferred destination for a diversity of weekly goods and services. This can only occur however, with improved facilities, amenity and retail offer that make the FCAD more convenient, accessible and user-friendly than alternative centres servicing the MTA.

12 SUPPORTABLE RETAIL FLOORSPACE FOR 2008 TO 2031

In order to assess the future supportable retail goods floorspace in the FCAD for 2008 to 2031, the industry accepted (sustainable) benchmarks for RTD (refer Section 11.2.1) have been applied to the forecast sales under Scenarios One and Two, resulting in two different estimates of future retail goods floorspace requirements for the FCAD. To understand demand for further major retail attractors, the demand for supermarkets and discount department stores were both analysed.

In addition to retail goods floorspace, the demand for retail services floorspace has also been assessed. The two types of retail activity both operate from shopfront floorspace. The difference between the two retail activities is that retail goods are an expenditure-driven activity that establish according to the level of sales in a centre and retail services are provided on the basis of demand and consumer preferences (often linked to affluence).

Net additional floorspace requirements have been calculated for both retail goods and services to produce an understanding of future floorspace requirements for each type of activity. In considering the development of future floorspace however, there is a need to consider the total net additional shopfront floorspace, as retail goods and services will both require a similar building format.

12.1 EXISTING RETAIL FLOORSPACE

Due to its historical role as a district centre and significant regional role, the FCAD already has significant levels of retail floorspace. As at October 2008, it is estimated that the total retail goods floorspace in the FCAD was approximately 75,700 square metres GLA (refer Appendix E, Table M.1).

In terms of retail goods floorspace, key activity types include the following.

- 30,150 square metres of food, groceries and liquor floorspace, including approximately:
  - 8,400 square metres GLA of supermarket floorspace;
  - 14,200 square metres GLA of take away food, cafe and restaurant floorspace.

- 38,930 square metres GLA of other household goods floorspace, including approximately:
  - 18,700 square metres GLA of discount department store floorspace;
  - 4,800 square metres GLA of floorspace used for pharmaceutical, cosmetic and toiletry retailing;
  - 5,300 square metres GLA of gift stores, discount and variety shops, duty free stores and other specialty retailers;
  - 1,200 square metres GLA of watch and jewellery retailing;
  - 1,400 square metres GLA of second hand and antique goods retailing.

In addition to retail goods floorspace, there was 10,350 square metres GLA of retail services floorspace. The total existing shopfront floorspace in the FCAD is therefore approximately 86,050 square metres GLA.

12.2 SUPPORTABLE RETAIL GOODS FLOORSPACE

12.2.1 Assessment of Floorspace Demand for 2008: Based on Current Trading Patterns

Assuming current trading patterns (Scenario One) continue in the FCAD, there are sufficient sales in 2008 (refer Appendix E, Tables N.2 and N.3) to enable sustainable levels of trade to be achieved for:

- 5,350 square metres GLA of supermarket floorspace;
- 7,520 square metres GLA of specialty food goods floorspace;
- 12,830 square metres GLA of take away food, cafe and restaurant floorspace;
- 15,800 square metres GLA of discount department store floorspace;
- 14,370 square metres GLA of other household goods floorspace;
- 6,800 square metres GLA of bulky goods floorspace.

At 2008, there is an oversupply of retail goods floorspace for all commodity or floorspace types (refer Appendix E, Table N.4), with insufficient sales to support sustainable levels of trade. Of particular concern are excess supplies of approximately:

- 3,000 square metres GLA of supermarket floorspace;
- 1,350 square metres GLA of take away food, cafe and restaurant floorspace;
- 3,000 square metres GLA of discount department store floorspace;
- 17,300 square metres GLA of other household goods floorspace;
- 5,300 square metres GLA of bulky goods floorspace.

In effect, the existing in-bound sales to the FCAD are spread between so many businesses that the levels of profitability are well below industry accepted benchmarks and the existing level of floorspace cannot be supported by the current trading patterns of the FCAD and its market shares. The issues arising from current conditions include:

- **risk of store closure due to an unprofitable trading environment;**
- **limited potential to attract national brands or higher quality brands to the FCAD to encourage segments of the MTA with higher expenditure profiles to visit more regularly;**
- **proliferation of discount and lower quality stores;**
- **limited incentive for capital improvement of properties, in terms of investment in upgrade and renewal of shop facades, signage and awnings, or more intensive development of properties to incorporate upper storey activity.**

12.2.2 Assessment of Floorspace Demand for 2008: Based on Typical Trading Patterns

Assuming the FCAD operated with typical trading patterns (Scenario Two), there would be sufficient sales in 2008 (refer Appendix E, Tables T.2 and T.3) to enable sustainable levels of trade to be achieved for approximately:

- 11,000 square metres GLA of supermarket floorspace;
- 6,200 square metres GLA of specialty food goods floorspace;
- 7,000 square metres GLA of take away food, cafe and restaurant floorspace;
- 15,800 square metres GLA of discount department store floorspace;
- 21,400 square metres GLA of other household goods floorspace;
- 4,200 square metres GLA of bulky goods floorspace.

At 2008, there would be an oversupply of retail goods floorspace for most commodity or floorspace types (refer Appendix E, Table T.4), with insufficient sales to support sustainable levels of trade for all activities other than supermarkets. In the case of supermarkets, there would be sufficient demand for an additional 2,600 square metres GLA of floorspace.

Even if the FCAD had trading patterns and market shares more typical of activity centres that draw strong levels of support from the MTA, the existing levels of floorspace could not be supported in the FCAD. For all retail goods types, other than supermarkets, there is no potential for further floorspace development at this point in time.

12.2.3 Assessment of Floorspace Demand for 2031: Based on Current Trading Patterns

Assuming current trading patterns (Scenario One) continue in the FCAD, the forecasts suggest that there will be sufficient sales in 2031 (refer Appendix E, Tables N.2 and N.3) to enable sustainable levels of trade to be achieved for approximately:

- 5,700 square metres GLA of supermarket floorspace;
- 8,000 square metres GLA of specialty food goods floorspace;
- 13,600 square metres GLA of take away food, cafe and restaurant floorspace;
- 17,600 square metres GLA of discount department store floorspace;
- 15,300 square metres GLA of other household goods floorspace;
- 8,500 square metres GLA of bulky goods floorspace.

At 2031, there is likely to still be an oversupply of retail goods floorspace for most commodity or floorspace types (refer Appendix E, Table N.4), with exception of specialty food goods stores. At 2031, there is likely to still be an excess supply of:

- 2,700 square metres GLA of supermarket floorspace;
- 590 square metres GLA of take away food, cafe and restaurant floorspace;
- 1,170 square metres GLA of discount department store floorspace;
- 17,100 square metres GLA of other household goods floorspace;
- 5,000 square metres GLA of bulky goods floorspace.

From 2008 to 2031, if the FCAD does not improve its relationship with the MTA and continues to operate with the same catchment trade patterns and market shares, the growth in sales from population and personal expenditure growth will have little impact on improving current performance. From 2008 to 2031, the excess supply of floorspace will only reduce by:

- 320 square metres GLA of supermarket floorspace;
- 760 square metres GLA of take away food, cafe and restaurant floorspace;
- 1,800 square metres GLA of discount department store floorspace;
- 190 square metres GLA of other household goods floorspace;
- 350 square metres GLA of bulky goods floorspace.

While an additional 370 square metres GLA of specialty food goods floorspace will be justifiable by 2031, this is likely to be occupied by no more than four restaurants, contributing little incentive for major retail development or improvement to the structure and layout of retail precincts within the FCAD.

12.2.4 Assessment of Floorspace Demand for 2031: Based on Typical Trading Patterns

Assuming the FCAD operated with typical trading patterns (Scenario Two), the forecasts suggest that there will be sufficient sales in 2031 (refer Appendix E, Tables T.2 and T.3) to enable sustainable levels of trade to be achieved for approximately:

- 11,600 square metres GLA of supermarket floorspace;
- 6,500 square metres GLA of specialty food goods floorspace;
- 7,400 square metres GLA of take away food, cafe and restaurant floorspace;
- 18,900 square metres GLA of discount department store floorspace;
- 22,940 square metres GLA of other household goods floorspace;
- 5,300 square metres GLA of bulky goods floorspace.

At 2031 (refer Appendix E, Table T.4), there would be sufficient demand for an additional approximately:

- 3,200 square metres GLA of supermarket floorspace, which is the equivalent of a second medium sized national brand supermarket;

- 130 square metres GLA of discount department store floorspace, which indicates that the discount department stores in the FCAD would have sufficient levels of trade to generate RTD above the industry accepted benchmark.

There is likely to still be an oversupply however, of retail goods floorspace for some commodity or floorspace types (refer Appendix E, Table T.4), including approximately:

- 1,100 square metres GLA of specialty food retail floorspace;
- 6,800 square metres GLA of take away, cafe and restaurant floorspace;
- 15,600 square metres GLA of other household goods floorspace;
- 5,600 square metres GLA of bulky goods floorspace.

While the oversupply of some retail goods floorspace should be of some concern, the potential for an additional major supermarket and for the discount department stores to achieve acceptable levels of sales clearly demonstrates the need for the FCAD to provide a more attractive retail environment that enables the FCAD to 'recapture' market share from within the MTA.

12.2.5 Summary

The analysis clearly demonstrates that at current trading levels (Scenario One), the FCAD trades at levels well below what is required to sustain industry accepted benchmarks for the amount of retail floorspace that already exists in the FCAD.

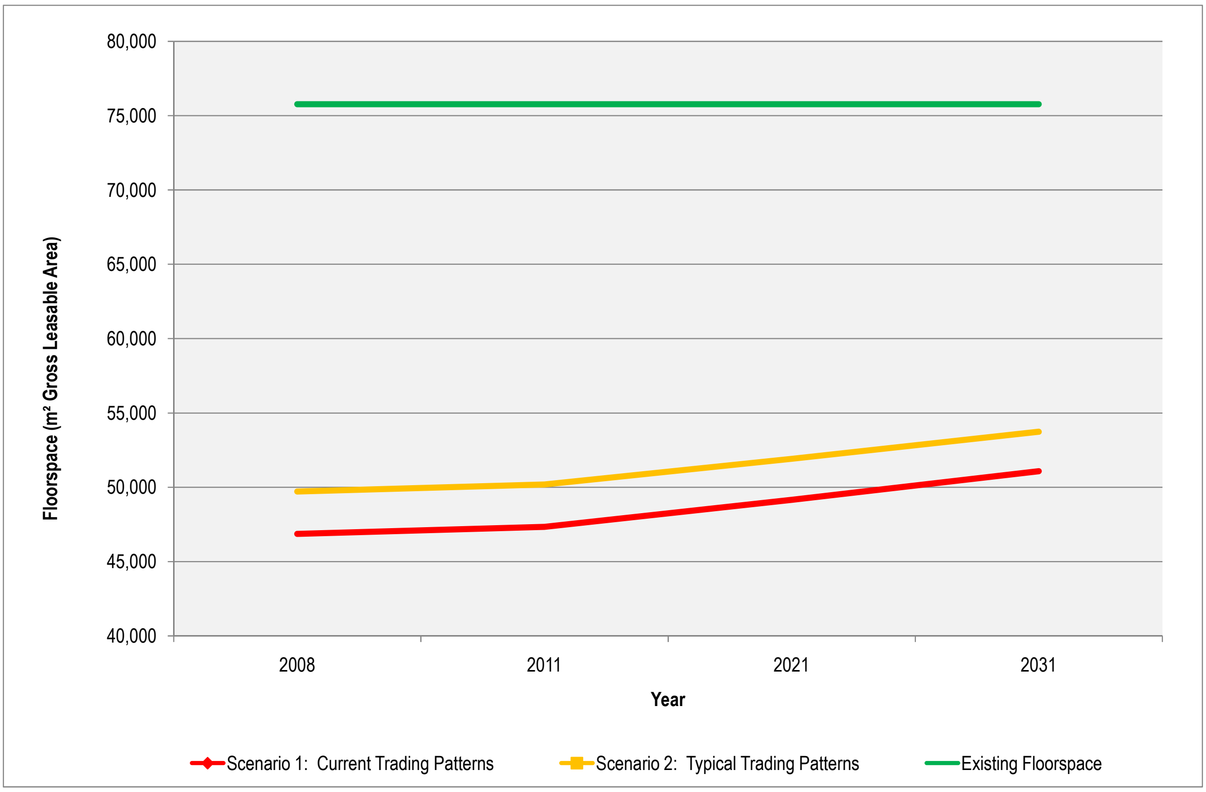
If the FCAD is able to 'recapture' market share within neighbourhoods in close proximity to the FCAD (Scenario Two), then the trading levels in the FCAD could be elevated to the extent that RTD are much more sustainable (particularly for discount department stores) and a new major supermarket could be justified by 2031.

The Scenario Two trends indicate that a more 'typical' pattern of centre trade would result in an oversupply of floorspace for specialty food goods, take away food, cafes, restaurants, other household goods and bulky goods, even at 2031. Ultimately, the niche or specialised role of the FCAD and a more extensive catchment for goods (reflecting current or Scenario One market shares) will sustain higher levels of provision in the long term, particularly for food, groceries and liquor floorspace.

There is a need for the FCAD to more effectively meet the needs of the MTA, as ultimately a reliance on the STR will increase the level of competition from other centres for the FCAD market share as the other centres in the STR improve their amenity and retail offer.

Despite potential increases in demand for major store types from 2008 to 2031, the level of supportable retail floorspace in the FCAD under both Scenarios One and Two is significantly less than the existing level of provision (refer Figure 8). With over 22,000 square metres of excess retail goods floorspace, the FCAD will continue to trade well below industry accepted, sustainable benchmarks, influencing the types of tenants likely to establish in the FCAD and its relevance to key segments of the population in its MTA.

Figure 8: Demand for Retail Goods Floorspace for 2008 to 2031



12.3 SUPPORTABLE RETAIL SERVICES FLOORSPACE

The supportable retail services floorspace for the FCAD has been modelled according to three different estimates of the current and forecast net effective supporting population of the FCAD. The net effective supporting population is the number of people from the MTA and beyond who visit the FCAD on a regular basis.

The three estimates are based on the following populations and market shares (refer Appendix E, Table Set V).

- **Estimate One** is a proportion of the population of the MTA and STR, utilising current market shares for supermarkets as an indicator of regular visitation levels.

- **Estimate Two** is a proportion of the population of the MTA and STR, utilising current market shares for specialty food goods as an indicator of regular visitation levels.
- **Estimate Three** is a proportion of the population of the MTA, plus an additional 15 percent of trade from outside the MTA, utilising the gravity-indexed market shares for supermarkets (noting that these are the same as specialty food goods, groceries and liquor market shares) as an indicator of regular visitation patterns.

The estimates show that the retail service role of the FCAD could support significantly different future populations (refer Appendix E, Table V.6), depending on the relationship with the MTA.

- Estimate One indicates that the FCAD will support approximately 16,200 people at 2008, increasing to approximately 20,500 at 2031, which represents growth of over 25 percent.
- Estimate Two indicates that the FCAD will support approximately 20,200 people at 2008, increasing to approximately 25,700 at 2031, which represents growth of over 27 percent.
- Estimate Three indicates that the FCAD will support approximately 32,300 people at 2008, increasing to approximately 41,000 at 2031, which represents growth of 27 percent.

The October 2008 floorspace surveys indicate that there is already 10,350 square metres of retail services floorspace in the FCAD. At 2008, the per capita provision rate for each estimate is therefore:

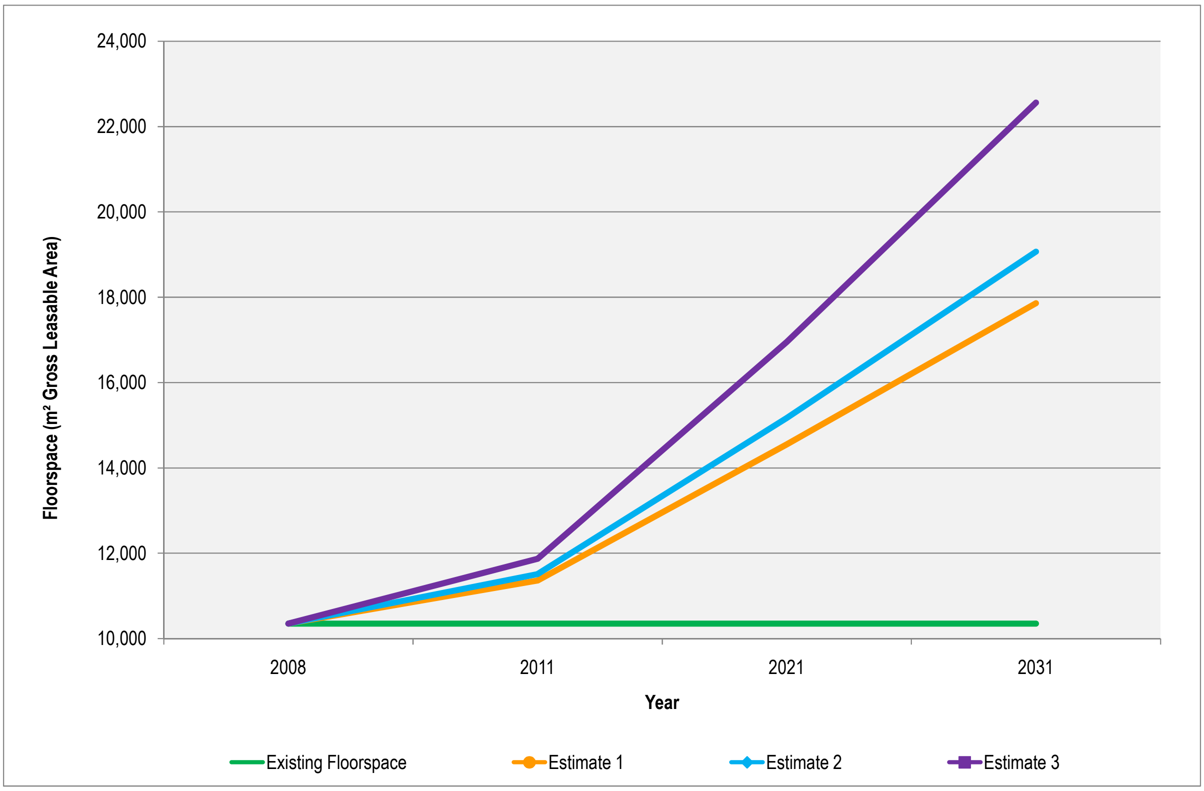
- 0.64 square metres of floorspace per person for Estimate One;
- 0.51 square metres of floorspace per person for Estimate Two;
- 0.32 square metres of floorspace per person for Estimate Three.

From each of these 2008 base estimates, the future provision of retail services has been forecast to 2031 (refer Appendix E, Table V.7), increasing by 0.01 square metre per capita per annum.

The future retail services requirements for the FCAD at 2031 (refer Figure 9) are therefore as follows.

- **Estimate One**: approximately 17,900 square metres of floorspace, representing an increase of over 70 percent of the 2008 floorspace provision.
- **Estimate Two**: approximately 19,000 square metres of floorspace, representing an increase of over 80 percent of the 2008 floorspace provision.
- **Estimate Three**: approximately 22,600 square metres of floorspace, representing an increase of over 110 percent of the 2008 floorspace provision.

Figure 9: Demand for Retail Services Floorspace for 2008 to 2031



The three estimates emphasise therefore the importance of improving the market share of the FCAD in the MTA, as at 2031 approximately 4,700 square metres more retail services floorspace will be required by Estimate Three than is required by Estimate One (which is based on current trading patterns).

12.4 NET ADDITIONAL SHOPFRONT FLOORSPACE

As retail goods and services floorspace occupy the same type of store format, it is necessary to consider the future floorspace requirements for the FCAD in terms of net additional shopfront floorspace.

As the discussion in Section 12.2 indicated, the analysis for future retail goods floorspace demand has demonstrated that there is no need for net additional retail goods floorspace under Scenarios One and Two in the forecast period (refer Table 10 and Table 11). The projected growth in sales within the catchment area for most types of goods needs to be directed to existing stores to achieve more sustainable trading levels.

If the FCAD is able to increase its market share in the MTA (Scenario Two), there will be some potential for additional major store development, generating demand for over 2,500 square metres of additional supermarket floorspace at 2008 (refer Table 10), which will increase to over 3,200 square metres by 2031 (refer Table 11). The floorspace demand generated would enable a new small to medium sized supermarket, such as Safeway, to be developed in the FCAD. It is unlikely however, that in the absence of significant positive shifts in the FCAD market share, that such a store would consider establishing in a centre which currently trades at levels well below industry accepted benchmarks.

Table 10: Net Additional Shopfront Floorspace Requirements for 2008

Major Commodity Group	**Supportable Retail Floorspace at Sustainable Trading Levels** m² Gross Leasable Floor Area	
	SCENARIO ONE: Current Trading Patterns	**SCENARIO TWO: Typical Trading Patterns**
Food, groceries and liquor		
Supermarket	*-3,020*	*2,580*
Other food specialty stores	*-80*	*-1,450*
Subtotal: Food, groceries and packaged liquor	-3,100	1,130
Take away food, cafes and restaurants	-1,350	-7,230
Subtotal: Food, groceries and liquor	**-4,450**	**-6,100**
Discount Department Stores	**-2,970**	**-2,970**
Other household goods	**-17,290**	**-15,880**
Bulky goods	**-5,330**	**-5,840**
TOTAL: RETAIL GOODS	**-30,040**	**-30,790**
TOTAL: RETAIL SERVICES	**Balance of Demand and Supply**	
TOTAL: SHOPFRONT FLOORSPACE	**Ranging from -30,040 to -30,790m²**	

Table 11: Net Additional Shopfront Floorspace Requirements for 2031

Major Commodity Group	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area	
	SCENARIO ONE: Current Trading Patterns	SCENARIO TWO: Typical Trading Patterns
Food, groceries and liquor		
Supermarket	*-2,700*	*3,230*
Other food specialty stores	*370*	*-1,090*
Subtotal: Food, groceries and packaged liquor	-2,330	2,140
Take away food, cafes and restaurants	-590	-6,810
Subtotal: Food, groceries and liquor	**-2,920**	**-4,670**
Discount Department Stores	**-1,170**	**130**
Other household goods	**-17,100**	**-15,570**
Bulky goods	**-4,980**	**-5,630**
TOTAL: RETAIL GOODS	**-26,170**	**-25,740**
TOTAL: RETAIL SERVICES	**Ranging from 7,510 to 12,210m²**	
TOTAL: SHOPFRONT FLOORSPACE	**Ranging from -18,660 to -13,530m²**	

The analysis has demonstrated that significant demand exists for additional retail services floorspace, with the need for approximately 7,500 to 12,200 square metres of new floorspace from 2008 to 2031. Much of this requirement will be met by existing floorspace in the FCAD.

At 2031, even if the performance of the FCAD improves significantly by increasing its market share in the MTA, there will still be an oversupply of shopfront floorspace of 13,500 to 18,600 square metres.

13 CONCLUSION

The FCAD has had an important historical role as a district centre serving western Melbourne. As a result, significant levels of floorspace developed at the FCAD. With further population growth to the west of the FCAD and the establishment of several Major and Principal Activity Centres in the catchment of the FCAD, it has faced increasing levels of competition for market share. Much of the new population growth occurring to the west will be serviced by activity centres at Werribee, Rose Grange, Sydenham, Braybrook, Sunshine and Highpoint. Thus the future retail role and function of the FCAD will be limited by these other activity centres.

The analysis undertaken in the preparation of the Study indicates that the FCAD currently has an inefficient trading pattern, with approximately 52 percent of the total food, groceries and liquor expenditure in the FCAD drawn from the MTA. Approximately 46 percent of the total food, groceries and liquor expenditure is drawn from the STR, which extend across sub-metropolitan areas that are well served by a network of existing and planned activity centres. Despite significant levels of population growth being anticipated in the STR, it is unlikely that the current levels of in-bound trade to the FCAD from the STR will continue. The existing trading patterns of the FCAD are highly vulnerable to changes in the regional activity centre network, where the continued improvement of the retail offer in other suburbs will continue to absorb some of the existing market share of the FCAD. As a result, there is a need to significantly strengthen the performance of the FCAD by improving its market share within the MTA. If the trading pattern of the FCAD was consistent with other activity centres, between 70 and 95 percent of expenditure from the surrounding suburbs of the MTA would be bound to the FCAD - significantly strengthening the sustainability of the source of trade for the FCAD.

The low market shares of the FCAD within the MTA illustrate that the FCAD is currently out-competed by other activity centres in the region, which offer a more appealing destination than the FCAD. In many cases, market shares can be increased by introducing new major retail attractors (such as supermarkets) into an activity centre however, the forecast floorspace requirements for the FCAD indicate that these stores are not viable at sustainable levels of trade until approximately 2031. If such a store sought to establish in the FCAD at an earlier point in time, it is likely that significantly lower levels of sales would be achieved - at below industry accepted benchmarks for the RTD. In order for the development of new major attractors to be viable, the RTD must be achieved to justify rent values, site acquisition and development costs. New major retail tenants must therefore have a business model with a low-overhead cost structure and / or be prepared to accept sales levels and profit margins that are below industry accepted benchmarks.

The FCAD has very limited potential for additional retail goods and services floorspace to 2031. Two different scenarios for trading patterns have been modelled in the preparation of the Study: Scenario One - based on current trading patterns; and Scenario Two - based on potential trading patterns where the FCAD is a much more preferred destination for residents of the MTA. Both scenarios indicate that the existing level of retail floorspace provision (for both goods and services) is well in excess of current demand, with over 85,000 square metres of shopfront floorspace already in the FCAD. At 2008, this represents an oversupply of over 30,000 square metres of floorspace, which will decrease (in the best case of Scenario Two) to 13,500 square metres of floorspace by 2031.

Throughout the forecast period however, significant shifts in demand for different types of floorspace may occur, particularly if the FCAD can 'recapture' market share within the MTA (Scenario Two) to generate sufficient in-bound sales to justify the development of a new small to medium sized supermarket of over 3,000 square metres. The range of specialty store retailers, particularly for food, groceries and liquor and take away food, cafes and restaurants, may continue to operate at the current RTD that are below industry accepted benchmarks. This will sustain the number of tenants in the FCAD and ensure ongoing occupancy of shopfronts however, it must be recognised that it impacts upon the quality of the FCAD, its retail offer and ultimately the MTA market share. Low levels of sales for specialty stores result in low rent values and in turn limit the potential for investment in upgrade, renewal and refurbishment of facades, signage and awnings, adversely impacting upon the attractiveness of streetscapes and the public realm. If the RTD within the FCAD do not increase, it will impact upon the potential for the FCAD to attract national brand specialty stores and other higher-order tenants who require higher sales levels and thus reinforce the existing trading patterns of the FCAD by not catering for the needs of its catchment population.

While the demand for additional retail services is likely to trigger some refurbishment and upgrade of existing buildings and cause some changes to the existing tenancy mix, it will not generate sufficient demand to elevate the FCAD to a level where there is equilibrium between supply and demand of shopfront floorspace. Consequently, the low levels of return on rental values for shopfront floorspace will not yield sales levels that justify as frequent improvement to facades and visitor facilities as other activity centres in the FCAD MTA, maintaining the current status of the FCAD as a less preferred destination in the region.

In order to stimulate a shift in the current trading patterns of the FCAD and encourage a greater proportion of MTA expenditure in the FCAD, further approvals of floorspace for developments servicing the MTA of the FCAD must be considered with caution. The development of additional retail floorspace at existing activity centres and the establishment of new activity centres will absorb the market share of the FCAD, further decreasing the level of in-bound sales to the FCAD and the RTD being achieved within the FCAD.

While the analysis shows little potential for significant levels of additional floorspace in the FCAD to 2031, the performance of the FCAD can be enhanced through increased levels of trade. To improve the existing performance of the FCAD however, an active policy of consolidation and regeneration must be adopted. The approach must concentrate future floorspace potential in the existing retail core area where it will have most impact on improving trading levels in the FCAD. To achieve this, the future potential for additional retail floorspace within the FCAD MTA must be directed to the FCAD, rather than being absorbed by other activity centres.

PART C: IMPLEMENTATION FRAMEWORK

14 INTRODUCTION

This part of the Study addresses the preferred role and structure for retail development in the FCAD, together with an implementation framework to achieve the retail revitalisation of the FCAD. The principal outcomes addressed in this part are:

- a context and vision statement;
- key issues for the retail framework plan;
- performance objectives;
- retail framework plan principles;
- retail framework plan elements;
- a management framework.

15 RETAIL FRAMEWORK PLAN

15.1 CONTEXT STATEMENT

A detailed SWOT analysis was prepared from the surveys and assessments undertaken for the Study (refer Table 12). This informed the preparation of the following context statement, which is a succinct summation of the FCAD's competitive retailing position and environment and the basis upon which a retail revitalisation strategy must be based.

Table 12: FCAD SWOT Analysis

Strengths	Opportunities
* Ongoing population and household growth close to the FCAD. * Major regional public transport node and accessibility. * Popularity of Footscray Market and Little Saigon Market. * Public acceptance in the region of the FCAD as a restaurant precinct. * Regional role of medical centres in Paisley Street. * Significant representation of banking services. * Strong representation of Vietnamese and African communities - important for local communities and investment potential. * Ongoing new residential development around and within the FCAD. * Presence of Victoria University.	* Large population close to the FCAD - great opportunities to target fresh food and grocery expenditure where convenience is a major factor in consumer choice. Food, groceries and liquor exceed 50 percent of all retail expenditures. * Availability of the Forges store site presents a unique retail development opportunity. * Significant opportunity for the redevelopment of Footscray Market. * Opportunity to consolidate the FCAD's retail precinct. * Opportunity to consolidate the Little Saigon precinct. * Potential offered by the student population.
Weaknesses	**Threats**
* Elemental retail structure - representation of major stores by very few national retailers. * Near total absence of national chain and franchise speciality stores - profoundly affects both spatial structure and market share. * Very poor shopfront quality in most of the FCAD. * Near total absence of complementary activities at the street front entries of several of the major attractors (Coles, Kmart, Forges, Footscray Market). * Lack of a regionally recognised shopping street in the FCAD. * Lack of consistent shopfront quality - high activity shopping streets in the FCAD.	* Further supermarket development at new neighbourhood centres close to the FCAD. * Departure of any of the remaining national chains in the FCAD. * Development of the new Costco store at Docklands. * Multi-storey developments which occupy large site areas that may result in some buildings creating a 'walled' effect. * Further developments which do not provide for high amenity, active street fronts. * Loss of existing patronage, particularly in the STR, with increasing upward mobility of former Footscray residents.

15.1.1 Historic Legacy

The FCAD evolved as a regional service centre for Melbourne's western suburbs following the early development of the region in the late nineteenth century. It served as the regional retailing and services centre through to the 1970's. Most of the existing buildings and the character of much of the FCAD is a reflection of these earlier periods of development. The rise of Highpoint as a major regional shopping centre commenced during the late 1970's and 1980's and this rise was mirrored by the decline of the FCAD's regional retail role.

The FCAD currently provides a low level retail regional role and a supporting neighbourhood role. The current level of performance of the FCAD would not justify its present shopfront floorspace provision. The current extensive provision of floorspace and extended shop frontages reflect the period when the FCAD was the major retail centre for Melbourne's western suburbs.

15.1.2 Policy

Footscray's role as a regional centre was set out in policy from the 1954 Melbourne and Metropolitan Board of Works Plan onwards. It was re-affirmed as a district centre in the 1980's and as a transit city in Melbourne 2030 and is currently proposed as a CAD in the Melbourne @ 5 Million reappraisal of Melbourne 2030. This designation may assist high level government interest and support for the FCAD's activation as a diversified activities district including a robust regional retailing role.

15.1.3 Retail Environment

The FCAD has an elemental retail structure where key trading sectors such as supermarket, department store and discount department store trade are supported by very few national retailers. There is a near absence of national chain and franchise specialty stores and this has profound effects on both the spatial structure of retailing in the FCAD and the patterns of market share.

The major attractors exist in three widely separated clusters with a near total absence of complementary activities at street front entries, the exception being Little Saigon Market. The FCAD lacks a regionally recognised shopping street of an amenity and consistency that would be comparable to other regional street based centres in metropolitan Melbourne.

15.1.4 Elements of Growth and Change

Footscray and the wider MCC have witnessed significant new investment in residential development over the past decade. This resurgence in activity is likely to continue with ongoing sustained interest in retail development in areas both adjacent to and within the FCAD. New investment in the Footscray railway station precinct will add further impetus for potential new retail and mixed use investment in the FCAD.

15.1.5 Opportunities for Retail Revitalisation

The imminent departure of the Forges store from the FCAD provides an historic opportunity for the redevelopment of the site for a new retail development with residential and commercial activities above. Similarly, there has been interest expressed for some considerable period of time by the current owners of Footscray Market for its redevelopment. This is also a very significant site and potentially could provide a major boost for the restructuring and revitalisation of retailing in the FCAD.

15.2 VISION STATEMENT

The FCAD will be seen as a modern, dynamic and attractive retail and services centre with a recognised regionally competitive offer in food, groceries and day-to-day household goods within a unique and cosmopolitan environment reflecting the diverse cultures of Melbourne's inner west.

15.3 KEY ISSUES FOR THE RETAIL FRAMEWORK PLAN

The development of the retail framework plan for the FCAD was influenced by a number of significant issues. These are discussed below.

15.3.1 Existing Retail Attractors

The most positive aspect of retailing in the FCAD is the existing major attractors. The imminent departure of the Forges store should be seen as a significant opportunity to achieve major positive change in the FCAD. Similarly the preparedness of the owners of the Footscray Market to seriously consider redevelopment opportunities should be seen as a positive step for the revitalisation of retailing in the FCAD.

Both Footscray Market and Little Saigon Market are major attractors drawing trade from beyond the MTA (refer Photographs 6 to 9). An important first step in the development of a retail framework plan for the FCAD will be to work with property owners and key existing tenants / potential major retailers to prepare redevelopment or reinvestment plans for each of the three clusters of activity.

Photograph 6

Footscray Market

Photograph 7

Footscray Market

Photograph 8

Little Saigon Market

Photograph 9

Little Saigon Market

15.3.2 Lack of Specialty Store Infrastructure

One of the most significant constraints for the FCAD to achieve a competitive retailing position is its lack of a specialty store infrastructure with any appreciable representation of the national major chain stores and franchises. This has minimised any benefits that the FCAD's retail attractors can provide. The immediate poor retailing environment in the surrounds of Coles, Kmart and Forges in the south west of the FCAD and the Footscray Market in the south east of the FCAD are a particular concern.

15.3.3 The Paradox of Ethnic Support

The analysis clearly indicates that a major element of the FCAD's support is drawn from the Asian communities and to a lesser extent from the small growing African community. The Vietnamese community, in particular, has profoundly influenced retailing, services and restaurant activity in the FCAD. It generates significant patronage and has provided major investment for significant elements of the FCAD's stores and services. There have been various measures of success in investment by the Vietnamese community into the FCAD, in particular, the development of Little Saigon Market has been a major success story (refer Photographs 8 and 9).

The difficulty with the current position is that many of the stores have poor external and internal shop quality and present an inconsistent and low quality environment. Most of the ethnically based retail stores and services, particularly household goods stores, do not provide a user-friendly environment for English-only customers, which should be the objective for a broadly based regional centre (refer Photographs 4 and 10).

Photograph 10

Leeds Street shopfront

The challenge of an effective retail framework plan for the FCAD is to galvanise and build on the significant ethnic support that the FCAD has to take it to a new level of development and provision. This would offer a different sort of future than that provided in most street based centres in metropolitan Melbourne but nonetheless a very powerful and competitive future.

15.3.4 Public Transport

One of the FCAD's great competitive advantages is its extensive regional public transport access. This high level of regional access should ideally be complemented by a high quality, high frequency, local and district public transport access system. A Central Area Transit (CAT) system could provide high frequency bus services for the FCAD to the surrounding suburbs and major trip generators. This concept is complementary to the Transit City Concept and formed part of the planning for the Dandenong Transit City. The most successful application of the concept has been in the Perth, where it has dramatically increased public transit ridership within and around the Perth central area.

The significant opportunity that a CAT system would provide would be to allow visitors to park at some distance from the FCAD and journey into the FCAD for shopping and personal business purposes.

15.3.5 Housing Demand and New Development Opportunities

The sustained interest in housing development in Footscray and the wider MCC provides a unique opportunity in the retailing revitalisation of the FCAD. In order to achieve economically viable redevelopment projects with large components of ground floor retail activities, these will need to be 'compensated' by an allowance for mid rise and high rise residential development. The presence of high levels of residential demand means that there are likely to be potential development projects that could be achieved and generate very high levels of shopping amenity, subject to an agreement with MCC and the DPCD on acceptable levels of residential development. A dangerous outcome would be the trading off of height of future developments for high intensity, high site coverage residential developments that effectively present a walled appearance for future developments; that is a larger scale version of the present Footscray Plaza development (refer Photographs 2 and 11).

Photograph 11

Footscray Plaza at the French Street / Paisley Street intersection

15.3.6 Restaurant Demand

The Study found that the FCAD is the leading restaurant destination in the MTA. This is a positive outcome that should be built upon in the retail framework plan. An incipient restaurant precinct in Hopkins Street between Nicholson and Leeds Streets could be the focus for a new investment strategy.

15.3.7 Nicholson Street Mall

The Nicholson Street Mall has been a major focus of public realm investment in the FCAD. The result has been an attractive public environment. Unfortunately, the level of public investment has not been matched in any appreciable way by private investment in the stores and services. The Nicholson Street Mall, particularly between Paisley Street and Irving Street, offers no significant attractions to the broader stream of visitors outside the African communities.

An important lesson arising from the Nicholson Street Mall redevelopment should be that any future major public realm investment should be linked as part of a wider redevelopment and reinvestment program. The redevelopment of the Forges store site and the Footscray Market could provide ideal opportunities for this type of approach to ensure that wider outcomes beyond improvements to the public realm are achieved, including:

- new tenancies and franchises that are both street based and within developments;
- consistent and high quality internal and external shopfront and store environments;
- agreement to maintain shopfronts free from graffiti and bill posters.

15.3.8 Links to Footscray Railway Station Precinct

A significant proportion of both shopping and general trips to the FCAD are by public transport. There needs to be a safe, attractive and direct pedestrian connection between the Footscray railway station and the Footscray Market, particularly if the Footscray Market is to be redeveloped. The nature of activities along Irving Street as a non shopping distributor road place higher emphasis on the need for a direct connection.

15.3.9 Retail Framework Plan and Government Policy

The prime purpose of the retail framework plan is to provide a rationale, principles and a pathway for the retail revitalisation of the FCAD. The interpretation of this work and the reconciliation of its consistency or otherwise with existing Government policy is considered to be part of the review process that MCC and the State Government would be expected to undertake.

15.4 PERFORMANCE OBJECTIVES

The retail framework plan for the FCAD will need to meet defined performance objectives to provide verifiable measures on progress toward improvement and revitalisation. These encompass the following and are capable of measurement from regular surveys or from retail sales information that could be provided by the FCAD retail tenants.

15.4.1 Range of Stores and Services

- Regionally competitive range of state of the art national chain supermarkets, fresh food stores and day-to-day household goods stores.
- Regionally unique fresh food market in a modern, attractive environment.
- Regionally significant range of take away food stores and restaurants.
- Regionally unique range of retail services.

15.4.2 Shopping Environment and Amenities

- Perceived quality of store and public space presentation.
- Perceived quality of shopping and FCAD visit experience.
- Actual and perceived safety of the shopping and wider FCAD environment.
- Hours of operation of services.
- Availability of a wide range of essential complementary shopping and financial services.
- Range of unique internal and external environments.

15.4.3 Access

- Safe, effective and convenient access by public transport (regional coverage, frequency of services, cost).
- Range of car parking options for shoppers (cost, hours of operation, park and ride/park and delivery options).
- Safe and amenable pedestrian access routes.

15.4.4 Market Share

- Dominant market share for food, groceries and liquor, day-to-day household goods and retail services in the FCAD's MTA.
- Regionally significant market share for food, groceries and liquor, day-to-day household goods and retail services in the FCAD's STR.

15.4.5 Retail Sales

- Attainment of industry accepted benchmarks for the RTD for the selected niche trade areas.
- Attainment of real levels of retail sales growth in the selected niche trade areas that parallel or exceed population growth in the MTA.

15.4.6 Customer Visitation and Satisfaction

- Attainment of consistent and significant year-on-year real growth in customer visitation to the FCAD.
- Progressive and sustained improvement in customer satisfaction levels measured in terms of perceived shopping environment, amenities and services.

15.5 RETAIL FRAMEWORK PLAN PRINCIPLES

The retail framework plan is derived from the following principles.

15.5.1 Focus on Existing Core Markets

The analysis undertaken for the Study clearly indicates that the FCAD only has a marginal role in the provision of household goods and for many of these goods its representation in terms of national chain stores is virtually nonexistent. It is recommended to focus on existing markets for which there is an established pattern of patronage and a recognised degree of competitive offer - in essence to build of what strengths remain in the FCAD.

The recommended sectors of focus are in food, groceries and liquor retailing and convenience household goods. This encompasses:

- supermarkets;
- fresh food stores;
- retail liquor sales;
- take away food stores;
- cafes and restaurants;
- pharmaceutical stores, newsagencies and small item household goods.

These items comprise well over 50 percent of household retail expenditures and for the FCAD represent the lowest risk approach on which to base a retail framework plan. In practice, opportunities for this approach could be achieved in the new retail redevelopment at the Forges site and the redevelopment of the Footscray Market.

15.5.2 Redevelopment / Refurbishment of the Major Attractors

As indicated in the previous discussion, the major attractors are the key for the revitalisation of retail trade in the FCAD. The redevelopment of the Forges store and the Footscray Market are the most significant opportunities available in the FCAD. In each case, a facilities and design brief should be prepared as a basis for negotiations with the development groups.

This should set out:

- an optional range of major stores and a balance of specialty stores;
- provision for specialty store street and arcade frontage to complement and lead to the major stores;
- provision for on-site parking, consistent with avoiding a fortress type development;
- provision for mid rise and high rise residential and commercial development consistent with avoiding a walled or fortress type development above;
- ideally linking of access to upper floors as an integral part of the design for the new developments.

15.5.3 Linking the Major Attractors

Linking the major attractors with a recognised shopping street is a key principle and major challenge for the retail framework plan. Paisley Street and the two blocks between Albert and Leeds Streets would appear to provide the best opportunity for the critical link between the south west and south east attractors. Optimally the focus should be to upgrade this section of Paisley Street as the recognised shopping street for the FCAD on the basis of a Government supported redevelopment package to encompass:

- a comprehensive master plan for the refurbishment of the street including street paving, improvements to canopies and awnings, provision of under veranda lighting and consistent signage;
- improvements to shop fronts and store fitouts with capital funding support on a dollar for dollar basis and / or zero interest loans;
- attraction packages for potential national chain stores and franchises with capital funding support on a dollar for dollar basis and / or zero interest loans;

15.5.4 Focussing Local Investment Interest

The level of existing investor interest in the FCAD is a major strength and opportunity for the revitalisation of retailing in the FCAD. The establishment of a planning, development and feasibility advisory service that could be provided on a confidential basis for the initial development and assessment of master planning concepts would be a positive step in generating additional interest from the existing investment community relevant to the FCAD.

15.6 RETAIL FRAMEWORK PLAN ELEMENTS

The retail framework plan comprises the following key elements.

15.6.1 Strategically Placed Major Retail Attractors

Prime generators of new retail activity will be established through two strategically placed clusters of retail activity generally focused on the selected niche trade areas.

(a) Eastern Cluster

An eastern cluster at the site is currently occupied by the Footscray Market.

The concept envisages the redevelopment of the Footscray Market with a north-south and east-west galleria system leading to a high volume space market hall. This network will be flanked by secondary attractors accessed from the streets, galleria and market hall. Several residential, hotel and office towers would be developed over the secondary attractors with lift cores linked to the market hall.

The eastern cluster is located with respect to the railway and bus stations and tram route. A priority pedestrian route will extend across Irving Street utilising pedestrian controlled traffic signals with a similar linkage across Hopkins Street.

(b) Western Cluster

A western cluster is located in the blocks bounded by Barkly, Nicholson, Paisley and French Streets.

The concept envisages the redevelopment of the Forges store and selected adjoining properties to provide a new full line supermarket and a new discount department store (to be operated by Forges or a new national operator) linked to new arcades providing access to Paisley and Nicholson Streets.

It is envisaged that the western cluster will be developed with roof-top car parking and / or co-location with a parking station on land currently occupied by the MCC car park with residential and office towers above.

A second supermarket-based development could be provided south of Paisley Street to further consolidate the western cluster.

Refurbishment of the existing Coles supermarket and Kmart development with modernised entry areas and shopfronts will complement significant new investment in the western cluster.

15.6.2 Pedestrian Network System

The pedestrian network system would link the clusters to each other, public transport, car parking facilities, the existing mall and street system and a wide range of supporting retail stores and services. It is comprised of the following.

- A new east-west spine to run directly from the new discount department store on the Forges site directly to the redeveloped Footscray Market via:
  - an arcade linking the Forges store site to Nicholson Street;
  - a revamped Chambers Street as a pedestrianised lane connected to the redeveloped Maddern Square, an urban square ringed by restaurants and specialty stores and services, connecting through to Leeds Street;
  - a new east-west galleria in the redeveloped Footscray Market, leading to the centrepiece of the market, a new high volume space market hall.

- Supporting north-south pedestrian links that would feed into the above east-west spine. These links include:
  - a north-south galleria at the redeveloped Footscray Market providing high quality pedestrian access from Irving Street to Hopkins Street via the market hall;
  - signalised priority pedestrian access across Irving Street to directly connect the north-south galleria to the Footscray railway station;
  - signalised priority pedestrian access across Hopkins Street to directly link with the north-south galleria (this could include possible pedestrianisation of the southern section of Dalmahoy Street to Byron Street);
  - new north-south links to Maddern Square providing additional connections between Paisley and Barkly Streets;
  - new north-south atria / arcades linking the new attractors in the western cluster to Paisley Street.

- A possible east-west arcade in the second supermarket development south of Paisley Street.

- Possible pedestrianisation of Albert Street between Paisley and Barkly Streets.

15.6.3 Public Transport Access System

- Regional railway and bus stations south of Irving Street.
- A tramway link at Leeds, Hopkins and Droop Streets.
- A CAT system providing high frequency bus services to key attractions and nodes in the MTA.

15.6.4 Car Parking Facilities

A network of car parking options for shoppers offers a range of access, price, convenience and length of stay choices for visitors. This should include car parking options for long term parking outside the FCAD accessed by the CAT system and a shopping purchase scheme which discounts costs of parking against purchases.

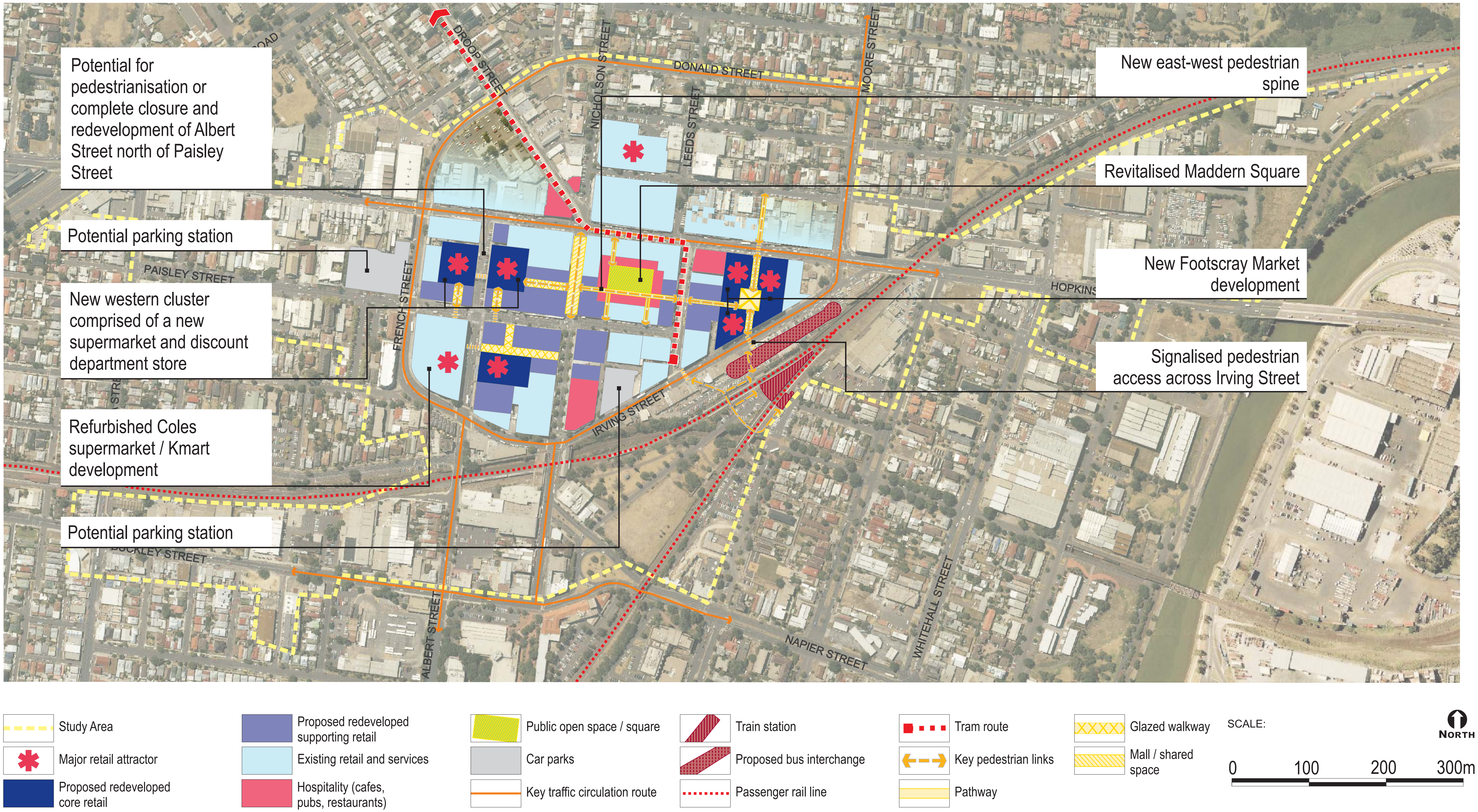
Potential parking stations:

- through the redevelopment of the existing MCC car park at Paisley and French Streets;
- co-located with the proposed new supermarket and discount department store redevelopment in the western cluster;
- co-located with the proposed new supermarket development south of Paisley Street in the western cluster;
- through the redevelopment of the existing MCC car park on the north side of Irving Street, between Nicholson and Leeds Streets.

15.7 SUMMARY

In summary, the retail framework plan is focused on selected strategic intervention in the FCAD with a system of new activities forming a framework for revitalisation through the redevelopment of two selected sites in the core, linked by an east-west pedestrian spine. This simple framework will reorganise and re-focus a hierarchy of activities and pedestrian movements and provide a robust framework for long term investment.

FIGURE 10 : RETAIL FRAMEWORK PLAN



Maribyrnong CITY COUNCIL

16 MANAGEMENT FRAMEWORK

It is recommended that the City of Maribyrnong adopt a management framework in order to effect the implementation of the retail framework plan for the FCAD. The management framework encompasses:

- resources and budgeting for the FCAD;
- an attraction, retention and development strategy;
- feasibility assessments and master plan development;
- communication and marketing framework;
- community services and facilities plan;
- sites acquisition program;
- public realm improvements;
- ongoing monitoring program;
- statutory implementation and management;
- special rate plans;
- cyclical review.

16.1 RESOURCES AND BUDGETING FOR THE FCAD

Programs to be undertaken by MCC in co-ordination with State agencies will be constrained by human information and material resource requirements available to implement the retail framework plan. The planned allocation of these resources should be established through a recurrent and capital budget provisions on a rolling three to five-year basis.

16.2 ATTRACTION, RETENTION AND DEVELOPMENT STRATEGY

A key outcome of the retail framework plan is to co-ordinate retail investment and redevelopment and to ensure maximum leverage for the revitalisation of the FCAD and ongoing stakeholder and community benefits. The first step in the refinement of the retail framework plan is the development of an attraction, retention and development strategy comprising the following elements.

- Review, refinement and adoption of a context and vision statement for retail development and services in the FCAD.

- Confirmation of the recommended trade area niches for the FCAD.
    - A clear finding of the Study is that the FCAD has no established trading core area that operates at industry accepted benchmarks and the mass of existing shopfront floorspace cannot be sustained in its current form. In this situation, the pathway to revitalisation should be focussed on a consolidated trade area niche and the logical niche is food, groceries and liquor sales (including take away food, cafes and restaurants), convenience household goods (including newsagents goods and pharmaceutical goods) and retail services (including beautician and hairdressing services, banking agencies, travel agencies and hire, repair and copy services). These elements of expenditure represent approximately 65 per cent of average household retail budgets. They are a significant component of weekly expenditure and comprise a realistic market target for the FCAD. New investment in this niche opens up the FCAD to more effectively compete in this market which comprises a significant component of retail expenditures in the MTA.
    - As the Study has found, discretionary expenditure (for example, on clothing, footwear, jewellery and electrical goods) is in market segments heavily dominated by Highpoint and other activity centres. Given the range of stores and services in these activity centres and their entrenched market position, it is the Consultant's view that it would be unrealistic at this stage to target these niches as a key direction for major development and investment in the FCAD.

- Subject to the selection of the trade area niche, the next step is the development of a facilities brief identifying specific store and service types that will be relevant for new investment. Two national supermarket chains (Safeway and Aldi) are not represented in the FCAD and these would form logical targets for new stores. The retail framework plan is based on:
    - two new supermarkets to be located in the western cluster;
    - a redeveloped and modernised Forges store in a discount department store format (or alternatively a new discount department store with a national chain operator);
    - a redeveloped Footscray Market comprising a galleria system and a market hall;
    - a revitalised Maddern Square as an urban plaza with redeveloped active edges comprising restaurants and specialty stores and services;
    - extensive provision for new specialty stores and services in an east-west pedestrian link running between the western and eastern clusters;
    - new car parking stations that could be co-located with the supermarket and discount department store developments in the western cluster and / or placed on redeveloped existing car parking sites at French Street and Irving Street.

- Compilation of a comprehensive business register providing details of business type, services provided and state of existing store or building. The register would be used in business and activity profiling and gap analysis, as part of the communication and marketing framework.

16.3 FEASIBILITY ASSESSMENTS AND MASTER PLAN DEVELOPMENT

Subject to the above actions being undertaken, it is recommended that feasibility assessments be undertaken interactively with master plan development to produce an attractive, feasible and practical master plan that is capable of implementation. Outcomes in this part of the implementation process will include the following.

- Understanding of the level of interest by major retailers and selected retail developers for key sites and stores in the FCAD and the conditions that would attach to their interest.
- Location and design requirements for new major stores.
- 'Arms length' feasibility assessments for the western and eastern clusters, Maddern Square and the car parking stations.
- Identified development (or finance) conditions required to achieve sustainable private sector based redevelopment at the identified sites.
- Master plan details for the retail framework plan.
- Identified packages of additional development for the retail development sites (for example, potential for hotel, residential and office towers as part of a redeveloped Footscray Market).

16.4 COMMUNICATION AND MARKETING FRAMEWORK

A communication and marketing framework should be prepared following the feasibility assessments and master planning and the application of a business attraction, retention and development strategy. Key elements of the communication and marketing framework encompass the following.

- Application of the agreed context and vision statement to the FCAD marketing and promotion activities. Marketing and promotion should communicate a consistent image that MCC wishes to portray in relation to the FCAD and the wider municipality. The first test of the marketing and promotion message is therefore consistency with the context and vision statement.
- Preparation of a set of marketing themes to guide the communication and marketing framework (developed from the context and vision statement and, for example, highlighting the cultural diversity reflected in the FCAD's stores and restaurants). The marketing themes should also encompass the new developments that are being implemented and the new stores, services and amenities coming to the FCAD.
- Preparation of a retail stores and services guide for the FCAD (from the business register, to be developed as part of the business attraction, retention and development strategy).
- Preparation of an events calendar for the FCAD with special events and fairs to celebrate each step in the revitalisation and redevelopment of the FCAD.
- Development of a MCC website providing the retail stores and services guide for the FCAD and highlighting coming events, fairs and festivals.

16.5 COMMUNITY SERVICES AND FACILITIES PLAN

The preparation of a comprehensive community services and facilities plan is an important step for MCC to identify, prioritise and develop community services and facilities for the FCAD that will significantly improve amenity and consumer attraction and preferences for the FCAD. It is appreciated that MCC will have an operational community services and facilities plan for the Municipality. The plan should indicate:

- existing services and facilities in the FCAD and surrounds;
- programmed improvements by MCC to augment existing services and facilities;
- opportunities for new facilities and services, particularly where these can be co-located with the new retail investments.

16.6 SITES ACQUSITION PROGRAM

Subject to the specific identification of required sites for development in the feasibility assessments and master planning stage and the identification of required development conditions, MCC and / or State agencies may be required to assist in a selected sites acquisition program in order to facilitate the identified developments.

16.7 PUBLIC REALM IMPROVEMENTS

Certain elements of the retail framework plan will require significant new public space development including the redevelopment of Maddern Square, the pedestrianisation of Chambers Street and the potential pedestrianisation of Albert Street between Paisley and Barkly Streets, in addition to priority pedestrian crossing areas across Irving and Hopkins Streets. The implementation of the retail framework plan will therefore require detailed design and development of the required public realm improvements.

16.8 ONGOING MONITORING PROGRAM

It is recommended that following the resolution and adoption of the retail framework plan that MCC prepares a program to monitor the establishment and progressive development of each of the programs outlined above. The monitoring program should be required to report to MCC on an annual basis in relation to progress in the establishment and implementation of the programs in respect of:

- the immediate and long term objectives for each of the programs;
- the specific operational objectives for each program;
- program effectiveness in relation to allocated budget resources;
- program implementation in relation to the original planning and intended staging;
- implementation issues that may have arisen and budget, resource and timing implications;
- feedback from the community and stakeholders where relevant;

- potential modifications to programs based on their progressive development and feedback from the community and stakeholders.

16.9 STATUTORY IMPLEMENTATION AND MANAGEMENT

It is recommended that MCC, in co-ordination with State agencies, ensures that there is sufficient flexibility in the provisions of the Maribyrnong Planning Scheme (Scheme) to enable the types and density of development to occur at the identified development sites. As indicated previously, the feasibility assessments and master planning stage will identify the required extent of development to achieve a sustainable development outcome. This information will need to be examined against the current Scheme provisions and expectations and MCC may need to review the Scheme provisions in order to facilitate the retail redevelopments.

16.10 SPECIAL RATE PLANS

MCC may wish to consider the application of special rates as part of the implementation of the retail framework plan in order to assist in the funding of selected public realm improvements, subject to the provisions of the Local Government Act.

16.11 CYCLICAL REVIEW

It is recommended that MCC undertake a major cyclical review of the development programs to implement the retail framework plan, generally on a rolling five year basis. It is recommended that the first review of the implementation framework occur following the release of the results of the 2011 Census of Population and Housing, likely to be available by 2013 and that subsequent cyclical reviews occur on a five-year basis from this date (that is, 2018 for the following review and 2023 for the subsequent review).

APPENDICES

These appendices were prepared by Collie Pty Ltd under the direction of then Project Director Jeff Wolinski – now with Renaissance Planning Pty Ltd.

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APPENDIX A: FLOORSPACE CLASSIFICATION SYSTEM

FLOORSPACE CLASSIFICATION

Source: Based on Ratio Consultant's retail classification system & ABS *ANZSIC* , Australian Cat. No. 1292.0.55.002, 2006.

Collie code	Revised ABS Description
A	FOOD, GROCERIES AND LIQUOR STORES
A.1	National chain supermarkets
A.2	Discount supermarkets
A.3	Other supermarkets
A.4	Convenience stores
A.5	Bakery product manufacturing (non-factory based)
A.6	Fresh meat, fish and poultry retailing
A.7	Fruit and vegetable retailing
A.8	Liquor retailing
A.9	Other specialised food retailing
A.10	Cafes and restaurants
A.11	Takeaway food services
A.12	Catering services
B	DEPARTMENT AND GENERAL STORES
B.1	Department stores
B.2	Discount department store
B.3	Mini major
C	CLOTHING, FOOTWEAR AND FABRIC STORES
C.1	Manchester and other textile goods retailing
C.2	Clothing retailing
C.3	Footwear retailing
C.4	Other retailing (personal accessories etc.)
D	OTHER HOUSEHOLD A STORES (generally < 350 sqm)
D.1	Houseware retailing
D.2	Computer and computer peripheral retailing
D.3	Sport and camping equipment retailing
D.4	Entertainment media retailing [CDs, DVDs, records]
D.5	Toy and game retailing
D.6	Newspaper and book retailing
D.7	Watch and jewellery retailing
D.8	Pharmaceutical, cosmetic and toiletry retailing
D.9	Stationery goods retailing
D.10	Antique and used goods retailing
D.11	Flower retailing
D.12	Other store-based retailing N.E.C.
E	OTHER HOUSEHOLD B STORES (generally > 350 sqm)
E.1	Furniture retailing
E.2	Floor coverings retailing
E.3	Houseware retailing
E.4	Electrical, electronic and gas appliance retailing
E.5	Other electrical and electronic goods retailing
E.6	Hardware and building supplies retailing
E.7	Garden supplies retailing
E.8	Toy and game retailing
E.9	Marine equipment retailing
E.10	Stationery goods retailing
F	RETAIL COMMERCIAL SERVICES
F.1	Banking
F.2	Building society operation
F.3	Credit union operation
F.4	Other retail banking n.e.c.
F.5	Life insurance
F.6	Health insurance
F.7	General insurance
F.8	Superannuation funds
F.9	Auxiliary insurance services
F.10	Passenger car rental and hiring
F.11	Other motor vehicle and transport equipment rental and hiring
F.12	Video and other electronic media rental and hiring
F.13	Other goods and equipment rental and hiring n.e.c
F.14	Professional photographic services
F.15	Travel agency and tour arrangement services
F.16	Packaging services
F.17	Lottery operation
F.18	Other gambling activities
F.19	Hairdressing and beauty services
F.20	Funeral, crematorium and cemetery services
F.21	Laundry and dry-cleaning services
F.22	Photographic film processing
F.23	Other personal services N.E.C.
G	TRADE SERVICES
G.1	Building construction
G.2	Heavy and civil engineering construction
G.3	Construction services
G.4	Plumbing services
G.5	Electrical services
G.6	Air conditioning and heating services
G.7	Fire and security alarm installation services
G.8	Other construction services N.E.C.
G.9	Other warehousing and storage services
G.10	Farm animal and bloodstock leasing
H	REPAIR SERVICES
H.1	Domestic appliance repair and maintenance
H.2	Electronic (except Domestic Appliance) and precision equipment repair
H.3	Other machinery and equipment repair and maintenance

Collie code	Revised ABS Description
H.4	Clothing and footwear repair
I	PROPERTY AND BUSINESS SERVICES (generally < 500 sqm)
I.1	Newspaper, periodical, book and directory publishing
I.2	Broadcasting (except Internet)
I.3	Internet publishing and broadcasting
I.4	Telecommunications services
I.5	Internet service providers, web search portals and data processing services
I.6	Financial services
I.7	Heavy machinery and scaffolding rental and hiring
I.8	Real estate services
I.9	Scientific research services
I.10	Architectural services
I.11	Surveying and mapping services
I.12	Engineering design and engineering consulting services
I.13	Other specialised design services
I.14	Scientific testing and analysis services
I.15	Legal services
I.16	Accounting services
I.17	Advertising services
I.18	Market research and statistical services
I.19	Management advice and related consulting services
I.20	Computer system design and related services
I.21	Employment services
I.22	Other administrative services
I.23	Building cleaning, pest control and other support services
I.24	Civic, professional and other interest group services
J	COMMERCIAL OFFICES (generally > 1,000 sqm)
J.1	Financial services
J.2	Scientific research services
J.3	Architectural services
J.4	Surveying and mapping services
J.5	Engineering design and engineering consulting services
J.6	Scientific testing and analysis services
J.7	Legal services
J.8	Accounting services
J.9	Corporate head office management services
J.10	Veterinary services
J.11	Employment services
J.12	Other administrative services
J.13	Central government administration
J.14	State government administration
J.15	Local government administration
J.16	Justice
K	EDUCATION, SPORTS AND COMMUNITY DEVELOPMENT SERVICES
K.1	Emergency, public order and safety services
K.2	Preschool education
K.3	Primary education
K.4	Secondary education
K.5	Combined primary and secondary education
K.6	Special school education
K.7	Technical and vocational education and training
K.8	Higher education
K.9	Sports and physical recreation instruction
K.10	Arts education
K.11	Adult, community and other education N.E.C.
K.12	Aged care residential services
K.13	Other social assistance services
K.14	Child care services
K.15	Creative and performing arts activities
K.16	Sports and physical recreation activities
K.17	Religious services
L	ENTERTAINMENT, RECREATION AND ACCOMODATION
L.1	Accommodation
L.2	Pubs, taverns and bars
L.3	Clubs (hospitality)
L.4	Motion picture exhibition
L.5	Libraries and archives
L.6	Museum operation
L.7	Zoological and botanical gardens operation
L.8	Nature reserves and conservation parks operation
L.9	Horse and dog racing activities
L.10	Amusement and other recreational activities N.E.C.
L.11	Brothel keeping and prostitution services
M	MEDICAL AND HEALTH CARE SERVICES
M.1	Hospitals
M.2	General practice medical services
M.3	Specialist medical services
M.4	Pathology and diagnostic imaging services
M.5	Dental services
M.6	Optometry and optical dispensing
M.7	Physiotherapy services
M.8	Chiropractic and osteopathic services
M.9	Other Allied Health services
M.10	Ambulance services
M.11	Other health care services n.e.c.
M.12	Diet and weight reduction centre operation
N	TRAFFIC AND TRANSPORT SERVICES
N.1	Road freight transport

Collie code	Revised ABS Description
N.2	Taxi and other road transport
N.3	Road passenger transport
N.4	Rail freight transport
N.5	Rail passenger transport
N.6	Air and space transport
N.7	Scenic and sightseeing transport
N.8	Other transport n.e.c.
N.9	Postal services
N.10	Courier pick-up and delivery services
N.11	Airport operations and other air transport support services
N.12	Parking services
O	MOTOR VEHICLE AND UTILITIES RETAILING AND SERVICES
O.1	Motor vehicle dismantling and used parts wholesaling
O.2	Car retailing
O.3	Motor cycle retailing
O.4	Trailer and other motor vehicle retailing
O.5	Motor vehicle parts retailing
O.6	Tyre retailing
O.7	Fuel retailing
O.8	Automotive electrical services
O.9	Automotive body, paint and interior repair
O.10	Other automotive repair and maintenance
P	INFRASTRUCTURE AND UTILITIES
P.1	Electricity supply
P.2	Gas supply
P.3	Water supply, sewerage and drainage services
P.4	Waste collection, treatment and disposal services
Q	WHOLESALING (including TRADE / BUILDING SUPPLIES)
Q.1	Basic material wholesaling
Q.2	Machinery and equipment wholesaling
Q.3	Motor vehicle and motor vehicle parts wholesaling
Q.4	Grocery, liquor and tobacco product wholesaling
Q.1	Other goods wholesaling
Q.2	Commission-based wholesaling
R	MANUFACTURING
R.1	Food product manufacturing
R.2	Beverage and tobacco product manufacturing
R.3	Textile, leather, clothing and footwear manufacturing
R.4	Wood product manufacturing
R.5	Pulp, paper and converter paper product manufacturing
R.6	Printing and printing support services
R.7	Petroleum and coal product manufacturing
R.8	Basic chemical and chemical product manufacturing
R.9	Polymer producter and rubber product manufacturing
R.10	Non-metallic mineral product manufacturing
R.11	Primary metal and metal product manufacturing
R.12	Fabricated metal product manufacturing
R.13	Transport equipment manufacturing
R.14	Machinery and equipment manufacturing
R.15	Furniture manufacturing
R.16	Other manufacturing
R.17	Non-metallic mineral mining and quarrying
R.18	Exploration and other mining support services
GVT	Government n.e.c.
LGA	Local government administration
CP	Parking services
V	VACANT
VL	VACANT LAND
VS	VACANT SHOP
DW	DWELLING
UN	UNKNOWN

* Ratio Codes.
Where n.e.c. = not elsewhere classified.

O:\projects\08-6976\006\pdf files\Consolidated FCADRS\AppendixA\[Floorspace Classification.xlsx]Classification 10.11.08

APPENDIX B: IN-HOME SURVEY

SWEENEY RESEARCH

Footscray Town Centre Survey

Study no. 17155 • July 2008

Introduction

Good morning/afternoon/evening. My name is (… … … … … …) from Sweeney Research, the market research company. We are conducting a research survey about shopping and would like to include your views. We are contacting people randomly and would like to speak to the main grocery buyer in the household.

Reintroduce if necessary.

The survey will take about 5 to 10 minutes – would you like to participate?

If not now, arrange call back or thank and close.

QUOTAS:	**Postcode:**	3011	Footscray / Seddon	60
		3012	Brooklyn / Kingsville	60
		3013	Yarraville	60
		3032	Maribyrnong	60

Q1.	**RECORD AUTOMATICALLY FROM SAMPLE**
	Suburb of residence:
	Postcode:
	Address:

SWEENEY RESEARCH

Q2a.	Where do you do most of your food and grocery shopping? **(Do not read out)**	Aldi – Footscray West	01
		Aldi – Maribyrnong	02
		Coles – Altona	03
		Coles - Altona Gate Shopping Centre (Altona North)	04
		Coles – Braybrook	05
		Coles – Footscray	06
		Coles - Sunshine	07
		Coles - Yarraville	08
		Foodworks - Highpoint (Maribyrnong)	09
		Foodworks - Kensington	10
		Foodworks - Seddon	11
		Foodworks - Sunshine	12
		Foodworks - Yarraville	13
		IGA - Footscray	14
		IGA - Kensington	15
		IGA - Maidstone	16
		IGA - Maribyrnong	17
		IGA - Yarraville	18
		Little Saigon – Footscray	19
		Market - Footscray	20
		Market - Queen Victoria	21
		NQR – Sunshine	22
		Safeway - Altona Gate	23
		Safeway – Braybrook	24
		Safeway – Highpoint (Maribyrnong)	25
		Safeway – Moonee Ponds	26
		Safeway - Newmarket (Kensington)	27
		Safeway - Sunshine	28
		Other **(Specify supermarket and location)**	29

Q2b.	Why do you do most of your food and grocery shopping there? **(Do not aid)**	Convenient/close to home	1
		Wide range/have what I want	2
		Cheaper/good prices	3
		Always shop there/familiar	4
		Other **(specify)**	5

Q2c.	What other reason do you have? **(Do not aid)**	Convenient/close to home	1
		Wide range/have what I want	2
		Cheaper/good prices	3
		Always shop there/familiar	4
		Other **(specify)**	5
		No other reason	6

SWEENEY RESEARCH

Q3a.	Where did you do most of your shopping for **clothes and shoes** in the last year? **(Do not read out)**	Altona Gate Shopping Centre, Altona North	01
		CBD (Melbourne)	02
		Central West Plaza, Braybrook	03
		DFO Essendon	04
		Footscray	05
		Highpoint Shopping Centre, Maribyrnong	06
		Moonee Ponds Shopping Centre	07
		Sunshine	08
		Seddon	09
		Williamstown	10
		Werribee Plaza	11
		Yarraville	12
		Other **(specify)**	20

Q3b.	Why did you do most of your shopping for clothes and shoes there? **(Do not aid)**	Convenient/close to home	1
		Wide range/have what I want	2
		Cheaper/good prices	3
		Always shop there/familiar	4
		Other **(specify)**	5

Q3c.	What other reasons do you have? **(Do not aid)**	Convenient/close to home	1
		Wide range/have what I want	2
		Cheaper/good prices	3
		Always shop there/familiar	4
		Other **(specify)**	5
		No other reason	6

Q4a.	Where did you do most of your **shopping for furniture** or other **large items for your house** in the last year? (For example chairs, televisions, fridge, curtains and beds) **(Do not read out)**	Altona Gate Shopping Centre, Altona North	01
		CBD (Melbourne)	02
		Central West Plaza, Braybrook	03
		DFO Essendon	04
		Footscray	05
		Highpoint Shopping Centre, Maribyrnong	06
		Hoppers Crossing (Old Geelong Road)	13
		Sunshine	08
		Other **(specify)**	20

Q4b.	Why did you do most of your shopping for furniture or other large items for your house there? **(Do not aid)**	Convenient/close to home	1
		Wide range/have what I want	2
		Cheaper/good prices	3
		Always shop there/familiar	4
		Other **(specify)**	5

Q4c.	What other reasons do you have? **(Do not aid)**	Convenient/close to home	1
		Wide range/have what I want	2
		Cheaper/good prices	3
		Always shop there/familiar	4
		Other **(specify)**	5
		No other reason	6

Q5a.	Where did you go to **eat out** most often in the last year? **(Do not read out)**	Altona Gate Shopping Centre, Altona North	01
		Altona (Pier Street)	14
		CBD (Melbourne)	02
		Central West Plaza, Braybrook	03
		Docklands	15
		Footscray	05
		Highpoint Shopping Centre, Maribyrnong	06
		Moonee Ponds Shopping Centre	07
		Newport	16
		Newmarket Shopping Centre, Kensington	17
		North Melbourne	18
		Port Melbourne	19
		Sunshine	08
		Seddon	09
		Williamstown	10
		Yarraville	12
		Other **(specify)**	20

Q5b.	Why did you eat out most often there? **(Do not aid)**	Convenient/close to home	1
		Wide range/have what I want	2
		Cheaper/good prices	3
		Always shop there/familiar	4
		Other **(specify)**	5

Q5c.	What other reasons did you have? **(Do not aid)**	Convenient/close to home	1
		Wide range/have what I want	2
		Cheaper/good prices	3
		Always shop there/familiar	4
		Other **(specify)**	5
		No other reason	6

Q7a. On a scale of 1 to 10 where 1 is very poor and 10 is very good – how would you rate the following shopping centres for **buying food and groceries**? **(Read out shopping centre – rotate order) (Now repeat for remaining purchase categories)**

	Altona Gate	Central Melbourne	Central West Plaza, Braybrook	Footscray	Highpoint	Newport	Sunshine	Yarra-ville	Williams-town
For buying food or groceries									
For buying clothes and shoes									
For buying furniture and appliances									
For eating out									
For meeting friends or family									
For health, medical and community services	N/A		N/A			N/A			

Q7b. On a scale of 1 to 10 where 1 is very poor and 10 is very good – how would you rate the following shopping centres for **feeling safe and secure**? **(Read out shopping centre – rotate order) (Now repeat for remaining aspects)**

	Altona Gate	Central Melbourne	Central West Plaza, Braybrook	Footscray	Highpoint	Newport	Sunshine	Yarra-ville	Williams-town
Feeling safe and secure									
Being easy to travel to									
Being easy to move around in									
Attractiveness									
How much you like it overall									

Q8a. Of all the places we have talked about, which one do you go to most for shopping?

Altona Gate	01
Central Melbourne	02
Central West Plaza, Braybrook	03
Footscray	04
Highpoint	05
Newport	06
Sunshine	07
Yarraville	08
Williamstown	09
Other **(specify)**	10

Q8b.	Why do you go there the most? **(Do not aid) Probe: Any other reasons?**	Convenient/close to home	1
		Wide range/have what I want	2
		Cheaper/good prices	3
		Always shop there/familiar	4
		Other **(specify)**	5

Q9a.	How often did you go to Footscray for shopping in the last year? **(Read out)**	Nearly everyday, at least five times per week		1
		Weekly, at least one or two times a week		2
		Regularly, every couple of weeks		3
		Sometimes, only a few times per month		4
		Never		5
		(If answer is never, go to Q9b, otherwise go to Q10)		
Q9b.	Have you ever been to Footscray for shopping?	Yes	**(Go to Q10)**	1
		No	**(Ask c)**	2

Q9c.	Why is that? **(Do not aid) Probe: Any other reasons?**	Too inconvenient/too far	1
		Too expensive	2
		Hard to park	3
		Other **(specify)**	4

To finish, can you answer a couple of questions about yourself to help classify your answers…

Q10.	To which age group do you belong to? **(Read out)**	18 years and under	1
		19 – 24 years	2
		25 – 39 years	3
		40 – 54 years	4
		55 – 64 years	5
		65 – 69 years	6
		70 + years	7
		(Refused)	8
Q11.	Which of these best describes your household? **(Read out)**	Single – Living alone or sharing	1
		Couple no children	2
		Couple/single with children who have left home	3
		Couple/single with children living at home	4
		(Refused)	5

Q12.	What is your approximate annual household income before tax? **(Read out)**	Less than $20,000 per year	1
		$20,000 - $40,000 per year	2
		$40,001 - $60,000 per year	3
		$60,001 - $100,000 per year	4
		More than $100,000 per year	5
		(Refused)	6

Q13.	How many cars do you have in your household?	None	1
		One	2
		Two	3
		Three or more	4

End of interview.

Thank you. That is the end of the interview. Once again my name is (… … …) from Sweeney Research. Should you need to contact us again please call us on 1800 35 77 39.

The study has been conducted on behalf of Collie Pty Ltd.

As part of quality control procedures, someone from our project team may wish to re-contact you to ask a couple of questions, validating the information we have collected.

As a market research company, we comply with the requirements of the Privacy Act. The information you have provided will be used only for market research purposes.

Would you like me to give you any more details about how we comply?

If yes then say:

As I mentioned we may contact you to verify some of the information you gave us. Once we have completed our validation and processing of information, please be assured that your name and contact details will be removed from your responses to this survey. After that time, we will no longer be able to identify the responses provided by you. However for the period of time that your name and contact details remain with your survey responses, which will be approximately (one month) you can contact us to request access to your information and/or ask us to delete some or all of your information.

Once again, thank you for your time. My name is ….. and I'm calling from Sweeney Research. If you have any queries, you can call the Market Research Society's Survey Line on 1300 364 830 (for the cost of a local call).

If no:

Thank and close.

Date of interview:	
Respondent's name:	
Phone number:	
Address (if applicable):	
"I certify that this is a true, accurate and complete interview, conducted in accordance with the IQCA standards and the MRSA Code of Professional Behaviour (ICC/ESOMAR). I will not disclose to any other person the content of this questionnaire or any other information relating to this project."	
Signed:	Interviewer:

Footscray Retail Study
Collie Pty Ltd (December 2008)

Table Set A: In-home surveys

Table A.1

Where did you eat out most often last year?

Source: Sweeney Research 2008

Location	Response (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	3012	3013	3032	
Footscray	33	16	15	8	20
Yarraville	14	35	38	1	19
CBD (Melbourne)	17	11	12	30	18
Highpoint Shopping Centre, Maribyrnong	6	3	4	15	8
Williamstown	2	14	8	1	5
Carlton	1	3	0	7	3
Moonee Ponds Shopping Centre	0	0	0	8	2
Maribyrnong	1	0	0	6	2
Sunshine	1	0	4	1	2
Seddon	4	0	0	0	1
Essendon	0	0	0	4	1
Docklands	1	0	0	1	1
South Melbourne	0	0	2	1	1
Ivanhoe/Doncaster/Templestowe areas	1	0	2	0	1
Ascotvale	0	0	0	3	1
Brunswick/Fitzroy	0	3	2	0	1
Altona Gate Shopping Centre, Altona North	0	3	0	0	0
Altona (Pier Street)	0	0	2	0	0
Newmarket Shopping Centre, Kensington	1	0	0	0	0
North Melbourne	0	0	0	1	0
Port Melbourne	0	0	2	0	0
Richmond	1	0	0	0	0
Chapel Street/South Yarra	0	3	0	0	0
Preston	0	0	0	1	0
Other	15	11	10	8	11
TOTAL	**100**	**100**	**100**	**100**	**100**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set A: In-home surveys

Table A.2

Where did you do the most shopping for furniture and large items?

Source: Sweeney Research 2008

Location	Response (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	**3012**	**3013**	**3032**	
Highpoint Shopping Centre, Maribyrnong	44	39	38	54	45
Highpoint Home maker Centre	5	11	10	12	9
Footscray	11	7	8	2	7
CBD (Melbourne)	5	0	8	3	4
Richmond	3	7	5	3	4
Central West Plaza, Braybrook	5	7	0	2	3
Hoppers Crossing (Old Geelong Road)	3	4	0	0	2
Chapel Street/South Yarra	2	4	3	0	2
DFO Essendon	2	0	0	2	1
Yarraville	0	0	5	0	1
Ballarat Road	2	4	0	0	1
Essendon	0	0	0	3	1
Preston	0	0	0	3	1
Williamstown	0	4	0	0	1
Werribee Plaza	0	0	3	0	1
Collingwood	2	0	0	0	1
Other	17	14	23	15	17
TOTAL	**100**	**100**	**100**	**100**	**100**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set A: In-home surveys

Table A.3

Where did you shop for clothing and footwear last year?

Source: Sweeney Research 2008

Location	Responses (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	3012	3013	3032	
Highpoint Shopping Centre, Maribyrnong	41	46	42	74	51
CBD (Melbourne)	28	9	14	13	18
Footscray	20	3	10	0	10
Altona Gate Shopping Centre, Altona North	0	14	12	0	5
DFO Essendon	1	11	0	3	3
Moonee Ponds Shopping Centre	0	0	4	3	2
Yarraville	0	0	8	0	2
Williamstown	1	3	0	0	1
Werribee Plaza	0	6	0	0	1
Collingwood	0	3	2	0	1
Richmond	0	0	2	1	1
Sunshine	1	0	0	0	0
Myer NFI	1	0	2	0	1
Other	6	6	4	6	5
TOTAL	**100**	**100**	**100**	**100**	**100**

*NFI - No further information

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set A: In-home surveys

Table A.4

Where do you do you food and grocery shopping?

Source: Sweeney Research 2008

	Location				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	**3012**	**3013**	**3032**	
Major Supermarkets					
Altona	2	27	4	0	6
Avondale Heights	1	0	0	13	4
Braybrook	5	5	4	3	4
Essendon	0	0	0	3	1
Footscray	30	11	10	4	15
West Footscray	8	5	0	3	5
Maribyrnong	13	0	2	52	20
Moonee Ponds	1	0	0	15	5
Newmarket (Kensington)	0	0	0	1	0
Queen Victoria	6	3	4	1	4
Seddon	1	0	0	0	0
Sunshine	2	0	2	0	1
Yarraville	20	32	69	0	27
Other					
Other Markets	0	3	0	0	0
Organic /Health Food stores	5	0	0	0	2
Other small local/speciality store	0	5	0	1	1
Other Safeway stores	0	5	0	1	1
Other ALDI stores	1	3	2	0	1
Other Coles stores	2	0	0	1	1
Other	1	0	4	0	1
TOTAL	**100**	**100**	**100**	**100**	**100**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set A: In-home surveys

Table A.5

Where do you go shopping most often?

Source: Sweeney Research 2008

Location	Response (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	**3012**	**3013**	**3032**	
Altona Gate	4	30	12	0	8
Central Melbourne	12	5	6	11	9
Central West Plaza,Braybrook	6	8	6	3	5
Footscray	35	8	12	4	17
Highpoint	27	11	19	75	37
Sunshine	4	5	0	1	2
Yarraville	13	22	44	1	18
Williamstown	0	8	2	0	2
Other	0	3	0	4	2
TOTAL	**100**	**100**	**100**	**100**	**100**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set A: In-home surveys

Table A.6

What is the main reason you purchased food and groceries from this location?

Source: Sweeney Research 2008

Reason	Response (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	3012	3013	3032	
Convenient/close to home	62	59	70	65	64
Wide range/have what I want	7	11	6	6	7
Cheaper/good prices	17	14	8	18	15
Always shop there/familiar	0	0	4	6	2
Good service	1	0	0	0	0
Has everything there/one stop	1	5	0	1	2
Prefer to shop there/like it there	0	3	0	1	1
Recommendation/word of mouth	0	0	0	1	0
Quality stock	5	5	2	0	3
Good Guys store NFI	0	0	2	0	0
Had what I/we wanted	0	0	0	1	0
Big W	1	0	0	0	0
They have organic food	5	0	4	0	2
Thats the only one around/not very much variety	0	0	2	0	0
Good parking/parking is close to shops/more parking	0	0	2	0	0
Other	1	3	0	0	1
TOTAL	**100**	**100**	**100**	**100**	**100**

Table A.7

What is the main reason you purchased your clothing and footwear from this location?

Source: Sweeney Research 2008

Reason	Response (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	3012	3013	3032	
Convenient/close to home	49	54	49	71	56
Wide range/have what I want	23	11	16	19	19
Cheaper/good prices	13	17	14	3	11
Always shop there/familiar	1	3	6	3	3
Has everything there/one stop	1	3	0	0	1
Prefer to shop there/like it there	4	3	4	4	4
Recommendation/word of mouth	0	3	0	0	0
Friendly staff	1	0	2	0	1
It is undercover	1	0	0	0	0
Know the owner/friend works there/know the people there	1	0	0	0	0
Close to other shops/wide variety of shops	1	3	2	0	1
Thats the only one around/not very much variety	1	3	2	0	1
Not too busy/not crowded	1	0	2	0	1
Other	1	0	2	0	1
TOTAL	**100**	**100**	**100**	**100**	**100**

Table A.8

What is the main reason you purchased your furniture from this location?

Source: Sweeney Research 2008

Reason	Response (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	3012	3013	3032	
Convenient/close to home	38	42	35	50	41
Wide range/have what I want	20	23	15	12	17
Cheaper/good prices	25	31	25	19	24
Always shop there/familiar	3	0	3	0	2
Prefer to shop there/like it there	2	0	5	3	3
Harvey Norman NFI	0	0	0	2	1
Quality stock	0	0	3	2	1
Friendly staff	0	0	3	0	1
Know the owner/friend works there/know the people there	0	0	0	3	1
Ready to bargain/give you a discount/cheaper	2	0	0	0	1
Had what I/we wanted	5	0	5	5	4
Purchase online/internet ie EB Games	0	0	3	0	1
Close to other shops/wide variety of shops	2	0	3	0	1
Credit is available and interest free terms	0	4	0	0	1
Good parking/parking is close to shops/more parking	0	0	0	2	1
Other	5	0	3	2	3
TOTAL	**100**	**100**	**100**	**100**	**100**

Table A.9

What is the main reason you travel to this location to eat out?

Source: Sweeney Research 2008

Reason	Response (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	3012	3013	3032	
Convenient/close to home	56	38	49	34	45
Wide range/have what I want	15	24	10	17	16
Cheaper/good prices	8	3	4	7	6
Always shop there/familiar	4	0	2	7	4
Review code	0	0	4	1	1
Recommendation/word of mouth	0	0	0	1	0
Know the owner/friend works there/know the people there	0	0	0	1	0
Close to other shops/wide variety of shops	0	3	0	0	0
Was shopping/needed to get something to eat	1	3	4	1	2
Good atmosphere	4	3	0	4	3
I work in the area	0	0	4	7	3
Good/great food/good quality	1	18	2	4	5
Am a member there	0	0	2	1	1
Catch up/meet with friends/family	4	0	6	3	3
Good restaurants/authentic food from different countries	4	9	12	9	8
It's local/like to support the community	0	0	2	0	0
Other	3	0	0	0	1
TOTAL	**100**	**100**	**100**	**100**	**100**

Table A.10

Perception of shopping destinations

Source: Sweeney Research 2008

Shopping destination	Category										
	Food or groceries	Clothes and shoes	Furniture and appliances	Eating out	Meeting family or friends	Health, medical and community services	Feeling safe and secure	Easy to travel to	Easy to move around in	Attractiveness	OVERALL
Altona Gate	6	5	4	5	5	-	7	7	7	6	6
Central Melbourne	6	7	5	7	7	6	6	7	7	7	6
Braybrook	6	4	4	5	5	-	6	7	7	5	5
Footscray	6	6	5	6	6	6	6	8	7	5	6
Highpoint	6	6	6	6	6	6	6	7	7	6	6
Newport	5	5	4	5	5	-	6	7	7	6	6
Sunshine	5	5	4	5	5	5	6	7	6	5	6
Yarraville	6	5	4	6	6	5	7	8	7	7	7
Williamstown	6	5	4	6	6	5	7	7	7	7	7

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set A: In-home surveys

Table A.11

How often did you shop in Footscray last year?

Source: Sweeney Research 2008

Frequency	Response (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	3012	3013	3032	
Nearly everyday, at least five times per week	13	3	2	0	5
Weekly, at least one or two times a week	46	22	29	24	32
Regularly, every couple of weeks	17	14	8	7	11
Sometimes, only a few times per month	17	24	35	25	24
Never	7	38	27	44	27
TOTAL	**100**	**100**	**100**	**100**	**100**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set A: In-home surveys

Table A.12

If you did not shop in Footscray last year, have you even been there?

Source: Sweeney Research 2008

Response	Location				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	3012	3013	3032	
Yes	60	93	79	68	75
No	40	7	21	32	25
TOTAL	**100**	**100**	**100**	**100**	**100**

Table A.13

For those who have not been to Footscray what is the main reason for this?

Source: Sweeney Research 2008

Reason	Response (%)				TOTAL
	Footscray / Seddon	Brooklyn / Kingsville	Yarraville	Maribyrnong	
	3011	3012	3013	3032	
Too inconvenient/too far	50	100	25	50	47
Feel unsafe/scary area/drugs	50	0	50	0	20
Dirty/smelly area/derelict buildings/unkempt	0	0	25	13	13
Other	0	0	0	38	20
TOTAL	100	100	100	100	100

ANAYLSIS --- FOOTSCRAY TOWN CENTRE SURVEY - AUGUST 2008

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BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q2a. WHERE DO YOU DO YOUR FOOD AND GROCERY SHOPPING					
Aldi - Footscray West	7 3%	4 5%	1 3%		2 3%
Aldi - Maribyrnong	15 6%	4 5%		1 2%	10 14%
Coles - Altona	1 0%		1 3%		
Coles - Altona Gate Shopping Centre (Altona North)	12 5%	1 1%	9 24%	2 4%	
Coles - Braybrook	7 3%	3 4%	2 5%	1 2%	1 1%
Coles - Footscray	24 10%	19 23%	3 8%	2 4%	
Coles - Sunshine	2 1%	1 1%		1 2%	
Coles - Yarraville	53 22%	13 15%	12 32%	28 54%	
Foodworks - Seddon	1 0%	1 1%			
Foodworks - Yarraville	2 1%			2 4%	
IGA - Yarraville	10 4%	4 5%		6 12%	
Little Saigon - Footscray	1 0%				1 1%
Market - Footscray	12 5%	6 7%	1 3%	3 6%	2 3%
Market - Queen Victoria	9 4%	5 6%	1 3%	2 4%	1 1%
Safeway - Altona Gate	1 0%	1 1%			
Safeway - Braybrook	3 1%	1 1%		1 2%	1 1%
Safeway - Highpoint (Maribyrnong)	34 14%	7 8%			27 38%
Safeway - Moonee Ponds	8 3%	1 1%			7 10%
Safeway - Newmarket (Kensington)	1 0%				1 1%
Safeway - Sunshine	1 0%	1 1%			
Coles - Avondale Heights	10 4%	1 1%			9 13%

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q2a. WHERE DO YOU DO YOUR FOOD AND GROCERY SHOPPING					
Coles - Moonee Ponds	4 2%				4 6%
Sims - West Footscray	4 2%	3 4%	1 3%		
Other Markets	1 0%		1 3%		
Organic /Health Food stores	4 2%	4 5%			
Other small local/ speciality store	3 1%		2 5%		1 1%
IGA - Essendon	2 1%				2 3%
Other Safeway stores	3 1%		2 5%		1 1%
Other ALDI stores	3 1%	1 1%	1 3%	1 2%	
Other Coles stores	3 1%	2 2%			1 1%
Other	3 1%	1 1%		2 4%	

BASE: RESPONDENTS

	TOTALS	Q2a. WHERE DO YOU DO YOUR FOOD AND GROCERY SHOPPING													
		Aldi - Footsc-ray West	Aldi - Maribyrnong	Coles - Altona	Coles - Altona Gate Shopping Centre (Altona North)	Coles - Braybrook	Coles - Footscray	Coles - Sunshine	Coles - Yarraville	Foodworks - Seddon	Foodworks - Yarraville	IGA - Yarraville	Little Saigon - Footscray	Market - Footscray	Market - Queen Victoria
RESPONDENTS	244 100%	7 100%	15 100%	1 100%	12 100%	7 100%	24 100%	2 100%	53 100%	1 100%	2 100%	10 100%	1 100%	12 100%	9 100%
Q2b/c. TOTAL REASONS - GROCERY SHOPPING															
Convenient/close to home	186 76%	4 57%	6 40%	1 100%	10 83%	7 100%	23 96%	1 50%	51 96%		2 100%	7 70%		4 33%	4 44%
Wide range/have what I want	54 22%	2 29%	2 13%	1 100%	2 17%		2 8%		12 23%			5 50%		7 58%	3 33%
Cheaper/good prices	63 26%	7 100%	14 93%		1 8%	1 14%	4 17%		5 9%				1 100%	8 67%	3 33%
Always shop there/ familiar	20 8%				1 8%		5 21%					1 10%		1 8%	
Good service	1 0%														
Has everything there/one stop	8 3%		1 7%		1 8%	1 14%	1 4%		1 2%			1 10%			
Prefer to shop there/like it there	8 3%				1 8%	1 14%			1 2%						
Recommendation/word of mouth	1 0%												1 100%		
Quality stock	15 6%		2 13%			1 14%	1 4%		2 4%	1 100%		1 10%			1 11%
Good Guys store NFI	1 0%														
Friendly staff	2 1%										1 50%				1 11%
Know the owner/ friend works there/ know the people there	1 0%										1 50%				
Had what I/we wanted	3 1%		1 7%									1 10%		1 8%	
Various 'other' stores mentioned	1 0%								1 2%						
Big W	1 0%				1 8%										
Close to other shops/wide variety of shops	3 1%					2 29%									
They have good advertising	1 0%														
They have organic food	9 4%								1 2%						4 44%
Thats the only one around/not very much variety	4 2%					1 14%			3 6%						

	TOTALS	Q2a. WHERE DO YOU DO YOUR FOOD AND GROCERY SHOPPING													
		Aldi - Footsc -ray West	Aldi - Mariby -rnong	Coles - Altona	Coles - Altona Gate Shoppi -ng Centre (Alton -a North)	Coles - Braybr -ook	Coles - Footsc -ray	Coles - Sunshi -ne	Coles - Yarrav -ille	Foodwo -rks - Seddon	Foodwo -rks - Yarrav -ille	IGA - Yarrav -ille	Little Saigon - Footsc -ray	Market - Footsc -ray	Market - Queen Victor -ia
RESPONDENTS	244	7	15	1	12	7	24	2	53	1	2	10	1	12	9
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q2b/c. TOTAL REASONS - GROCERY SHOPPING															
Good parking/ parking is close to shops/more parking	7						2		3						
	3%						8%		6%						
Always fresh	8	1		1	1							1		1	3
	3%	14%		100%	8%							10%		8%	33%
Not too busy/not crowded	2					1									
	1%					14%									
Its always clean	2								1						
	1%								2%						
No other	96	1	5		5	2	8	2	26	1	1	2		2	
	39%	14%	33%		42%	29%	33%	100%	49%	100%	50%	20%		17%	
Other	8				1		1	1	1					1	1
	3%				8%		4%	50%	2%					8%	11%
No reason	3				1				2						
	1%				8%				4%						

BASE: RESPONDENTS

	Q2a. WHERE DO YOU DO YOUR FOOD AND GROCERY SHOPPING														
	Safeway - Altona Gate	Safeway - Braybrook	Safeway - Highpoint (Maribyrnong)	Safeway - Moonee Ponds	Safeway - Newmarket (Kensington)	Safeway - Sunshine	Other	Coles - Avondale Heights	Coles - Moonee Ponds	Sims - West Footscray	Other Markets	Organic/Health Food stores	Other small local/speciality store	IGA - Essendon	Other Safeway stores
RESPONDENTS	1	3	34	8	1	1	3	10	4	4	1	4	3	2	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q2b/c. TOTAL REASONS - GROCERY SHOPPING															
Convenient/close to home	1	2	31	5	1		2	7	3	3		1	2	2	3
	100%	67%	91%	63%	100%		67%	70%	75%	75%		25%	67%	100%	100%
Wide range/have what I want		1	6	1		1	2	3	1	1			2		
		33%	18%	13%		100%	67%	30%	25%	25%			67%		
Cheaper/good prices	1		8			1	2		1	1			1		2
	100%		24%			100%	67%		25%	25%			33%		67%
Always shop there/ familiar			5	1			1	2	1	1			1		
			15%	13%			33%	20%	25%	25%			33%		
Good service		1													
		33%													
Has everything there/one stop				1								1			
				13%								25%			
Prefer to shop there/like it there				1						2			1		1
				13%						50%			33%		33%
Recommendation/word of mouth															
Quality stock			2					1			1	1	1		
			6%					10%			100%	25%	33%		
Good Guys store NFI															
Friendly staff															
Know the owner/ friend works there/ know the people there															
Had what I/we wanted															
Various 'other' stores mentioned															
Big W															
Close to other shops/wide variety of shops															
They have good advertising			1												
			3%												
They have organic food												3			
												75%			
Thats the only one around/not very much variety															

	Q2a. WHERE DO YOU DO YOUR FOOD AND GROCERY SHOPPING														
	Safeway - Altona Gate	Safeway - Braybrook	Safeway - Highpoint (Maribyrnong)	Safeway - Moonee Ponds	Safeway - Newmarket (Kensington)	Safeway - Sunshine	Other	Coles - Avondale Heights	Coles - Moonee Ponds	Sims - West Footscray	Other Markets	Organic /Health Food stores	Other small local /speciality store	IGA - Essendon	Other Safeway stores
RESPONDENTS	1	3	34	8	1	1	3	10	4	4	1	4	3	2	3
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q2b/c. TOTAL REASONS - GROCERY SHOPPING															
Good parking/ parking is close to shops/more parking		1	1												
		33%	3%												
Always fresh															
Not too busy/not crowded		1													
		33%													
Its always clean								1							
								10%							
No other		1	16	6	1		1	6	1		1	2	1	2	
		33%	47%	75%	100%		33%	60%	25%		100%	50%	33%	100%	
Other										1					
										25%					
No reason															

BASE: RESPONDENTS

	Q2a. WHERE DO YOU DO YOUR FOOD AND GROCERY SHOPPING	
	Other ALDI stores	Other Coles stores
RESPONDENTS	3 100%	3 100%
Q2b/c. TOTAL REASONS - GROCERY SHOPPING		
Convenient/close to home		3 100%
Wide range/have what I want		
Cheaper/good prices	2 67%	
Always shop there/ familiar		
Good service		
Has everything there/one stop		
Prefer to shop there/like it there		
Recommendation/word of mouth		
Quality stock		
Good Guys store NFI	1 33%	
Friendly staff		
Know the owner/ friend works there/ know the people there		
Had what I/we wanted		
Various 'other' stores mentioned		
Big W		
Close to other shops/wide variety of shops		1 33%
They have good advertising		
They have organic food	1 33%	
Thats the only one around/not very much variety		

TABLE 2 (CONT.) Q2a. WHERE DO YOU DO YOUR FOOD AND GROCERY SHOPPING *BY* Q2b/c. TOTAL REASONS - GROCERY SHOPPING

	Q2a. WHERE DO YOU DO YOUR FOOD AND GROCERY SHOPPING	
	Other ALDI stores	Other Coles stores
RESPONDENTS	3 100%	3 100%
Q2b/c. TOTAL REASONS - GROCERY SHOPPING		
Good parking/ parking is close to shops/more parking		
Always fresh		
Not too busy/not crowded		
Its always clean		
No other	1 33%	2 67%
Other	1 33%	
No reason		

BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q2b. MAIN REASON - GROCERY SHOPPING					
Convenient/close to home	155 64%	52 62%	22 59%	35 67%	46 65%
Wide range/have what I want	17 7%	6 7%	4 11%	3 6%	4 6%
Cheaper/good prices	36 15%	14 17%	5 14%	4 8%	13 18%
Always shop there/ familiar	6 2%			2 4%	4 6%
Good service	1 0%	1 1%			
Has everything there/one stop	4 2%	1 1%	2 5%		1 1%
Prefer to shop there/like it there	2 1%		1 3%		1 1%
Recommendation/word of mouth	1 0%				1 1%
Quality stock	7 3%	4 5%	2 5%	1 2%	
Good Guys store NFI	1 0%			1 2%	
Had what I/we wanted	1 0%				1 1%
Big W	1 0%	1 1%			
They have organic food	6 2%	4 5%		2 4%	
Thats the only one around/not very much variety	1 0%			1 2%	
Good parking/ parking is close to shops/more parking	1 0%			1 2%	
Other	2 1%	1 1%	1 3%		
No reason	2 1%			2 4%	

BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q2b/c. TOTAL REASONS - GROCERY SHOPPING					
Convenient/close to home	186 76%	63 75%	27 73%	45 87%	51 72%
Wide range/have what I want	54 22%	24 29%	11 30%	7 13%	12 17%
Cheaper/good prices	63 26%	22 26%	10 27%	8 15%	23 32%
Always shop there/ familiar	20 8%	6 7%	3 8%	3 6%	8 11%
Good service	1 0%	1 1%			
Has everything there/one stop	8 3%	2 2%	2 5%	1 2%	3 4%
Prefer to shop there/like it there	8 3%	1 1%	4 11%	1 2%	2 3%
Recommendation/word of mouth	1 0%				1 1%
Quality stock	15 6%	5 6%	4 11%	3 6%	3 4%
Good Guys store NFI	1 0%			1 2%	
Friendly staff	2 1%		1 3%	1 2%	
Know the owner/ friend works there/ know the people there	1 0%			1 2%	
Had what I/we wanted	3 1%	2 2%			1 1%
Various 'other' stores mentioned	1 0%			1 2%	
Big W	1 0%	1 1%			
Close to other shops/wide variety of shops	3 1%	3 4%			
They have good advertising	1 0%				1 1%
They have organic food	9 4%	5 6%	1 3%	3 6%	
Thats the only one around/not very much variety	4 2%		2 5%	2 4%	
Good parking/ parking is close to shops/more parking	7 3%	5 6%		1 2%	1 1%

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q2b/c. TOTAL REASONS - GROCERY SHOPPING					
Always fresh	8 3%	2 2%	2 5%	2 4%	2 3%
Not too busy/not crowded	2 1%	1 1%			1 1%
Its always clean	2 1%		1 3%		1 1%
No other	96 39%	26 31%	13 35%	24 46%	33 46%
Other	8 3%	2 2%	3 8%	2 4%	1 1%
No reason	3 1%			3 6%	

BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q3a. WHERE DID YOU DO CLOTHES AND SHOES - LAST YEAR					
Altona Gate Shopping Centre, Altona North	11 5%		5 14%	6 12%	
CBD (Melbourne)	42 17%	23 27%	3 8%	7 13%	9 13%
DFO Essendon	7 3%	1 1%	4 11%		2 3%
Footscray	23 9%	17 20%	1 3%	5 10%	
Highpoint Shopping Centre, Maribyrnong	122 50%	34 40%	16 43%	21 40%	51 72%
Moonee Ponds Shopping Centre	4 2%			2 4%	2 3%
Sunshine	1 0%	1 1%			
Williamstown	2 1%	1 1%	1 3%		
Werribee Plaza	2 1%		2 5%		
Yarraville	4 2%			4 8%	
None	7 3%	1 1%	2 5%	2 4%	2 3%
Collingwood	2 1%		1 3%	1 2%	
Richmond	2 1%			1 2%	1 1%
Myer NFI	2 1%	1 1%		1 2%	
Overseas - Various	2 1%	1 1%	1 3%		
Interstate - Various	2 1%		1 3%		1 1%
Other	9 4%	4 5%		2 4%	3 4%

Q3a. WHERE DID YOU DO CLOTHES AND SHOES - LAST YEAR
BY Q3b/c. TOTAL REASONS - CLOTHES AND SHOES
BASE: RESPONDENTS

	TOTALS	Q3a. WHERE DID YOU DO CLOTHES AND SHOES - LAST YEAR													
		Altona Gate Shopping Centre -, Altona North	CBD (Melbourne)	DFO Essendon	Footscray	Highpoint Shopping Centre -, Maribyrnong	Moonee Ponds Shopping Centre	Sunshine	Williamstown	Werribee Plaza	Yarraville	Other	None	Collingwood	Richmond
RESPONDENTS	244	11	42	7	23	122	4	1	2	2	4	9	7	2	2
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q3b/c. TOTAL REASONS - CLOTHES AND SHOES															
Convenient/close to home	160	8	20	1	15	105	1			2	2	2			2
	66%	73%	48%	14%	65%	86%	25%			100%	50%	22%			100%
Wide range/have what I want	104	3	25	4	6	59	1				3	3			
	43%	27%	60%	57%	26%	48%	25%				75%	33%			
Cheaper/good prices	51	3	4	6	16	11		1			2	2		2	2
	21%	27%	10%	86%	70%	9%		100%			50%	22%		100%	100%
Always shop there/ familiar	25	2	5		3	11	1				1	1			
	10%	18%	12%		13%	9%	25%				25%	11%			
Good service	3								1			1			
	1%								50%			11%			
Has everything there/one stop	6		2			2			1						
	2%		5%			2%			50%						
Prefer to shop there/like it there	15	1	3	1	1	1	3					3			
	6%	9%	7%	14%	4%	1%	75%					33%			
Recommendation/word of mouth	1					1									
	0%					1%									
Quality stock	6		1	1	1	1						1			
	2%		2%	14%	4%	1%						11%			
Friendly staff	2					2									
	1%					2%									
It is undercover	1					1									
	0%					1%									
Know the owner/ friend works there/ know the people there	5		3			1								1	
	2%		7%			1%								50%	
Ready to bargain/ give you a discount/ cheaper	2					2									
	1%					2%									
Had what I/we wanted	4		1				1					1			
	2%		2%				25%					11%			
Close to other shops/wide variety of shops	4					2	1					1			
	2%					2%	25%					11%			
Thats the only one around/not very much variety	3		1			2									
	1%		2%			2%									
Good parking/ parking is close to shops/more parking	3	1				2									
	1%	9%				2%									
Not too busy/not crowded	4	1	1			1			1						
	2%	9%	2%			1%			50%						

		Q3a. WHERE DID YOU DO CLOTHES AND SHOES - LAST YEAR													
	TOTALS	Altona Gate Shoppi-ng Centre-, Altona North	CBD (Melbo-urne)	DFO Essend-on	Footsc-ray	Highpo-int Shoppi-ng Centre-, Mariby-rnong	Moonee Ponds Shoppi-ng Centre	Sunshi-ne	Willia-mstow-n	Werrib-ee Plaza	Yarrav-ille	Other	None	Collin-gwood	Richmo-nd
RESPONDENTS	244	11	42	7	23	122	4	1	2	2	4	9	7	2	2
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q3b/c. TOTAL REASONS - CLOTHES AND SHOES															
No other	92	4	17	2	6	47	1	1	1	2		3	6	1	
	38%	36%	40%	29%	26%	39%	25%	100%	50%	100%		33%	86%	50%	
Other	2					1						1			
	1%					1%						11%			
No reason	8											1	7		
	3%											11%	100%		

BY Q3b/c. TOTAL REASONS - CLOTHES AND SHOES
BASE: RESPONDENTS

	Q3a. WHERE DID YOU DO CLOTHES AND SHOES - LAST YEAR		
	Myer NFI	Overse-as - Variou-s	Inters-tate - Variou-s
RESPONDENTS	2 100%	2 100%	2 100%
Q3b/c. TOTAL REASONS - CLOTHES AND SHOES			
Convenient/close to home	1 50%	1 50%	
Wide range/have what I want			
Cheaper/good prices		2 100%	
Always shop there/ familiar			1 50%
Good service	1 50%		
Has everything there/one stop	1 50%		
Prefer to shop there/like it there		1 50%	1 50%
Recommendation/word of mouth			
Quality stock		1 50%	
Friendly staff			
It is undercover			
Know the owner/ friend works there/ know the people there			
Ready to bargain/ give you a discount/ cheaper			
Had what I/we wanted			1 50%
Close to other shops/wide variety of shops			
Thats the only one around/not very much variety			
Good parking/ parking is close to shops/more parking			
Not too busy/not crowded			

	Q3a. WHERE DID YOU DO CLOTHES AND SHOES - LAST YEAR		
	Myer NFI	Overse-as - Variou-s	Inters-tate - Variou-s
RESPONDENTS	2 100%	2 100%	2 100%
Q3b/c. TOTAL REASONS - CLOTHES AND SHOES			
No other	1 50%		
Other			
No reason			

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q3b. MAIN REASON - CLOTHES AND SHOES					
Convenient/close to home	133 55%	41 49%	19 51%	24 46%	49 69%
Wide range/have what I want	44 18%	19 23%	4 11%	8 15%	13 18%
Cheaper/good prices	26 11%	11 13%	6 16%	7 13%	2 3%
Always shop there/ familiar	7 3%	1 1%	1 3%	3 6%	2 3%
Has everything there/one stop	2 1%	1 1%	1 3%		
Prefer to shop there/like it there	9 4%	3 4%	1 3%	2 4%	3 4%
Recommendation/word of mouth	1 0%		1 3%		
Friendly staff	2 1%	1 1%		1 2%	
It is undercover	1 0%	1 1%			
Know the owner/ friend works there/ know the people there	1 0%	1 1%			
Close to other shops/wide variety of shops	3 1%	1 1%	1 3%	1 2%	
Thats the only one around/not very much variety	3 1%	1 1%	1 3%	1 2%	
Not too busy/not crowded	2 1%	1 1%		1 2%	
Other	2 1%	1 1%		1 2%	
No reason	8 3%	1 1%	2 5%	3 6%	2 3%

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q3b/c. TOTAL REASONS - CLOTHES AND SHOES					
Convenient/close to home	160 66%	53 63%	20 54%	32 62%	55 77%
Wide range/have what I want	104 43%	46 55%	11 30%	19 37%	28 39%
Cheaper/good prices	51 21%	21 25%	11 30%	12 23%	7 10%
Always shop there/ familiar	25 10%	7 8%	3 8%	4 8%	11 15%
Good service	3 1%		1 3%	2 4%	
Has everything there/one stop	6 2%	3 4%	1 3%	1 2%	1 1%
Prefer to shop there/like it there	15 6%	4 5%	1 3%	6 12%	4 6%
Recommendation/word of mouth	1 0%		1 3%		
Quality stock	6 2%	4 5%	2 5%		
Friendly staff	2 1%	1 1%		1 2%	
It is undercover	1 0%	1 1%			
Know the owner/ friend works there/ know the people there	5 2%	2 2%	1 3%	2 4%	
Ready to bargain/ give you a discount/ cheaper	2 1%	1 1%			1 1%
Had what I/we wanted	4 2%	2 2%	1 3%		1 1%
Close to other shops/wide variety of shops	4 2%	1 1%	1 3%	1 2%	1 1%
Thats the only one around/not very much variety	3 1%	1 1%	1 3%	1 2%	
Good parking/ parking is close to shops/more parking	3 1%		1 3%	1 2%	1 1%
Not too busy/not crowded	4 2%	2 2%		2 4%	
No other	92 38%	21 25%	16 43%	18 35%	37 52%
Other	2 1%	1 1%		1 2%	

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q3b/c. TOTAL REASONS - CLOTHES AND SHOES					
No reason	8 3%	1 1%	2 5%	3 6%	2 3%

BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q4a. WHERE DID YOU DO MOST SHOPPING FOR FURNITURE / LARGE ITEMS					
CBD (Melbourne)	8 3%	3 4%		3 6%	2 3%
Central West Plaza, Braybrook	6 2%	3 4%	2 5%		1 1%
DFO Essendon	2 1%	1 1%			1 1%
Footscray	13 5%	7 8%	2 5%	3 6%	1 1%
Highpoint Shopping Centre, Maribyrnong	86 35%	28 33%	11 30%	15 29%	32 45%
Williamstown	1 0%		1 3%		
Werribee Plaza	1 0%			1 2%	
Yarraville	2 1%			2 4%	
Hoppers Crossing (Old Geelong Road)	3 1%	2 2%	1 3%		
None	54 22%	21 25%	9 24%	12 23%	12 17%
Collingwood	1 0%	1 1%			
Richmond	8 3%	2 2%	2 5%	2 4%	2 3%
Highpoint Home maker Centre	17 7%	3 4%	3 8%	4 8%	7 10%
Second hand places/ stores	6 2%	2 2%	2 5%	1 2%	1 1%
Online/internet	7 3%	4 5%		2 4%	1 1%
Ballarat Road	2 1%	1 1%	1 3%		
Chapel Street/South Yarra	3 1%	1 1%	1 3%	1 2%	
I go everywhere	2 1%			1 2%	1 1%
Essendon	2 1%				2 3%
Preston	2 1%				2 3%
Other	17 7%	5 6%	2 5%	4 8%	6 8%
Don't Know	1 0%			1 2%	

Q4a. WHERE DID YOU DO MOST SHOPPING FOR FURNITURE / LARGE ITEMS
BY Q4b/c. TOTAL REASONS - FURNITURE / OTHER LARGE ITEMS
BASE: RESPONDENTS

		Q4a. WHERE DID YOU DO MOST SHOPPING FOR FURNITURE / LARGE ITEMS													
	TOTALS	CBD (Melbo-urne)	Centra-l West Plaza, Braybr-ook	DFO Essend-on	Footsc-ray	Highpo-int Shoppi-ng Centre -, Mariby-rnong	Willia-mstow-n	Werrib-ee Plaza	Yarrav-ille	Hopper-s Crossi-ng (Old Geelon-g Road)	Other	None	Collin-gwood	Richmo-nd	Don't Know
RESPONDENTS	244 100%	8 100%	6 100%	2 100%	13 100%	86 100%	1 100%	1 100%	2 100%	3 100%	17 100%	54 100%	1 100%	8 100%	1 100%
Q4b/c. TOTAL REASONS - FURNITURE / OTHER LARGE ITEMS															
Convenient/close to home	103 42%	1 13%	2 33%	1 50%	9 69%	65 76%	1 100%			2 67%	3 18%			2 25%	1 100%
Wide range/have what I want	67 27%	4 50%	1 17%	1 50%	1 8%	40 47%			1 50%	1 33%	3 18%	1 2%		2 25%	
Cheaper/good prices	76 31%	4 50%	3 50%	1 50%	7 54%	26 30%		1 100%		1 33%	9 53%	2 4%		3 38%	
Always shop there/ familiar	7 3%	1 13%				3 3%					1 6%				
Good service	2 1%						1 100%								
Has everything there/one stop	1 0%														
Prefer to shop there/like it there	6 2%		1 17%		1 8%				1 50%		2 12%			1 13%	
Harvey Norman NFI	1 0%											1 2%			
Quality stock	2 1%										1 6%				
Have been going there for a long time	1 0%														
Friendly staff	1 0%				1 8%										
Know the owner/ friend works there/ know the people there	2 1%		1 17%												
Ready to bargain/ give you a discount/ cheaper	3 1%		1 17%			1 1%									
Had what I/we wanted	10 4%					2 2%					2 12%		1 100%	2 25%	
Purchase online/ internet ie EB Games	2 1%														1 100%
Close to other shops/wide variety of shops	3 1%					1 1%								1 13%	
Credit is available and interest free terms	3 1%					1 1%	1 100%				1 6%				
Good parking/ parking is close to shops/more parking	3 1%					2 2%									

	TOTALS	Q4a. WHERE DID YOU DO MOST SHOPPING FOR FURNITURE / LARGE ITEMS													
		CBD (Melbo-urne)	Central West Plaza, Braybrook	DFO Essendon	Footscray	Highpoint Shopping Centre -, Maribyrnong	Williamstown	Werribee Plaza	Yarraville	Hoppers Crossing (Old Geelong Road)	Other	None	Collingwood	Richmond	Don't Know
RESPONDENTS	244	8	6	2	13	86	1	1	2	3	17	54	1	8	1
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q4b/c. TOTAL REASONS - FURNITURE / OTHER LARGE ITEMS															
Have delivery service/minimal charge for deliveries	5		1											1	
	2%		17%											13%	
Major brands/well known	2	1				1									
	1%	13%				1%									
Good/lots of competition/able to go around and compare prices	4					1									
	2%					1%									
No other	129	4	4	1	6	32		1	2	2	10	43	1	6	
	53%	50%	67%	50%	46%	37%		100%	100%	67%	59%	80%	100%	75%	
Other	12	2	1		1	2						2			
	5%	25%	17%		8%	2%						4%			
No reason	56					1					2	50			
	23%					1%					12%	93%			

Q4a. WHERE DID YOU DO MOST SHOPPING FOR FURNITURE / LARGE ITEMS
BY Q4b/c. TOTAL REASONS - FURNITURE / OTHER LARGE ITEMS
BASE: RESPONDENTS

	Q4a. WHERE DID YOU DO MOST SHOPPING FOR FURNITURE / LARGE ITEMS							
	Highpo-int Home maker Centre	Second hand places /store-s	Online /inter-net	Ballar-at Road	Chapel Street /South Yarra	I go everyw-here	Essend-on	Presto-n
RESPONDENTS	17 100%	6 100%	7 100%	2 100%	3 100%	2 100%	2 100%	2 100%
Q4b/c. TOTAL REASONS - FURNITURE / OTHER LARGE ITEMS								
Convenient/close to home	10 59%		4 57%				1 50%	1 50%
Wide range/have what I want	7 41%	2 33%			1 33%	1 50%	1 50%	
Cheaper/good prices	5 29%	4 67%	6 86%	1 50%		1 50%	1 50%	1 50%
Always shop there/ familiar	2 12%							
Good service	1 6%							
Has everything there/one stop	1 6%							
Prefer to shop there/like it there								
Harvey Norman NFI								
Quality stock		1 17%						
Have been going there for a long time	1 6%							
Friendly staff								
Know the owner/ friend works there/ know the people there								1 50%
Ready to bargain/ give you a discount/ cheaper	1 6%							
Had what I/we wanted		2 33%			1 33%			
Purchase online/ internet ie EB Games			1 14%					
Close to other shops/wide variety of shops	1 6%							
Credit is available and interest free terms								
Good parking/ parking is close to shops/more parking	1 6%							

	Q4a. WHERE DID YOU DO MOST SHOPPING FOR FURNITURE / LARGE ITEMS							
	Highpo-int Home maker Centre	Second hand places /store-s	Online /inter-net	Ballar-at Road	Chapel Street /South Yarra	I go everyw-here	Essend-on	Presto-n
RESPONDENTS	17 100%	6 100%	7 100%	2 100%	3 100%	2 100%	2 100%	2 100%
Q4b/c. TOTAL REASONS - FURNITURE / OTHER LARGE ITEMS								
Have delivery service/minimal charge for deliveries	3 18%							
Major brands/well known								
Good/lots of competition/able to go around and compare prices	3 18%							
No other	3 18%	2 33%	3 43%	2 100%	3 100%	2 100%	1 50%	1 50%
Other	2 12%	1 17%						1 50%
No reason			1 14%	1 50%	1 33%			

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q4b. MAIN REASON - FURNITURE / OTHER LARGE ITEMS					
Convenient/close to home	78 32%	24 29%	11 30%	14 27%	29 41%
Wide range/have what I want	32 13%	13 15%	6 16%	6 12%	7 10%
Cheaper/good prices	45 18%	16 19%	8 22%	10 19%	11 15%
Always shop there/ familiar	3 1%	2 2%		1 2%	
Prefer to shop there/like it there	5 2%	1 1%		2 4%	2 3%
Harvey Norman NFI	1 0%				1 1%
Quality stock	2 1%			1 2%	1 1%
Friendly staff	1 0%			1 2%	
Know the owner/ friend works there/ know the people there	2 1%				2 3%
Ready to bargain/ give you a discount/ cheaper	1 0%	1 1%			
Had what I/we wanted	8 3%	3 4%		2 4%	3 4%
Purchase online/ internet ie EB Games	1 0%			1 2%	
Close to other shops/wide variety of shops	2 1%	1 1%		1 2%	
Credit is available and interest free terms	1 0%		1 3%		
Good parking/ parking is close to shops/more parking	1 0%				1 1%
Other	5 2%	3 4%		1 2%	1 1%
No reason	56 23%	20 24%	11 30%	12 23%	13 18%

BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q4b/c. TOTAL REASONS - FURNITURE / OTHER LARGE ITEMS					
Convenient/close to home	103 42%	35 42%	14 38%	18 35%	36 51%
Wide range/have what I want	67 27%	28 33%	9 24%	8 15%	22 31%
Cheaper/good prices	76 31%	24 29%	11 30%	18 35%	23 32%
Always shop there/ familiar	7 3%	2 2%		3 6%	2 3%
Good service	2 1%		1 3%	1 2%	
Has everything there/one stop	1 0%		1 3%		
Prefer to shop there/like it there	6 2%	2 2%		2 4%	2 3%
Harvey Norman NFI	1 0%				1 1%
Quality stock	2 1%			1 2%	1 1%
Have been going there for a long time	1 0%	1 1%			
Friendly staff	1 0%			1 2%	
Know the owner/ friend works there/ know the people there	2 1%				2 3%
Ready to bargain/ give you a discount/ cheaper	3 1%	2 2%			1 1%
Had what I/we wanted	10 4%	5 6%		2 4%	3 4%
Purchase online/ internet ie EB Games	2 1%			1 2%	1 1%
Close to other shops/wide variety of shops	3 1%	1 1%		1 2%	1 1%
Credit is available and interest free terms	3 1%		3 8%		
Good parking/ parking is close to shops/more parking	3 1%	2 2%			1 1%
Have delivery service/minimal charge for deliveries	5 2%	1 1%	1 3%	2 4%	1 1%

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q4b/c. TOTAL REASONS - FURNITURE / OTHER LARGE ITEMS					
Major brands/well known	2 1%			1 2%	1 1%
Good/lots of competition/able to go around and compare prices	4 2%		1 3%		3 4%
No other	129 53%	36 43%	24 65%	33 63%	36 51%
Other	12 5%	6 7%	1 3%	1 2%	4 6%
No reason	56 23%	20 24%	11 30%	12 23%	13 18%

BASE: RESPONDENTS

	Total	LOCATION 3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q5a. WHERE DID YOU EAT OUT MOST OFTEN LAST YEAR					
Altona Gate Shopping Centre, Altona North	1 0%		1 3%		
CBD (Melbourne)	45 18%	14 17%	4 11%	6 12%	21 30%
Footscray	48 20%	28 33%	6 16%	8 15%	6 8%
Highpoint Shopping Centre, Maribyrnong	19 8%	5 6%	1 3%	2 4%	11 15%
Moonee Ponds Shopping Centre	6 2%				6 8%
Sunshine	4 2%	1 1%		2 4%	1 1%
Seddon	3 1%	3 4%			
Williamstown	12 5%	2 2%	5 14%	4 8%	1 1%
Yarraville	46 19%	12 14%	13 35%	20 38%	1 1%
Altona (Pier Street)	1 0%			1 2%	
Docklands	2 1%	1 1%			1 1%
Newmarket Shopping Centre, Kensington	1 0%	1 1%			
North Melbourne	1 0%				1 1%
Port Melbourne	1 0%			1 2%	
None	14 6%	9 11%	3 8%	1 2%	1 1%
Richmond	1 0%	1 1%			
Chapel Street/South Yarra	1 0%		1 3%		
I go everywhere	5 2%	2 2%			3 4%
Essendon	3 1%				3 4%
Preston	1 0%				1 1%
Maribyrnong	5 2%	1 1%			4 6%
Carlton	7 3%	1 1%	1 3%		5 7%

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q5a. WHERE DID YOU EAT OUT MOST OFTEN LAST YEAR					
South Melbourne	2 1%			1 2%	1 1%
Ivanhoe/Doncaster/ Templestowe areas	2 1%	1 1%		1 2%	
Ascotvale	2 1%				2 3%
Brunswick/Fitzroy	2 1%		1 3%	1 2%	
Other	9 4%	2 2%	1 3%	4 8%	2 3%

Q5a. WHERE DID YOU EAT OUT MOST OFTEN LAST YEAR *BY* Q5b/c. TOTAL REASONS - EAT OUT
BASE: RESPONDENTS

	TOTALS	Q5a. WHERE DID YOU EAT OUT MOST OFTEN LAST YEAR													
		Altona Gate Shoppi-ng Centre-, Altona North	CBD (Melbo-urne)	Footsc-ray	Highpo-int Shoppi-ng Centre-, Mariby-rnong	Moonee Ponds Shoppi-ng Centre	Sunshi-ne	Seddon	Willia-mstow-n	Yarrav-ille	Altona (Pier Street-)	Dockla-nds	Newmar-ket Shoppi-ng Centre-, Kensin-gton	North Melbou-rne	Port Melbou-rne
RESPONDENTS	244 100%	1 100%	45 100%	48 100%	19 100%	6 100%	4 100%	3 100%	12 100%	46 100%	1 100%	2 100%	1 100%	1 100%	1 100%
Q5b/c. TOTAL REASONS - EAT OUT															
Convenient/close to home	133 55%	1 100%	12 27%	32 67%	15 79%	5 83%	1 25%	3 100%	6 50%	37 80%	1 100%		1 100%		1 100%
Wide range/have what I want	68 28%		18 40%	16 33%	5 26%			2 67%	2 17%	15 33%		1 50%			
Cheaper/good prices	46 19%	1 100%	3 7%	17 35%	5 26%	1 17%	1 25%		1 8%	5 11%	1 100%				
Always shop there/ familiar	27 11%	1 100%	5 11%	9 19%	1 5%	1 17%				4 9%				1 100%	1 100%
Review code	3 1%		1 2%							1 2%					
Good service	2 1%														
Prefer to shop there/like it there	4 2%		2 4%	1 2%											
Recommendation/word of mouth	2 1%		1 2%							1 2%					
Quality stock	10 4%		2 4%	1 2%		1 17%		1 33%	1 8%	2 4%					
Friendly staff	1 0%														
Know the owner/ friend works there/ know the people there	1 0%														
Various 'other' stores mentioned	1 0%								1 8%						
Close to other shops/wide variety of shops	5 2%		1 2%	1 2%						2 4%					
Thats the only one around/not very much variety	1 0%								1 8%						
Good parking/ parking is close to shops/more parking	7 3%			2 4%					1 8%	2 4%					
Its always clean	1 0%						1 25%								
Was shopping/needed to get something to eat	5 2%				2 11%		1 25%		1 8%						
Good atmosphere	8 3%		3 7%				1 25%		2 17%			1 50%			

	TOTALS	Q5a. WHERE DID YOU EAT OUT MOST OFTEN LAST YEAR													
		Altona Gate Shoppi -ng Centre -, Altona North	CBD (Melbo -urne)	Footsc -ray	Highpo -int Shoppi -ng Centre -, Mariby -rnong	Moonee Ponds Shoppi -ng Centre	Sunshi -ne	Seddon	Willia -mstow -n	Yarrav -ille	Altona (Pier Street -)	Dockla -nds	Newmar -ket Shoppi -ng Centre -, Kensin -gton	North Melbou -rne	Port Melbou -rne
RESPONDENTS	244 100%	1 100%	45 100%	48 100%	19 100%	6 100%	4 100%	3 100%	12 100%	46 100%	1 100%	2 100%	1 100%	1 100%	1 100%
Q5b/c. TOTAL REASONS - EAT OUT															
I work in the area	7 3%		5 11%	1 2%			1 25%								
Good/great food/ good quality	18 7%		3 7%	4 8%	2 11%					4 9%					
Am a member there	2 1%														
Catch up/meet with friends/family	18 7%		10 22%	1 2%		1 17%				2 4%					
Good restaurants/ authentic food from different countries	18 7%		2 4%	5 10%					3 25%	3 7%					
It's local/like to support the community	1 0%									1 2%					
No other	101 41%		22 49%	13 27%	9 47%	3 50%	3 75%		6 50%	16 35%		2 100%	1 100%	1 100%	
Other	6 2%		1 2%							3 7%					
No reason	14 6%														

BASE: RESPONDENTS

	Q5a. WHERE DID YOU EAT OUT MOST OFTEN LAST YEAR												
	Other	None	Richmo-nd	Chapel Street/South Yarra	I go everyw-here	Essend-on	Presto-n	Mariby-rnong	Carlto-n	South Melbou-rne	Ivanho-e/Donca-ster/Templ-estow-e areas	Ascotv-ale	Brunsw-ick/Fitzr-oy
RESPONDENTS	9	14	1	1	5	3	1	5	7	2	2	2	2
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q5b/c. TOTAL REASONS - EAT OUT													
Convenient/close to home	7			1	2	1	1	3	2			1	
	78%			100%	40%	33%	100%	60%	29%			50%	
Wide range/have what I want	1					2		1	2			2	1
	11%					67%		20%	29%			100%	50%
Cheaper/good prices	4		1			1		3	2				
	44%		100%			33%		60%	29%				
Always shop there/familiar						1			2	1			
						33%			29%	50%			
Review code											1		
											50%		
Good service								1	1				
								20%	14%				
Prefer to shop there/like it there	1												
	11%												
Recommendation/word of mouth													
Quality stock								1					1
								20%					50%
Friendly staff	1												
	11%												
Know the owner/friend works there/know the people there									1				
									14%				
Various 'other' stores mentioned													
Close to other shops/wide variety of shops									1				
									14%				
Thats the only one around/not very much variety													
Good parking/parking is close to shops/more parking	1								1				
	11%								14%				
Its always clean													
Was shopping/needed to get something to eat									1				
									14%				
Good atmosphere									1				
									14%				

	Q5a. WHERE DID YOU EAT OUT MOST OFTEN LAST YEAR												
	Other	None	Richmo -nd	Chapel Street /South Yarra	I go everyw -here	Essend -on	Presto -n	Mariby -rnong	Carlto -n	South Melbou -rne	Ivanho -e /Donca -ster /Templ -estow -e areas	Ascotv -ale	Brunsw -ick /Fitzr -oy
RESPONDENTS	9	14	1	1	5	3	1	5	7	2	2	2	2
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Q5b/c. TOTAL REASONS - EAT OUT													
I work in the area													
Good/great food/ good quality	2			1						2			
	22%			100%						100%			
Am a member there	1					1							
	11%					33%							
Catch up/meet with friends/family					2				1		1		
					40%				14%		50%		
Good restaurants/ authentic food from different countries			1				1		1			1	1
			100%				100%		14%			50%	50%
It's local/like to support the community													
No other	3	11			3			1	2	1	2	1	1
	33%	79%			60%			20%	29%	50%	100%	50%	50%
Other					2								
					40%								
No reason		14											
		100%											

BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q5b. MAIN REASON - EAT OUT					
Convenient/close to home	104 43%	42 50%	13 35%	25 48%	24 34%
Wide range/have what I want	36 15%	11 13%	8 22%	5 10%	12 17%
Cheaper/good prices	14 6%	6 7%	1 3%	2 4%	5 7%
Always shop there/ familiar	9 4%	3 4%		1 2%	5 7%
Review code	3 1%			2 4%	1 1%
Recommendation/word of mouth	1 0%				1 1%
Know the owner/ friend works there/ know the people there	1 0%				1 1%
Close to other shops/wide variety of shops	1 0%		1 3%		
Was shopping/needed to get something to eat	5 2%	1 1%	1 3%	2 4%	1 1%
Good atmosphere	7 3%	3 4%	1 3%		3 4%
I work in the area	7 3%			2 4%	5 7%
Good/great food/ good quality	11 5%	1 1%	6 16%	1 2%	3 4%
Am a member there	2 1%			1 2%	1 1%
Catch up/meet with friends/family	8 3%	3 4%		3 6%	2 3%
Good restaurants/ authentic food from different countries	18 7%	3 4%	3 8%	6 12%	6 8%
It's local/like to support the community	1 0%			1 2%	
Other	2 1%	2 2%			
No reason	14 6%	9 11%	3 8%	1 2%	1 1%

STANDARD ANALYSIS *BY* Q5b/c. TOTAL REASONS - EAT OUT
BASE: RESPONDENTS

		LOCATION			
	Total	3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q5b/c. TOTAL REASONS - EAT OUT					
Convenient/close to home	133 55%	48 57%	20 54%	34 65%	31 44%
Wide range/have what I want	68 28%	25 30%	12 32%	10 19%	21 30%
Cheaper/good prices	46 19%	17 20%	8 22%	11 21%	10 14%
Always shop there/ familiar	27 11%	10 12%	3 8%	6 12%	8 11%
Review code	3 1%			2 4%	1 1%
Good service	2 1%				2 3%
Prefer to shop there/like it there	4 2%	1 1%		1 2%	2 3%
Recommendation/word of mouth	2 1%				2 3%
Quality stock	10 4%	1 1%	2 5%	3 6%	4 6%
Friendly staff	1 0%			1 2%	
Know the owner/ friend works there/ know the people there	1 0%				1 1%
Various 'other' stores mentioned	1 0%				1 1%
Close to other shops/wide variety of shops	5 2%		2 5%	1 2%	2 3%
Thats the only one around/not very much variety	1 0%		1 3%		
Good parking/ parking is close to shops/more parking	7 3%	1 1%	2 5%	2 4%	2 3%
Its always clean	1 0%	1 1%			
Was shopping/needed to get something to eat	5 2%	1 1%	1 3%	2 4%	1 1%
Good atmosphere	8 3%	4 5%	1 3%		3 4%
I work in the area	7 3%			2 4%	5 7%
Good/great food/ good quality	18 7%	4 5%	6 16%	4 8%	4 6%

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q5b/c. TOTAL REASONS - EAT OUT					
Am a member there	2 1%			1 2%	1 1%
Catch up/meet with friends/family	18 7%	7 8%	2 5%	3 6%	6 8%
Good restaurants/ authentic food from different countries	18 7%	3 4%	3 8%	6 12%	6 8%
It's local/like to support the community	1 0%			1 2%	
No other	101 41%	36 43%	14 38%	19 37%	32 45%
Other	6 2%	3 4%	1 3%	1 2%	1 1%
No reason	14 6%	9 11%	3 8%	1 2%	1 1%

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	142	49	26	31	36
- Altona Gate - For buying food or groceries - Very Poor - Very Good					
MEANS	5.85	5.79	5.98	6.24	5.49
MEDIANS	5.96	5.79	6.00	6.57	5.71
STD. ERROR	0.18	0.29	0.37	0.35	0.48
- Altona Gate - For buying clothes and shoes - Very Poor - Very Good					
MEANS	5.24	4.84	5.79	5.80	4.76
MEDIANS	5.25	4.79	5.58	6.58	4.40
STD. ERROR	0.21	0.33	0.38	0.50	0.56
- Altona Gate - For buying furniture and appliances - Very Poor - Very Good					
MEANS	4.23	4.25	4.65	3.94	3.71
MEDIANS	3.82	3.81	4.88	3.10	3.25
STD. ERROR	0.25	0.41	0.45	0.57	0.60
- Altona Gate - For eating out - Very Poor - Very Good					
MEANS	4.87	4.49	5.13	4.26	5.78
MEDIANS	4.81	4.06	4.91	4.33	6.33
STD. ERROR	0.21	0.32	0.39	0.45	0.53
- Altona Gate - For meeting friends or family - Very Poor - Very Good					
MEANS	5.03	4.96	5.33	4.40	5.20
MEDIANS	4.97	4.88	5.08	3.88	6.13
STD. ERROR	0.22	0.34	0.43	0.58	0.56

	Total	LOCATION 3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	147	51	27	34	35
- Central Melbourne - For buying food or groceries - Very Poor - Very Good					
MEANS	6.20	5.93	6.94	6.02	6.22
MEDIANS	6.60	6.08	7.57	6.67	6.86
STD. ERROR	0.18	0.24	0.43	0.44	0.43
- Central Melbourne - For buying clothes and shoes - Very Poor - Very Good					
MEANS	6.58	6.53	6.34	6.45	7.11
MEDIANS	7.33	7.15	7.64	7.21	7.55
STD. ERROR	0.20	0.32	0.51	0.42	0.31
- Central Melbourne - For buying furniture and appliances - Very Poor - Very Good					
MEANS	4.96	4.54	4.91	5.35	5.65
MEDIANS	5.13	4.29	5.08	5.75	5.75
STD. ERROR	0.20	0.31	0.42	0.46	0.51
- Central Melbourne - For eating out - Very Poor - Very Good					
MEANS	6.84	6.56	6.60	7.04	7.42
MEDIANS	7.54	7.17	7.36	7.67	7.91
STD. ERROR	0.17	0.26	0.44	0.39	0.31
- Central Melbourne - For meeting friends or family - Very Poor - Very Good					
MEANS	6.58	6.38	5.80	6.95	7.49
MEDIANS	7.38	6.79	7.00	7.81	7.77
STD. ERROR	0.18	0.27	0.48	0.43	0.29
- Central Melbourne - For health, medical and community services - Very Poor - Very Good					
MEANS	6.02	6.23	7.15	5.48	5.70
MEDIANS	6.55	6.73	7.50	5.79	6.10
STD. ERROR	0.20	0.33	0.61	0.36	0.41

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	138	48	27	31	32
- Central West Plaza, Braybrook - For buying food or groceries - Very Poor - Very Good					
MEANS	5.74	6.31	6.54	4.90	4.97
MEDIANS	6.00	6.36	6.88	4.50	5.50
STD. ERROR	0.17	0.25	0.30	0.40	0.38
- Central West Plaza, Braybrook - For buying clothes and shoes - Very Poor - Very Good					
MEANS	4.52	4.41	5.42	3.57	4.77
MEDIANS	4.36	3.88	5.57	3.25	4.92
STD. ERROR	0.19	0.35	0.40	0.33	0.42
- Central West Plaza, Braybrook - For buying furniture and appliances - Very Poor - Very Good					
MEANS	4.09	3.51	5.12	3.49	4.43
MEDIANS	3.97	3.13	5.29	2.94	4.83
STD. ERROR	0.19	0.34	0.35	0.34	0.50
- Central West Plaza, Braybrook - For eating out - Very Poor - Very Good					
MEANS	4.90	4.70	5.91	4.34	4.74
MEDIANS	5.02	4.70	6.33	4.00	5.50
STD. ERROR	0.19	0.34	0.36	0.40	0.44
- Central West Plaza, Braybrook - For meeting friends or family - Very Poor - Very Good					
MEANS	4.62	4.38	5.39	4.10	4.72
MEDIANS	4.69	4.21	5.71	3.20	5.33
STD. ERROR	0.21	0.36	0.45	0.40	0.44

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	155	54	25	37	39
- Footscray - For buying food or groceries - Very Poor - Very Good					
MEANS	6.10	6.29	5.00	6.03	6.42
MEDIANS	6.24	6.61	5.13	5.63	6.92
STD. ERROR	0.14	0.21	0.44	0.26	0.29
- Footscray - For buying clothes and shoes - Very Poor - Very Good					
MEANS	5.60	5.69	4.48	5.91	5.78
MEDIANS	5.85	5.81	4.92	6.17	6.25
STD. ERROR	0.17	0.27	0.45	0.31	0.35
- Footscray - For buying furniture and appliances - Very Poor - Very Good					
MEANS	4.97	5.10	4.24	5.10	5.11
MEDIANS	5.09	5.53	4.69	4.94	5.63
STD. ERROR	0.18	0.30	0.40	0.36	0.40
- Footscray - For eating out - Very Poor - Very Good					
MEANS	6.37	6.78	5.45	6.72	5.99
MEDIANS	6.66	7.35	5.50	6.81	6.25
STD. ERROR	0.14	0.23	0.37	0.24	0.29
- Footscray - For meeting friends or family - Very Poor - Very Good					
MEANS	5.82	6.33	4.89	6.25	5.35
MEDIANS	6.33	6.83	5.14	6.64	5.88
STD. ERROR	0.17	0.25	0.45	0.35	0.33
- Footscray - For health, medical and community services - Very Poor - Very Good					
MEANS	5.61	5.92	4.33	6.05	5.41
MEDIANS	5.90	6.38	4.50	5.83	5.93
STD. ERROR	0.18	0.26	0.46	0.38	0.42

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	144	49	27	30	38
- Highpoint - For buying food or groceries - Very Poor - Very Good					
MEANS	5.97	6.16	5.39	5.53	6.67
MEDIANS	6.25	6.36	5.31	5.71	7.43
STD. ERROR	0.16	0.24	0.37	0.34	0.31
- Highpoint - For buying clothes and shoes - Very Poor - Very Good					
MEANS	6.27	6.88	5.23	6.29	6.54
MEDIANS	6.85	7.25	5.30	6.75	7.06
STD. ERROR	0.17	0.24	0.41	0.35	0.31
- Highpoint - For buying furniture and appliances - Very Poor - Very Good					
MEANS	5.60	6.30	4.85	5.47	5.81
MEDIANS	5.83	6.83	4.67	5.33	6.58
STD. ERROR	0.20	0.35	0.41	0.42	0.44
- Highpoint - For eating out - Very Poor - Very Good					
MEANS	5.54	5.82	4.98	5.20	5.93
MEDIANS	5.89	6.19	5.06	5.64	6.55
STD. ERROR	0.17	0.28	0.39	0.37	0.35
- Highpoint - For meeting friends or family - Very Poor - Very Good					
MEANS	5.69	5.88	4.74	5.47	6.45
MEDIANS	6.20	6.65	4.50	5.58	7.04
STD. ERROR	0.18	0.31	0.41	0.38	0.33
- Highpoint - For health, medical and community services - Very Poor - Very Good					
MEANS	5.53	5.21	5.38	5.44	6.08
MEDIANS	5.76	5.25	5.30	5.63	6.30
STD. ERROR	0.21	0.36	0.58	0.48	0.31

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	150	50	27	31	42
- Newport - For buying food or groceries - Very Poor - Very Good					
MEANS	5.31	5.53	5.61	4.85	5.29
MEDIANS	5.34	5.33	5.67	4.83	5.55
STD. ERROR	0.17	0.26	0.52	0.34	0.32
- Newport - For buying clothes and shoes - Very Poor - Very Good					
MEANS	5.14	5.65	4.69	4.69	5.32
MEDIANS	5.13	5.80	4.63	4.17	5.71
STD. ERROR	0.20	0.33	0.51	0.38	0.40
- Newport - For buying furniture and appliances - Very Poor - Very Good					
MEANS	4.21	4.68	4.06	3.69	4.33
MEDIANS	4.05	4.56	4.00	3.27	4.70
STD. ERROR	0.20	0.34	0.52	0.34	0.47
- Newport - For eating out - Very Poor - Very Good					
MEANS	5.15	5.22	4.71	4.95	5.54
MEDIANS	5.40	5.24	5.00	5.13	5.79
STD. ERROR	0.18	0.29	0.48	0.36	0.35
- Newport - For meeting friends or family - Very Poor - Very Good					
MEANS	5.18	4.96	5.22	5.38	5.28
MEDIANS	5.42	5.14	5.33	5.75	5.75
STD. ERROR	0.18	0.30	0.37	0.38	0.38

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	141	48	26	31	36
- Sunshine - For buying food or groceries - Very Poor - Very Good					
MEANS	5.18	5.01	6.32	4.63	5.02
MEDIANS	5.32	5.22	6.75	5.00	5.11
STD. ERROR	0.18	0.25	0.43	0.33	0.42
- Sunshine - For buying clothes and shoes - Very Poor - Very Good					
MEANS	4.69	4.77	5.84	3.63	4.54
MEDIANS	4.70	4.78	5.57	3.00	4.67
STD. ERROR	0.20	0.35	0.43	0.36	0.44
- Sunshine - For buying furniture and appliances - Very Poor - Very Good					
MEANS	4.14	4.13	5.45	2.98	3.91
MEDIANS	3.92	4.25	5.88	2.50	3.75
STD. ERROR	0.22	0.38	0.47	0.36	0.46
- Sunshine - For eating out - Very Poor - Very Good					
MEANS	4.84	4.82	5.31	3.89	5.50
MEDIANS	4.93	4.69	5.50	3.58	5.88
STD. ERROR	0.20	0.35	0.43	0.36	0.46
- Sunshine - For meeting friends or family - Very Poor - Very Good					
MEANS	4.52	4.70	4.71	3.76	4.94
MEDIANS	4.64	4.83	5.10	2.90	5.06
STD. ERROR	0.19	0.36	0.43	0.35	0.39
- Sunshine - For health, medical and community services - Very Poor - Very Good					
MEANS	4.92	4.87	4.52	5.04	5.06
MEDIANS	5.02	5.20	4.25	5.15	5.33
STD. ERROR	0.21	0.40	0.47	0.39	0.41

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	144	51	27	32	34
- Yarraville - For buying food or groceries - Very Poor - Very Good					
MEANS	6.27	6.37	6.39	6.49	5.55
MEDIANS	6.64	6.92	6.50	6.71	5.40
STD. ERROR	0.15	0.25	0.27	0.32	0.40
- Yarraville - For buying clothes and shoes - Very Poor - Very Good					
MEANS	5.28	5.26	5.61	4.80	5.63
MEDIANS	5.14	4.95	5.41	4.91	5.75
STD. ERROR	0.19	0.33	0.33	0.36	0.50
- Yarraville - For buying furniture and appliances - Very Poor - Very Good					
MEANS	3.69	3.76	3.88	3.00	4.80
MEDIANS	3.14	3.08	4.00	2.57	4.25
STD. ERROR	0.21	0.34	0.40	0.35	0.76
- Yarraville - For eating out - Very Poor - Very Good					
MEANS	6.26	6.28	6.39	5.98	6.45
MEDIANS	6.78	6.96	6.85	6.14	7.00
STD. ERROR	0.17	0.29	0.38	0.35	0.37
- Yarraville - For meeting friends or family - Very Poor - Very Good					
MEANS	6.08	6.59	5.63	5.92	5.86
MEDIANS	6.60	7.50	5.69	6.60	6.38
STD. ERROR	0.20	0.34	0.42	0.48	0.37
- Yarraville - For health, medical and community services - Very Poor - Very Good					
MEANS	5.25	5.34	5.29	5.89	4.19
MEDIANS	5.40	6.00	5.17	5.79	4.40
STD. ERROR	0.18	0.30	0.35	0.37	0.42

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	146	51	25	35	35
- Williamstown - For buying food or groceries - Very Poor - Very Good					
MEANS	5.57	5.56	6.52	5.68	4.88
MEDIANS	5.72	5.67	6.58	5.80	4.94
STD. ERROR	0.16	0.30	0.35	0.25	0.39
- Williamstown - For buying clothes and shoes - Very Poor - Very Good					
MEANS	5.07	5.19	5.55	5.05	4.57
MEDIANS	5.00	5.25	5.44	4.82	4.13
STD. ERROR	0.18	0.33	0.49	0.29	0.44
- Williamstown - For buying furniture and appliances - Very Poor - Very Good					
MEANS	3.57	3.63	3.75	3.54	3.41
MEDIANS	3.09	2.50	4.00	3.27	2.80
STD. ERROR	0.19	0.37	0.52	0.28	0.39
- Williamstown - For eating out - Very Poor - Very Good					
MEANS	5.94	6.00	6.65	5.88	5.56
MEDIANS	6.47	6.64	6.50	6.23	6.56
STD. ERROR	0.16	0.29	0.37	0.28	0.37
- Williamstown - For meeting friends or family - Very Poor - Very Good					
MEANS	5.81	5.84	6.09	6.07	5.35
MEDIANS	6.16	6.50	6.25	6.27	5.78
STD. ERROR	0.17	0.31	0.50	0.28	0.34
- Williamstown - For health, medical and community services - Very Poor - Very Good					
MEANS	5.33	5.50	5.00	5.82	4.55
MEDIANS	5.46	6.58	4.75	5.83	4.88
STD. ERROR	0.20	0.32	0.54	0.29	0.49

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	179	57	33	41	48
- Altona Gate - Feeling safe and secure - Very Poor - Very Good					
MEANS	6.59	6.62	6.41	7.06	6.02
MEDIANS	7.16	7.35	6.83	7.58	6.82
STD. ERROR	0.16	0.32	0.32	0.29	0.34
- Altona Gate - Being easy to travel to - Very Poor - Very Good					
MEANS	6.91	6.44	6.95	7.72	6.49
MEDIANS	7.26	6.82	7.06	7.79	7.00
STD. ERROR	0.15	0.28	0.31	0.21	0.37
- Altona Gate - Being easy to move around in - Very Poor - Very Good					
MEANS	7.00	7.12	6.87	7.31	6.49
MEDIANS	7.32	7.64	7.33	7.24	6.94
STD. ERROR	0.15	0.27	0.32	0.23	0.37
- Altona Gate - Attractiveness - Very Poor - Very Good					
MEANS	5.77	5.71	5.90	5.47	6.18
MEDIANS	5.98	5.86	6.28	5.68	6.44
STD. ERROR	0.14	0.30	0.29	0.24	0.30
- Altona Gate - How much you like it overall - Very Poor - Very Good					
MEANS	5.72	5.94	6.07	5.71	5.08
MEDIANS	5.95	6.14	6.63	5.73	4.94
STD. ERROR	0.15	0.31	0.31	0.26	0.36

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	177	58	31	41	47
- Central Melbourne - Feeling safe and secure - Very Poor - Very Good					
MEANS	6.38	6.61	5.80	6.71	6.40
MEDIANS	6.67	6.91	6.14	6.87	6.59
STD. ERROR	0.13	0.22	0.28	0.28	0.24
- Central Melbourne - Being easy to travel to - Very Poor - Very Good					
MEANS	7.27	7.50	6.74	7.49	7.30
MEDIANS	7.55	8.14	7.10	7.33	7.67
STD. ERROR	0.12	0.21	0.26	0.22	0.23
- Central Melbourne - Being easy to move around in - Very Poor - Very Good					
MEANS	6.82	6.99	6.89	7.15	6.31
MEDIANS	7.17	7.59	6.92	7.61	6.30
STD. ERROR	0.13	0.20	0.26	0.30	0.26
- Central Melbourne - Attractiveness - Very Poor - Very Good					
MEANS	6.50	6.70	6.32	6.51	6.42
MEDIANS	6.87	7.07	6.80	6.87	6.78
STD. ERROR	0.13	0.22	0.27	0.29	0.25
- Central Melbourne - How much you like it overall - Very Poor - Very Good					
MEANS	6.35	6.28	6.20	6.75	6.28
MEDIANS	6.81	6.77	6.77	7.13	6.57
STD. ERROR	0.14	0.24	0.31	0.29	0.25

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	177	59	32	41	45
- Central West Plaza, Braybrook - Feeling safe and secure - Very Poor - Very Good					
MEANS	5.96	6.73	5.00	5.81	5.23
MEDIANS	6.30	7.30	5.13	6.44	5.08
STD. ERROR	0.17	0.26	0.37	0.30	0.44
- Central West Plaza, Braybrook - Being easy to travel to - Very Poor - Very Good					
MEANS	6.76	6.91	6.65	7.06	6.10
MEDIANS	7.26	7.63	6.58	7.37	6.58
STD. ERROR	0.15	0.24	0.37	0.25	0.42
- Central West Plaza, Braybrook - Being easy to move around in - Very Poor - Very Good					
MEANS	6.70	6.87	6.77	6.76	6.22
MEDIANS	7.02	7.33	6.50	6.92	6.94
STD. ERROR	0.16	0.26	0.38	0.24	0.49
- Central West Plaza, Braybrook - Attractiveness - Very Poor - Very Good					
MEANS	5.33	5.84	4.96	5.13	4.76
MEDIANS	5.55	5.97	5.10	5.33	4.42
STD. ERROR	0.17	0.24	0.45	0.32	0.42
- Central West Plaza, Braybrook - How much you like it overall - Very Poor - Very Good					
MEANS	5.44	5.98	5.00	5.19	4.98
MEDIANS	5.49	5.94	5.50	5.39	4.90
STD. ERROR	0.17	0.25	0.49	0.31	0.42

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	183	63	33	42	45
- Footscray - Feeling safe and secure - Very Poor - Very Good					
MEANS	5.70	6.14	4.66	5.72	5.46
MEDIANS	5.93	6.29	4.81	6.00	5.60
STD. ERROR	0.13	0.18	0.39	0.28	0.30
- Footscray - Being easy to travel to - Very Poor - Very Good					
MEANS	7.61	7.59	7.80	7.73	7.39
MEDIANS	7.82	7.69	8.25	8.10	7.71
STD. ERROR	0.10	0.15	0.30	0.24	0.24
- Footscray - Being easy to move around in - Very Poor - Very Good					
MEANS	6.78	6.81	6.56	6.99	6.57
MEDIANS	6.97	7.03	7.17	6.92	6.77
STD. ERROR	0.11	0.16	0.34	0.24	0.26
- Footscray - Attractiveness - Very Poor - Very Good					
MEANS	5.28	5.77	4.73	4.88	5.19
MEDIANS	5.42	5.91	4.77	4.95	5.39
STD. ERROR	0.13	0.19	0.35	0.28	0.30
- Footscray - How much you like it overall - Very Poor - Very Good					
MEANS	5.77	6.14	5.23	5.69	5.56
MEDIANS	5.95	6.34	5.04	5.92	5.83
STD. ERROR	0.13	0.17	0.39	0.27	0.31

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	179	60	31	41	47
- Highpoint - Feeling safe and secure - Very Poor - Very Good					
MEANS	6.29	6.91	6.26	6.31	5.78
MEDIANS	6.72	7.21	7.05	6.62	6.07
STD. ERROR	0.13	0.23	0.35	0.20	0.26
- Highpoint - Being easy to travel to - Very Poor - Very Good					
MEANS	7.29	7.47	7.26	7.47	7.03
MEDIANS	7.70	7.85	7.41	7.69	7.63
STD. ERROR	0.11	0.20	0.27	0.19	0.23
- Highpoint - Being easy to move around in - Very Poor - Very Good					
MEANS	6.87	6.91	7.25	6.80	6.73
MEDIANS	7.36	7.69	7.57	7.03	7.17
STD. ERROR	0.12	0.25	0.28	0.21	0.24
- Highpoint - Attractiveness - Very Poor - Very Good					
MEANS	6.03	6.40	6.15	5.85	5.84
MEDIANS	6.29	6.77	6.38	6.00	6.19
STD. ERROR	0.12	0.24	0.36	0.21	0.23
- Highpoint - How much you like it overall - Very Poor - Very Good					
MEANS	6.11	6.35	5.98	6.18	5.92
MEDIANS	6.58	6.83	6.76	6.26	6.44
STD. ERROR	0.12	0.23	0.36	0.20	0.22

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	182	62	31	42	47
- Newport - Feeling safe and secure - Very Poor - Very Good					
MEANS	6.11	6.80	6.04	5.69	5.94
MEDIANS	6.53	7.23	6.38	6.14	6.29
STD. ERROR	0.13	0.24	0.34	0.26	0.22
- Newport - Being easy to travel to - Very Poor - Very Good					
MEANS	7.25	7.43	7.67	7.21	6.71
MEDIANS	7.55	7.84	8.04	7.31	6.58
STD. ERROR	0.11	0.20	0.26	0.22	0.23
- Newport - Being easy to move around in - Very Poor - Very Good					
MEANS	6.81	7.13	6.81	6.84	6.43
MEDIANS	7.12	7.72	6.95	6.97	6.77
STD. ERROR	0.13	0.26	0.32	0.20	0.26
- Newport - Attractiveness - Very Poor - Very Good					
MEANS	5.69	6.11	5.53	5.16	6.03
MEDIANS	5.93	6.40	5.19	5.56	6.50
STD. ERROR	0.14	0.27	0.34	0.24	0.27
- Newport - How much you like it overall - Very Poor - Very Good					
MEANS	5.63	5.90	5.67	5.33	5.67
MEDIANS	5.74	6.20	5.70	5.38	5.84
STD. ERROR	0.13	0.26	0.37	0.22	0.26

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	178	58	32	40	48
- Sunshine - Feeling safe and secure - Very Poor - Very Good					
MEANS	5.73	6.21	5.71	5.47	5.34
MEDIANS	5.97	6.60	6.17	5.71	5.50
STD. ERROR	0.16	0.25	0.37	0.40	0.29
- Sunshine - Being easy to travel to - Very Poor - Very Good					
MEANS	6.83	6.95	6.93	6.78	6.65
MEDIANS	7.12	7.23	7.10	6.90	7.25
STD. ERROR	0.13	0.23	0.29	0.31	0.26
- Sunshine - Being easy to move around in - Very Poor - Very Good					
MEANS	6.41	6.58	7.25	6.33	5.72
MEDIANS	6.69	6.92	7.56	6.55	6.04
STD. ERROR	0.14	0.21	0.30	0.30	0.27
- Sunshine - Attractiveness - Very Poor - Very Good					
MEANS	5.26	5.70	5.58	4.80	4.76
MEDIANS	5.16	5.67	5.17	4.71	4.79
STD. ERROR	0.15	0.23	0.33	0.37	0.28
- Sunshine - How much you like it overall - Very Poor - Very Good					
MEANS	5.55	5.92	6.19	5.25	4.92
MEDIANS	5.46	5.97	6.33	5.00	4.97
STD. ERROR	0.14	0.20	0.36	0.32	0.28

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	180	62	31	41	46
- Yarraville - Feeling safe and secure - Very Poor - Very Good					
MEANS	7.06	7.07	7.25	7.78	6.35
MEDIANS	7.41	7.55	7.50	7.88	6.59
STD. ERROR	0.13	0.19	0.32	0.22	0.32
- Yarraville - Being easy to travel to - Very Poor - Very Good					
MEANS	7.64	7.50	7.83	8.42	7.27
MEDIANS	7.94	7.85	8.21	9.25	7.62
STD. ERROR	0.12	0.18	0.29	0.25	0.25
- Yarraville - Being easy to move around in - Very Poor - Very Good					
MEANS	7.25	6.92	7.71	7.75	7.21
MEDIANS	7.49	7.08	8.00	8.00	7.47
STD. ERROR	0.13	0.20	0.32	0.27	0.27
- Yarraville - Attractiveness - Very Poor - Very Good					
MEANS	6.82	6.68	7.02	7.28	6.57
MEDIANS	7.15	7.00	7.33	7.62	6.92
STD. ERROR	0.13	0.19	0.32	0.28	0.27
- Yarraville - How much you like it overall - Very Poor - Very Good					
MEANS	6.75	6.60	7.29	7.70	5.97
MEDIANS	7.08	6.81	7.45	8.00	6.31
STD. ERROR	0.14	0.20	0.33	0.25	0.31

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	184	61	31	43	49
- Williamstown - Feeling safe and secure - Very Poor - Very Good					
MEANS	6.99	7.14	7.63	7.14	6.36
MEDIANS	7.20	7.41	7.86	7.27	6.38
STD. ERROR	0.11	0.18	0.31	0.23	0.22
- Williamstown - Being easy to travel to - Very Poor - Very Good					
MEANS	7.03	6.88	7.31	7.60	6.65
MEDIANS	7.32	7.28	7.63	8.38	6.69
STD. ERROR	0.12	0.21	0.29	0.25	0.23
- Williamstown - Being easy to move around in - Very Poor - Very Good					
MEANS	6.86	6.69	7.87	7.25	6.22
MEDIANS	7.28	7.10	7.96	7.50	6.50
STD. ERROR	0.13	0.21	0.28	0.25	0.28
- Williamstown - Attractiveness - Very Poor - Very Good					
MEANS	6.78	6.58	7.36	7.09	6.47
MEDIANS	7.25	7.21	7.77	7.50	6.89
STD. ERROR	0.13	0.22	0.35	0.25	0.22
- Williamstown - How much you like it overall - Very Poor - Very Good					
MEANS	6.53	6.38	6.82	6.78	6.36
MEDIANS	6.85	6.93	7.10	6.97	6.38
STD. ERROR	0.12	0.23	0.35	0.23	0.22

STANDARD ANALYSIS *BY* Q8a. PLACES GO MOST OFTEN
BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q8a. PLACES GO MOST OFTEN					
Altona Gate	20 8%	3 4%	11 30%	6 12%	
Central Melbourne	23 9%	10 12%	2 5%	3 6%	8 11%
Central West Plaza,Braybrook	13 5%	5 6%	3 8%	3 6%	2 3%
Footscray	41 17%	29 35%	3 8%	6 12%	3 4%
Highpoint	90 37%	23 27%	4 11%	10 19%	53 75%
Sunshine	6 2%	3 4%	2 5%		1 1%
Yarraville	43 18%	11 13%	8 22%	23 44%	1 1%
Williamstown	4 2%		3 8%	1 2%	
Other	4 2%		1 3%		3 4%

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q8b. REASON - PLACES GO MOST OFTEN					
Convenient/close to home	192 79%	64 76%	31 84%	42 81%	55 77%
Wide range/have what I want	87 36%	37 44%	6 16%	16 31%	28 39%
Cheaper/good prices	31 13%	14 17%	7 19%	5 10%	5 7%
Always shop there/ familiar	36 15%	18 21%	4 11%	7 13%	7 10%
Has everything there/one stop	8 3%	2 2%	4 11%	1 2%	1 1%
Prefer to shop there/like it there	13 5%	2 2%	4 11%	3 6%	4 6%
Quality stock	3 1%			1 2%	2 3%
Friendly staff	2 1%		2 5%		
It is undercover	2 1%	1 1%			1 1%
Know the owner/ friend works there/ know the people there	1 0%	1 1%			
Ready to bargain/ give you a discount/ cheaper	1 0%	1 1%			
Had what I/we wanted	3 1%	1 1%		1 2%	1 1%
Close to other shops/wide variety of shops	16 7%	3 4%	3 8%	3 6%	7 10%
They have organic food	1 0%			1 2%	
Good parking/ parking is close to shops/more parking	7 3%	1 1%	1 3%	1 2%	4 6%
Always fresh	2 1%				2 3%
Not too busy/not crowded	4 2%	1 1%	1 3%	2 4%	
Its always clean	2 1%	1 1%		1 2%	
Have delivery service/minimal charge for deliveries	1 0%		1 3%		
Good atmosphere	5 2%		3 8%	2 4%	

		LOCATION			
	Total	3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q8b. REASON - PLACES GO MOST OFTEN					
Good/great food/ good quality	1 0%				1 1%
Catch up/meet with friends/family	3 1%	1 1%			2 3%
Good restaurants/ authentic food from different countries	2 1%	1 1%			1 1%
It's local/like to support the community	3 1%	1 1%		2 4%	
Other	5 2%	1 1%	1 3%	1 2%	2 3%

STANDARD ANALYSIS *BY* Q9a. HOW OFTEN GO TO FOOTSCRAY FOR SHOPPING - LAST YEAR
BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q9a. HOW OFTEN GO TO FOOTSCRAY FOR SHOPPING - LAST YEAR					
Nearly everyday, at least five times per week	13 5%	11 13%	1 3%	1 2%	
Weekly, at least one or two times a week	79 32%	39 46%	8 22%	15 29%	17 24%
Regularly, every couple of weeks	28 11%	14 17%	5 14%	4 8%	5 7%
Sometimes, only a few times per month	59 24%	14 17%	9 24%	18 35%	18 25%
Never	65 27%	6 7%	14 38%	14 27%	31 44%

STANDARD ANALYSIS *BY* Q9b. HAVE YOU EVER BEEN TO FOOTCRAY SC
BASE: RESPONDENTS
FILTERS: *AND* NOT SHOP AT FOOTSCRAY IN LAST YEAR

		LOCATION			
	Total	3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	65	6	14	14	31
	100%	100%	100%	100%	100%
Q9b. HAVE YOU EVER BEEN TO FOOTCRAY SC					
Yes	46	3	13	11	19
	71%	50%	93%	79%	61%
No	15	2	1	3	9
	23%	33%	7%	21%	29%
NOT ESTABLISHED	4	1			3
	6%	17%			10%

STANDARD ANALYSIS *BY* Q9c. REASON - NEVER BEEN TO FOOTCRAY SC
BASE: RESPONDENTS
FILTERS: *AND* NEVER BEEN TO FOOTSCRAY

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	15 100%	2 100%	1 100%	3 100%	9 100%
Q9c. REASON - NEVER BEEN TO FOOTCRAY SC					
Too inconvenient/ too far	7 47%	1 50%	1 100%	1 33%	4 44%
Don't know	1 7%				1 11%
Feel unsafe/scary area/drugs	3 20%	1 50%		2 67%	
Dirty/smelly area/ derelict buildings/ unkempt	2 13%			1 33%	1 11%
Other	3 20%				3 33%

STANDARD ANALYSIS *BY* Q. GENDER
BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q. GENDER					
Male	70 29%	27 32%	17 46%	11 21%	15 21%
Female	174 71%	57 68%	20 54%	41 79%	56 79%

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q10. AGE GROUP					
18 years and under	2 1%			1 2%	1 1%
19 - 24 years	13 5%	4 5%	3 8%	2 4%	4 6%
25 - 39 years	97 40%	40 48%	18 49%	18 35%	21 30%
40 - 54 years	66 27%	20 24%	11 30%	17 33%	18 25%
55 - 64 years	31 13%	8 10%	2 5%	5 10%	16 23%
65 - 69 years	12 5%	4 5%	1 3%	2 4%	5 7%
70 + years	23 9%	8 10%	2 5%	7 13%	6 8%

STANDARD ANALYSIS *BY* Q11. HOUSEHOLD STRUCTURE
BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q11. HOUSEHOLD STRUCTURE					
Single - Living alone or sharing	104 43%	34 40%	19 51%	19 37%	32 45%
Couple no children	35 14%	18 21%	5 14%	6 12%	6 8%
Couple/single with children who have left home	25 10%	9 11%		7 13%	9 13%
Couple/single with children living at home	80 33%	23 27%	13 35%	20 38%	24 34%

STANDARD ANALYSIS *BY* Q12. APPROX. ANNUAL HOUSEHOLD INCOME BEFORE TAX
BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q12. APPROX. ANNUAL HOUSEHOLD INCOME BEFORE TAX					
Less than $20,000 per year	34 14%	11 13%	3 8%	9 17%	11 15%
$20,000 - $40,000 per year	37 15%	9 11%	11 30%	8 15%	9 13%
$40,001 - $60,000 per year	26 11%	10 12%	4 11%	5 10%	7 10%
$60,001 - $100,000 per year	54 22%	15 18%	9 24%	16 31%	14 20%
More than $100,000 per year	45 18%	15 18%	7 19%	7 13%	16 23%
Refused	48 20%	24 29%	3 8%	7 13%	14 20%

STANDARD ANALYSIS *BY* Q13. # OF CAR
BASE: RESPONDENTS

	Total	LOCATION 3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
Q13. # OF CAR					
None	38 16%	20 24%	4 11%	7 13%	7 10%
One	106 43%	37 44%	15 41%	25 48%	29 41%
Two	77 32%	21 25%	15 41%	16 31%	25 35%
Three or more	23 9%	6 7%	3 8%	4 8%	10 14%

BASE: RESPONDENTS

	Total	LOCATION			
		3011 Footscray / Seddon	3012 Brooklyn / Kingsville	3013 Yarraville	3032 Maribyrnong
RESPONDENTS	244 100%	84 100%	37 100%	52 100%	71 100%
STANDARD ANALYSIS					
Total	244 100%	84 100%	37 100%	52 100%	71 100%
LOCATION					
3011 Footscray / Seddon	84 34%	84 100%			
3012 Brooklyn / Kingsville	37 15%		37 100%		
3013 Yarraville	52 21%			52 100%	
3032 Maribyrnong	71 29%				71 100%

APPENDIX C: IN-CENTRE SURVEY

Survey No: ☐ ☐ ☐

IN-CENTRE SURVEY FOOTSCRAY

Date ________ Time __ : __

Hello, I'm doing a survey of people in Footscray today for a Maribyrnong City Council project. Can I ask you a few questions? It will only take a few minutes.

Gender

☐ Female ☐ Male

1. What suburb or locality do you live in?

____ (__________)
Postcode

2. Where did you travel from today?

____ (__________)
Postcode

3. What is the main reason you are visiting Footscray today? *(TICK ONE ONLY)*

IF FOR SOCIAL REASONS - GO TO SECTION A

☐ Shopping ☐ Medical or health services

☐ Recreation ☐ Passing through

☐ Eating out ☐ Meet friends

☐ Professional Services (eg accountant, lawyers)

☐ Community services (eg library, Centrelink, migrant services, legal aid)

IF WORK OR STUDY REASONS - GO TO SECTION B

☐ Work ☐ Study

SECTION A: People visiting for social reasons

A.1 How did you get here today? *(may choose more than one)*

☐ Car: from ________________to ________________

☐ Bus: from ________________to ________________

☐ Train: from ________________to ________________

☐ Walked: from ________________to ________________

☐ Cycled: from ________________to ________________

☐ Taxi: from ________________to ________________

☐ Other (specify)________________________

A.2 How often do you visit Footscray *(READ ACTIVITY)*? *(Please tick)*

ACTIVITY	Everyday	Every other day	Once a week	Once a fortnight	Once a month	Infrequently	First time/ hardly ever
To go shopping							
To visit the doctor or other health service?							
For business purposes? (like visiting accountants, lawyer, financial advisor)							
To visit community services? (such as a neighbourhood house, child care centre, migrant resource centre)							
To eat out							
To meet friends							
For recreation (go to the gym, go for a walk etc)							

A.3 How much time will you spend in Footscray today?

☐ Less than ½ hour ☐ 1-2 hours ☐ 3 hours +

☐ ½ -1 hour ☐ 2-3 hours

A.4 What is the main store, service or community facility you are visiting?

______________________________ or, ☐ None

A.5 What other stores or services are you visiting in Footscray? *(TICK ALL THAT APPLY)*

☐ Coles	☐ IGA	☐ Footscray Market
☐ Little Saigon	☐ Kmart	☐ Forges
☐ Centrelink	☐ Priceline	☐ Bakery
☐ Newsagents	☐ Post Office	☐ Chemist

☐ Café /Restaurant (please specify) ______________________________

☐ Other (please specify) ______________________________

☐ None

A.6 Which part/s of Footscray are you visiting today? *(SHOW MAP: TICK ALL THAT APPLY)*

☐ A	☐ B	☐ C	☐ D	☐ E	☐ F
☐ G	☐ H	☐ J	☐ K		

A.7 Where do you usually do most of your food and grocery shopping?

Store / area / shopping centre

____

Suburb / Location

____

A.8 Why do you shop there?

____

____

A.9 How much of your food and groceries did you buy there? *(READ OUT)*

☐ All or almost all	☐ More than ¾
☐ Between ½ and ¾	☐ ½
☐ Only a few things	

A.10 In the past 12 months, have you bought *(READ TYPE OF GOODS)*?

Type of goods	Question	Store	Location	Why didn't you buy it here in Footscray?
Computers, electrical or white goods	Which stores have you bought computers, electrical or white goods from?			
Furniture and things for your home, such as curtains?	Which stores have you bought furniture or things for your home from?			
Hardware	Which stores have you bought hardware goods from?			
Clothing and footwear	Have you bought clothes or shoes from *(READ STORE)*?	Myer K-Mart Target Big W Best and Less Forges		

A.11 What changes would make you use Footscray more often?

Stores: ____

Services: ____

General Improvements: ____

A.12 Of the people you live with, who earns the most at work? What suburb do they work in?
(Include postcode if known. If two equal wage earners, list locations of both)

Suburb: ____ (__________)
Postcode

Suburb: ____ (__________)
Postcode

SECTION B: People in the centre for work or study

B.1 If you work in Footscray, what do you do for a job?

____

B.2 Where is your workplace? *(SHOW MAP: TICK ALL THAT APPLY)*

☐ A ☐ B ☐ C ☐ D ☐ E ☐ F

☐ G ☐ H ☐ J ☐ K

B.3 If you are a student, where do you study?

☐ Footscray Park Campus ☐ Footscray Nicholson Campus

☐ Other (please specify) ____________________________________

B.4 Do you regularly use shops, services or other facilities in Footscray?

☐ Yes If yes, which ones?
(TICK ALL THAT APPLY)

	Coles		IGA
	Chemist		Little Saigon
	Kmart		Forges
	Centrelink		Priceline
	Bakery		Newsagents
	Post Office		Footscray Market

☐ Café /Restaurant (please specify)

____

☐ Other (please specify)

____

☐ No If no, why not?
(please specify)

____

____

____

B.4 What changes would make you use Footscray more often for reasons other than work or study?

Stores: ____

Services: ____

General Improvements: ____

SECTION C: All survey participants

C.1 What country is your family from?

- [ ] Australia
- [ ] Bangladesh
- [ ] Cambodia
- [ ] China
- [ ] Ethiopia
- [ ] Greece
- [ ] Italy
- [ ] India
- [ ] Malaysia
- [ ] Sudanese
- [ ] Vietnam
- [ ] Other ____________________

C.2 What country were you born in?

- [ ] Australia
- [ ] Same as my family background
- [ ] Other____________________

C.2 What language do you speak at home?

- [ ] Arabic
- [ ] Chinese - Cantonese
- [ ] Chinese - Mandarin
- [ ] Croatian
- [ ] English
- [ ] Filipino (Tagalog)
- [ ] Greek
- [ ] Italian
- [ ] Macedonian
- [ ] Spanish
- [ ] Vietnamese
- [ ] Other ____________

C.3 In total, how much do the people you live with earn each year?

- [ ] $20,000 or less
- [ ] $40,001 - $60,000
- [ ] $100,001+
- [ ] $20,001 - $40,000
- [ ] $60,001 - $100,000
- [ ] Not Stated

C.4 Who lives in your house?

- Couple with Children [ ]
- Couple without Children [ ]
- One Parent Family [ ]
- Lone Person Household [ ]
- Other Family Type [ ]
- Group / Share Household [ ]

C.5 How old are you?

- [ ] Under 18
- [ ] 25 - 39
- [ ] 55 - 64
- [ ] 70 +
- [ ] 18 - 24
- [ ] 40 - 54
- [ ] 65 - 69

Thank you for talking with me today and helping Council with the survey!

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.1

Gender

All survey participants

Gender	Location	
	Frequency	%
Female	174	44.4
Male	218	55.6
TOTAL	**392**	**100.0**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.2

What suburb do you live in?

All survey participants

Suburb	Frequency	%
People visiting Footscray for social reasons		
Footscray	83	29.5
Maribyrnong	15	5.3
Sunshine	14	5.0
Maidstone	13	4.6
West Footscray	12	4.3
Yarraville	10	3.6
Altona	8	2.8
Braybrook	8	2.8
Werribee	7	2.5
St Albans	7	2.5
Seddon	6	2.1
Ascot Vale	4	1.4
Flemington	4	1.4
Brunswick West	3	1.1
Burnside	3	1.1
North Melbourne	3	1.1
Williamstown	3	1.1
Altona Meadows	3	1.1
St Kilda	3	1.1
Altona North	2	0.7
Avondale Heights	2	0.7
Collingwood	2	0.7
Fitzroy	2	0.7
Glenroy	2	0.7
Hoppers Crossing	2	0.7
Kensington	2	0.7
Laverton	2	0.7
Moonee Ponds	2	0.7
Newport	2	0.7
Parkville	2	0.7
Point Cook	2	0.7
Richmond	2	0.7
Spotswood	2	0.7
Tottenham	2	0.7
Tullamarine	2	0.7
Allansford	1	0.4
Avondale	1	0.4
Bacchus Marsh	1	0.4
Belgrave	1	0.4
Broadford	1	0.4
Broadmeadows	1	0.4
Brunswick	1	0.4
Burwood	1	0.4
Cairnlea	1	0.4
Camberwell	1	0.4
Castlemaine	1	0.4
CBD	1	0.4
Craigieburn	1	0.4
Dandenong	1	0.4
Deer Park	1	0.4
East Geelong	1	0.4
Essendon West	1	0.4
Geelong	1	0.4
Gisborne	1	0.4
Gladstone Park	1	0.4
Hadfield	1	0.4
Hillside	1	0.4
Keilor East	1	0.4
Kings Park	1	0.4
Melton	1	0.4
Mill Park	1	0.4
Montrose	1	0.4
Regent West	1	0.4
Seaholme	1	0.4
South Melbourne	1	0.4
Sunbury	1	0.4
Sunshine North	1	0.4
Sydenham	1	0.4
Taylors Hill	1	0.4
Taylors Lakes	1	0.4
Thomastown	1	0.4
Thornbury	1	0.4
Trentham	1	0.4
West Melbourne	1	0.4
Wyndham	1	0.4
Sub total	*281*	*100.0*

Suburb	Frequency	%
People visiting Footscray for work or study		
Footscray	27	25.0
West Footscray	9	8.3
Braybrook	8	7.4
Sunshine	7	6.5
Maribyrnong	4	3.7
St Albans	3	2.8
Brooklyn	2	1.9
Deer Park	2	1.9
Maidstone	2	1.9
North Melbourne	2	1.9
Oak Park	2	1.9
Thornbury	2	1.9
Werribee	2	1.9
Altona	1	0.9
Altona Meadows	1	0.9
Ardeer	1	0.9
Ascot vale	1	0.9
Brunswick	1	0.9
Cairnlea	1	0.9
Chelsea	1	0.9
Clayton	1	0.9
Derrimut	1	0.9
East Melbourne	1	0.9
Fitzroy	1	0.9
Flemington	1	0.9
Geelong	1	0.9
Geelong West	1	0.9
Glen Iris	1	0.9
Hoppers Crossing	1	0.9
Huntingdale	1	0.9
Keilor	1	0.9
Keilor East	1	0.9
Laverton	1	0.9
Malmsbury	1	0.9
CBD	1	0.9
Tullamarine	1	0.9
Melton	1	0.9
Noble Park	1	0.9
North Balwyn	1	0.9
Pearcedale	1	0.9
Point Cook	1	0.9
Preston	1	0.9
Reservoir	1	0.9
Seddon	1	0.9
Sydenham	1	0.9
Toorak	1	0.9
Tottenham	1	0.9
Williamstown	1	0.9
Yarraville	1	0.9
Sub total	*108*	*100.0*
TOTAL	**389**	**100.0**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.3

Where did you travel from today?

All survey participants

Suburb	Frequency	%
Footscray	81	29.2
Sunshine	15	5.4
Maribyrnong	14	5.1
Maidstone	13	4.7
West Footscray	11	4.0
Altona	8	2.9
Braybrook	8	2.9
CBD	8	2.9
Yarraville	8	2.9
Werribee	7	2.5
Seddon	6	2.2
St. Albans	6	2.2
Flemington	4	1.4
Ascot Vale	3	1.1
Brunswick West	3	1.1
Burnside	3	1.1
North Melbourne	3	1.1
Williamstown	3	1.1
St Kilda	3	1.1
Altona Meadows	2	0.7
Burwood	2	0.7
Collingwood	2	0.7
Fitzroy	2	0.7
Glenroy	2	0.7
Hoppers Crossing	2	0.7
Kensington	2	0.7
Laverton	2	0.7
Newport	2	0.7
Parkville	2	0.7
Richmond	2	0.7
Tottenham	2	0.7
Tullamarine	2	0.7
Altona North	2	0.7
Broadmeadows	2	0.7
Allansford	1	0.4
Avondale	1	0.4
Avondale Heights	1	0.4
Bacchus Marsh	1	0.4
Broadford	1	0.4
Brunswick	1	0.4
Cairnlea	1	0.4
Castlemaine	1	0.4
Craigieburn	1	0.4
Dandenong	1	0.4
Deer Park	1	0.4
East Geelong	1	0.4
Elwood	1	0.4
Essendon West	1	0.4
Geelong	1	0.4
Gisborne	1	0.4
Gladstone Park	1	0.4
Hadfield	1	0.4
Heidelberg	1	0.4
Hillside	1	0.4
Keilor East	1	0.4
Kensington	1	0.4
Kings Park	1	0.4
Melton	1	0.4
Montrose	1	0.4
Moonee Ponds	1	0.4
Point Cook	1	0.4
Regent West	1	0.4
Seaholme	1	0.4
South Melbourne	1	0.4
Spotswood	1	0.4
Sunbury	1	0.4
Sunshine North	1	0.4
Taylors Lakes	1	0.4
Taylors Hill	1	0.4
Thomastown	1	0.4
Thornbury	1	0.4
Trentham	1	0.4
West Melbourne	1	0.4
Wyndham	1	0.4

TOTAL	**277**	**100.0**

Table B.4

Why are you visiting Footscray today?

All survey participants

Reason	Frequency	%
Shopping	169	37.1
Study	70	15.4
Passing through	42	9.2
Meet friends	39	8.6
Work	39	8.6
Eating out	32	7.0
Medical or health services	19	4.2
Recreation	18	3.9
Community services	15	3.3
Professional services	13	2.9
TOTAL	**456**	**100.0**

Table B.5

How did you get to Footscray today?

Section A: People in the centre for social reasons

Mode of travel	Frequency	%
Car	108	37.8
Bus	66	23.1
Train	52	18.2
Walked	47	16.4
Tram	9	3.1
Cycled	2	0.7
Taxi	1	0.3
Other	1	0.3
TOTAL	**286**	**100.0**

Footscray Retail Study
Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.6
Where did you travel from and where are you going?
Section A: People in the centre for social reasons

Travelled from	Frequency	%
Footscray	68	25.9
West Footscray	14	5.3
Sunshine	13	4.9
CBD	12	4.6
Maribyrnong	10	3.8
Maidstone	10	3.8
Altona	8	3.0
Yarraville	7	2.7
Werribee	7	2.7
Braybrook	7	2.7
St Albans	5	1.9
Seddon	5	1.9
Flemington	4	1.5
Ascot Vale	4	1.5
Williamstown	3	1.1
North Melbourne	3	1.1
Laverton	3	1.1
Kensington	3	1.1
Burnside	3	1.1
Brunswick West	3	1.1
Tottenham	2	0.8
St Kilda	2	0.8
Spotswood	2	0.8
Richmond	2	0.8
Point Cook	2	0.8
Newport	2	0.8
Moonee Ponds	2	0.8
Hoppers Crossing	2	0.8
Home	2	0.8
Highpoint	2	0.8
Glenroy	2	0.8
Flinders St	2	0.8
Collingwood	2	0.8
Burwood	2	0.8
Broadmeadows	2	0.8
Nicholson St.	2	0.8
Wyndham	1	0.4
West Melbourne	1	0.4
Watergardens	1	0.4
Tullamarine	1	0.4
Trentham	1	0.4
Thornbury	1	0.4
Thomastown	1	0.4
Sunshine North	1	0.4
Sunbury	1	0.4
Seaholme	1	0.4
Parkville	1	0.4
Montrose	1	0.4
Melton	1	0.4
Kings Park	1	0.4
Keilor East	1	0.4
Keilor Downs	1	0.4
Heidelberg	1	0.4
Hadfield	1	0.4
Gordon St	1	0.4
Gisborne	1	0.4
Geelong	1	0.4
Fitzroy	1	0.4
Essendon	1	0.4
Elwood	1	0.4
East Geelong	1	0.4
Deer Park	1	0.4
Dandenong	1	0.4
Craigieburn	1	0.4
Castlemaine	1	0.4
Camberwell	1	0.4
Cairnlea	1	0.4
Brunswick	1	0.4
Brooklyn	1	0.4
Broadford	1	0.4
Bacchus Marsh	1	0.4
Avondale Heights	1	0.4
Avondale	1	0.4
Altona North	1	0.4
Altona Meadows	1	0.4
TOTAL	**263**	**100.0**

Travelling to	Frequency	%
Footscray	257	95.2
CBD	5	1.9
Altona	1	0.4
Caulfield	1	0.4
East Melbourne	1	0.4
Essendon	1	0.4
Highpoint	1	0.4
Maribyrnong	1	0.4
North Melbourne	1	0.4
Sunshine	1	0.4
TOTAL	**270**	**100.0**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.7

How often do you visit Footscray for each service?

Section A: People in the centre for social reasons

Frequency of visitation	Reason for visiting Footscray									
	Shopping		Medical reasons		Business purposes		Community services		To eat out	
	Frequency	%	Frequency	%	Frequency	%	Frequency	%	Frequency	%
Everyday	33	11.7	2	0.8	3	1.1	2	0.8	10	3.6
Every other day	62	22.1	5	1.9	9	3.4	19	7.3	50	18.2
Once a week	98	34.9	7	2.6	9	3.4	14	5.3	58	21.2
Once a fortnight	23	8.2	5	1.9	8	3.1	7	2.7	25	9.1
Once a month	16	5.7	33	12.4	10	3.8	5	1.9	24	8.8
Infrequently	23	8.2	70	26.3	27	10.3	26	9.9	26	9.5
First time / Hardly ever	26	9.3	144	54.1	195	74.7	189	72.1	81	29.6
TOTAL	**281**	**100.0**	**266**	**100.0**	**261**	**100.0**	**262**	**100.0**	**274**	**100.0**

To meet friends		For recreation	
Frequency	%	Frequency	%
30	11.2	18	6.9
47	17.5	26	10.0
27	10.1	21	8.1
5	1.9	5	1.9
23	8.6	8	3.1
29	10.8	21	8.1
107	39.9	160	61.8
268	**100.0**	**259**	**100.0**

Table B.8

How much time do you spend in Footscray?
Section A: People in the centre for social reasons

Time spent	Frequency	%
Less than 1/2 hour	34	12.0
1/2 - 1 hour	50	17.7
1-2 hours	97	34.3
2-3 hours	49	17.3
3+ hours	53	18.7
TOTAL	**283**	**100.0**

Table B.9

What is the main store, service or community facility you are visiting?

Section A: People in the centre for social reasons

Response	Frequency	%
Food, groceries and liquor stores		
Supermarket	33	12.8
Other food specialty stores	98	38.1
Restaurant, cafés and take-away	20	7.8
Food, groceries and liquor stores Sub total	*151*	*58.8*
Household retailing	26	10.1
Retail commercial services	19	7.4
Clothing, footwear and fabric stores	15	5.8
Health and community services	15	5.8
Department and general stores	9	3.5
Entertainment, recreation, sports and accommodation	9	3.5
Education, sports and community development services	5	1.9
Property and business services	3	1.2
Traffic and Transport Services	3	1.2
Motor vehicle and utilities retailing and services	1	0.4
Other	1	0.4
Total	**257**	**100.0**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.10

What other stores and services are you visiting in Footscray?

Section A: People in the centre for social reasons

Response	Frequency	%
Food, groceries and liquor stores		
Packaged food, groceries and liquor	442	49.2
Restaurants, cafés and take-away	66	7.3
Food, groceries and liquor stores sub total	*508*	*56.6*
Household retailing	106	11.8
Retail commercial services	93	10.4
Department and general stores	87	9.7
Clothing, footwear and fabric stores	73	8.1
Health and community services	24	2.7
Entertainment, recreation, sports and accommodation	4	0.4
Traffic and Transport Services	2	0.2
Bulky goods	1	0.1
Total	**898**	**100.0**

Table Set B: In-centre surveys

Table B.11

Which part/s of Footscray are you visiting today?

Section A: People in the centre for social reasons

Part	Frequency	%
A	3	0.6
B	36	7.8
C	70	15.2
D	102	22.1
E	61	13.2
F	115	24.9
G	41	8.9
H	27	5.8
J	6	1.3
K	1	0.2
Total	**462**	**100.0**

Footscray Retail Study
Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.12
Where do you usually do most of your food and grocery shopping?
Section A: People in the centre for social reasons

Response	Frequency	%
Footscray		
Footscray Market	64	24.5
Little Saigon	40	15.5
Coles	38	14.5
IGA	3	1.0
Bilo	3	1.0
Other Footscray	2	0.8
Tatsing supermarket	2	0.8
Footscray Plaza	2	0.6
African store on Nicholson St	1	0.4
Chinese shops on Barkly St	1	0.4
Indian grocery store	1	0.4
Local supermarket	1	0.4
Arabic shops	1	0.2
Safeway	1	0.2
Different stores	1	0.2
Fresh market	1	0.2
Grassland	1	0.2
India Impex	1	0.2
Footscray town centre	1	0.2
Nicholson St mall	0.3	0.1
Bangladeshi shops	0.3	0.1
Indian shops	0.3	0.1
Sub Total: Footscray	*161*	*61.7*
West Footscray		
Aldi	6	2.4
Sims supemarket	5	1.9
Central west shopping centre	2	0.6
Bharat stores	1	0.4
Sub Total: West Footscray	*14*	*5.2*
CBD		
Victoria Market	5	2.0
Coles	2	0.8
Other CBD	2	0.6
Chinatown	1	0.2
Sub Total: CBD	*9*	*3.6*
Sunshine		
Sunshine Plaza	2	0.8
Safeway	2	0.6
Aldi	1	0.4
Sunshine Marketplace	1	0.4
Sub Total: Sunshine	*6*	*2.1*
St Albans		
Other St Albans	3	1.1
Mumbai Spice	1	0.4
St Albans Plaza	1	0.4
Coles	1	0.2
Sub Total: St Albans	*6*	*2.1*
Highpoint Shopping Centre (Maribyrnong)		
Other Highpoint	5	1.7
Safeway	1	0.2
Sub Total: Highpoint shopping centre (Maribyrnong)	*5*	*1.7*
Yarraville		
Coles	2	0.8
IGA	2	0.8
Other Yarraville	1	0.4
Sub Total: Yarraville	*5*	*1.9*
Altona		
Coles	3	1.1
Local market	1	0.2
Local shopping centre	1	0.2
Safeway	1	0.2
Sub Total: Altona	*5*	*1.7*
Werribee		
Other Werribee	1	0.4
Safeway	1	0.4
Werribee Plaza	1	0.4
Aldi	1	0.2
Coles	1	0.2
Sub Total: Werribee	*4*	*1.5*

Response	Frequency	%
Altona Gate Shopping Centre (Altona North)		
Other Altona Gate	3	1.1
Sub Total: Altona North	*3*	*1.1*
Flemington		
Coles	1	0.4
Newmarket shops	1	0.4
Safeway	1	0.2
Sub Total: Flemington	*3*	*1.0*
Moonee Ponds		
Coles	3	1.0
Safeway	2	1.0
Sub Total: Moonee Ponds	*3*	*1.0*
Watergardens (Taylors Lakes)		
Other Watergardens	3	1.0
Sub Total: Watergardens (Taylors Lakes)	*3*	*1.0*
Maribyrnong		
Safeway	1	0.4
Coles	1	0.4
Sub Total: Maribyrnong	*2*	*0.8*
Brunswick		
Barkly square supermarket	1	0.4
Coles	1	0.4
Sub Total: Brunswick	*2*	*0.8*
Geelong		
Corio Village	1	0.4
Other Geelong	1	0.4
Sub Total: Geelong	*2*	*0.8*
Fitzroy		
Safeway	1	0.4
Other Fitzroy	1	0.4
Sub Total: Fitzroy	*2*	*0.8*
Altona Meadows		
Other Altona Meadows	2	0.8
Sub Total: Altona Meadows	*2*	*0.8*
Burnside		
Aldi	2	0.6
Sub Total: Burnside	*2*	*0.6*
Melton		
Castlemaine Market	1	0.4
Other Melton	1	0.2
Sub Total: Melton	*2*	*0.6*
Newport		
Coles	1	0.4
Other Newport	1	0.2
Sub Total: Newport	*2*	*0.6*
Other		
Ascot Vale - Safeway	1	0.4
Belgrave - Small Shops	1	0.4
Braybrook - Safeway	1	0.4
Broadford - Foodworks	1	0.4
Camberwell - Safeway	1	0.4
Clayton - Coles	1	0.4
Cragieburn - Safeway	1	0.4
Dandenong - Coles	1	0.4
Deer Park - NFI	1	0.4
East Garden - Aldi	1	0.4
Gisbourne - Coles	1	0.4
Hoppers Crossing - Parnied	1	0.4
Maidstone - Safeway	1	0.4
Preston - NFI	1	0.4
Regent West - NFI	1	0.4
Richmond - NFI	1	0.4
Ringwood - NFI	1	0.4
Seddon - Pompello	1	0.4
South Melbourne - South Melbourne Market	1	0.4
Springvale - Safeway	1	0.4
Tullamarine - Safeway	1	0.4
Williamstown - Safeway	1	0.4
Point Cook - Tasmanian meats	0.3	0.1
Point Cook - Safeway	0.3	0.1
Point Cook - Coles	0.3	0.1
Hadfield - Coles	1	0.2
Hadfield - Safeway	1	0.2
St Kilda - Coles	1	0.2
St Kilda - Safeway	1	0.2
Sunbury - Coles	1	0.2
Sunbury - Safeway	1	0.2
Thomastown - Coles	1	0.2
Thomastown - IGA	1	0.2
Bacchus Marsh - NFI	1	0.2
TOTAL	**261**	**100.0**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.13

Where do you usually do most of your food and grocery shopping? (Footscray residents only)

Section A: People in the centre for social reasons

Response	Frequency	%
Footscray		
Footscray Market	24	30.2
Coles	20	25.5
Little Saigon	14	17.3
Tatsing supermarket	1	1.3
IGA	1	1.3
Indian grocery store	1	1.3
Indian Impex	1	0.6
Bangladesh shops	0	0.4
Nicholson Street mall	0	0.4
Indian shops	0	0.4
Sub Total: Footscray	62	78.7
West Footscray		
Aldi	4	4.4
Sims supermarket	1	1.7
Sub Total: West Footscray	*5*	*6.1*
West Footscray		
Aldi	4	4.4
Sims supermarket	1	1.7
Sub Total: West Footscray	*5*	*6.1*
CBD		
Victoria market	2	1.9
Other CBD	1	0.6
Sub Total: CBD	*2*	*2.5*
Moonee Ponds		
Coles	1	1.3
Safeway	1	1.3
Sub Total: Moonee Ponds	2	2.5
Highpoint Shopping Centre (Maribyrnong)		
Coles	1	1.3
Other Highpoint	1	0.6
Sub Total: Highpoint shopping centre (Maribyrnong)	*2*	*1.9*
Clayton		
Coles	1	1.3
Sub Total: Clayton	*1*	*1.3*
Seddon		
Pompello	1	1.3
Sub Total: Seddon	*1*	*1.3*
Yarraville		
Coles	1	1.3
Sub Total: Yarraville	*1*	*1.3*
TOTAL	**75**	**95.6**

Table B.14

Why do you shop at the location you purchase your food and groceries?

Section A: People in the centre for social reasons

Response	Frequency	%
Food, grocery and price		
Cheap / good value	109	27.7
For the fresh food	42	10.7
Wide variety of foods and groceries	33	8.4
African and Asian food/s	18	4.6
High quality / good food and groceries	14	3.6
For a specific shop (meat, market)	3	0.8
No organic food	1	0.3
Sub Total : Food, grocery and price	*220*	*56.0*
Location		
Close to home	81	20.6
Convenient	57	14.5
Easy access / accessible	2	0.5
Not close	1	0.3
Sub Total : Location	*141*	*35.9*
General amenity		
Neat and clean/er	6	1.5
Just like it	5	1.3
Not too many people	1	0.3
For environmentally friendly things	1	0.3
Quiet	1	0.3
Habit	1	0.3
Support the local community	1	0.3
Sub Total : General amenity	*16*	*4.1*
Shop / service		
Good / friendly staff and shopping environment	4	1.0
Good supplier	1	0.3
Sub Total : Shop / service	*5*	*1.3*
Social and familiarity		
Friends will shop with me here	2	0.5
Australian made	1	0.3
Friends take me there	1	0.3
Familiar with the area	1	0.3
Sub Total : Socially and familiarity	*5*	*1.3*
Car parking and transport		
Good / easy parking	2	0.5
Good transportation	2	0.5
Sub Total : Car parking and transport	*4*	*1.0*
Layout		
Walkable	2	0.5
Sub Total : Layout	*2*	*0.5*
TOTAL	**393**	**100.0**

Table B.15

How much of your food and groceries did you buy there?

Section A: People in the centre for social reasons

Response	Frequency	%
All/ almost all	166	60.8
more than 3/4	27	9.9
between 1/2 and 3/4	46	16.8
1/2	14	5.1
Only a few things	20	7.3
TOTAL	**273**	**100.0**

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.16

In the last 12 months where have you bought computer, electricals or white goods?

Section A: People in the centre for social reasons

Response	Frequency	%
Highpoint		
Other Highpoint	10	9.6
JB Hi-Fi	7	6.7
Dick Smith	6	5.8
Harvey Norman	4	3.8
Good Guys	3	2.9
Big W	1	1.0
Kmart	1	1.0
Myer	1	1.0
Office Works	1	1.0
Sub Total: Highpoint (Maribyrnong)	*34*	*32.7*
Footscray		
Retravision	6	5.8
Post Office	3	2.9
Aldi	1	1.0
Savers	1	1.0
Sign	1	1.0
Tan Thanh	1	1.0
Barkly St	1	1.0
Gift shops	1	1.0
Klapp	1	1.0
Mobile shop	1	1.0
Optus World	1	1.0
Vodafone	1	1.0
Harvey Norman	1	1.0
Sub Total: Footscray	*20*	*19.2*
CBD		
JB Hi-Fi	6	5.8
3 store	2	1.9
Apple store	1	1.0
Myer	1	1.0
Safeway	1	1.0
Camera store	1	1.0
Other CBD stores	1	1.0
Vodafone	1	1.0
Harvey Norman	1	1.0
Sub Total: CBD	*15*	*14.4*
Maribyrnong		
Big W	1	1.0
Dick Smith	1	1.0
Kmart	1	1.0
Sub Total: Maribyrnong	*3*	*2.9*
Airport West		
Harvey Norman	1	1.0
Godfrey	1	1.0
Sub Total: Airport West	*2*	*1.9*
Braybrook		
Clive Peters	2	1.9
Sub Total: Braybrook	*2*	*1.9*
Internet / Online		
Ebay	1	1.0
Other Internet / Online	1	1.0
Sub Total: Internet/Online	*2*	*1.9*
Laverton		
Unknown	2	1.9
Sub Total: Laverton	*2*	*1.9*
Nunawading		
Sams	1	1.0
Unknown	1	1.0
Sub Total: Nunawading	*2*	*1.9*
Other		
Altona Gate Shopping Centre - NFI	1	1.0
Ashburton - E & S Trading	1	1.0
Broadmeadows - Harvey Norman	1	1.0
Chadstone - JB Hi-Fi	1	1.0
Cheltenham - Computer co.	1	1.0
Flemington - Safeway	1	1.0
Frankston - The Good Guys	1	1.0
Geeling - NFI	1	1.0
Glenroy - Coles	1	1.0
Hadfield - Harvey Norman	1	1.0
Hillside - Harvey Norman	1	1.0
Hoppers Crossing - Best Buy	1	1.0
Maidstone - Sams	1	1.0
Richmond - Retravision	1	1.0
South Melbourne - Post Office	1	1.0
Sunshine - NFI	1	1.0
Watergardens - NFI	1	1.0
Werribee - Kmart	1	1.0
West Footscray - Central West S.C.	1	1.0
Western suburbs - NFI	1	1.0
Yarraville - Office Works	1	1.0
Sub total: Other	*1*	*1.0*

Table B.16a

Why didn't you buy it in Footscray?

Source: Sweeney Research 2008

Response	Frequency	%
Range and quality of products	38	61.3
Convenience	11	17.7
Price	10	16.1
Unfamiliar with area	2	3.2
Generally prefer other	1	1.6
Total	**62**	**100.0**

TOTAL	104	100.0

Footscray Retail Study

Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.17

In the last 12 months where have you bought furniture?

Section A: People in the centre for social reasons

Response	Frequency	%
Footscray		
Forges	6	11.1
Other Footscray	6	11.1
Kmart	6	11.1
Kymdan	1	1.9
Savers	1	1.9
Sub Total: Footscray	*20*	*37.0*
Highpoint		
Other Highpoint	4	7.4
Fantastic Furniture	2	3.7
Coles	1	1.9
Big W	1	1.9
Office Works	1	1.9
Oz Design	1	1.9
Sub Total: Highpoint (Maribyrnong)	*10*	*18.5*
Richmond		
IKEA	8	14.8
Fantastic Furniture	1	1.9
Second hand store	1	1.9
Sub Total: Richmond	*10*	*18.5*
Sunshine		
Bunnings	2	3.7
Second hand store	2	3.7
Other Sunshine	1	1.9
Sub Total: Sunshine	*5*	*9.3*
Hoppers Crossing		
Harvey Norman	1	1.9
Other Hoppers Crossing	1	1.9
Sub Total: Hoppers Crossing	*2*	*3.7*
Maidstone		
Frogs	1	1.9
Spotlight	1	1.9
Sub Total: Maidstone	*2*	*3.7*
Braybrook		
Clive Peters	1	1.9
Sub Total: Braybrook	*1*	*1.9*
Brunswick		
Salvation army store	1	1.9
Sub Total: Brunswick	*1*	*1.9*
South Yarra		
Designer store	1	1.9
Sub Total: South Yarra	*1*	*1.9*
Watergardens		
Watergardens shopping centre	1	1.9
Sub Total: Watergardnes (Taylors Lakes)	*1*	*1.9*
West Footscray		
Central West shopping centre	1	1.9
Sub Total: West Footscray	*1*	*1.9*
TOTAL	**54**	**100.0**

Table B.17a

Why didn't you buy it in Footscray?

Source: Sweeney Research 2008

Response	Frequency	%
Range and quality of products	11	57.9
Price	4	21.1
Convenience	2	10.5
Unfamiliar	1	5.3
Generally prefer other	1	5.3
TOTAL	**19**	**100.0**

Table B.18

In the last 12 months where have you bought hardware?

Section A: People in the centre for social reasons

Response	Frequency	%
Highpoint		
Bunnings	8	14.8
Other Highpoint	5	9.3
Harvey Norman	2	3.7
Other Highpoint	1	1.9
Sub Total: Highpoint (Maribyrnong)	*16*	*29.6*
Footscray		
Home hardware	4	7.4
Other Footscray	3	5.6
Kmart	2	3.7
Footscray hardware	1	1.9
Footscray market	1	1.9
Gift shops	1	1.9
Paintspot	1	1.9
Savers	1	1.9
Sub Total: Footscray	*14*	*25.9*
Sunshine		
Bunnings	5	9.3
Chinese store	1	1.9
Wala	1	1.9
Sub Total: Sunshine	*7*	*13.0*
Maribyrnong		
Bunnings	3	5.6
Big W	1	1.9
Kmart	1	1.9
Sub Total: Maribyrnong	*5*	*9.3*
Watergardens (Taylors Lakes)		
Bunnings	2	3.7
Sub Total: Watergardens (Taylors Lakes)	*2*	*3.7*
Other		
Altona - Bunnings	1	1.9
Altona North - Bunnings	1	1.9
Broadmeadows - Bunnings	1	1.9
Fitzroy - Chinese store	1	1.9
Geelong - Bunnings	1	1.9
Hillside - Bunnings	1	1.9
Richmond - Ikea	1	1.9
Southland - David Jones	1	1.9
Frankston - Bunnings	1	1.9
Hadfield - Bunnings	1	1.9
TOTAL	**54**	**100.0**

Table B.18a

Why didn't you buy it in Footscray?

Source: Sweeney Research 2008

Response	Frequency	%
Range and quality of products	12	63.2
Convenience	5	26.3
Price	2	10.5
TOTAL	**19**	**100.0**

Footscray Retail Study
Collie Pty Ltd (December 2008)

Table Set B: In-centre surveys

Table B.19
In the last 12 months where have you bought clothing and footwear?
Section A: People in the centre for social reasons

Response	Frequency	%
Highpoint		
Myer	54	15.3
Target	39	11.1
Big W	35	9.9
Best and Less	13	3.7
Other Highpoint	10	2.8
Foot Locker	1	0.3
Sub Total: Highpoint (Maribyrnong)	*152*	*43.2*
Footscray		
Forges	39	11.1
Kmart	36	10.2
Savers	9	2.6
Other Footscray	7	2.0
Hip hop store	1	0.3
Sub Total: Footscray	*92*	*26.1*
CBD		
Myer	30	8.5
Target	7	2.0
Other CBD	9	2.6
Big W	5	1.4
Athletes Foot	1	0.3
David Jones	1	0.3
Sub Total: CBD	*53*	*15.1*
Werribee		
Myer	2	0.6
Big W	2	0.6
Target	2	0.6
Kmart	2	0.6
Best and Less	1	0.3
Other Werribee	1	0.3
Forges	1	0.3
Sub Total: Werribee	*11*	*0.6*
Sunshine		
Big W	5	1.4
Other Sunshine	2	0.6
Target	1	0.3
Sports Co	1	0.3
Best and Less	1	0.3
Sub Total: Sunshine	*10*	*1.4*
Geelong		
Kmart	2	0.6
Myer	1	0.3
Big W	1	0.3
Target	1	0.3
Sub Total: Geelong	*5*	*0.6*
Tullamarine		
Kmart	1	0.3
Other Tullamarine	1	0.3
Forges	1	0.3
Sub Total: Tullamarine	*3*	*0.3*
Broadmeadows		
Target	1	0.3
Big W	1	0.3
Best and Less	1	0.3
Sub Total: Broadmeadows	*3*	*0.3*
Northland		
Kmart	1	0.3
Unknown	1	0.3
Sub Total: Northland (East Preston)	*2*	*0.6*
Altona Meadows		
Big W	2	0.6
Sub Total: Altona Meadows	*2*	*0.6*
Burwood		
Kmart	2	0.6
Sub Total: Burwood	*2*	*0.6*
Altona Gate (Altona North)		
Kmart	1	0.3
Best and Less	1	0.3
Sub Total: Altona Gate (Altona North)	*2*	*0.6*
Other		
Northcote - Kmart	1	0.3
St Albans - Kmart	1	0.3
Brunswick - Target	1	0.3
Ringwood - Target	1	0.3
Flemington - Kmart	1	0.3
Box Hill - Kmart	1	0.3
Broadmeadows - Kmart	1	0.3
Chadstone - NFI	1	0.3
Hawthorn - NFI	1	0.3
Hoppers Crossing - NFI	1	0.3
South Yarra - NFI	1	0.3
Thornbury - NFI	1	0.3
Torquay - NFI	1	0.3
Southland (Cheltenham) - NFI	1	0.3
Camberwell - NFI	1	0.3
TOTAL	**352**	**100.0**

Table B.19a
Why didn't you buy it in Footscray?

Source: Sweeney Research 2008

Response	Frequency	%
Range and quality of products	55	52.4
Convenience	27	25.7
Generally prefers other	9	8.6
General amenity	5	4.8
Price	4	3.8
Unfamiliarity	3	2.9
Car parking and access	2	1.9
TOTAL	**105**	**100.0**

Table B.20

What changes would make you use Footscray more often? (People visiting for social reasons)

Section A: People in the centre for social reasons

Response	Frequency	%
Amenity of public realm		
Make the area cleaner / neater / less dirty	58	19.1
Improve anti-social behaviour	21	6.9
Improve environment quality (shade,trees, gardens etc)	9	3.0
Improve aesthetically (painting, modernise, more attractive)	8	2.6
Less crowded	3	1.0
More rules, regulations	2	0.7
Continue with current improvement strategy	2	0.7
Create a festival to attract people	1	0.3
More socialising	1	0.3
Reduce noise	1	0.3
Less street workers	1	0.3
More promotion of the area	1	0.3
Cheaper petrol	1	0.3
A bigger ethnic community	1	0.3
Sub Total: Amenity of public realm	*110*	*36.2*
Shops and retailing		
Improve range and quality of goods and services	40	13.2
More department and general store retailing	16	5.3
More food, grocery and liquor retailing	13	4.3
Refurbish old buildings and shops	9	3.0
More multicultural retailing	8	2.6
More clothing, footwear and fabric retailing	5	1.6
More price competitive	4	1.3
More other household A retailing	3	1.0
More entertainment facilities	2	0.7
Greater convenience	2	0.7
A cinema	1	0.3
More electrics retailing	1	0.3
Sub Total: Shops and retailing	*104*	*34.2*
Range of services and facilities		
Greater security and improved safety	63	20.7
More lighting at night	5	1.6
More medical services	4	1.3
More gym and pool facilities	3	1.0
Bins emptied more / more rubbish bins	3	1.0
More and improved public toilets	3	1.0
More seating	2	0.7
More community centres	1	0.3
More housing and accommodation	1	0.3
More shelter	1	0.3
More public toilets	1	0.3
General service quality improvement	1	0.3
More public phones	1	0.3
Improve police attitude	1	0.3
Sub Total: Range of services and facilities	*90*	*29.6*
Car parking, access and transport		
More, longer and improved car parking	35	11.5
Better / more frequent public transport	23	7.6
Increase free parking / remove parking meters	13	4.3
Less traffic	5	1.6
Road improvements	5	1.6
No parking on Nicholson st	1	0.3
More bike paths	1	0.3
More taxis	1	0.3
Sub Total: Car parking, access and transport	*84*	*27.6*
TOTAL	**304**	**100.0**

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Table Set B: In-centre surveys

Table B.21

Of the people you live with, who earns the most at work? What suburb do they work in?

Section A: People in the centre for social reasons

Location	Frequency	%
CBD	34	25.2
Footscray	22	16.3
Sunshine	5	3.7
Laverton	4	3.0
Maribyrnong	4	3.0
North Melbourne	4	3.0
Altona	3	2.2
Dandenong	2	1.5
Fitzroy	2	1.5
Parkville	2	1.5
St Kilda	2	1.5
Sunbury	2	1.5
Tullamarine	2	1.5
South Melbourne	2	1.5
Abbotsford	1	0.7
Albert Park	1	0.7
Altona North	1	0.7
Ballarat	1	0.7
Belgrave	1	0.7
Box Hill	1	0.7
Braybrook	1	0.7
Brighton	1	0.7
Broadmeadows	1	0.7
Brunswick	1	0.7
Campbellfield	1	0.7
Doncaster	1	0.7
East Melbourne	1	0.7
Epping	1	0.7
Essendon	1	0.7
Flemington	1	0.7
Geelong	1	0.7
Gladstone Park	1	0.7
Hadfield	1	0.7
Hawthorn	1	0.7
Heidelberg	1	0.7
Highett	1	0.7
Hawthorn	1	0.7
Laverton North	1	0.7
Maidstone	1	0.7
Malvern	1	0.7
Melton	1	0.7
Moonee Ponds	1	0.7
Mt Waverley	1	0.7
Newport	1	0.7
Port Melbourne	1	0.7
Prahran	1	0.7
Reservoir	1	0.7
Richmond	1	0.7
Seddon	1	0.7
Seymour	1	0.7
South Yarra	1	0.7
Southbank	1	0.7
Spotswood	1	0.7
Springvale	1	0.7
Toorak	1	0.7
Warrnambool	1	0.7
Werribee	1	0.7
West Footscray	1	0.7
Yarraville	1	0.7

TOTAL	135	100.0

Table B.22

If you work in Footscray, what do you do for a job?

Section B: People in the centre for work or study

Location	Frequency	%
Retail trade	10	27.8
Hospitality and food services	7	19.4
Professional services	4	11.1
University / civic services	3	8.3
Health and community services	3	8.3
Volunteer services	2	5.6
Public administration and safety	2	5.6
Trade services	2	5.6
Transport services	1	2.8
Administration and support services	1	2.8
Recreation and entertainment services	1	2.8
TOTAL	**36**	**100.0**

Table Set B: In-centre surveys

Table B.23

If you work in Footscray, what precinct* do you work in?

Section B: People in the centre for work or study

Precinct	Frequency	%
A	1	2.2
B	2	4.3
C	4	8.7
D	6	13.0
E	4	8.7
F	10	21.7
G	7	15.2
H	3	6.5
J	6	13.0
K	3	6.5
TOTAL	**46**	**100.0**

* Refer to precinct map

Table B.24

If you are a student, where do you study?

Section B: People in the centre for work or study

Place of study	Frequency	%
Footscray		
Footscray Park campus	28	42.4
Footscray Nicholson campus	23	34.8
Footscray City College	3	4.5
Gilmore Girls College	2	3.0
AMES Nicholson campus	1	1.5
Sub Total: Footscray	*57*	*86.4*
Inner suburbs (CBD, Parkville, Carlton, North Melbourne)		
Melbourne University (Parkville / Carlton)	2	3.0
AMI School (CBD)	1	1.5
Other North Melbourne (North Melbourne)	1	1.5
Victoria University (CBD)	1	1.5
Sub Total: CBD	*5*	*7.6*
Other		
Australian Education Academy (Ascot Vale)	1	1.5
Emmanuel College (Altona North)	1	1.5
Maribyrnong Secondary College (Maribyrnong)	1	1.5
Victoria University (Sunbury)	1	1.5
Sub Total: Other	*4*	*6.1*
TOTAL	**66**	**100.0**

Table Set B: In-centre surveys

Table B.25

Do you regularly use shops, services or other facilities in Footscray? If Yes, which ones?

Section B: People in the centre for work or study

Response	Frequency	%
Food, groceries and liquor stores		
Packaged food, groceries and liquor	205	45.3
Restaurants, cafés and take-away	41	9.1
Food, groceries and liquor stores sub total	*246*	*54.3*
Household retailing	57	12.6
Retail commercial services	54	11.9
Department and general stores	50	11.0
Clothing, footwear and fabric stores	32	7.1
Health and community services	12	2.6
Entertainment, recreation, sports and accommodation	1	0.2
Traffic and Transport Services	1	0.2
Total	**453**	**100.0**

Table B.26

Do you regularly use shops, services or other facilities in Footscray? If no, why not?

Section B: People in the centre for work or study

Response	Frequency	%
Not convenient	10	45.5
Only here for one function (e.g. work, study)	5	22.7
Unfamiliar with area	3	13.6
Range and quality of products	1	4.5
Generally prefer other	1	4.5
General amenity	1	4.5
Security	1	4.5
Total	**22**	**100.0**

Table B.27

What changes would make you use Footscray more often? (People in the centre for work or study)

Section B: People in the centre for work or study

Response	Frequency	%
Amenity of public realm		
Make the area cleaner / neater / less dirty	27	20.9
Remove drug dealers, drug addicts and drunks	8	6.2
Improve environment quality (shade, trees, gardens)	5	3.9
Better management of mental-ill people	1	0.8
Improve aesthetically (painting, make more modemn etc)	1	0.8
Stores shouldn't dump their rubbish in public bins	1	0.8
More business investment in the area	1	0.8
Sub Total : Amenity of public realm	*44*	*34.1*
Shops and retailing		
More restaurants, bars, café's, grocery and other food stores	6	4.7
Renovate / refurbish old buildings and shops	6	4.7
More shops	5	3.9
Better quality stores and products	4	3.1
More recorded music stores	3	2.3
More book stores	2	1.6
More clothing shops	2	1.6
More discounts and sales	2	1.6
Improve customer service	2	1.6
New shopping centre	2	1.6
More entertainment options (cinema)	2	1.6
More and cleaner public toilets	2	1.6
Make the area less expensive	1	0.8
More signs on stores in English	1	0.8
Get Italian and Greek restaurants to be 24hr	1	0.8
More newsagents	1	0.8
More electrical retail shops	1	0.8
Greater variety of stores and products	1	0.8
Sub Total : Shops and retailing	*44*	*34.1*
Range of services and facilities		
Greater security and improved safety	31	24.0
Improve people's behaviour	3	2.3
More health services	2	1.6
More gym facilities	1	0.8
More lighting at night	1	0.8
More Medicare offices	1	0.8
More footpaths without bumps	1	0.8
More pubs	1	0.8
Sub Total : Range of services and facilities	*41*	*31.8*
Car parking, access and transport		
Better / more frequent public transport	12	9.3
Increase free parking / remove parking meters	7	5.4
More / longer / improved car parking	6	4.7
Improve traffic	1	0.8
No more parking on Nicholson St	1	0.8
More bike lanes	1	0.8
Sub Total : Car parking, transport and access	*28*	*21.7*
TOTAL	**129**	**100.0**

Table B.28

What country is your family from?

All survey participants

Reason	Frequency	%
Asia (excluding Middle East)	204	52.3
Oceania	95	24.4
Europe	52	13.3
Africa	26	6.7
South America	5	1.3
Middle East	4	1.0
North America	4	1.0
TOTAL	**390**	**100.0**

Table B.29

What country were you born in?

All survey participants

Reason	Frequency	%
Same as my family background	248	65.3
Australia	116	30.5
Hong Kong	3	0.8
Myanmar	2	0.5
East Timor	1	0.3
France	1	0.3
Italy	1	0.3
New Zealand	1	0.3
Poland	1	0.3
USA	1	0.3
Bangladesh	1	0.3
Ethiopia	1	0.3
Cambodia	1	0.3
Algeria	1	0.3
Santa Isabel (Africa)	1	0.3
TOTAL	**380**	**100.0**

Table B.30

What language do you speak at home?

All survey participants

Reason	Frequency	%
English	228	43.2
Vietnamese	87	16.5
Chinese (Mandarin)	33	6.3
Chinese (Cantonese)	25	4.7
Arabic	15	2.8
Spanish	13	2.5
Italian	10	1.9
Hindi	10	1.9
Greek	9	1.7
Indian	7	1.3
Bengali	7	1.3
French	6	1.1
Punjabi	7	1.3
German	4	0.8
Telugu	4	0.8
Filipino	3	0.6
Pidgen English	3	0.6
Indonesian	3	0.6
Nepali	3	0.6
Polish	3	0.6
Sudanese	3	0.6
Burmese	2	0.4
Ethiopian	2	0.4
Thai	2	0.4
Malaysian	2	0.4
Tigrinya	2	0.4
Korean	2	0.4
Urdu	2	0.4
Turkish	2	0.4
Croation	1	0.2
Ikalanga	1	0.2
African	1	0.2
Albanian	1	0.2
Amharic	1	0.2
Creole	1	0.2
Dinka	1	0.2
Kissi	1	0.2
Gujarati	1	0.2
Hakka	1	0.2
Motuan	1	0.2
Hokkien	1	0.2
Huli	1	0.2
Japanese	1	0.2
Lao	1	0.2
Malayalam	1	0.2
Maori	2	0.4
Oromo	1	0.2
Portuguese	1	0.2
Romanian	1	0.2
Russian	1	0.2
Setswana	1	0.2
Somalian	1	0.2
Teochew	1	0.2
Tongan	1	0.2
Visayan	1	0.2
Sinhalesi	2	0.4
TOTAL	**528**	**100.0**

Table B.31

In total, how much do the people you live with earn each year?

All survey participants

Reason	Frequency	%
$20,000 or less	73	30.3
$20,001 - $40,000	46	19.1
$40,001-$60,000	65	27.0
$60,001-$100,000	36	14.9
$100,000 +	21	8.7
TOTAL	**241**	**100.0**

Table B.32

Who lives in your house?

All survey participants

Reason	Frequency	%
Couple with children	116	30.4
Group/ share household	87	22.8
Couple without children	58	15.2
Lone person household	49	12.9
Other family type	44	11.5
One parent family	27	7.1
TOTAL	**381**	**100.0**

Table B.33

How old are you?

All survey participants

Age	Frequency	%
Under 18	20	5.2
18-24	117	30.7
25-39	133	34.9
40-54	65	17.1
55-64	17	4.5
65-69	13	3.4
70+	16	4.2
TOTAL	**381**	**100.0**

APPENDIX D: CONSULTATION NOTES

FOOTSCRAY RETAIL STUDY
Consultation Notes

17 November 2008

1 FEEDBACK AND DISCUSSION

- Need to consider the issue of police and ensure an active on-street presence.
- Need to review truck movements in the centre as this compromises the amenity and functionality of the streets in the centre and surrounding residential areas.
- Leeds Street and Albert Street have traffic conflicts between site servicing and pedestrian or traffic movements.
- Need to focus on how to get Footscray back to its best - similar to the 1960s and 1970s.
- Need to diversify the centre and look at theatres, cinemas and so forth, as the large resident student population and location of the university provides the opportunity to promote Footscray as a cultural centre - with many students often looking for places to showcase their work.
- Opportunity to improve links between the centre and Footscray's cultural elements with the university.
- Desire to 'value-add' to the suburb by creating quality buildings and design.
- Transit city vision is a bit of a negative image for Footscray as it suggests it is a place for people to 'come through' rather than stay in.
- Many people do not feel safe in Footscray because of visible levels of drug use, the presence of the needle exchange and other social welfare facilities, which create a negative image for the suburb.
- Need to develop a more positive image for Footscray.
- Target used to be in the centre, was replaced by Savers. Want to attract these kinds of businesses back into Footscray.
- Downfall of Footscray is not just because of Highpoint, many other new centres have been developed that include major stores - including Ashley Street.
- Such a high concentration of social welfare facilities in Footscray has meant it is less relevant to the newer, more affluent communities establishing in surrounding suburbs.
- There is no Medicare office in Footscray, which means the centre has very little relevance to local market, as it does not provide basic everyday facilities to the general community.
- The average house price in Footscray is above the median in Melbourne, but all of the big and small shops in Footscray are 'bottom end' of the range.
- Everywhere in Footscray is changing, except for the study area.
- People will not walk across the bridge to Footscray, they would rather jump in their car and drive further to centres that have higher amenity.
- Too scary for people to visit Footscray.
- People who live in Seddon rarely visit Footscray, even though it is their closest major centre.

- Representatives of the Footscray Asian Business Association put forward the following suggestions:
  - main issue is security - time to put in CCTV monitoring as a crime deterrent;
  - police booth needs to be reinstated - was removed from the mall;
  - need to improve lighting across the centre;
  - need to improve quality of footpath environment - for pedestrian safety and street trading perspective;
  - every time Council changes, the plan changes;
  - metered parking is a deterrent to people visiting the centre as they have to pay;
  - very little parking has been created in recent developments - developers should be able to develop car parks on public land to increase supply.
- Need to put in place good Council policy to ensure basic community services establish and are retained in Footscray to reinforce its relevance to the community (including services such as Medicare).
- Free parking will not solve the attractiveness of Footscray as a shopping destination, as people choose where to go on the basis of how pleasant it is to visit and what it offers (such as Williamstown).
- Need to ensure Footscray becomes a place for young people - that is a vibrant and exciting place to be.
- Williamstown put in metered parking and this has not deterred people from visiting - it is attractive and vibrant, which brings people in.
- Footscray looks dull - make it more vibrant and put some colour in.
- Footscray is dead at night, with exception of a few streets.
- 'Ghost town' - Footscray needs a cafe and restaurant culture.
- Need to change the retail mix - so local people can find the things they want and choose to shop there.
- Too many shops going through, the truck curfew seems to be ineffective.
- Very difficult to get into Coles / Kmart due to the layout of the area.
- Major issue with image, which is based on old perceptions of what Footscray is like.
- Mall doesn't work - the design is too modern or industrial - not ready for Footscray.
- Other parts of Melbourne have gentrified to the extent that they have lost their character or what made them unique - such as Gertrude Street and Brunswick Street in Fitzroy.
- Desire to maintain the character of the area while improving the range of shops, quality of buildings and addressing issues of safety and crime.
- Nicholson Street is an example of bad planning: a TAB, pub and liquor store and located beside Centrelink, encouraging anti-social behaviour and activities which reinforce disadvantage.
- Real Estate Agent: Image of drugs and crime needs to be overcome.
- Puckle Street in Moonee Ponds is a terrific example of a lively, attractive street.
- Concern that no major investment in retail, or attraction of new retailers will occur if the issue of crime is not dealt with.
- Surprisingly large number of 20 to 30 year olds are living in Footscray, but concern that they will move away from the area.
- Challenge of converting university students and young professionals into permanent residents needs to be the focus: how do we make Footscray a place they want to stay in.
- Footscray has turned its back on the river historically, but there is a need to directly connect to it as it is a major feature of the area. Study area does not directly address this - concern that it should.

2 PRINCIPLES FOR FUTURE DEVELOPMENT

- Improve lighting and night-time visibility.
- Improve traffic flow around and through the centre.
- Manage site-servicing facilities to minimise the impact on the amenity and safety of the streets (for all other users).
- Improve pedestrian connectivity.
- Improve police presence and security in the centre.
- Beautify the buildings and play on the history of Footscray. For example: Launceston.
- Use setbacks at upper storeys of new buildings to 'show off' heritage facades.
- Enhance the markets - recognising their significance in drawing trade into the centre.
- Diversify retailing to provide for the needs of an increasingly diverse population.
- Strengthen the existing precincts within the centre: including the retail area on Paisley Street, the community precinct, the restaurant precinct and connections from Irving Street to the station.
- Develop design guidelines for facades and shopfronts to create a more safe and attractive street environment (including use and design of roller-shutters and security gates).
- Improve the range of general community services in the centre, which service the needs of the wider community (for example Medicare).
- Upgrade the image of Footscray and create a more positive sense of place.

18 November 2008

Collie Pty Ltd

APPENDIX E: ECONOMIC ANALYSIS

Footscray Retail Study

Collie Pty Ltd

December 2008

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Analysis One: Estimates of Main Trade Area Population, Expenditure and Sales 2006-2031

Table Set A: Forecast Estimated Resident Population in the Main Trade Area 2006 to 2031

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Table Set A: Forecast Estimated Resident Population in the Main Trade Area 2006 to 2031

Table A.1

Population Projections

Source: id Consulting (2006-2016) and VIF projections by SLA for 2021-2031

Main Trade Area Component Area	Estimated Resident Population Number of Persons						
	2006	2008	2011	2016	2021	2026	2031
Footscray	17,180	17,860	18,880	19,900	20,980	21,970	22,840
Maidstone, West Footscray and Brooklyn	19,850	20,060	20,370	21,110	22,260	23,300	24,230
Yarraville	12,830	12,900	13,010	12,990	13,690	14,340	14,910
Maribyrnong	8,470	9,710	11,570	14,580	15,370	16,090	16,730
Braybrook	7,330	7,650	8,120	8,070	8,510	8,910	9,270
Sunshine	6,810	7,030	7,370	8,090	8,530	8,930	9,280
TOTAL: MAIN TRADE AREA	**72,470**	**75,210**	**79,320**	**84,740**	**89,340**	**93,540**	**97,260**

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Analysis One: Estimates of Main Trade Area Population, Expenditure and Sales 2006-2031

Table Set B: Current and Forecast Per Capita Retail Expenditure for the Main Trade Area for 2006 to 2031

Table Set B: Current and Forecast Per Capita Retail Expenditure for the Main Trade Area for 2006 to 2031

Table B.1

Footscray Post Code Area (3011)

Source: Analysis of MarketInfo 2007 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	2011	2016	2021	2026	2031
Food, groceries and liquor						
Supermarket	*3,573*	*3,663*	*3,756*	*3,851*	*3,948*	*4,048*
Other food specialty stores	*1,128*	*1,157*	*1,186*	*1,216*	*1,247*	*1,278*
Subtotal: Food, groceries and packaged liquor	4,701	4,820	4,942	5,067	5,195	5,326
Take away food, cafes and restaurants	2,051	2,103	2,156	2,210	2,266	2,323
Subtotal: Food, groceries and liquor	**6,752**	**6,923**	**7,097**	**7,277**	**7,460**	**7,649**
Other household goods	**2,873**	**3,020**	**3,174**	**3,336**	**3,506**	**3,685**
Bulky goods	**2,191**	**2,419**	**2,671**	**2,949**	**3,256**	**3,595**
TOTAL: RETAIL GOODS	**11,817**	**12,362**	**12,942**	**13,562**	**14,222**	**14,928**

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Table Set B: Current and Forecast Per Capita Retail Expenditure for the Main Trade Area for 2006 to 2031

Table B.2

Maidstone, West Footscray and Booklyn Post Code Area (3012)

Source: Analysis of MarketInfo 2007 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	2011	2016	2021	2026	2031
Food, groceries and liquor						
Supermarket	*3,567*	*3,657*	*3,750*	*3,844*	*3,942*	*4,041*
Other food specialty stores	*1,127*	*1,155*	*1,184*	*1,214*	*1,245*	*1,276*
Subtotal: Food, groceries and packaged liquor	4,694	4,812	4,934	5,059	5,186	5,317
Take away food, cafes and restaurants	1,804	1,850	1,896	1,944	1,993	2,044
Subtotal: Food, groceries and liquor	**6,498**	**6,662**	**6,830**	**7,003**	**7,180**	**7,361**
Other household goods	**2,653**	**2,788**	**2,930**	**3,080**	**3,237**	**3,402**
Bulky goods	**2,055**	**2,269**	**2,505**	**2,766**	**3,054**	**3,372**
TOTAL: RETAIL GOODS	**11,206**	**11,719**	**12,266**	**12,849**	**13,471**	**14,135**

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Table Set B: Current and Forecast Per Capita Retail Expenditure for the Main Trade Area for 2006 to 2031

Table B.3

Yarraville Post Code Area (3013)

Source: Analysis of MarketInfo 2007 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	2011	2016	2021	2026	2031
Food, groceries and liquor						
Supermarket	*3,879*	*3,976*	*4,077*	*4,180*	*4,285*	*4,394*
Other food specialty stores	*1,225*	*1,256*	*1,287*	*1,320*	*1,353*	*1,387*
Subtotal: Food, groceries and packaged liquor	5,103	5,232	5,364	5,500	5,639	5,781
Take away food, cafes and restaurants	2,186	2,242	2,298	2,356	2,416	2,477
Subtotal: Food, groceries and liquor	**7,290**	**7,474**	**7,663**	**7,856**	**8,054**	**8,258**
Other household goods	**3,234**	**3,399**	**3,573**	**3,755**	**3,947**	**4,148**
Bulky goods	**2,537**	**2,801**	**3,093**	**3,415**	**3,770**	**4,163**
TOTAL: RETAIL GOODS	**13,061**	**13,675**	**14,328**	**15,026**	**15,771**	**16,568**

Table Set B: Current and Forecast Per Capita Retail Expenditure for the Main Trade Area for 2006 to 2031

Table B.4

Maribyrnong Post Code Area (3032)

Source: Analysis of MarketInfo 2007 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	2011	2016	2021	2026	2031
Food, groceries and liquor						
Supermarket	*3,771*	*3,866*	*3,964*	*4,064*	*4,167*	*4,272*
Other food specialty stores	*1,191*	*1,221*	*1,252*	*1,283*	*1,316*	*1,349*
Subtotal: Food, groceries and packaged liquor	4,962	5,087	5,216	5,347	5,482	5,621
Take away food, cafes and restaurants	2,289	2,347	2,406	2,467	2,529	2,593
Subtotal: Food, groceries and liquor	**7,251**	**7,434**	**7,622**	**7,814**	**8,012**	**8,214**
Other household goods	**3,312**	**3,481**	**3,658**	**3,845**	**4,041**	**4,247**
Bulky goods	**2,503**	**2,764**	**3,051**	**3,369**	**3,719**	**4,106**
TOTAL: RETAIL GOODS	**13,066**	**13,679**	**14,331**	**15,028**	**15,772**	**16,568**

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Table Set B: Current and Forecast Per Capita Retail Expenditure for the Main Trade Area for 2006 to 2031

Table B.5

Braybrook Post Code Area (3019)

Source: Analysis of MarketInfo 2007 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	2011	2016	2021	2026	2031
Food, groceries and liquor						
Supermarket	*3,125*	*3,204*	*3,285*	*3,367*	*3,453*	*3,540*
Other food specialty stores	*987*	*1,012*	*1,037*	*1,063*	*1,090*	*1,118*
Subtotal: Food, groceries and packaged liquor	4,112	4,215	4,322	4,431	4,543	4,657
Take away food, cafes and restaurants	1,185	1,215	1,245	1,277	1,309	1,342
Subtotal: Food, groceries and liquor	**5,296**	**5,430**	**5,567**	**5,708**	**5,852**	**6,000**
Other household goods	**1,982**	**2,083**	**2,190**	**2,301**	**2,419**	**2,542**
Bulky goods	**1,509**	**1,666**	**1,839**	**2,030**	**2,242**	**2,475**
TOTAL: RETAIL GOODS	**8,787**	**9,179**	**9,596**	**10,039**	**10,512**	**11,017**

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Table Set B: Current and Forecast Per Capita Retail Expenditure for the Main Trade Area for 2006 to 2031

Table B.6

Sunshine Post Code Area (3020)

Source: Analysis of MarketInfo 2007 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	2011	2016	2021	2026	2031
Food, groceries and liquor						
Supermarket	*3,231*	*3,313*	*3,397*	*3,482*	*3,570*	*3,660*
Other food specialty stores	*1,020*	*1,046*	*1,073*	*1,100*	*1,127*	*1,156*
Subtotal: Food, groceries and packaged liquor	4,252	4,359	4,469	4,582	4,698	4,816
Take away food, cafes and restaurants	1,716	1,760	1,804	1,850	1,896	1,944
Subtotal: Food, groceries and liquor	**5,968**	**6,272**	**6,592**	**6,929**	**7,282**	**7,654**
Other household goods	**2,446**	**2,701**	**2,982**	**3,292**	**3,635**	**4,013**
Bulky goods	**1,843**	**1,843**	**1,843**	**1,843**	**1,843**	**1,843**
TOTAL: RETAIL GOODS	**10,257**	**10,816**	**11,417**	**12,064**	**12,760**	**13,509**

Table Set B: Current and Forecast Per Capita Retail Expenditure for the Main Trade Area for 2006 to 2031

Table B.7

Per Annum Growth Rate Assumptions for Per Capita Retail Expenditure
Source: Collie

Major Commodity Group	Per Annum Growth Rates
Food, groceries and liquor	
Supermarkets	0.005
Other food specialty stores	0.005
Food, groceries and packaged liquor - subtotal	0.005
Take away food, cafes and restaurants	0.005
Average: Food, groceries and liquor	0.005
Other household goods	0.010
Bulky goods	0.020

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Analysis One: Estimates of Main Trade Area Population, Expenditure and Sales 2006-2031

Table Set C: Current and Forecast Resident Expenditure for the Main Trade Area for 2006 to 2031

Table Set C: Current and Forecast Resident Expenditure for the Main Trade Area for 2006 to 2031

Table C.1

Footscray Post Code Area (3011)

Table A.1 x Table B.1

Major Commodity Group	Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*61.4*	*62.0*	*62.9*	*64.5*	*66.2*	*67.8*	*69.5*
Other food specialty stores	*19.4*	*19.6*	*19.9*	*20.4*	*20.9*	*21.4*	*22.0*
Subtotal: Food, groceries and packaged liquor	80.8	81.6	82.8	84.9	87.0	89.2	91.5
Take away food, cafes and restaurants	35.2	35.6	36.1	37.0	38.0	38.9	39.9
Subtotal: Food, groceries and liquor	**116.0**	**117.2**	**118.9**	**121.9**	**125.0**	**128.2**	**131.4**
Other household goods	**49.4**	**50.4**	**51.9**	**54.5**	**57.3**	**60.2**	**63.3**
Bulky goods	**37.6**	**39.2**	**41.6**	**45.9**	**50.7**	**55.9**	**61.8**
TOTAL: RETAIL GOODS	**203.0**	**206.8**	**212.4**	**222.4**	**233.0**	**244.4**	**256.5**

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Table Set C: Current and Forecast Resident Expenditure for the Main Trade Area for 2006 to 2031

Table C.2

Maidstone, West Footscray and Brooklyn Post Code Area (3012)

Table A.1 x Table B.2

Major Commodity Group	Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*70.8*	*71.5*	*72.6*	*74.4*	*76.3*	*78.2*	*80.2*
Other food specialty stores	*22.4*	*22.6*	*22.9*	*23.5*	*24.1*	*24.7*	*25.3*
Subtotal: Food, groceries and packaged liquor	93.2	94.1	95.5	97.9	100.4	102.9	105.5
Take away food, cafes and restaurants	35.8	36.2	36.7	37.6	38.6	39.6	40.6
Subtotal: Food, groceries and liquor	**129.0**	**130.3**	**132.2**	**135.6**	**139.0**	**142.5**	**146.1**
Other household goods	**52.7**	**53.7**	**55.3**	**58.2**	**61.1**	**64.3**	**67.5**
Bulky goods	**40.8**	**42.5**	**45.0**	**49.7**	**54.9**	**60.6**	**66.9**
TOTAL: RETAIL GOODS	**222.4**	**226.5**	**232.6**	**243.5**	**255.0**	**267.4**	**280.6**

Table Set C: Current and Forecast Resident Expenditure for the Main Trade Area for 2006 to 2031

Table C.3

Yarraville Post Code Area (3013)

Table A.1 x Table B.3

Major Commodity Group	Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*49.8*	*50.3*	*51.0*	*52.3*	*53.6*	*55.0*	*56.4*
Other food specialty stores	*15.7*	*15.9*	*16.1*	*16.5*	*16.9*	*17.4*	*17.8*
Subtotal: Food, groceries and packaged liquor	65.5	66.1	67.1	68.8	70.6	72.3	74.2
Take away food, cafes and restaurants	28.1	28.3	28.8	29.5	30.2	31.0	31.8
Subtotal: Food, groceries and liquor	**93.5**	**94.5**	**95.9**	**98.3**	**100.8**	**103.3**	**106.0**
Other household goods	**41.5**	**42.3**	**43.6**	**45.8**	**48.2**	**50.6**	**53.2**
Bulky goods	**32.6**	**33.9**	**35.9**	**39.7**	**43.8**	**48.4**	**53.4**
TOTAL: RETAIL GOODS	**167.6**	**170.7**	**175.5**	**183.8**	**192.8**	**202.4**	**212.6**

Table Set C: Current and Forecast Resident Expenditure for the Main Trade Area for 2006 to 2031

Table C.4

Maribyrnong Post Code Area (3032)

Table A.1 x Table B.4

Major Commodity Group	Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*31.9*	*32.3*	*32.7*	*33.6*	*34.4*	*35.3*	*36.2*
Other food specialty stores	*10.1*	*10.2*	*10.3*	*10.6*	*10.9*	*11.1*	*11.4*
Subtotal: Food, groceries and packaged liquor	42.0	42.4	43.1	44.2	45.3	46.4	47.6
Take away food, cafes and restaurants	19.4	19.6	19.9	20.4	20.9	21.4	22.0
Subtotal: Food, groceries and liquor	**61.4**	**62.0**	**63.0**	**64.5**	**66.2**	**67.8**	**69.6**
Other household goods	**28.0**	**28.6**	**29.5**	**31.0**	**32.6**	**34.2**	**36.0**
Bulky goods	**21.2**	**22.1**	**23.4**	**25.8**	**28.5**	**31.5**	**34.8**
TOTAL: RETAIL GOODS	**110.7**	**112.7**	**115.8**	**121.4**	**127.3**	**133.6**	**140.3**

Table Set C: Current and Forecast Resident Expenditure for the Main Trade Area for 2006 to 2031

Table C.5

Braybrook Post Code Area (3019)

Table A.1 x Table B.5

Major Commodity Group	Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*22.9*	*23.1*	*23.5*	*24.1*	*24.7*	*25.3*	*26.0*
Other food specialty stores	*7.2*	*7.3*	*7.4*	*7.6*	*7.8*	*8.0*	*8.2*
Subtotal: Food, groceries and packaged liquor	30.2	30.5	30.9	31.7	32.5	33.3	34.2
Take away food, cafes and restaurants	8.7	8.8	8.9	9.1	9.4	9.6	9.8
Subtotal: Food, groceries and liquor	**38.8**	**39.2**	**39.8**	**40.8**	**41.9**	**42.9**	**44.0**
Other household goods	**14.5**	**14.8**	**15.3**	**16.1**	**16.9**	**17.7**	**18.6**
Bulky goods	**11.1**	**11.5**	**12.2**	**13.5**	**14.9**	**16.4**	**18.2**
TOTAL: RETAIL GOODS	**64.4**	**65.6**	**67.3**	**70.4**	**73.6**	**77.1**	**80.8**

Table Set C: Current and Forecast Resident Expenditure for the Main Trade Area for 2006 to 2031

Table C.6

Sunshine Post Code Area (3020)

Table A.1 x Table B.6

Major Commodity Group	Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*22.0*	*22.2*	*22.6*	*23.1*	*23.7*	*24.3*	*24.9*
Other food specialty stores	*6.9*	*7.0*	*7.1*	*7.3*	*7.5*	*7.7*	*7.9*
Subtotal: Food, groceries and packaged liquor	28.9	29.2	29.7	30.4	31.2	32.0	32.8
Take away food, cafes and restaurants	11.7	11.8	12.0	12.3	12.6	12.9	13.2
Subtotal: Food, groceries and liquor	**40.6**	**41.5**	**42.7**	**44.9**	**47.2**	**49.6**	**52.1**
Other household goods	**16.7**	**17.3**	**18.4**	**20.3**	**22.4**	**24.7**	**27.3**
Bulky goods	**12.5**	**12.5**	**12.5**	**12.5**	**12.5**	**12.5**	**12.5**
TOTAL: RETAIL GOODS	**69.8**	**71.3**	**73.6**	**77.7**	**82.1**	**86.9**	**92.0**

Table Set C: Current and Forecast Resident Expenditure for the Main Trade Area for 2006 to 2031

Table C.7

Total Expenditure by Residents in the Footscray Main Trade Area

Sum of Tables C.1 to C.6.

Major Commodity Group	Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*258.8*	*261.4*	*265.4*	*272.1*	*278.9*	*286.0*	*293.2*
Other food specialty stores	*81.7*	*82.6*	*83.8*	*85.9*	*88.1*	*90.3*	*92.6*
Subtotal: Food, groceries and packaged liquor	340.5	344.0	349.1	358.0	367.0	376.3	385.8
Take away food, cafes and restaurants	138.9	140.3	142.4	146.0	149.6	153.4	157.3
Subtotal: Food, groceries and liquor	**479.4**	**484.7**	**492.6**	**506.1**	**520.0**	**534.4**	**549.1**
Other household goods	**202.8**	**207.3**	**214.0**	**225.9**	**238.5**	**251.8**	**266.0**
Bulky goods	**155.8**	**161.8**	**170.7**	**187.2**	**205.4**	**225.4**	**247.6**
TOTAL: RETAIL GOODS	**838.0**	**853.7**	**877.3**	**919.2**	**963.9**	**1,011.6**	**1,062.7**

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Analysis One: **Estimates of Main Trade Area Population, Expenditure and Sales 2006-2031**

Table Set D: Current Market Share Estimates for the Main Trade Area

Footscray Retail Study

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Table Set D: Current Market Share Estimates for the Main Trade Area

Table D.1

Current Estimated Proportion of Expenditure Bound to Footscray

Source: Sweeney Telephone Surveys 2008

Major Commodity Group	Estimated Market Share by Post Code in the Main Trade Area Percent of Expenditure Bound to Footscray					
	Footscray 3011	Maidstone, West Footscray and Brooklyn 3012	Yarraville 3013	Braybrook 3019	Maribyrnong 3032	Sunshine 3020
Food, groceries and liquor						
Supermarket	*28.1*	*10.8*	*9.6*	*5.0*	*4.2*	*2.0*
Other food specialty stores	*50.6*	*10.8*	*9.6*	*5.0*	*4.2*	*2.0*
Subtotal: Food, groceries and packaged liquor	29.8	10.8	9.6	5.0	4.2	2.0
Take away food, cafes and restaurants	33.3	16.2	15.4	8.0	8.5	5.0
Subtotal: Food, groceries and liquor	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Other household goods	**20.5**	**2.9**	**10.0**	**7.0**	**0.0**	**2.0**
Bulky goods	**11.1**	**7.1**	**7.5**	**5.0**	**1.7**	**2.0**
TOTAL: RETAIL GOODS	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Column	(1)	(2)	(3)	(4)	(5)	(6)

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Analysis One: Estimates of Main Trade Area Population, Expenditure and Sales 2006-2031

Table Set E: Current and Forecast Expenditure Bound to Footscray from the Main Trade Area for 2006 to 2031

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Table Set E: Current and Forecast Expenditure Bound to Footscray from the Main Trade Area for 2006 to 2031

Table E.1

Footscray Post Code Area (3011)

Table C.1 x Table D.1 Column (1)

Major Commodity Group	Retail Expenditure in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*17.2*	*17.4*	*17.7*	*18.1*	*18.6*	*19.0*	*19.5*
Other food specialty stores	*9.8*	*9.9*	*10.1*	*10.3*	*10.6*	*10.8*	*11.1*
Subtotal: Food, groceries and packaged liquor	27.0	27.3	27.7	28.4	29.1	29.9	30.6
Take away food, cafes and restaurants	11.7	11.9	12.0	12.3	12.7	13.0	13.3
Subtotal: Food, groceries and liquor	**38.8**	**39.2**	**39.8**	**40.8**	**41.8**	**42.9**	**43.9**
Other household goods	**10.1**	**10.3**	**10.6**	**11.2**	**11.7**	**12.3**	**13.0**
Bulky goods	**4.2**	**4.4**	**4.6**	**5.1**	**5.6**	**6.2**	**6.9**
TOTAL: RETAIL GOODS	**53.1**	**53.9**	**55.0**	**57.0**	**59.2**	**61.4**	**63.8**

Table Set E: Current and Forecast Expenditure Bound to Footscray from the Main Trade Area for 2006 to 2031

Table E.2

Maidstone, West Footscray and Brooklyn Post Code Area (3012)

Table C.2 x Table D.1 Column (2)

Major Commodity Group	Retail Expenditure in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*7.6*	*7.7*	*7.8*	*8.0*	*8.2*	*8.4*	*8.7*
Other food specialty stores	*2.4*	*2.4*	*2.5*	*2.5*	*2.6*	*2.7*	*2.7*
Subtotal: Food, groceries and packaged liquor	10.1	10.2	10.3	10.6	10.8	11.1	11.4
Take away food, cafes and restaurants	5.8	5.9	6.0	6.1	6.3	6.4	6.6
Subtotal: Food, groceries and liquor	**15.9**	**16.0**	**16.3**	**16.7**	**17.1**	**17.5**	**18.0**
Other household goods	**1.5**	**1.5**	**1.6**	**1.7**	**1.7**	**1.8**	**1.9**
Bulky goods	**2.9**	**3.0**	**3.2**	**3.6**	**3.9**	**4.3**	**4.8**
TOTAL: RETAIL GOODS	**20.3**	**20.6**	**21.1**	**21.9**	**22.8**	**23.7**	**24.7**

Table Set E: Current and Forecast Expenditure Bound to Footscray from the Main Trade Area for 2006 to 2031

Table E.3

Yarraville Post Code Area (3013)

Table C.3 x Table D.1 Column (3)

Major Commodity Group	Retail Expenditure in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*4.8*	*4.8*	*4.9*	*5.0*	*5.1*	*5.3*	*5.4*
Other food specialty stores	*1.5*	*1.5*	*1.5*	*1.6*	*1.6*	*1.7*	*1.7*
Subtotal: Food, groceries and packaged liquor	*1.5*	*1.5*	*1.5*	*1.6*	*1.6*	*1.7*	*1.7*
Take away food, cafes and restaurants	4.3	4.4	4.4	4.5	4.7	4.8	4.9
Subtotal: Food, groceries and liquor	5.8	5.9	6.0	6.1	6.3	6.4	6.6
Other household goods	**4.2**	**4.2**	**4.4**	**4.6**	**4.8**	**5.1**	**5.3**
Bulky goods	**2.4**	**2.5**	**2.7**	**3.0**	**3.3**	**3.6**	**4.0**
TOTAL: RETAIL GOODS	**12.4**	**12.7**	**13.0**	**13.7**	**14.4**	**15.1**	**15.9**

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Table Set E: Current and Forecast Expenditure Bound to Footscray from the Main Trade Area for 2006 to 2031

Table E.4

Maribyrnong Post Code Area (3032)

Table C.4 x Table D.1 Column (4)

Major Commodity Group	Retail Expenditure in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*1.3*	*1.4*	*1.4*	*1.4*	*1.4*	*1.5*	*1.5*
Other food specialty stores	*0.4*	*0.4*	*0.4*	*0.4*	*0.5*	*0.5*	*0.5*
Subtotal: Food, groceries and packaged liquor	*1.8*	*1.8*	*1.8*	*1.9*	*1.9*	*2.0*	*2.0*
Take away food, cafes and restaurants	1.6	1.7	1.7	1.7	1.8	1.8	1.9
Subtotal: Food, groceries and liquor	3.4	3.4	3.5	3.6	3.7	3.8	3.9
Other household goods	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Bulky goods	**0.4**	**0.4**	**0.4**	**0.4**	**0.5**	**0.5**	**0.6**
TOTAL: RETAIL GOODS	**3.8**	**3.8**	**3.9**	**4.0**	**4.2**	**4.3**	**4.4**

Table Set E: Current and Forecast Expenditure Bound to Footscray from the Main Trade Area for 2006 to 2031

Table E.5

Braybrook Post Code Area (3019)

Table C.5 x Table D.1 Column (5)

Major Commodity Group	Retail Expenditure in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*1.1*	*1.2*	*1.2*	*1.2*	*1.2*	*1.3*	*1.3*
Other food specialty stores	*0.4*	*0.4*	*0.4*	*0.4*	*0.4*	*0.4*	*0.4*
Subtotal: Food, groceries and packaged liquor	*1.5*	*1.5*	*1.5*	*1.6*	*1.6*	*1.7*	*1.7*
Take away food, cafes and restaurants	0.7	0.7	0.7	0.7	0.7	0.8	0.8
Subtotal: Food, groceries and liquor	2.2	2.2	2.3	2.3	2.4	2.4	2.5
Other household goods	**1.0**	**1.0**	**1.1**	**1.1**	**1.2**	**1.2**	**1.3**
Bulky goods	**0.6**	**0.6**	**0.6**	**0.7**	**0.7**	**0.8**	**0.9**
TOTAL: RETAIL GOODS	**3.8**	**3.8**	**3.9**	**4.1**	**4.3**	**4.5**	**4.7**

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Table Set E: Current and Forecast Expenditure Bound to Footscray from the Main Trade Area for 2006 to 2031

Table E.6

Sunshine Post Code Area (3020)

Table C.6 x Table D.1 Column (6)

Major Commodity Group	Retail Expenditure in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*0.4*	*0.4*	*0.5*	*0.5*	*0.5*	*0.5*	*0.5*
Other food specialty stores	*0.1*	*0.1*	*0.1*	*0.1*	*0.1*	*0.2*	*0.2*
Subtotal: Food, groceries and packaged liquor	*0.6*	*0.6*	*0.6*	*0.6*	*0.6*	*0.6*	*0.7*
Take away food, cafes and restaurants	0.6	0.6	0.6	0.6	0.6	0.6	0.7
Subtotal: Food, groceries and liquor	1.2	1.2	1.2	1.2	1.3	1.3	1.3
Other household goods	**0.3**	**0.3**	**0.4**	**0.4**	**0.4**	**0.5**	**0.5**
Bulky goods	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**
TOTAL: RETAIL GOODS	**1.7**	**1.8**	**1.8**	**1.9**	**2.0**	**2.0**	**2.1**

Table Set E: Current and Forecast Expenditure Bound to Footscray from the Main Trade Area for 2006 to 2031

Table E.7

Total Expenditure in Footscray Generated from the Main Trade Area

Sum of Tables E.1 to E.6.

Major Commodity Group	Retail Expenditure in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*32.6*	*32.9*	*33.4*	*34.2*	*35.1*	*36.0*	*36.9*
Other food specialty stores	*14.7*	*14.8*	*15.0*	*15.4*	*15.8*	*16.2*	*16.6*
Subtotal: Food, groceries and packaged liquor	*42.5*	*42.9*	*43.5*	*44.6*	*45.8*	*46.9*	*48.1*
Take away food, cafes and restaurants	24.8	25.0	25.4	26.1	26.7	27.4	28.1
Subtotal: Food, groceries and liquor	67.2	67.9	68.9	70.7	72.5	74.3	76.2
Other household goods	**17.1**	**17.5**	**18.0**	**18.9**	**19.9**	**21.0**	**22.1**
Bulky goods	**10.7**	**11.1**	**11.8**	**13.0**	**14.3**	**15.8**	**17.4**
TOTAL: RETAIL GOODS	**95.1**	**96.5**	**98.7**	**102.6**	**106.7**	**111.1**	**115.6**

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Analysis Two: **Estimates of Secondary Trade Regions Population, Expenditure and Sales 2006-2031**

Table Set F: Population Projections for the Footscray Secondary Trade Regions 2001 to 2031

Table Set F: Population Projections for the Footscray Secondary Trade Regions 2001 to 2031

Table F.1

Actual and Projected Estimated Resident Population for Selected Statistical Local Areas

Source: Department of Infrastructure, Victoria in Future Population Projections 2004

Secondary Trade Region (STR) Component Statistical Local Areas	Estimated Resident Population Number of Persons							
	2001 *	2006	2008	2011	2016	2021	2026	2031
Brimbank - Keilor	89,282	92,571	93,425	94,706	95,921	96,283	96,666	97,269
Brimbank - Sunshine	78,965	81,603	81,969	82,517	84,121	85,469	86,696	87,817
Hobsons Bay - Altona	54,410	54,845	55,352	56,114	57,422	58,437	59,390	60,358
Hobsons Bay - Williamstown	28,957	30,082	30,545	31,239	32,282	33,086	33,933	34,793
Hume - Broadmeadows	67,744	64,694	63,844	62,568	60,553	58,467	56,645	55,333
Maribyrnong	61,226	63,595	65,040	67,208	71,255	75,119	78,658	81,783
Melbourne - Inner	6,498	10,011	11,340	13,334	16,027	18,486	21,004	23,292
Melbourne - Remainder	39,663	44,191	45,437	47,308	53,152	64,250	74,153	82,201
Melbourne - Southbank-Docklands	4,512	11,528	14,232	18,289	24,364	26,113	26,919	27,428
Melton - East	16,091	37,753	43,059	51,018	56,088	57,648	56,482	54,466
Moonee Valley - Essendon	67,802	67,868	68,014	68,233	68,848	69,630	70,839	72,040
Moonee Valley - West	42,709	42,300	42,698	43,295	44,369	45,400	46,521	47,691
Moreland - Brunswick	41,366	41,418	41,820	42,422	44,214	46,562	49,030	51,063
Moreland - Coburg	48,087	48,643	49,366	50,451	52,370	54,190	55,841	57,331
Moreland - North	46,928	49,568	51,186	53,613	57,651	61,389	64,778	67,806
Port Phillip - West	32,007	36,239	38,170	41,067	45,920	50,512	54,655	58,288
Wyndham - North	64,847	82,417	87,773	95,806	101,840	109,270	117,864	125,959
Wyndham - South	3,836	15,867	19,600	25,198	34,515	39,088	38,183	34,489
Wyndham - West	18,458	19,946	20,648	21,703	26,581	33,163	40,505	47,760
Yarra - North	44,424	45,650	46,284	47,236	49,182	51,452	53,916	56,042
Yarra - Richmond	24,523	25,638	26,280	27,244	28,982	30,773	32,445	33,856
TOTAL: POPULATION OF SLAs IN STR	**882,335**	**966,423**	**996,082**	**1,040,570**	**1,105,658**	**1,164,788**	**1,215,121**	**1,257,065**
Column	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)

* 2001 Estimated Resident Population - Refer ABS Catalogue Number 3218.0

Table Set F: Population Projections for the Footscray Secondary Trade Regions 2001 to 2031

Table F.2

Projected Rate of Population Growth for Selected Statistical Local Areas

Source: Collie Analysis of Department of Infrastructure, Victoria in Future Population Projections 2004

Secondary Trade Region (STR) Component Statistical Local Areas	Projected Rate of Growth By Five Year Period* % Change					
	2001 - 2006	2006 - 2011	2011 - 2016	2016 - 2021	2021 - 2026	2026 - 2031
Brimbank - Keilor	3.7	2.3	1.3	0.4	0.4	0.6
Brimbank - Sunshine	3.3	1.1	1.9	1.6	1.4	1.3
Hobsons Bay - Altona	0.8	2.3	2.3	1.8	1.6	1.6
Hobsons Bay - Williamstown	3.9	3.8	3.3	2.5	2.6	2.5
Hume - Broadmeadows	-4.5	-3.3	-3.2	-3.4	-3.1	-2.3
Maribyrnong	3.9	5.7	6.0	5.4	4.7	4.0
Melbourne - Inner	54.1	33.2	20.2	15.3	13.6	10.9
Melbourne - Remainder	11.4	7.1	12.4	20.9	15.4	10.9
Melbourne - Southbank-Docklands	155.5	58.7	33.2	7.2	3.1	1.9
Melton - East	134.6	35.1	9.9	2.8	-2.0	-3.6
Moonee Valley - Essendon	0.1	0.5	0.9	1.1	1.7	1.7
Moonee Valley - West	-1.0	2.4	2.5	2.3	2.5	2.5
Moreland - Brunswick	0.1	2.4	4.2	5.3	5.3	4.1
Moreland - Coburg	1.2	3.7	3.8	3.5	3.0	2.7
Moreland - North	5.6	8.2	7.5	6.5	5.5	4.7
Port Phillip - West	13.2	13.3	11.8	10.0	8.2	6.6
Wyndham - North	27.1	16.2	6.3	7.3	7.9	6.9
Wyndham - South	313.6	58.8	37.0	13.2	-2.3	-9.7
Wyndham - West	8.1	8.8	22.5	24.8	22.1	17.9
Yarra - North	2.8	3.5	4.1	4.6	4.8	3.9
Yarra - Richmond	4.5	6.3	6.4	6.2	5.4	4.3
OVERALL GROWTH RATE OF SLAs IN STR	**9.5**	**7.7**	**6.3**	**5.3**	**4.3**	**3.5**
Column	(1)	(2)	(3)	(4)	(5)	(6)

* Rate of change calculated by: Column (1) = (Table F.1 Column (2) - Table F.1 Column (1)) / Table F.1 Column (1)

Table Set F: Population Projections for the Footscray Secondary Trade Regions 2001 to 2031

Table F.3

Actual and Updated Population Projections for Selected Statistical Local Areas

Source: Collie Analysis of Department of Infrastructure, Victoria in Future Population Projections 2004
Table F.1 x Table F.2

Secondary Trade Region	Component Statistical Local Area by Secondary Trade Region	Proportion of SLA in STR (%) *	Estimated Resident Population Number of Persons							
			Actual ^	Forecast **						
			2001	2006	2008	2011	2016	2021	2026	2031
Inner East	Melbourne - Inner	1.82	11,825	18,220	20,640	24,270	29,170	33,640	38,220	42,380
	Melbourne - Remainder	0.85	33,568	37,400	38,460	40,040	44,990	54,380	62,760	69,570
	Melbourne - Southbank-Docklands	2.62	5,168	13,200	16,300	20,940	27,900	29,900	30,820	31,400
	Moonee Valley - Essendon	0.10	6,891	6,900	6,920	6,940	7,000	7,080	7,200	7,320
	Moreland - Brunswick	0.23	9,447	9,460	9,550	9,690	10,100	10,640	11,200	11,660
	Port Phillip - West	0.45	14,491	16,410	17,290	18,600	20,800	22,880	24,760	26,410
	Yarra - North	0.53	23,755	24,410	24,750	25,260	26,300	27,510	28,830	29,970
	Yarra - Richmond	0.79	19,405	20,290	20,800	21,560	22,940	24,360	25,680	26,800
Subtotal: Inner East		**n.c.m**	**124,550**	**146,290**	**154,690**	**167,300**	**189,200**	**210,390**	**229,470**	**245,510**
North	Brimbank - Keilor	0.01	796	830	840	850	860	860	860	870
	Hume - Broadmeadows	0.30	19,992	19,090	18,840	18,460	17,870	17,250	16,710	16,320
	Maribyrnong	0.02	1,451	1,510	1,550	1,600	1,700	1,790	1,870	1,940
	Moonee Valley - Essendon	0.59	40,334	40,370	40,460	40,590	40,960	41,430	42,150	42,860
	Moonee Valley - West	0.67	28,808	28,530	28,800	29,200	29,920	30,620	31,380	32,170
	Moreland - Brunswick	0.15	6,285	6,290	6,350	6,440	6,710	7,070	7,440	7,750
	Moreland - Coburg	0.19	9,021	9,130	9,270	9,470	9,830	10,170	10,480	10,760
	Moreland - North	0.53	24,753	26,150	27,000	28,280	30,410	32,380	34,170	35,770
Subtotal: North		**n.c.m**	**131,440**	**131,900**	**133,100**	**134,890**	**138,260**	**141,570**	**145,060**	**148,440**
North West	Brimbank - Keilor	0.82	72,916	75,600	76,300	77,340	78,330	78,630	78,940	79,430
	Brimbank - Sunshine	0.75	59,149	61,130	61,400	61,810	63,010	64,020	64,940	65,780
	Melton - East	0.28	4,492	10,540	12,020	14,240	15,650	16,090	15,760	15,200
	Moonee Valley - West	0.21	8,852	8,770	8,850	8,980	9,200	9,410	9,640	9,880
Subtotal: North West		**n.c.m**	**145,409**	**156,040**	**158,570**	**162,370**	**166,190**	**168,150**	**169,280**	**170,290**
South West	Hobsons Bay - Altona	0.91	49,771	50,170	50,630	51,330	52,530	53,460	54,330	55,220
	Hobsons Bay - Williamstown	0.78	22,548	23,420	23,780	24,320	25,130	25,760	26,420	27,090
	Wyndham - North	0.91	58,800	74,730	79,590	86,870	92,340	99,080	106,870	114,210
	Wyndham - South	0.51	1,951	8,070	9,970	12,820	17,560	19,890	19,430	17,550
	Wyndham - West	0.08	1,455	1,570	1,630	1,710	2,090	2,610	3,190	3,760
Subtotal: South West		**n.c.m**	**134,525**	**157,960**	**165,600**	**177,050**	**189,650**	**200,800**	**210,240**	**217,830**
TOTAL: POPULATION OF STRs		**n.c.m**	**535,924**	**592,190**	**611,960**	**641,610**	**683,300**	**720,910**	**754,050**	**782,070**
	Column	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)

* Calculated from the Census Enumerated Resident Population of Census Collection Districts within each Secondary Trade Region divided by the Estimated Resident Population. Where the proportion of the SLA in the STR is greater than 1, this represents population growth at the time of the Census being greater than the preliminary ABS estimate of ERP.

^ Count of persons resident on Census Night (Enumerated Resident Population) for Census Collection Districts within each Secondary Trade Region.

** Recalibrated Victoria in Future Population Projections, applying the growth rates of Table F.2 to the 2001 Enumerated Resident Population (refer Column 2).

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Table Set F: Population Projections for the Footscray Secondary Trade Regions 2001 to 2031

Table F.4

Summary Updated Population Projections

Sum of Table F.3

Secondary Trade Region	Estimated Resident Population Number of Persons							
	Actual ^	Forecast *						
	2001	2006	2008	2011	2016	2021	2026	2031
Inner East	124,550	146,290	154,690	167,300	189,200	210,390	229,470	245,510
North	131,440	131,900	133,100	134,890	138,260	141,570	145,060	148,440
North West	145,409	156,040	158,570	162,370	166,190	168,150	169,280	170,290
South West	134,525	157,960	165,600	177,050	189,650	200,800	210,240	217,830
TOTAL: POPULATION OF STRs	**535,924**	**592,190**	**611,960**	**641,610**	**683,300**	**720,910**	**754,050**	**782,070**
Column	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)

^ Count of persons resident on Census Night (Enumerated Resident Population) for Census Collection Districts within each Secondary Trade Region.

* Recalibrated Victoria in Future Population Projections, applying the growth rates of Table F.2 to the 2001 Enumerated Resident Population (refer Column 1).

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Analysis Two: **Estimates of Secondary Trade Regions Population, Expenditure and Sales 2006-2031**

Table Set G: Current and Forecast Per Capita Expenditure for the Secondary Trade Regions for 2006 to 2031

Table Set G: Current and Forecast Per Capita Expenditure for the Secondary Trade Regions for 2006 to 2031

Table G.1
Profiles by Region for 2004
Source: MarketInfo 2004. Analysis by Collie

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2003 / 04 Prices				
	Melbourne *	Inner East	North	North West	South West
Food, groceries and liquor					
Supermarkets ^	*3,292*	*4,294*	*3,655*	*3,058*	*3,424*
Other food specialty stores	*1,040*	*1,356*	*1,154*	*966*	*1,081*
Subtotal: Food, groceries and packaged liquor ^^	4,331	5,042	4,291	3,591	4,021
Take away food, cafes and restaurants ^^	1,785	2,078	1,769	1,480	1,657
Subtotal: Food, groceries and liquor	**6,117**	**7,121**	**6,060**	**5,071**	**5,678**
Other household goods	**2,838**	**3,385**	**2,798**	**2,224**	**2,542**
Bulky goods	**1,832**	**2,139**	**1,771**	**1,434**	**1,672**
TOTAL: RETAIL GOODS	**10,787**	**12,644**	**10,629**	**8,729**	**9,892**

* Average across the Melbourne Statistical Division at 2003 / 04 Prices.

^ Assumes 76 percent of total expenditure on Food, groceries and packaged liquor occurs at supermarkets.

^^ Assumes the same proportion of expenditure on these items as per the 2006 / 07 MarketInfo 75 Category Personal Expenditure Profiles for the Melbourne Statistical Division.

Table Set G: Current and Forecast Per Capita Expenditure for the Secondary Trade Regions for 2006 to 2031

Table G.2
Calibration Ratios to Update Profiles from 2003 to 2006 Prices
Source: Collie Analysis

Major Commodity Group	Calibration Factor Proportion of Melbourne Statistical Division Average Expenditure Profile			
	Inner East	North	North West	South West
Food, groceries and liquor	1.1641	0.9907	0.8290	0.9283
Other household goods	1.1927	0.9856	0.7836	0.8957
Bulky goods	1.1671	0.9666	0.7826	0.9123
TOTAL: RETAIL GOODS	1.1721	0.9853	0.8092	0.9170

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Table Set G: Current and Forecast Per Capita Expenditure for the Secondary Trade Regions for 2006 to 2031

Table G.3

Profiles by Region for 2006

Source: Department of Infrastructure, Victoria in Future Population Projections 2004

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices				
	Melbourne *	Inner East	North	North West	South West
Food, groceries and liquor					
*Supermarkets***	*3,689*	*4,294*	*3,655*	*3,058*	*3,424*
Other food specialty stores	*1,165*	*1,356*	*1,154*	*966*	*1,081*
Subtotal: Food, groceries and packaged liquor ^	4,854	5,650	4,809	4,024	4,506
Take away food, cafes and restaurants ^^	2,000	2,329	1,982	1,658	1,857
Subtotal: Food, groceries and liquor	**6,854**	**7,979**	**6,791**	**5,682**	**6,363**
Other household goods	**3,089**	**3,684**	**3,045**	**2,421**	**2,767**
Bulky goods	**2,341**	**2,732**	**2,263**	**1,832**	**2,136**
TOTAL: RETAIL GOODS	**12,284**	**14,395**	**12,098**	**9,935**	**11,265**
Column	(1)	(2)	(3)	(4)	(5)

* Average across the Melbourne Statistical Division at 2006/07 Prices.

^ Assuming Melbourne Statistical Division Average Personal Expenditure Levels on Food, Groceries and Liquor (aggregated from MarketInfo 75 Category Expenditure Profiles).

^^ Assuming Melbourne Statistical Division Average Personal Expenditure Levels on Take Away Food, Cafes and Restaurants (aggregated from MarketInfo 75 Category Expenditure Profiles).

** Assuming 76 percent of Food, Groceries and Packaged Liquor expenditure occurs in Supermarkets.

Table Set G: Current and Forecast Per Capita Expenditure for the Secondary Trade Regions for 2006 to 2031

Table G.4

Inner East Trade Region

Source: Analysis of MarketInfo 2004 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	2011	2016	2021	2026	2031
Food, groceries and liquor						
Supermarket	4,294	4,403	4,514	4,628	4,745	4,864
Other food specialty stores	1,356	1,390	1,425	1,461	1,498	1,536
Subtotal: Food, groceries and packaged liquor	5,650	5,793	5,939	6,089	6,243	6,401
Take away food, cafes and restaurants	2,329	2,387	2,448	2,510	2,573	2,638
Subtotal: Food, groceries and liquor	7,979	8,180	8,387	8,599	8,816	9,039
Other household goods	3,684	3,872	4,070	4,277	4,495	4,725
Bulky goods	2,732	3,017	3,331	3,677	4,060	4,483
TOTAL: RETAIL GOODS	**14,395**	**15,069**	**15,787**	**16,553**	**17,371**	**18,246**

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Table Set G: Current and Forecast Per Capita Expenditure for the Secondary Trade Regions for 2006 to 2031

Table G.5

North Trade Region

Source: Analysis of MarketInfo 2004 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	2011	2016	2021	2026	2031
Food, groceries and liquor	2006	2011	2016	2021	2026	2031
Supermarket	3,655	3,747	3,842	3,939	4,038	4,140
Other food specialty stores	1,154	1,183	1,213	1,244	1,275	1,307
Subtotal: Food, groceries and packaged liquor	4,809	4,930	5,055	5,182	5,313	5,447
Take away food, cafes and restaurants	1,982	2,032	2,083	2,136	2,190	2,245
Subtotal: Food, groceries and liquor	6,791	6,962	7,138	7,318	7,503	7,692
Other household goods	3,045	3,200	3,363	3,535	3,715	3,905
Bulky goods	2,263	2,499	2,759	3,046	3,363	3,713
TOTAL: RETAIL GOODS	**12,098**	**12,661**	**13,260**	**13,899**	**14,581**	**15,310**

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Table Set G: Current and Forecast Per Capita Expenditure for the Secondary Trade Regions for 2006 to 2031

Table G.6

North West Trade Region

Source: Analysis of MarketInfo 2004 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	**2011**	**2016**	**2021**	**2026**	**2031**
Food, groceries and liquor	2006	2011	2016	2021	2026	2031
Supermarket	3,058	3,135	3,214	3,296	3,379	3,464
Other food specialty stores	966	990	1,015	1,041	1,067	1,094
Subtotal: Food, groceries and packaged liquor	4,024	4,125	4,229	4,336	4,446	4,558
Take away food, cafes and restaurants	1,658	1,700	1,743	1,787	1,832	1,879
Subtotal: Food, groceries and liquor	5,682	5,825	5,973	6,123	6,278	6,436
Other household goods	2,421	2,544	2,674	2,810	2,954	3,104
Bulky goods	1,832	2,023	2,234	2,466	2,723	3,006
TOTAL: RETAIL GOODS	**9,935**	**10,393**	**10,880**	**11,400**	**11,954**	**12,547**

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Table Set G: Current and Forecast Per Capita Expenditure for the Secondary Trade Regions for 2006 to 2031

Table G.7

South West Trade Region

Source: Analysis of MarketInfo 2004 by Collie.

Major Commodity Group	Per Capita Retail Expenditure by Commodity Group $ Per Person Per Annum at 2006 / 07 Prices					
	2006	2011	2016	2021	2026	2031
Food, groceries and liquor	2006	2011	2016	2021	2026	2031
Supermarket	3,424	3,511	3,599	3,690	3,784	3,879
Other food specialty stores	1,081	1,109	1,137	1,165	1,195	1,225
Subtotal: Food, groceries and packaged liquor	4,506	4,619	4,736	4,856	4,978	5,104
Take away food, cafes and restaurants	1,857	1,904	1,952	2,001	2,052	2,104
Subtotal: Food, groceries and liquor	6,363	6,523	6,688	6,857	7,030	7,208
Other household goods	2,767	2,908	3,056	3,212	3,376	3,548
Bulky goods	2,136	2,358	2,603	2,874	3,174	3,504
TOTAL: RETAIL GOODS	**11,265**	**11,789**	**12,348**	**12,944**	**13,580**	**14,260**

Table Set G: Current and Forecast Per Capita Expenditure for the Secondary Trade Regions for 2006 to 2031

Table G.8

Per Annum Growth Rate Assumptions

Source: Collie

Major Commodity Group	Per Annum Growth Rates
Food, groceries and liquor	
Supermarkets	0.005
Other food specialty stores	0.005
Average: Food, groceries and packaged liquor	0.005
Take away food, cafes and restaurants	0.005
Average: Food, groceries and liquor	**0.005**
Other household goods	**0.010**
Bulky goods	**0.020**

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Analysis Two: Estimates of Secondary Trade Regions Population, Expenditure and Sales 2006-2031

Table Set H: Current and Forecast Catchment Expenditure for the Secondary Trade Regions for 2006 to 2031

Table Set H: Current and Forecast Catchment Expenditure for the Secondary Trade Regions for 2006 to 2031

Table H.1

Inner East Trade Region

Source: Collie Analysis

Table F.4 x Table G.3 Column (2)

Major Commodity Group	Total Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*534.8*	*540.0*	*548.4*	*562.2*	*576.4*	*590.9*	*605.9*
Other food specialty stores	*168.9*	*170.0*	*173.2*	*177.5*	*182.0*	*186.6*	*191.3*
Subtotal: Food, groceries and packaged liquor	703.7	710.0	721.5	739.7	758.4	777.6	797.2
Take away food, cafes and restaurants	290.0	290.0	297.4	304.9	312.6	320.5	328.6
Subtotal: Food, groceries and liquor	**993.8**	**1,000.0**	**1,018.9**	**1,044.6**	**1,071.0**	**1,098.0**	**1,125.8**
Other household goods	**458.9**	**470.0**	**482.3**	**506.9**	**532.7**	**559.9**	**588.5**
Bulky goods	**340.3**	**350.0**	**375.7**	**414.8**	**458.0**	**505.7**	**558.3**
TOTAL: RETAIL GOODS	**1,793.0**	**1,830.0**	**1,876.9**	**1,966.3**	**2,061.7**	**2,163.6**	**2,272.5**

Table Set H: Current and Forecast Catchment Expenditure for the Secondary Trade Regions for 2006 to 2031

Table H.2

North Trade Region

Source: Collie Analysis

Table F.4 x Table G.3 Column (3)

Major Commodity Group	Total Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	**2008**	**2011**	**2016**	**2021**	**2026**	**2031**
Food, groceries and liquor							
Supermarket	*480.4*	*490.0*	*492.5*	*504.9*	*517.7*	*530.8*	*544.2*
Other food specialty stores	*151.7*	*150.0*	*155.5*	*159.5*	*163.5*	*167.6*	*171.8*
Subtotal: Food, groceries and packaged liquor	632.1	640.0	648.0	664.4	681.2	698.4	716.0
Take away food, cafes and restaurants	260.5	260.0	267.1	273.8	280.7	287.8	295.1
Subtotal: Food, groceries and liquor	**892.6**	**900.0**	**915.1**	**938.2**	**961.9**	**986.2**	**1,011.1**
Other household goods	**400.2**	**410.0**	**420.6**	**442.1**	**464.6**	**488.3**	**513.2**
Bulky goods	**297.5**	**310.0**	**328.4**	**362.6**	**400.3**	**442.0**	**488.0**
TOTAL: RETAIL GOODS	**1,590.2**	**1,620.0**	**1,664.1**	**1,742.8**	**1,826.8**	**1,916.5**	**2,012.3**

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Table Set H: Current and Forecast Catchment Expenditure for the Secondary Trade Regions for 2006 to 2031

Table H.3

North West Trade Region

Source: Collie Analysis

Table F.4 x Table G.3 Column (4)

Major Commodity Group	Total Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*444.7*	*450.0*	*455.9*	*467.4*	*479.2*	*491.3*	*503.7*
Other food specialty stores	*140.4*	*140.0*	*144.0*	*147.6*	*151.3*	*155.1*	*159.1*
Subtotal: Food, groceries and packaged liquor	585.1	590.0	599.8	615.0	630.5	646.4	662.8
Take away food, cafes and restaurants	241.1	240.0	247.2	253.5	259.9	266.4	273.2
Subtotal: Food, groceries and liquor	**826.2**	**830.0**	**847.1**	**868.5**	**890.4**	**912.9**	**935.9**
Other household goods	**352.0**	**360.0**	**369.9**	**388.8**	**408.7**	**429.5**	**451.4**
Bulky goods	**266.4**	**280.0**	**294.2**	**324.8**	**358.6**	**395.9**	**437.1**
TOTAL: RETAIL GOODS	**1,444.6**	**1,470.0**	**1,511.2**	**1,582.0**	**1,657.6**	**1,738.3**	**1,824.4**

Table Set H: Current and Forecast Catchment Expenditure for the Secondary Trade Regions for 2006 to 2031

Table H.4

South West Trade Region

Source: Collie Analysis

Table F.4 x Table G.3 Column (5)

Major Commodity Group	Total Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*460.7*	*470.0*	*472.3*	*484.2*	*496.4*	*509.0*	*521.8*
Other food specialty stores	*145.5*	*150.0*	*149.1*	*152.9*	*156.8*	*160.7*	*164.8*
Subtotal: Food, groceries and packaged liquor	606.1	610.0	621.4	637.1	653.2	669.7	686.6
Take away food, cafes and restaurants	249.8	250.0	256.1	262.6	269.2	276.0	283.0
Subtotal: Food, groceries and liquor	**855.9**	**860.0**	**877.6**	**899.7**	**922.4**	**945.7**	**969.6**
Other household goods	**372.2**	**380.0**	**391.2**	**411.2**	**432.1**	**454.2**	**477.3**
Bulky goods	**287.3**	**300.0**	**317.2**	**350.2**	**386.7**	**426.9**	**471.4**
TOTAL: RETAIL GOODS	**1,515.5**	**1,540.0**	**1,586.0**	**1,661.1**	**1,741.2**	**1,826.8**	**1,918.3**

Table Set H: Current and Forecast Catchment Expenditure for the Secondary Trade Regions for 2006 to 2031

Table H.5

Total Expenditure Generated in the Secondary Trade Regions

Source: Collie Analysis

Sum of Tables H.1 to H.4

Major Commodity Group	Total Retail Expenditure of Residents by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*1,920.5*	*1,940.0*	*1,969.0*	*2,018.7*	*2,069.7*	*2,122.0*	*2,175.6*
Other food specialty stores	*606.5*	*610.0*	*621.8*	*637.5*	*653.6*	*670.1*	*687.0*
Subtotal: Food, groceries and packaged liquor	2,527.0	2,550.0	2,590.8	2,656.2	2,723.3	2,792.1	2,862.6
Take away food, cafes and restaurants	1,041.5	1,050.0	1,067.8	1,094.7	1,122.4	1,150.7	1,179.8
Subtotal: Food, groceries and liquor	**3,568.5**	**3,600.0**	**3,658.6**	**3,751.0**	**3,845.7**	**3,942.8**	**4,042.4**
Other household goods	**1,583.3**	**1,620.0**	**1,664.0**	**1,748.9**	**1,838.1**	**1,931.9**	**2,030.4**
Bulky goods	**1,191.5**	**1,240.0**	**1,315.5**	**1,452.4**	**1,603.6**	**1,770.5**	**1,954.8**
TOTAL: RETAIL GOODS	**6,343.2**	**6,460.0**	**6,638.1**	**6,952.3**	**7,287.4**	**7,645.2**	**8,027.6**

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Analysis Two: Estimates of Secondary Trade Regions Population, Expenditure and Sales 2006-2031

Table Set I: NO TABLE SET

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Analysis Two: Estimates of Secondary Trade Regions Population, Expenditure and Sales 2006-2031

Table Set J: Current Market Share Estimates for the Footscray Secondary Trade Regions

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Table Set J: Current Market Share Estimates for the Footscray Secondary Trade Regions

Table J.1

Current Estimated Proportion of Expenditure Bound to Footscray

Source: Collie Analysis of In-Home Surveys

Major Commodity Group	Estimated Market Share by Secondary Trade Region % of Expenditure Bound to Footscray			
	Inner East	North	North West	South West
Food, groceries and liquor				
Supermarket	0.5	0.5	0.5	0.5
Other food specialty stores	3.0	3.0	3.0	3.0
Subtotal: Food, groceries and packaged liquor	1.1	1.1	1.1	1.1
Take away food, cafes and restaurants	3.0	3.0	3.0	3.0
Subtotal: Food, groceries and liquor	**N/A**	**N/A**	**N/A**	**N/A**
Other household goods	**2.0**	**2.0**	**2.0**	**2.0**
Bulky goods	**1.0**	**1.0**	**1.0**	**1.0**
TOTAL: RETAIL GOODS	**N/A**	**N/A**	**N/A**	**N/A**
Column	(1)	(2)	(3)	(4)

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Analysis Two: **Estimates of Secondary Trade Regions Population, Expenditure and Sales 2006-2031**

Table Set K: Current and Forecast Expenditure Bound to Footscray from the Secondary Trade Regions for 2006 to 2031

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Table Set K: Current and Forecast Expenditure Bound to Footscray from the Secondary Trade Regions for 2006 to 2031

Table K.1

Inner East Trade Region

Table H.1 x Table J.1 Column (1)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*2.7*	*2.7*	*2.7*	*2.8*	*2.9*	*3.0*	*3.0*
Other food specialty stores	*5.1*	*5.1*	*5.2*	*5.3*	*5.5*	*5.6*	*5.7*
Subtotal: Food, groceries and packaged liquor	7.7	7.8	7.9	8.1	8.3	8.6	8.8
Take away food, cafes and restaurants	8.7	8.8	8.9	9.1	9.4	9.6	9.9
Subtotal: Food, groceries and liquor	**16.4**	**16.6**	**16.9**	**17.3**	**17.7**	**18.2**	**18.6**
Other household goods	**9.2**	**9.4**	**9.6**	**10.1**	**10.7**	**11.2**	**11.8**
Bulky goods	**3.4**	**3.5**	**3.8**	**4.1**	**4.6**	**5.1**	**5.6**
TOTAL: RETAIL GOODS	**29.0**	**29.5**	**30.3**	**31.6**	**33.0**	**34.4**	**36.0**

Table Set K: Current and Forecast Expenditure Bound to Footscray from the Secondary Trade Regions for 2006 to 2031

Table K.2

North Trade Region

Table H.2 x Table J.1 Column (2)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*2.4*	*2.4*	*2.5*	*2.5*	*2.6*	*2.7*	*2.7*
Other food specialty stores	*4.6*	*4.6*	*4.7*	*4.8*	*4.9*	*5.0*	*5.2*
Subtotal: Food, groceries and packaged liquor	7.0	7.0	7.1	7.3	7.5	7.7	7.9
Take away food, cafes and restaurants	7.8	7.9	8.0	8.2	8.4	8.6	8.9
Subtotal: Food, groceries and liquor	**14.8**	**14.9**	**15.1**	**15.5**	**15.9**	**16.3**	**16.7**
Other household goods	**8.0**	**8.2**	**8.4**	**8.8**	**9.3**	**9.8**	**10.3**
Bulky goods	**3.0**	**3.1**	**3.3**	**3.6**	**4.0**	**4.4**	**4.9**
TOTAL: RETAIL GOODS	**25.7**	**26.2**	**26.8**	**28.0**	**29.2**	**30.5**	**31.9**

Table Set K: Current and Forecast Expenditure Bound to Footscray from the Secondary Trade Regions for 2006 to 2031

Table K.3

North West Trade Region

Table H.3 x Table J.1 Column (3)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*2.2*	*2.2*	*2.3*	*2.3*	*2.4*	*2.5*	*2.5*
Other food specialty stores	*4.2*	*4.3*	*4.3*	*4.4*	*4.5*	*4.7*	*4.8*
Subtotal: Food, groceries and packaged liquor	6.4	6.5	6.6	6.8	6.9	7.1	7.3
Take away food, cafes and restaurants	7.2	7.3	7.4	7.6	7.8	8.0	8.2
Subtotal: Food, groceries and liquor	**13.7**	**13.8**	**14.0**	**14.4**	**14.7**	**15.1**	**15.5**
Other household goods	**7.0**	**7.2**	**7.4**	**7.8**	**8.2**	**8.6**	**9.0**
Bulky goods	**2.7**	**2.8**	**2.9**	**3.2**	**3.6**	**4.0**	**4.4**
TOTAL: RETAIL GOODS	**23.4**	**23.8**	**24.4**	**25.4**	**26.5**	**27.7**	**28.9**

Table Set K: Current and Forecast Expenditure Bound to Footscray from the Secondary Trade Regions for 2006 to 2031

Table K.4

South West Trade Region

Table H.4 x Table J.1 Column (4)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*2.3*	*2.3*	*2.4*	*2.4*	*2.5*	*2.5*	*2.6*
Other food specialty stores	*4.4*	*4.4*	*4.5*	*4.6*	*4.7*	*4.8*	*4.9*
Subtotal: Food, groceries and packaged liquor	6.7	6.7	6.8	7.0	7.2	7.4	7.6
Take away food, cafes and restaurants	7.5	7.6	7.7	7.9	8.1	8.3	8.5
Subtotal: Food, groceries and liquor	**14.2**	**14.3**	**14.5**	**14.9**	**15.3**	**15.6**	**16.0**
Other household goods	**7.4**	**7.6**	**7.8**	**8.2**	**8.6**	**9.1**	**9.5**
Bulky goods	**2.9**	**3.0**	**3.2**	**3.5**	**3.9**	**4.3**	**4.7**
TOTAL: RETAIL GOODS	**24.5**	**24.9**	**25.5**	**26.6**	**27.8**	**29.0**	**30.3**

Table Set K: Current and Forecast Expenditure Bound to Footscray from the Secondary Trade Regions for 2006 to 2031

Table K.5

Total Expenditure in Footscray Generated from the Secondary Trade Regions

Sum of Table K.1 to K.4

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	**2008**	**2011**	**2016**	**2021**	**2026**	**2031**
Food, groceries and liquor							
Supermarket	*9.6*	*9.7*	*9.8*	*10.1*	*10.3*	*10.6*	*10.9*
Other food specialty stores	*18.2*	*18.4*	*18.7*	*19.1*	*19.6*	*20.1*	*20.6*
Subtotal: Food, groceries and packaged liquor	27.8	28.1	28.5	29.2	30.0	30.7	31.5
Take away food, cafes and restaurants	31.2	31.6	32.0	32.8	33.7	34.5	35.4
Subtotal: Food, groceries and liquor	**59.0**	**59.6**	**60.5**	**62.1**	**63.6**	**65.2**	**66.9**
Other household goods	**31.7**	**32.3**	**33.3**	**35.0**	**36.8**	**38.6**	**40.6**
Bulky goods	**11.9**	**12.4**	**13.2**	**14.5**	**16.0**	**17.7**	**19.5**
TOTAL: RETAIL GOODS	**102.6**	**104.4**	**107.0**	**111.6**	**116.4**	**121.6**	**127.0**

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Analysis Three: **Assessment of Current and Future Performance based on Current Trading Patterns 2006-2031**

Table Set L: Current and Forecast Sales in Footscray for 2006 to 2031

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Table Set L: Current and Forecast Sales in Footscray for 2006 to 2031

Table L.1

Sales in Footscray from the Main Trade Area and Secondary Trade Regions

Table E.7 + Table K.7

Major Commodity Group	Total Estimated Retail Sales in Footscray by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*42.2*	*42.6*	*43.2*	*44.3*	*45.5*	*46.6*	*47.8*
Other food specialty stores	*32.9*	*33.2*	*33.7*	*34.5*	*35.4*	*36.3*	*37.2*
Subtotal: Food, groceries and packaged liquor	70.3	71.0	72.0	73.9	75.7	77.6	79.6
Take away food, cafes and restaurants	56.0	56.6	57.4	58.9	60.4	61.9	63.5
Subtotal: Food, groceries and liquor	**126.3**	**127.6**	**129.5**	**132.7**	**136.1**	**139.5**	**143.1**
Other household goods	**48.8**	**49.8**	**51.3**	**53.9**	**56.7**	**59.6**	**62.7**
Bulky goods	**22.6**	**23.5**	**24.9**	**27.5**	**30.4**	**33.5**	**36.9**
TOTAL: RETAIL GOODS	**197.7**	**200.9**	**205.7**	**214.2**	**223.1**	**232.6**	**242.7**

Table Set L: Current and Forecast Sales in Footscray for 2006 to 2031

Table L.2
Estimated Proportion of Trade from beyond the Main Trade Area and Secondary Trade Regions
Source: Collie Analysis

Major Commodity Group	Estimated Proportion of Retail Sales in Footscray from Beyond the Catchment by Commodity Group Percentage (%) of Trade in Footscray						
	2006	**2008**	**2011**	**2016**	**2021**	**2026**	**2031**
Food, groceries and liquor							
Supermarket	*0.5*	*0.5*	*0.5*	*0.5*	*0.5*	*0.5*	*0.5*
Other food specialty stores	*2.0*	*2.0*	*2.0*	*2.0*	*2.0*	*2.0*	*2.0*
Subtotal: Food, groceries and packaged liquor	n.c.m	n.c.m	n.c.m	n.c.m	n.c.m	n.c.m	n.c.m
Take away food, cafes and restaurants	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Subtotal: Food, groceries and liquor	**n.c.m**	**n.c.m**	**n.c.m**	**n.c.m**	**n.c.m**	**n.c.m**	**n.c.m**
Other household goods	**1.0**	**1.0**	**1.0**	**1.0**	**1.0**	**1.0**	**1.0**
Bulky goods	**1.0**	**1.0**	**1.0**	**1.0**	**1.0**	**1.0**	**1.0**
TOTAL: RETAIL GOODS	**n.c.m**	**n.c.m**	**n.c.m**	**n.c.m**	**n.c.m**	**n.c.m**	**n.c.m**

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Table Set L: Current and Forecast Sales in Footscray for 2006 to 2031

Table L.3

Estimated Inbound Sales from beyond the Main Trade Area and Secondary Trade Regions

Table L.1 x Table L.2

Major Commodity Group	Total Estimated Inbound Sales from beyond the Catchment by Commodity $ Million at 2006 / 07 Prices						
	2006	**2008**	**2011**	**2016**	**2021**	**2026**	**2031**
Food, groceries and liquor							
Supermarket	*0.2*	*0.2*	*0.2*	*0.2*	*0.2*	*0.2*	*0.2*
Other food specialty stores	*0.7*	*0.7*	*0.7*	*0.7*	*0.7*	*0.7*	*0.7*
Subtotal: Food, groceries and packaged liquor	0.9	0.9	0.9	0.9	0.9	1.0	1.0
Take away food, cafes and restaurants	1.1	1.1	1.1	1.2	1.2	1.2	1.3
Subtotal: Food, groceries and liquor	**2.0**	**2.0**	**2.0**	**2.1**	**2.1**	**2.2**	**2.3**
Other household goods	**0.5**	**0.5**	**0.5**	**0.5**	**0.6**	**0.6**	**0.6**
Bulky goods	**0.2**	**0.2**	**0.2**	**0.3**	**0.3**	**0.3**	**0.4**
TOTAL: RETAIL GOODS	**2.7**	**2.7**	**2.8**	**2.9**	**3.0**	**3.1**	**3.2**

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Table Set L: Current and Forecast Sales in Footscray for 2006 to 2031

Table L.4

Estimated Total Sales

Source: Collie Analysis

Table L.1 + Table L.3

Major Commodity Group	Estimated Total Retail Sales in Footscray by Commodity Group $ Million at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*42.4*	*42.8*	*43.5*	*44.6*	*45.7*	*46.8*	*48.0*
Other food specialty stores	*33.5*	*33.9*	*34.4*	*35.2*	*36.1*	*37.0*	*38.0*
Subtotal: Food, groceries and packaged liquor	71.1	71.8	72.9	74.8	76.7	78.6	80.6
Take away food, cafes and restaurants	57.1	57.7	58.6	60.1	61.6	63.1	64.7
Subtotal: Food, groceries and liquor	**128.3**	**129.6**	**131.5**	**134.8**	**138.2**	**141.7**	**145.3**
Other household goods	**49.3**	**50.3**	**51.8**	**54.5**	**57.3**	**60.2**	**63.3**
Bulky goods	**22.8**	**23.8**	**25.2**	**27.8**	**30.7**	**33.8**	**37.3**
TOTAL: RETAIL GOODS	**200.4**	**203.6**	**208.5**	**217.1**	**226.2**	**235.8**	**245.9**
Column	(1)	(2)	(3)	(4)	(5)	(6)	(7)

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Table Set L: Current and Forecast Sales in Footscray for 2006 to 2031

Table L.5

Source of Trade

Source: Collie Analysis

Major Commodity Group	Retail Sales in Footscray by Source of Trade by Commodity Group							
	Main Trade Area		Secondary Trade Regions		Beyond Catchment		Total Sales	
	Turnover ($ Million) *	Proportion of Total Sales (%)	Turnover ($ Million) *	Proportion of Total Sales (%)	Turnover ($ Million) *	Proportion of Total Sales (%)	Turnover ($ Million) *	Proportion of Total Sales (%)
Food, groceries and liquor								
Supermarket	32.6	76.9	9.6	22.7	0.2	0.5	42.4	100.0
Other food specialty stores	14.7	43.8	18.2	54.3	0.7	2.0	33.5	100.0
Subtotal: Food, groceries and packaged liquor	42.5	59.7	27.8	39.1	0.9	1.2	71.1	100.0
Take away food, cafes and restaurants	24.8	43.4	31.2	54.7	1.1	2.0	57.1	100.0
Subtotal: Food, groceries and liquor	67.2	52.4	59.0	46.0	2.0	1.6	128.3	100.0
Other household goods	17.1	34.7	31.7	64.3	0.5	1.0	49.3	100.0
Bulky goods	10.7	46.9	11.9	52.2	0.2	1.0	22.8	100.0
TOTAL: RETAIL GOODS	**95.1**	**47.4**	**102.6**	**51.2**	**2.7**	**1.3**	**200.4**	**100.0**
Column	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)

* At 2006 / 07 Prices

Source Column (1): Refer Table E.7
Source Column (3): Refer Table H.5
Source Column (5): Refer Table L.3
Source Column (7): Refer Table L.4

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Analysis Three: **Assessment of Current and Future Performance based on Current Trading Patterns 2006-2031**

Table Set M: Turnover Levels in Footscray Transit City Assuming Current Trading Patterns for 2008 to 2031

Table Set M: Turnover Levels in Footscray Transit City Assuming Current Trading Patterns for 2008 to 2031

Table M.1

Existing Retail Goods Floorspace in Footscray Transit City by Commodity Type

Source: Collie Floorspace Assessment (October, 2008)

Major Commodity Group	Existing Floorspace (m² Gross Leasable Floor Area)
Food, groceries and liquor	
Supermarket	*8,370*
Other food specialty stores	*7,600*
Subtotal: Food, groceries and packaged liquor	15,970
Take away food, cafes and restaurants	14,180
Subtotal: Food, groceries and liquor	**30,150**
Other household goods	**38,930**
Bulky goods	**6,690**
TOTAL: RETAIL GOODS	**75,770**

Table Set M: Turnover Levels in Footscray Transit City Assuming Current Trading Patterns for 2008 to 2031

Table M.2

Existing Retail Turnover Densities by Commodity Type

Table L.4 Column (2) / Table M.1

Major Commodity Group	Current Retail Turnover Densities by Commodity Type Turnover ($) per m² Gross Leasable Floor Area
Food, groceries and liquor	
Supermarket	*5,116*
Other food specialty stores	*4,454*
Average: Food, groceries and packaged liquor	4,499
Take away food, cafes and restaurants	4,071
Average: Food, groceries and liquor	**4,298**
Other household goods	**1,292**
Bulky goods	**3,555**
AVERAGE: RETAIL GOODS	**2,688**

Table Set M: Turnover Levels in Footscray Transit City Assuming Current Trading Patterns for 2008 to 2031

Table M.3

Current and Forecast Retail Turnover Densities by Commodity Type for 2008 to 2031*

* Assuming current Retail Turnover Densities are sustained and the centre continues to trade at below industry standards.

Major Commodity Group	Retail Turnover Densities by Commodity Type Turnover ($) per m² Gross Leasable Floor Area			
	Current	Forecast		
	2008	2011	2021	2031
Food, groceries and liquor				
Supermarket	*5,116*	*5,154*	*5,283*	*5,415*
Other food specialty stores	*4,454*	*4,488*	*4,600*	*4,715*
Average: Food, groceries and packaged liquor	4,499	4,533	4,646	4,762
Take away food, cafes and restaurants	4,071	4,102	4,204	4,309
Average: Food, groceries and liquor	***4,298***	***4,330***	***4,438***	**4,549**
Other household goods	**1,292**	**1,321**	**1,420**	**1,526**
Bulky goods	**3,555**	**3,662**	**4,028**	**4,431**

Assumed Real Growth Rates:

Commodity Group	Real Expenditure		RTD Real Growth Rate	
	% per person per annum	Multiplication factor	% per person per annum	Multiplication factor
Food	0.5	0.005	0.25	0.0025
Other Household Goods	1.5	0.015	0.75	0.0075
Bulky Goods	2	0.02	1	0.01

Table Set M: Turnover Levels in Footscray Transit City Assuming Current Trading Patterns for 2008 to 2031

Table M.4

Current and Forecast Sustainable Retail Turnover Densities by Commodity Type for 2008 to 2031*

* Assuming Retail Turnover Densities shift to acceptable industry standards.

Major Commodity Group	Retail Turnover Densities by Commodity Type Turnover ($) per m² Gross Leasable Floor Area					
	2008 Trading Levels			Forecast		
	Current	Variation from Industry Standard	Industry Standard	2011	2021	2031
Food, groceries and liquor						
Supermarket	*5,116*	*-56.4%*	*8,000*	*8,060*	*8,262*	*8,468*
Other food specialty stores	*4,454*	*-1.0%*	*4,500*	*4,534*	*4,647*	*4,763*
Average: Food, groceries and packaged liquor	4,499	n.c.m	n.c.m	n.c.m	n.c.m	n.c.m
Take away food, cafes and restaurants	4,071	-10.5%	4,500	4,534	4,647	4,763
Average: Food, groceries and liquor	***4,298***	***n.c.m***	***n.c.m***	***n.c.m***	***n.c.m***	***n.c.m***
Other household goods	**1,292**	**-171.0%**	**3,500**	**3,579**	**3,847**	**4,136**
Bulky goods	**3,555**	**1.6%**	**3,500**	**3,605**	**3,966**	**4,362**

Assumed Real Growth Rates:

Commodity Group	Real Expenditure		RTD Real Growth Rate	
	% per person per annum	Multiplication factor	% per person per annum	Multiplication factor
Food	0.5	0.005	0.25	0.0025
Other Household Goods	1.5	0.015	0.75	0.0075
Bulky Goods	2	0.02	1	0.01

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Analysis Three: **Assessment of Current and Future Performance based on Current Trading Patterns 2006-2031**

Table Set N: Supportable Retail Floorspace in Footscray Transit City for 2008 to 2031

Table Set N: Supportable Retail Floorspace in Footscray Transit City for 2008 to 2031

Table N.1

Supportable Retail Floorspace at Current Trading Levels

Source: Collie Analysis

Table L.4 ÷ Table M.3

Major Commodity Group	Supportable Retail Floorspace at Current Trading Levels m² Gross Leasable Floor Area			
	2008	2011	2021	2031
Food, groceries and liquor				
Supermarket	*8,370*	*8,430*	*8,650*	*8,870*
Other food specialty stores	*7,600*	*7,660*	*7,850*	*8,050*
Subtotal: Food, groceries and packaged liquor	15,970	16,090	16,500	16,920
Take away food, cafes and restaurants	14,180	14,290	14,650	15,020
Subtotal: Food, groceries and liquor	**30,150**	**30,380**	**31,150**	**31,940**
Other household goods	**38,930**	**39,220**	**40,330**	**41,480**
Bulky goods	**6,690**	**6,880**	**7,610**	**8,420**
TOTAL: RETAIL GOODS	**75,770**	**76,480**	**79,090**	**81,840**

Table Set N: Supportable Retail Floorspace in Footscray Transit City for 2008 to 2031

Table N.2
Supportable Retail Floorspace at Sustainable Trading Levels
Source: Collie Analysis
Table L.4 ÷ Table M.4

Major Commodity Group	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area			
	2008	2011	2021	2031
Food, groceries and liquor				
Supermarket	*5,350*	*5,390*	*5,530*	*5,670*
Other food specialty stores	*7,520*	*7,580*	*7,770*	*7,970*
Subtotal: Food, groceries and packaged liquor	12,870	12,970	13,300	13,640
Take away food, cafes and restaurants	12,830	12,920	13,250	13,590
Subtotal: Food, groceries and liquor	**25,700**	**25,890**	**26,550**	**27,230**
Other household goods	**14,370**	**14,470**	**14,880**	**15,310**
Bulky goods	**6,800**	**6,990**	**7,730**	**8,550**
TOTAL: RETAIL GOODS	**46,870**	**47,350**	**49,160**	**51,090**

Table Set N: Supportable Retail Floorspace in Footscray Transit City for 2008 to 2031

Table N.3

Supportable Department Store Type Merchandise Floorspace

Source: Collie Analysis

Department Store Trade Merchandise (DSTM)		2008	2011	2021	2031
1	**Current and Forecast Household Goods Expenditure** ($ million at 2006 constant prices)	50.3	51.8	57.3	63.3
2	**Current and Forecast Bulky Goods Expenditure** ($ million at 2006 constant prices)	23.8	25.2	27.8	30.7
3	**Current and Forecast DSTM Expenditures Bound to Footscray** ($ million at 2006 constant prices)	59.3	61.6	68.0	75.2
4	**Conjoint Market Share of Existing Department and Discount Department Stores** (as a proportion of DSTM turnover %)	67.51	70.00	70.00	70.00
5	**Maximum Potential DSTM Sales at Footscray** ($ million at 2006 constant prices)	40.0	43.1	47.6	52.6
6	**Current and Forecast Sustainable Retail Turnover Densities for DSTM** ($ per annum per m² GLA)	2,538	2,594	2,788	2,997
7	**Sustainable DSTM Floorspace in Footscray** (m² GLA)	15,800	16,600	17,100	17,600

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Table Set N: Supportable Retail Floorspace in Footscray Transit City for 2008 to 2031

Table N.4

Net Additional Retail Floorspace Requirements at Sustainable Trading Levels

Source: Collie Analysis

Table N.2 and N.3 - Table M.1

Major Commodity Group	Existing Floorspace m² Gross Leasable Floor Area	Net Additional Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area			
	2008	2008	2011	2021	2031
Food, groceries and liquor					
Supermarket	*8,370*	*-3,020*	*-2,980*	*-2,840*	*-2,700*
Other food specialty stores	*7,600*	*-80*	*-20*	*170*	*370*
Subtotal: Food, groceries and packaged liquor	15,970	-3,100	-3,000	-2,670	-2,330
Take away food, cafes and restaurants	14,180	-1,350	-1,260	-930	-590
Subtotal: Food, groceries and liquor	***30,150***	**-4,450**	**-4,260**	**-3,600**	**-2,920**
Discount Department Stores	***18,770***	**-2,970**	**-2,170**	**-1,670**	**-1,170**
Other household goods	**20,160**	**-17,290**	**-17,270**	**-17,180**	**-17,100**
Bulky goods	**6,690**	**-5,330**	**-5,290**	**-5,140**	**-4,980**
TOTAL: RETAIL GOODS	**75,770**	**-30,040**	**-28,990**	**-27,590**	**-26,170**

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Analysis Three: **Assessment of Current and Future Performance based on Current Trading Patterns 2006-2031**

Table Set O: NO TABLE SET

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Analysis Four: **Assessment of Potential Performance based on Typical Trading Patterns 2006-2031**

Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

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Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.1

Supermarket Market Shares for Braybrook

Source: Collie Analysis

Centre	Supermarket/s	Distance to Centre km	Supermarket Floorspace m² GLA	Gravity Index Propensity to Visit Centre m²/km	Market Share Proportion of Expenditure Bound to Centre (%)	
					Estimate 1	Estimate 2
Altona	Coles	11.17	2,005	180	1.19	1.13
Altona Gate	Safeway Coles	6.16	8,129	1,319	8.75	8.31
Ascot Vale	Foodworks	6.72	275	41	0.27	0.26
Braybrook Shopping Centre	Safeway	1.35	2,799	2,071	13.73	13.04
Central West Plaza	Coles Aldi	1.52	3,785	2,495	16.55	15.72
Footscray	Coles KFL Supermarket Independent	5.23	8,369	1,601	10.62	10.08
Highpoint Shopping Centre	Safeway Foodworks	4.20	3,414	813	5.39	5.12
Moonee Ponds	Safeway Coles	7.92	7,287	920	6.10	5.79
Newmarket	Foodworks Safeway	7.79	3,821	490	3.25	3.09
Seddon	Foodworks	5.18	228	44	0.29	0.28
Sunshine	IGA Safeway NQR Foodworks	2.24	12,073	5,399	35.81	34.02
Williamstown	Coles	11.53	2,471	214	1.42	1.35
Yarraville	IGA Foodworks	6.52	615	94	0.63	0.59
		TOTALS	**55,270**	**15,079**	**100.0**	**95.0**

Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.2
Supermarket Market Shares for Maidstone, West Footscray and Brooklyn
Source: Collie Analysis

Centre	Supermarket/s	Distance to Centre km	Supermarket Floorspace m² GLA	Gravity Index Propensity to Visit Centre m²/km	Market Share Proportion of Expenditure Bound to Centre (%) Estimate 1	Estimate 2
Altona	Coles	10.48	2,005	191	1.21	1.15
Altona Gate	Safeway Coles	5.48	8,129	1,483	9.41	8.94
Ascot Vale	Foodworks	5.81	275	47	0.30	0.29
Braybrook Shopping Centre	Safeway	1.38	2,799	2,033	12.90	12.25
Central West Plaza	Coles Aldi	0.87	3,785	4,351	27.61	26.23
Footscray	Coles KFL Supermarket Independent	2.83	8,369	2,960	18.78	17.84
Highpoint Shopping Centre	Safeway Foodworks	3.55	3,414	961	6.10	5.79
Moonee Ponds	Safeway Coles	7.24	7,287	1,006	6.39	6.07
Newmarket	Foodworks Safeway	5.92	3,821	645	4.09	3.89
Seddon	Foodworks	2.73	228	83	0.53	0.50
Sunshine	IGA Safeway NQR Foodworks	4.46	12,073	2,704	17.16	16.30
Williamstown	Coles	9.40	2,471	263	1.67	1.58
Yarraville	IGA Foodworks	4.29	615	143	0.91	0.86
		TOTALS	**55,270**	**15,760**	**100.0**	**95.0**

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Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.3
Supermarket Market Shares for Maribyrnong
Source: Collie Analysis

Centre	Supermarket/s	Distance to Centre (km)	Supermarket Floorspace (m^2 GLA)	Gravity Index: Propensity to Visit Centre (m^2/km)	Market Share: Proportion of Expenditure Bound to Centre (%) — Estimate 1	Estimate 2
Altona	Coles	13.82	2,005	145	0.45	0.42
Altona Gate	Safeway Coles	8.82	8,129	921	2.84	2.70
Ascot Vale	Foodworks	3.18	275	87	0.27	0.25
Braybrook Shopping Centre	Safeway	2.40	2,799	1,168	3.60	3.42
Central West Plaza	Coles Aldi	3.69	3,785	1,025	3.16	3.00
Footscray	Coles KFL supermarket Independent	4.26	8,369	1,964	6.05	5.75
Highpoint Shopping Centre	Safeway Foodworks	0.15	3,414	22,990	70.85	67.30
Moonee Ponds	Safeway Coles	4.37	7,287	1,668	5.14	4.88
Newmarket	Foodworks Safeway	5.41	3,821	707	2.18	2.07
Seddon	Foodworks	4.50	228	51	0.16	0.15
Sunshine	IGA Safeway NQR Foodworks	5.64	12,073	2,140	6.59	6.26
Williamstown	Coles	11.14	2,471	222	0.68	0.65
Yarraville	IGA Foodworks	6.13	615	100	0.31	0.29
		TOTALS	**55,270**	**32,450**	**100.0**	**95.0**

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Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.4

Supermarket Market Shares for Footscray

Source: Collie Analysis

Centre	Supermarket/s	Distance to Centre	Supermarket Floorspace	Gravity Index Propensity to Visit Centre	Market Share Proportion of Expenditure Bound to Centre (%)	
		km	m² GLA	m²/km	Estimate 1	Estimate 2
Altona	Coles	10.77	2,005	186	1.13	1.07
Altona Gate	Safeway Coles	5.77	8,129	1,409	8.55	8.12
Ascot Vale	Foodworks	4.53	275	61	0.37	0.35
Braybrook Shopping Centre	Safeway	3.47	2,799	807	4.90	4.65
Central West Plaza	Coles Aldi	3.26	3,785	1,161	7.04	6.69
Footscray	Coles KFL supermarket Independent	0.72	8,369	11,644	70.64	67.11
Highpoint Shopping Centre	Safeway Foodworks	3.51	3,414	974	5.91	5.61
Moonee Ponds	Safeway Coles	5.97	7,287	1,220	7.40	7.03
Newmarket	Foodworks Safeway	3.49	3,821	1,094	6.64	6.30
Seddon	Foodworks	0.95	228	240	1.46	1.38
Sunshine	IGA Safeway NQR Foodworks	6.90	12,073	1,749	10.61	10.08
Williamstown	Coles	8.20	2,471	301	1.83	1.74
Yarraville	IGA Foodworks	3.06	615	201	1.22	1.16
		TOTALS	**55,270**	**16,483**	**100.0**	**95.0**

Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.5
Supermarket Market Shares for Yarraville
Source: Collie Analysis

Centre	Supermarket/s	Distance to Centre	Supermarket Floorspace	Gravity Index Propensity to Visit Centre	Market Share Proportion of Expenditure Bound to Centre (%)	
		km	m² GLA	m²/km	Estimate 1	Estimate 2
Altona	Coles	10.10	2,005	198	1.79	1.70
Altona Gate	Safeway Coles	5.10	8,129	1,594	14.40	13.68
Ascot Vale	Foodworks	6.58	275	42	0.38	0.36
Braybrook Shopping Centre	Safeway	5.70	2,799	491	4.44	4.21
Central West Plaza	Coles Aldi	5.08	3,785	745	6.73	6.39
Footscray	Coles KFL supermarket Independent	2.48	8,369	3,369	30.44	28.91
Highpoint Shopping Centre	Safeway Foodworks	5.93	3,414	576	5.20	4.94
Moonee Ponds	Safeway Coles	8.01	7,287	910	8.22	7.81
Newmarket	Foodworks Safeway	6.20	3,821	616	5.57	5.29
Seddon	Foodworks	1.42	228	160	1.45	1.37
Sunshine	IGA Safeway NQR Foodworks	7.21	12,073	1,675	15.14	14.38
Williamstown	Coles	6.19	2,471	399	3.61	3.43
Yarraville	IGA Foodworks	0.39	615	1,559	14.09	13.38
		TOTALS	**55,270**	**11,069**	**100.0**	**95.0**

Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.6

Supermarket Market Shares for Sunshine

Source: Collie Analysis

Centre	Supermarket/s	Distance to Centre km	Supermarket Floorspace m² GLA	Gravity Index Propensity to Visit Centre m²/km	Market Share Proportion of Expenditure Bound to Centre (%) Estimate 1	Estimate 2
Altona	Coles	12.22	2,005	164	0.81	0.77
Altona Gate	Safeway Coles	7.22	8,129	1,126	5.53	5.25
Ascot Vale	Foodworks	9.25	275	30	0.15	0.14
Braybrook Shopping Centre	Safeway	3.46	2,799	808	3.97	3.77
Central West Plaza	Coles Aldi	2.78	3,785	1,361	6.68	6.34
Footscray	Coles KFL supermarkets Independent	6.51	8,369	1,286	6.31	6.00
Highpoint Shopping Centre	Safeway Foodworks	6.35	3,414	538	2.64	2.51
Moonee Ponds	Safeway Coles	10.68	7,287	683	3.35	3.18
Newmarket	Foodworks Safeway	9.62	3,821	397	1.95	1.85
Seddon	Foodworks	6.45	228	35	0.17	0.16
Sunshine	IGA Safeway NQR Foodworks	0.85	12,073	14,155	69.48	66.01
Williamstown	Coles	12.79	2,471	193	0.95	0.90
Yarraville	IGA Foodworks	7.78	615	79	0.39	0.37
		TOTALS	**55,270**	**20,372**	**100.0**	**95.0**

Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.7
Department Store Trade Merchandise Market Shares for Braybrook
Source: Collie Analysis

Centre	Department and Discount Department Stores	Distance to Centre km	Department Store Type Floorspace m^2 GLA	Gravity Index Propensity to Visit Centre m^2/km	Market Share Proportion of Expenditure Bound to Centre (%) Estimate 1	Estimate 2
Altona Gate	Kmart	6.16	7,711	1,251	6.1	4.9
Footscray	Kmart	5.23	18,766	3,590	17.4	13.9
Highpoint Shopping Centre	Myer	4.20	20,068	4,780	23.2	18.6
	Big W		8,162	1,944	9.4	7.5
	Target		8,301	1,977	9.6	7.7
Sunshine	Big W	2.24	6,902	3,087	15.0	12.0
	Target		8,896	3,979	19.3	15.4
		Totals	**78,806**	**20,608**	**100.0**	**80.0**

Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.8

Department Store Trade Merchandise Market Shares for Maidstone, West Footscray and Brooklyn

Source: Collie Analysis

Centre	Department and Discount Department Stores	Distance to Centre km	Department Store Type Floorspace m² GLA	Gravity Index Propensity to Visit Centre m²/km	Market Share Proportion of Expenditure Bound to Centre (%) Estimate 1	Estimate 2
Altona Gate	Kmart	5.48	7,711	1,407	5.6	4.5
Footscray	Kmart	2.83	18,766	6,638	26.3	21.1
Highpoint Shopping Centre	Myer	2.83	20,068	7,099	28.2	22.5
	Big W		8,162	2,887	11.5	9.2
	Target		8,301	3,630	14.4	11.5
Sunshine	Big W	4.46	6,902	1,546	6.1	4.9
	Target		8,896	1,993	7.9	6.3
		Totals	**78,806**	**25,200**	**100.0**	**80.0**

Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.9

Department Store Trade Merchandise Market Shares for Maribrynong

Source: Collie Analysis

Centre	Department and Discount Department Stores	Distance to Centre km	Department Store Type Floorspace m^2 GLA	Gravity Index Propensity to Visit Centre m^2/km	Market Share Proportion of Expenditure Bound to Centre (%) Estimate 1	Estimate 2
Altona Gate	Kmart	8.82	7,711	874	0.3	0.3
Footscray	Kmart	4.26	18,766	4,405	1.7	1.6
Highpoint Shopping Centre	Myer	0.15	20,068	135,138	53.2	47.9
	Big W		8,162	54,963	21.6	19.5
	Target		8,301	55,899	22.0	19.8
Sunshine	Big W	5.64	6,902	1,223	0.5	0.4
	Target		8,896	1,577	0.6	0.6
		Totals	**78,806**	**254,079**	**100.0**	**90.0**

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Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.10

Department Store Trade Merchandise Market Shares for Footscray

Source: Collie Analysis

Centre	Department and Discount Department Stores	Distance to Centre km	Department Store Type Floorspace m² GLA	Gravity Index Propensity to Visit Centre m²/km	Market Share Proportion of Expenditure Bound to Centre (%) Estimate 1	 Estimate 2
Altona Gate	Kmart	5.77	7,711	1,336	3.3	2.7
Footscray	Kmart	0.72	18,766	26,111	65.0	52.0
Highpoint Shopping Centre	Myer	3.51	20,068	5,724	14.3	11.4
	Big W		8,162	2,328	5.8	4.6
	Target		8,301	2,368	5.9	4.7
Sunshine	Big W	6.90	6,902	1,000	2.5	2.0
	Target		8,896	1,289	3.2	2.6
		Totals	**78,806**	**40,155**	**100.0**	**80.0**

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Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.11

Department Store Trade Merchandise Market Shares for Yarraville

Source: Collie Analysis

Centre	Department and Discount Department Stores	Distance to Centre km	Department Store Type Floorspace m² GLA	Gravity Index Propensity to Visit Centre m²/km	Market Share Proportion of Expenditure Bound to Centre (%) Estimate 1	Estimate 2
Altona Gate	Kmart	5.10	7,711	1,512	8.7	6.9
Footscray	Kmart	2.48	18,766	7,555	43.4	34.7
Highpoint Shopping Centre	Myer	5.93	20,068	3,386	19.4	15.5
	Big W		8,162	1,377	7.9	6.3
	Target		8,301	1,401	8.0	6.4
Sunshine	Big W	7.21	6,902	958	5.5	4.4
	Target		8,896	1,235	7.1	5.7
		Totals	**78,806**	**17,424**	**100.0**	**80.0**

Table Set P: Application of Standard Market Share Trends to Footscray Transit City: Gravity Model of Consumer Choice

Table P.12

Department Store Trade Merchandise Market Shares for Sunshine

Source: Collie Analysis

Centre	Department and Discount Department Stores	Distance to Centre	Department Store Type Floorspace	Gravity Index Propensity to Visit Centre	Market Share Proportion of Expenditure Bound to Centre (%)	
		km	m² GLA	m²/km	Estimate 1	Estimate 2
Altona Gate	Kmart	7.22	7,711	1,068	3.8	3.2
Footscray	Kmart	6.51	18,766	2,884	10.2	8.7
Highpoint Shopping Centre	Myer	6.35	20,068	3,161	11.2	9.5
	Big W		8,162	1,286	4.6	3.9
	Target		8,301	1,308	4.6	3.9
Sunshine	Big W	0.85	6,902	8,092	28.7	24.4
	Target		8,896	10,430	36.9	31.4
		Totals	**78,806**	**28,230**	**100.0**	**85.0**

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Analysis Four: **Assessment of Potential Performance based on Typical Trading Patterns 2006-2031**

Table Set Q: Estimated Market Share for the Main Trade Area Assuming Typical Trading Patterns

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Table Set Q: Estimated Market Share for the Main Trade Area Assuming Typical Trading Patterns

Table Q.1

Estimated Proportion of Catchment Expenditure Currently Bound to Footscray determined by Gravity Index *

Source: Collie Analysis

Major Commodity Group	Estimated Market Share by Post Code Component Area of the Main Trade Area Percent of Expenditure Bound to Footscray					
	Footscray 3011	Maidstone, West Footscray and Brooklyn 3012	Yarraville 3013	Braybrook 3019	Maribyrnong 3032	Sunshine 3020
Food, groceries and liquor ^						
Supermarket	*67.1*	*17.8*	*28.9*	*10.1*	*5.8*	*6.0*
Other food specialty stores	*67.1*	*17.8*	*28.9*	*10.1*	*5.8*	*6.0*
Subtotal: Food, groceries and packaged liquor	67.1	17.8	28.9	10.1	5.8	6.0
Take away food, cafes and restaurants	33.3	16.2	15.4	8.0	8.5	5.0
Subtotal: Food, groceries and liquor	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Other household goods ^^	**52.0**	**21.1**	**34.7**	**13.9**	**1.6**	**8.7**
Bulky goods	**11.1**	**7.1**	**7.5**	**5.0**	**1.7**	**2.0**
TOTAL: RETAIL GOODS	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Column	(1)	(2)	(3)	(4)	(5)	(6)

* Applying a gravity model to determine the propensity of residents to visit each centre based on retail offer (floor area) divided by distance to centre from each small area.

^ Refer Table Set P, Tables P.1 - P.6: Estimate 2 of Market Share for Footscray

^^ Refer Table Set P, Tables P.7 - P.12: Estimate 2 of Market Share for Footscray

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Analysis Four: **Assessment of Potential Performance based on Typical Trading Patterns 2006-2031**

Table Set R: Estimated Current and Forecast Expenditure Bound to Footscray from the Main Trade Area Assuming Typical Trading Patterns for 2006 to 2031

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Table Set R: Estimated Current and Forecast Expenditure Bound to Footscray from the Main Trade Area Assuming Typical Trading Patterns for 2006 to 2031

Table R.1

Footscray Post Code Area (3011)

Table C.1 x Table Q.1 Column (1)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*41.2*	*41.6*	*42.2*	*43.3*	*44.4*	*45.5*	*46.7*
Other food specialty stores	*13.0*	*13.1*	*13.3*	*13.7*	*14.0*	*14.4*	*14.7*
Subtotal: Food, groceries and packaged liquor	54.2	54.8	55.6	57.0	58.4	59.9	61.4
Take away food, cafes and restaurants	11.7	11.9	12.0	12.3	12.7	13.0	13.3
Subtotal: Food, groceries and liquor	**66.0**	**66.6**	**67.6**	**69.3**	**71.1**	**72.9**	**74.7**
Other household goods	**25.7**	**26.2**	**27.0**	**28.4**	**29.8**	**31.3**	**32.9**
Bulky goods	**4.2**	**4.4**	**4.6**	**5.1**	**5.6**	**6.2**	**6.9**
TOTAL: RETAIL GOODS	**95.8**	**97.2**	**99.2**	**102.8**	**106.5**	**110.4**	**114.5**

Table Set R: Estimated Current and Forecast Expenditure Bound to Footscray from the Main Trade Area Assuming Typical Trading Patterns for 2006 to 2031

Table R.2

Maidstone, West Footscray and Brooklyn Post Code Area (3012)

Table C.2 x Table Q.1 Column (2)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*12.6*	*12.8*	*13.0*	*13.3*	*13.6*	*14.0*	*14.3*
Other food specialty stores	*4.0*	*4.0*	*4.1*	*4.2*	*4.3*	*4.4*	*4.5*
Subtotal: Food, groceries and packaged liquor	16.6	16.8	17.0	17.5	17.9	18.4	18.8
Take away food, cafes and restaurants	5.8	5.9	6.0	6.1	6.3	6.4	6.6
Subtotal: Food, groceries and liquor	**22.4**	**22.7**	**23.0**	**23.6**	**24.2**	**24.8**	**25.4**
Other household goods	**11.1**	**11.3**	**11.7**	**12.3**	**12.9**	**13.5**	**14.2**
Bulky goods	**2.9**	**3.0**	**3.2**	**3.6**	**3.9**	**4.3**	**4.8**
TOTAL: RETAIL GOODS	**36.4**	**37.0**	**37.9**	**39.4**	**41.0**	**42.7**	**44.4**

Table Set R: Estimated Current and Forecast Expenditure Bound to Footscray from the Main Trade Area Assuming Typical Trading Patterns for 2006 to 2031

Table R.3

Yarraville Post Code Area (3013)

Table C.3 x Table Q.1 Column (3)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*14.4*	*14.5*	*14.8*	*15.1*	*15.5*	*15.9*	*16.3*
Other food specialty stores	*4.5*	*4.6*	*4.7*	*4.8*	*4.9*	*5.0*	*5.1*
Subtotal: Food, groceries and packaged liquor	4.5	4.6	4.7	4.8	4.9	5.0	5.1
Take away food, cafes and restaurants	4.3	4.4	4.4	4.5	4.7	4.8	4.9
Subtotal: Food, groceries and liquor	**8.9**	**8.9**	**9.1**	**9.3**	**9.5**	**9.8**	**10.0**
Other household goods	**14.4**	**14.7**	**15.1**	**15.9**	**16.7**	**17.6**	**18.5**
Bulky goods	**2.4**	**2.5**	**2.7**	**3.0**	**3.3**	**3.6**	**4.0**
TOTAL: RETAIL GOODS	**25.7**	**26.2**	**26.9**	**28.2**	**29.5**	**31.0**	**32.5**

Table Set R: Estimated Current and Forecast Expenditure Bound to Footscray from the Main Trade Area Assuming Typical Trading Patterns for 2006 to 2031

Table R.4

Maribyrnong Post Code Area (3032)

Table C.4 x Table Q.1 Column (5)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*1.8*	*1.9*	*1.9*	*1.9*	*2.0*	*2.0*	*2.1*
Other food specialty stores	*0.6*	*0.6*	*0.6*	*0.6*	*0.6*	*0.6*	*0.7*
Subtotal: Food, groceries and packaged liquor	2.4	2.4	2.5	2.5	2.6	2.7	2.7
Take away food, cafes and restaurants	1.6	1.7	1.7	1.7	1.8	1.8	1.9
Subtotal: Food, groceries and liquor	**4.1**	**4.1**	**4.2**	**4.3**	**4.4**	**4.5**	**4.6**
Other household goods	**0.4**	**0.4**	**0.5**	**0.5**	**0.5**	**0.5**	**0.6**
Bulky goods	**0.4**	**0.4**	**0.4**	**0.4**	**0.5**	**0.5**	**0.6**
TOTAL: RETAIL GOODS	**4.9**	**4.9**	**5.0**	**5.2**	**5.4**	**5.5**	**5.7**

Table Set R: Estimated Current and Forecast Expenditure Bound to Footscray from the Main Trade Area Assuming Typical Trading Patterns for 2006 to 2031

Table R.5

Braybrook Post Code Area (3019)

Table C.5 x Table Q.1 Column (4)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*2.3*	*2.3*	*2.4*	*2.4*	*2.5*	*2.6*	*2.6*
Other food specialty stores	*0.7*	*0.7*	*0.7*	*0.8*	*0.8*	*0.8*	*0.8*
Subtotal: Food, groceries and packaged liquor	3.0	3.1	3.1	3.2	3.3	3.4	3.4
Take away food, cafes and restaurants	0.7	0.7	0.7	0.7	0.7	0.8	0.8
Subtotal: Food, groceries and liquor	**3.7**	**3.8**	**3.8**	**3.9**	**4.0**	**4.1**	**4.2**
Other household goods	**2.0**	**2.1**	**2.1**	**2.2**	**2.4**	**2.5**	**2.6**
Bulky goods	**0.6**	**0.6**	**0.6**	**0.7**	**0.7**	**0.8**	**0.9**
TOTAL: RETAIL GOODS	**6.3**	**6.4**	**6.6**	**6.8**	**7.1**	**7.4**	**7.7**

Table Set R: Estimated Current and Forecast Expenditure Bound to Footscray from the Main Trade Area Assuming Typical Trading Patterns for 2006 to 2031

Table R.6

Sunshine Post Code Area (3020)

Table C.6 x Table Q.1 Column (6)

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*1.3*	*1.3*	*1.4*	*1.4*	*1.4*	*1.5*	*1.5*
Other food specialty stores	*0.4*	*0.4*	*0.4*	*0.4*	*0.4*	*0.5*	*0.5*
Subtotal: Food, groceries and packaged liquor	1.7	1.8	1.8	1.8	1.9	1.9	2.0
Take away food, cafes and restaurants	0.6	0.6	0.6	0.6	0.6	0.6	0.7
Subtotal: Food, groceries and liquor	**2.3**	**2.3**	**2.4**	**2.4**	**2.5**	**2.6**	**2.6**
Other household goods	**1.4**	**1.5**	**1.6**	**1.8**	**1.9**	**2.1**	**2.4**
Bulky goods	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**
TOTAL: RETAIL GOODS	**4.0**	**4.1**	**4.2**	**4.5**	**4.7**	**5.0**	**5.3**

Table Set R: Estimated Current and Forecast Expenditure Bound to Footscray from the Main Trade Area Assuming Typical Trading Patterns for 2006 to 2031

Table R.7

Total Expenditure Generated by Residents in the Footscray Main Trade Area

Sum of Tables R.1 to R.6

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*73.7*	*74.4*	*75.6*	*77.5*	*79.4*	*81.4*	*83.5*
Other food specialty stores	*23.3*	*23.5*	*23.9*	*24.5*	*25.1*	*25.7*	*26.4*
Subtotal: Food, groceries and packaged liquor	82.6	83.4	84.7	86.8	89.0	91.2	93.5
Take away food, cafes and restaurants	24.8	25.0	25.4	26.1	26.7	27.4	28.1
Subtotal: Food, groceries and liquor	**107.4**	**108.4**	**110.1**	**112.8**	**115.7**	**118.6**	**121.6**
Other household goods	**55.1**	**56.2**	**58.0**	**61.0**	**64.2**	**67.6**	**71.2**
Bulky goods	**10.7**	**11.1**	**11.8**	**13.0**	**14.3**	**15.8**	**17.4**
TOTAL: RETAIL GOODS	**173.1**	**175.8**	**179.8**	**186.8**	**194.2**	**202.0**	**210.2**

Table Set R: Estimated Current and Forecast Expenditure Bound to Footscray from the Main Trade Area Assuming Typical Trading Patterns for 2006 to 2031

Table R.8

Total Estimated Sales Assuming Typical Trading Patterns

Source: Collie Analysis

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices						
	2006	2008	2011	2016	2021	2026	2031
Food, groceries and liquor							
Supermarket	*86.7*	*87.6*	*88.9*	*91.1*	*93.4*	*95.8*	*98.2*
Other food specialty stores	*27.4*	*27.7*	*28.1*	*28.8*	*29.5*	*30.2*	*31.0*
Subtotal: Food, groceries and packaged liquor	114.1	115.2	117.0	119.9	122.9	126.0	129.2
Take away food, cafes and restaurants	31.0	31.3	31.8	32.6	33.4	34.2	35.1
Subtotal: Food, groceries and liquor	**145.1**	**146.5**	**148.7**	**152.5**	**156.3**	**160.3**	**164.3**
Other household goods	**73.4**	**75.0**	**77.3**	**81.3**	**85.6**	**90.1**	**94.9**
Bulky goods	**14.3**	**14.9**	**15.7**	**17.3**	**19.1**	**21.0**	**23.2**
TOTAL: RETAIL GOODS	**232.8**	**236.4**	**241.7**	**251.1**	**261.0**	**271.4**	**282.4**

Proportion of Trade Drawn From Beyond the Main Trade Area

Commodity Group	Proportion of Trade (%)	
	Applied	Likely Range
Food, groceries and packaged liquor	15.0	10 to 15
Take away food, cafes and restaurants	20.0	15 to 20
Other household goods	25.0	20 to 25
Bulky goods	25.0	20 to 25

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Analysis Four: Assessment of Potential Performance based on Typical Trading Patterns 2006-2031

Table Set S: Estimated Turnover Levels in Footscray Transit City Assuming Typical Trading Patterns for 2008 to 2031

Table Set S: Estimated Turnover Levels in Footscray Transit City Assuming Typical Trading Patterns for 2008 to 2031

Table S.1
Estimated Retail Turnover Densities by Commodity Type
Table R.8 ÷ Table M.1

Major Commodity Group	Current Retail Turnover Densities by Commodity Type Turnover ($) per m² Gross Leasable Floor Area
Food, groceries and liquor	
Supermarket	*10,462*
Other food specialty stores	*3,639*
Average: Food, groceries and packaged liquor	7,215
Take away food, cafes and restaurants	2,207
Average: Food, groceries and liquor	**4,860**
Other household goods	**1,926**
Bulky goods	**2,220**
AVERAGE: RETAIL GOODS	**3,119**

Table Set S: Estimated Turnover Levels in Footscray Transit City Assuming Typical Trading Patterns for 2008 to 2031

Table S.2

Estimated Current and Forecast Retail Turnover Densities by Commodity Type*

* Assuming current Retail Turnover Densities are sustained and the centre continues to trade at below industry standards.

Major Commodity Group	Retail Turnover Densities by Commodity Type Turnover ($) per m² Gross Leasable Floor Area			
	Current	Forecast		
	2008	2011	2021	2031
Food, groceries and liquor				
Supermarket	*10,462*	*10,541*	*10,804*	*11,075*
Other food specialty stores	*3,639*	*3,666*	*3,758*	*3,852*
Average: Food, groceries and packaged liquor	7,215	7,269	7,451	7,637
Take away food, cafes and restaurants	2,207	2,223	2,279	2,336
Average: Food, groceries and liquor	***4,860***	***4,896***	***5,019***	**5,144**
Other household goods	**1,926**	**1,969**	**2,117**	**2,276**
Bulky goods	**2,220**	**2,286**	**2,515**	**2,766**

Assumed Real Growth Rates:

Commodity Group	Real Expenditure		RTD Real Growth Rate	
	% per person per annum	Multiplication factor	% per person per annum	Multiplication factor
Food	0.5	0.005	0.25	0.0025
Other Household Goods	1.5	0.015	0.75	0.0075
Bulky Goods	2	0.02	1	0.01

Table Set S: Estimated Turnover Levels in Footscray Transit City Assuming Typical Trading Patterns for 2008 to 2031

Table S.3

Estimated Current and Forecast Sustainable Retail Turnover Densities by Commodity Type*

* Assuming Retail Turnover Densities shift to acceptable industry standards.

Major Commodity Group	Retail Turnover Densities by Commodity Type Turnover ($) per m² Gross Leasable Floor Area					
	2008 Trading Levels			Forecast		
	Current	Variation from Industry Standard	Industry Standard	2011	2021	2031
Food, groceries and liquor						
Supermarket	*10,462*	*23.5%*	*8,000*	*8,060*	*8,262*	*8,468*
Other food specialty stores	*3,639*	*-23.7%*	*4,500*	*4,534*	*4,647*	*4,763*
Average: Food, groceries and packaged liquor	7,215	n.c.m	n.c.m	n.c.m	n.c.m	n.c.m
Take away food, cafes and restaurants	2,207	-103.9%	4,500	4,534	4,647	4,763
Average: Food, groceries and liquor	***4,860***	***n.c.m***	***n.c.m***	***n.c.m***	***n.c.m***	***n.c.m***
Other household goods	**1,926**	**-81.7%**	**3,500**	**3,579**	**3,847**	**4,136**
Bulky goods	**2,220**	**-57.7%**	**3,500**	**3,605**	**3,966**	**4,362**

Assumed Real Growth Rates:

Commodity Group	Real Expenditure		RTD Real Growth Rate	
	% per person per annum	Multiplication factor	% per person per annum	Multiplication factor
Food	0.5	0.005	0.25	0.0025
Other Household Goods	1.5	0.015	0.75	0.0075
Bulky Goods	2	0.02	1	0.01

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Analysis Four: **Assessment of Potential Performance based on Typical Trading Patterns 2006-2031**

Table Set T: Estimated Supportable Retail Floorspace in Footscray Transit City Assuming Typical Trading Patterns for 2008 to 2031

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Table Set T: Estimated Supportable Retail Floorspace in Footscray Transit City Assuming Typical Trading Patterns for 2008 to 2031

Table T.1

Estimated Supportable Retail Floorspace Assuming Typical Trading Patterns

Source: Collie Analysis

Table R.8 ÷ Table S.2

Major Commodity Group	Supportable Retail Floorspace at Current Trading Levels m² Gross Leasable Floor Area			
	2008	2011	2021	2031
Food, groceries and liquor				
Supermarket	*8,370*	*8,430*	*8,650*	*8,870*
Other food specialty stores	*7,600*	*7,660*	*7,850*	*8,050*
Subtotal: Food, groceries and packaged liquor	15,970	16,090	16,500	16,920
Take away food, cafes and restaurants	14,180	14,290	14,650	15,020
Subtotal: Food, groceries and liquor	**30,150**	**30,380**	**31,150**	**31,940**
Other household goods	**38,930**	**39,250**	**40,440**	**41,690**
Bulky goods	**6,690**	**6,880**	**7,590**	**8,390**
TOTAL: RETAIL GOODS	**75,770**	**76,510**	**79,180**	**82,020**

Table Set T: Estimated Supportable Retail Floorspace in Footscray Transit City Assuming Typical Trading Patterns for 2008 to 2031

Table T.2

Estimated Supportable Retail Floorspace at Typical, Sustainable Trading Levels

Source: Collie Analysis

Table R.8 ÷ Table S.3

Major Commodity Group	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area			
	2008	2011	2021	2031
Food, groceries and liquor				
Supermarket	*10,950*	*11,030*	*11,310*	*11,600*
Other food specialty stores	*6,150*	*6,190*	*6,350*	*6,510*
Subtotal: Food, groceries and packaged liquor	17,100	17,220	17,660	18,110
Take away food, cafes and restaurants	6,950	7,010	7,180	7,370
Subtotal: Food, groceries and liquor	**24,050**	**24,230**	**24,840**	**25,480**
Other household goods	**21,420**	**21,600**	**22,260**	**22,940**
Bulky goods	**4,240**	**4,360**	**4,810**	**5,320**
TOTAL: RETAIL GOODS	**49,710**	**50,190**	**51,910**	**53,740**

Table Set T: Estimated Supportable Retail Floorspace in Footscray Transit City Assuming Typical Trading Patterns for 2008 to 2031

Table T.3

Estimated Supportable Department Store Type Merchandise Floorspace

Source: Collie Analysis

Department Store Trade Merchandise (DSTM)		2008	2011	2021	2031
1	**Current and Forecast Household Goods Expenditure** ($ million at 2006 constant prices)	75.0	77.3	85.6	94.9
2	**Current and Forecast Bulky Goods Expenditure** ($ million at 2006 constant prices)	14.9	15.7	19.1	23.2
3	**Current and Forecast DSTM Expenditures Bound to Footscray** ($ million at 2006 constant prices)	71.9	74.4	83.8	94.5
4	**Conjoint Market Share of Existing Department and Discount Department Stores** (as a proportion of DSTM turnover %)	55.66	60.00	60.00	60.00
5	**Maximum Potential DSTM Sales at Footscray** ($ million at 2006 constant prices)	40.0	44.6	50.3	56.7
6	**Current and Forecast Sustainable Retail Turnover Densities for DSTM** ($ per annum per m^2 GLA)	2,538	2,594	2,788	2,997
7	**Sustainable DSTM Floorspace in Footscray** (m^2 GLA)	15,800	17,200	18,000	18,900

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Table Set T: Estimated Supportable Retail Floorspace in Footscray Transit City Assuming Typical Trading Patterns for 2008 to 2031

Table T.4

Estimated Net Additional Retail Floorspace Requirements at Typical, Sustainable Trading Levels

Source: Collie Analysis

Table T.2 and T.3 - Table M.1

Major Commodity Group	Existing Floorspace m² Gross Leasable Floor Area	Net Additional Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area			
	2008	2008	2011	2021	2031
Food, groceries and liquor					
Supermarket	*8,370*	*2,580*	*2,660*	*2,940*	*3,230*
Other food specialty stores	*7,600*	*-1,450*	*-1,410*	*-1,250*	*-1,090*
Subtotal: Food, groceries and packaged liquor	15,970	1,130	1,250	1,690	2,140
Take away food, cafes and restaurants	14,180	-7,230	-7,170	-7,000	-6,810
Subtotal: Food, groceries and liquor	***30,150***	**-6,100**	**-5,920**	**-5,310**	**-4,670**
Discount Department Stores	***18,770***	**-2,970**	**-1,570**	**-770**	**130**
Other household goods	**20,160**	**-15,880**	**-15,840**	**-15,710**	**-15,570**
Bulky goods	**6,690**	**-5,840**	**-5,820**	**-5,730**	**-5,630**
TOTAL: RETAIL GOODS	**75,770**	**-30,790**	**-29,150**	**-27,520**	**-25,740**

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Analysis Five: Comparison of Market Shares for Analyses Three and Four

Table Set U: Comparison of Market Share Estimates for the Main Trade Area

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Table Set U: Comparison of Market Share Estimates for the Main Trade Area

Table U.1

Comparison of Estimated Current and Gravity Indexed Market Shares

Major Commodity Group	Estimated Market Share by Post Code Component Area of the Main Trade Area Percent of Expenditure Bound to Footscray											
	Footscray 3011		Maidstone, West Footscray and Brooklyn 3012		Yarraville 3013		Braybrook 3019		Maribyrnong 3032		Sunshine 3020	
	Current Estimate *	Gravity Indexed **	Current Estimate *	Gravity Indexed **	Current Estimate *	Gravity Indexed **	Current Estimate *	Gravity Indexed **	Current Estimate *	Gravity Indexed **	Current Estimate *	Gravity Indexed **
Food, groceries and liquor												
Supermarket	*28.1*	*67.1*	*10.8*	*17.8*	*9.6*	*28.9*	*5.0*	*10.1*	*4.2*	*5.8*	*2.0*	*6.0*
Other food specialty stores	*50.6*	*67.1*	*10.8*	*17.8*	*9.6*	*28.9*	*5.0*	*10.1*	*4.2*	*5.8*	*2.0*	*6.0*
Average: Food, groceries and packaged liquor	29.8	67.1	10.8	17.8	9.6	28.9	5.0	10.1	4.2	5.8	2.0	6.0
Take away food, cafes and restaurants	33.3	33.3	16.2	16.2	15.4	15.4	8.0	8.0	8.5	8.5	5.0	5.0
Average: Food, groceries and liquor	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Other household goods	**20.5**	**52.0**	**2.9**	**21.1**	**10.0**	**34.7**	**7.0**	**13.9**	**0.0**	**1.6**	**2.0**	**8.7**
Bulky goods	**11.1**	**11.1**	**7.1**	**7.1**	**7.5**	**7.5**	**5.0**	**5.0**	**1.7**	**1.7**	**2.0**	**2.0**
AVERAGE: RETAIL GOODS	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**

* Refer Table Set D, Table D.1: Estimated Proportion of Catchment Expenditure Currently Bound to Footscray. Source: In Home Telephone Surveys.

** Refer Table Set Q, Table Q.1: Estimated Proportion of Catchment Expenditure Currently Bound to Footscray

Table Set U: Comparison of Market Share Estimates for the Main Trade Area

Table U.2
Estimated Current Market Share as a Percentage of Gravity Indexed Market Share

Major Commodity Group	Estimated Market Share by Post Code Component Area of the Main Trade Area Percent of Expenditure Bound to Footscray					
	Footscray 3011	Maidstone, West Footscray and Brooklyn 3012	Yarraville 3013	Braybrook 3019	Maribyrnong 3032	Sunshine 3020
Food, groceries and liquor						
Supermarket ^	*41.8%*	*60.5%*	*33.2%*	*49.6%*	*73.0%*	*33.3%*
Other food specialty stores	*75.4%*	*60.5%*	*33.2%*	*49.6%*	*73.0%*	*33.3%*
Average: Food, groceries and packaged liquor	N/A	N/A	N/A	N/A	N/A	N/A
Take away food, cafes and restaurants	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average: Food, groceries and liquor	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**
Other household goods	**39.4%**	**13.6%**	**28.8%**	**50.2%**	**0.0%**	**23.0%**
Bulky goods	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
AVERAGE: RETAIL GOODS	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**	**N/A**

* Applying a gravity model to determine the propensity of residents to visit each centre based on retail offer (floor area) divided by distance to centre from each small area.
^ Refer Table Set P, Tables P.1 - P.6: Estimate 2 of Market Share for Footscray
^^ Refer Table Set P, Tables P.7 - P.12: Estimate 2 of Market Share for Footscray

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Analysis Six: **Estimates of Future Retail Services Requirements for 2008 to 2031**

Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

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Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

Table V.1

Estimate One: Net Effective Supporting Population for the Main Trade Area

Table A.1 x Table D.1

Main Trade Area Component Area	Estimated Resident Population Number of Persons					
	2008	2011	2016	2021	2026	2031
Footscray	5,010	5,300	5,580	5,890	6,160	6,410
Maidstone, West Footscray and Brooklyn	2,170	2,200	2,280	2,400	2,520	2,620
Yarraville	1,240	1,250	1,250	1,310	1,380	1,430
Maribyrnong	410	490	610	650	680	700
Braybrook	380	410	400	430	450	460
Sunshine	140	150	160	170	180	190
TOTAL: MAIN TRADE AREA	**9,350**	**9,800**	**10,280**	**10,850**	**11,370**	**11,810**

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Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

Table V.2

Estimate Two: Net Effective Supporting Population for the Main Trade Area

Table A.1 x Table D.1

Main Trade Area Component Area	Estimated Resident Population Number of Persons					
	2008	2011	2016	2021	2026	2031
Footscray	9,040	9,560	10,080	10,620	11,120	11,560
Maidstone, West Footscray and Brooklyn	2,170	2,200	2,280	2,400	2,520	2,620
Yarraville	1,240	1,250	1,250	1,310	1,380	1,430
Maribyrnong	410	490	610	650	680	700
Braybrook	380	410	400	430	450	460
Sunshine	140	150	160	170	180	190
TOTAL: MAIN TRADE AREA	**13,380**	**14,060**	**14,780**	**15,580**	**16,330**	**16,960**

Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

Table V.3

Estimate Three: Net Effective Supporting Population for the Main Trade Area

Table A.1 x Table Q.1

Main Trade Area Component Area	Estimated Resident Population Number of Persons					
	2008	2011	2016	2021	2026	2031
Footscray	11,990	12,670	13,360	14,080	14,740	15,330
Maidstone, West Footscray and Brooklyn	3,580	3,630	3,770	3,970	4,160	4,320
Yarraville	3,730	3,760	3,760	3,960	4,150	4,310
Maribyrnong	560	670	840	880	930	960
Braybrook	770	820	810	860	900	930
Sunshine	420	440	490	510	540	560
TOTAL: MAIN TRADE AREA	**21,050**	**21,990**	**23,030**	**24,260**	**25,420**	**26,410**

Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

Table V.4

Net Effective Supporting Population for the Secondary Trade Regions and Beyond

Table F.4 x Table J.1

Secondary Trade Region	Estimated Resident Population Number of Persons					
	2008	2011	2016	2021	2026	2031
Inner East	1,720	1,860	2,110	2,340	2,550	2,730
North	1,480	1,500	1,540	1,580	1,620	1,650
North West	1,770	1,810	1,850	1,870	1,880	1,900
South West	1,840	1,970	2,110	2,240	2,340	2,430
TOTAL: POPULATION OF STRs	**6,810**	**7,140**	**7,610**	**8,030**	**8,390**	**8,710**

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Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

Table V.5

Net Effective Supporting Population from outside the Main Trade Area

Table A.1 x 0.15

Population from Outside the MTA	Estimated Resident Population Number of Persons					
	2008	2011	2016	2021	2026	2031
Number of Visitors	11,280	11,900	12,710	13,400	14,030	14,590

NB: Multiplication factor from Table R.8 calibration table

Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

Table V.6

Estimates of Total Net Effective Supporting Population

Source: Collie Analysis

Estimate of Net Effective Supportable Population	Estimated Resident Population Number of Persons					
	2008	2011	2016	2021	2026	2031
Estimate 1	16,160	16,940	17,890	18,880	19,760	20,520
Estimate 2	20,190	21,200	22,390	23,610	24,720	25,670
Estimate 3	32,330	33,890	35,740	37,660	39,450	41,000

Estimate 1 = Table V.1 + Table V.4

Estimate 2 = Table V.2 + Table V.4

Estimate 3 = Table V.3 + Table V.5

Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

Table V.7

Estimates of Forecast Per Capita Provision Rate

Source: Collie Analysis

Estimate of Future Per Capita Floorspace	Per Capita Supportable Retail Services Floorspace m^2 Gross Leasable Floor Area					
	2008*	2011**	2016	2021	2026	2031
Estimate 1	0.64	0.67	0.72	0.77	0.82	0.87
Estimate 2	0.51	0.54	0.59	0.64	0.69	0.74
Estimate 3	0.32	0.35	0.40	0.45	0.50	0.55

* Existing Retail Services Floorspace (m^2 GLA) ÷ Table V.6

** Assumes 0.01 increase in per capita provision rate per annum.

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Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

Table V.8

Estimates of Forecast Retail Services Floorspace

Table V.6 x Table V.7

Estimate of Net Effective Supportable Population	Supportable Retail Services Floorspace m^2 Gross Leasable Floor Area					
	2008	2011	2016	2021	2026	2031
Estimate 1	10,350	11,360	12,890	14,550	16,210	17,860
Estimate 2	10,350	11,510	13,270	15,170	17,120	19,070
Estimate 3	10,350	11,870	14,300	16,950	19,730	22,560

Table Set V: Retail Services Floorspace Requirements for Footscray from 2008 to 2031

Table V.9

Estimates of Net Additional Retail Services Floorspace from 2008

Source: Collie Analysis

Estimate of Future Net Additional Floorspace	Existing Floorspace m^2 GLFA	Net Additional Retail Services Floorspace from 2008 Provision m^2 Gross Leasable Floor Area				
	2008	2011	2016	2021	2026	2031
Estimate 1	10,350	1,010	2,540	4,200	5,860	7,510
Estimate 2	10,350	1,160	2,920	4,820	6,770	8,720
Estimate 3	10,350	1,520	3,950	6,600	9,380	12,210

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Analysis Seven: Summary Tables

Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

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Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.1

Estimated Retail Sales in 2008

Source: Collie Analysis

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices	
	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor		
Supermarket	*42.6*	*87.6*
Other food specialty stores	*33.2*	*27.7*
Subtotal: Food, groceries and packaged liquor	71.0	115.2
Take away food, cafes and restaurants	56.6	31.3
Subtotal: Food, groceries and liquor	**127.6**	**146.5**
Other household goods	**49.8**	**75.0**
Bulky goods	**23.5**	**14.9**
TOTAL: RETAIL GOODS	**200.9**	**236.4**

[1] Source: Table Set L, Table L.4: Estimated Total Sales in Footscray for 2008

[2] Source: Table Set R, Table R.8: Total Estimated Sales in Footscray Assuming Typical Trading Patterns for 2008

Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.2
Estimated Retail Sales in 2011
Source: Collie Analysis

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices	
	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor		
Supermarket	*43.5*	*88.9*
Other food specialty stores	*34.4*	*28.1*
Subtotal: Food, groceries and packaged liquor	72.9	117.0
Take away food, cafes and restaurants	58.6	31.8
Subtotal: Food, groceries and liquor	**131.5**	**148.7**
Other household goods	**51.8**	**77.3**
Bulky goods	**25.2**	**15.7**
TOTAL: RETAIL GOODS	**208.5**	**241.7**

[1] Source: Table Set L, Table L.4: Estimated Total Sales in Footscray for 2011
[2] Source: Table Set R, Table R.8: Total Estimated Sales in Footscray Assuming Typical Trading Patterns for 2011

Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.3

Estimated Retail Sales at 2021

Source: Collie Analysis

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices	
	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor		
Supermarket	*45.7*	*93.4*
Other food specialty stores	*36.1*	*29.5*
Subtotal: Food, groceries and packaged liquor	76.7	122.9
Take away food, cafes and restaurants	61.6	33.4
Subtotal: Food, groceries and liquor	**138.2**	**156.3**
Other household goods	**57.3**	**85.6**
Bulky goods	**30.7**	**19.1**
TOTAL: RETAIL GOODS	**226.2**	**261.0**

[1] Source: Table Set L, Table L.4: Estimated Total Sales in Footscray for 2021

[2] Source: Table Set R, Table R.8: Total Estimated Sales in Footscray Assuming Typical Trading Patterns for 2021

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Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.4

Estimated Retail Sales in 2031

Source: Collie Analysis

Major Commodity Group	Estimated Retail Sales in Footscray by Commodity Group $ Million Per Annum at 2006 / 07 Prices	
	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor		
Supermarket	*48.0*	*98.2*
Other food specialty stores	*38.0*	*31.0*
Subtotal: Food, groceries and packaged liquor	80.6	129.2
Take away food, cafes and restaurants	64.7	35.1
Subtotal: Food, groceries and liquor	**145.3**	**164.3**
Other household goods	**63.3**	**94.9**
Bulky goods	**37.3**	**23.2**
TOTAL: RETAIL GOODS	**245.9**	**282.4**

[1] Source: Table Set L, Table L.4: Estimated Total Sales in Footscray for 2031

[2] Source: Table Set R, Table R.8: Total Estimated Sales in Footscray Assuming Typical Trading Patterns for 2031

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Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.5

Retail Floorspace Requirements in 2008

Source: Collie Analysis

Major Commodity Group	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area	
	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor		
Supermarket	*5,350*	*10,950*
Other food specialty stores	*7,520*	*6,150*
Subtotal: Food, groceries and packaged liquor	12,870	17,100
Take away food, cafes and restaurants	12,830	6,950
Subtotal: Food, groceries and liquor	**25,700**	**24,050**
Discount Department Stores *	*15,800*	*15,800*
Other household goods	**14,370**	**21,420**
Bulky goods	**6,800**	**4,240**
TOTAL: RETAIL GOODS	**46,870**	**49,710**

[1] Source: Table Set N, Table N.2: Supportable Retail Floorspace in Footscray at Sustainable Trading Levels for 2008

[2] Source: Table Set T, Table T.2: Estimated Supportable Retail Floorspace in Footscray at Typical, Sustainable Trading Patterns for 2008

* Discount Department Store Floorspace will absorb approximately 80 percent of 'Other household goods' and 'Bulky goods' floorspace, thus has not been included in the Total: Retail Goods figure.

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Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.6

Retail Floorspace Requirements in 2011

Source: Collie Analysis

Major Commodity Group	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area	
	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor		
Supermarket	*5,390*	*11,030*
Other food specialty stores	*7,580*	*6,190*
Subtotal: Food, groceries and packaged liquor	12,970	17,220
Take away food, cafes and restaurants	12,920	7,010
Subtotal: Food, groceries and liquor	**25,890**	**24,230**
Discount Department Stores *	*16,600*	*17,200*
Other household goods	**14,470**	**21,600**
Bulky goods	**6,990**	**4,360**
TOTAL: RETAIL GOODS	**47,350**	**50,190**

[1] Source: Table Set N, Table N.2: Supportable Retail Floorspace in Footscray at Sustainable Trading Levels for 2011

[2] Source: Table Set T, Table T.2: Estimated Supportable Retail Floorspace in Footscray at Typical, Sustainable Trading Patterns for 2011

* Discount Department Store Floorspace will absorb approximately 80 percent of 'Other household goods' and 'Bulky goods' floorspace, thus has not been included in the Total: Retail Goods figure.

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Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.7

Retail Floorspace Requirements in 2021

Source: Collie Analysis

Major Commodity Group	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area	
	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor		
Supermarket	*5,530*	*11,310*
Other food specialty stores	*7,770*	*6,350*
Subtotal: Food, groceries and packaged liquor	13,300	17,660
Take away food, cafes and restaurants	13,250	7,180
Subtotal: Food, groceries and liquor	**26,550**	**24,840**
Discount Department Stores *	*17,100*	*18,000*
Other household goods	**14,880**	**22,260**
Bulky goods	**7,730**	**4,810**
TOTAL: RETAIL GOODS	**49,160**	**51,910**

[1] Source: Table Set N, Table N.2: Supportable Retail Floorspace in Footscray at Sustainable Trading Levels for 2021

[2] Source: Table Set T, Table T.2: Estimated Supportable Retail Floorspace in Footscray at Typical, Sustainable Trading Patterns for 2021

* Discount Department Store Floorspace will absorb approximately 80 percent of 'Other household goods' and 'Bulky goods' floorspace, thus has not been included in the Total: Retail Goods figure.

Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.8

Retail Floorspace Requirements in 2031

Source: Collie Analysis

Major Commodity Group	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area	
	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor		
Supermarket	*5,670*	*11,600*
Other food specialty stores	*7,970*	*6,510*
Subtotal: Food, groceries and packaged liquor	13,640	18,110
Take away food, cafes and restaurants	13,590	7,370
Subtotal: Food, groceries and liquor	**27,230**	**25,480**
Discount Department Stores *	*17,600*	*18,900*
Other household goods	**15,310**	**22,940**
Bulky goods	**8,550**	**5,320**
TOTAL: RETAIL GOODS	**51,090**	**53,740**

[1] Source: Table Set N, Table N.2: Supportable Retail Floorspace in Footscray at Sustainable Trading Levels for 2031

[2] Source: Table Set T, Table T.2: Estimated Supportable Retail Floorspace in Footscray at Typical, Sustainable Trading Patterns for 2031

* Discount Department Store Floorspace will absorb approximately 80 percent of 'Other household goods' and 'Bulky goods' floorspace, thus has not been included in the Total: Retail Goods figure.

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Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.9

Net Additional Floorspace Requirements in 2008

Source: Collie Analysis

Major Commodity Group	Existing Floorspace m² Gross Leasable Floor Area	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area	
	2008	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor			
Supermarket	*8,370*	*-3,020*	*2,580*
Other food specialty stores	*7,600*	*-80*	*-1,450*
Subtotal: Food, groceries and packaged liquor	15,970	-3,100	1,130
Take away food, cafes and restaurants	14,180	-1,350	-7,230
Subtotal: Food, groceries and liquor	***30,150***	**-4,450**	**-6,100**
Discount Department Stores	***18,770***	**-2,970**	**-2,970**
Other household goods *	**20,160**	**-17,290**	**-15,880**
Bulky goods *	**6,690**	**-5,330**	**-5,840**
TOTAL: RETAIL GOODS	**75,770**	**-30,040**	**-30,790**
TOTAL: RETAIL SERVICES	**10,400**	**Balance of Demand and Supply**	
TOTAL: RETAIL	**86,170**	**Ranging from -30,040 to -30,790m²**	

[1] Source: Table Set N, Table N.4: Net Additional Retail Floorspace Requirements in Footscray at Sustainable Trading Levels for 2008

[2] Source: Table Set T, Table T.4: Estimated Net Additional Retail Floorspace in Footscray at Typical, Sustainable Trading Patterns for 2008

* Discount Department Stores will absorb approximately 80 percent of demand for 'Other household goods' and 'Bulky goods' floorspace, thus this has been deducted to produce the Net Additional Floorspace figures, better representing future floorspace requirements by type and separating major store floorspace requirements from specialty stores.

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Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.10

Net Additional Floorspace Requirements in 2011

Source: Collie Analysis

Major Commodity Group	Existing Floorspace m² Gross Leasable Floor Area	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area	
	2008	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor			
Supermarket	*8,370*	*-2,980*	*2,660*
Other food specialty stores	*7,600*	*-20*	*-1,410*
Subtotal: Food, groceries and packaged liquor	15,970	-3,000	1,250
Take away food, cafes and restaurants	14,180	-1,260	-7,170
Subtotal: Food, groceries and liquor	***30,150***	**-4,260**	**-5,920**
Discount Department Stores	***18,770***	**-2,170**	**-1,570**
Other household goods *	**20,160**	**-17,270**	**-15,840**
Bulky goods *	**6,690**	**-5,290**	**-5,820**
TOTAL: RETAIL GOODS	**75,770**	**-28,990**	**-29,150**
TOTAL: RETAIL SERVICES	**10,400**	**Ranging from 1,010 to 1,520m²**	
TOTAL: RETAIL	**86,170**	**Ranging from -27,980 to -27,630m²**	

[1] Source: Table Set N, Table N.4: Net Additional Retail Floorspace Requirements in Footscray at Sustainable Trading Levels for 2011

[2] Source: Table Set T, Table T.4: Estimated Net Additional Retail Floorspace in Footscray at Typical, Sustainable Trading Patterns for 2011

* Discount Department Stores will absorb approximately 80 percent of demand for 'Other household goods' and 'Bulky goods' floorspace, thus this has been deducted to produce the Net Additional Floorspace figures, better representing future floorspace requirements by type and separating major store floorspace requirements from specialty stores.

Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.11

Net Additional Floorspace Requirements in 2021

Source: Collie Analysis

Major Commodity Group	Existing Floorspace m² Gross Leasable Floor Area	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area	
	2008	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor			
Supermarket	*8,370*	*-2,840*	*2,940*
Other food specialty stores	*7,600*	*170*	*-1,250*
Subtotal: Food, groceries and packaged liquor	15,970	-2,670	1,690
Take away food, cafes and restaurants	14,180	-930	-7,000
Subtotal: Food, groceries and liquor	***30,150***	**-3,600**	**-5,310**
Discount Department Stores	***18,770***	**-1,670**	**-770**
Other household goods *	**20,160**	**-17,180**	**-15,710**
Bulky goods *	**6,690**	**-5,140**	**-5,730**
TOTAL: RETAIL GOODS	**75,770**	**-27,590**	**-27,520**
TOTAL: RETAIL SERVICES	**10,400**	**Ranging from 4,200 to 6,600m²**	
TOTAL: RETAIL	**86,170**	**Ranging from -23,390 to -20,920m²**	

[1] Source: Table Set N, Table N.4: Net Additional Retail Floorspace Requirements in Footscray at Sustainable Trading Levels for 2021

[2] Source: Table Set T, Table T.4: Estimated Net Additional Retail Floorspace in Footscray at Typical, Sustainable Trading Patterns for 2021

* Discount Department Stores will absorb approximately 80 percent of demand for 'Other household goods' and 'Bulky goods' floorspace, thus this has been deducted to produce the Net Additional Floorspace figures, better representing future floorspace requirements by type and separating major store floorspace requirements from specialty stores.

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Table Set W: Summary Tables: Comparison Sales and Future Floorspace Requirements for Footscray Transit City from 2008 to 2031

Table W.12

Net Additional Floorspace Requirements in 2031

Source: Collie Analysis

Major Commodity Group	Existing Floorspace m² Gross Leasable Floor Area	Supportable Retail Floorspace at Sustainable Trading Levels m² Gross Leasable Floor Area	
	2008	Current Trading Patterns [1]	Typical Trading Patterns [2]
Food, groceries and liquor			
Supermarket	*8,370*	*-2,700*	*3,230*
Other food specialty stores	*7,600*	*370*	*-1,090*
Subtotal: Food, groceries and packaged liquor	15,970	-2,330	2,140
Take away food, cafes and restaurants	14,180	-590	-6,810
Subtotal: Food, groceries and liquor	***30,150***	**-2,920**	**-4,670**
Discount Department Stores	***18,770***	**-1,170**	**130**
Other household goods *	**20,160**	**-17,100**	**-15,570**
Bulky goods *	**6,690**	**-4,980**	**-5,630**
TOTAL: RETAIL GOODS	**75,770**	**-26,170**	**-25,740**
TOTAL: RETAIL SERVICES	**10,400**	**Ranging from 7,510 to 12,210m²**	
TOTAL: RETAIL	**86,170**	**Ranging from -18,660 to -13,530m²**	

[1] Source: Table Set N, Table N.4: Net Additional Retail Floorspace Requirements in Footscray at Sustainable Trading Levels for 2031

[2] Source: Table Set T, Table T.4: Estimated Net Additional Retail Floorspace in Footscray at Typical, Sustainable Trading Patterns for 2031

* Discount Department Stores will absorb approximately 80 percent of demand for 'Other household goods' and 'Bulky goods' floorspace, thus this has been deducted to produce the Net Additional Floorspace figures, better representing future floorspace requirements by type and separating major store floorspace requirements from specialty stores.