Maribyrnong City Council

Update of Retail Development and Activity Centre Policy

Volume 1

Issues and Recommended Policy and Strategies

by

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1. Introduction and Purpose

The purpose of this study is to update the analysis and conclusions of the review of the Maribyrnong City Council's Retail and Activity Centre Policy (adopted in February 1998) conducted in 2005-2006 in light of:

- Recent planning changes in Maribyrnong's activity centres
- Retail and activity centre trends that have emerged over the four years and expected future retailing trends
- Changes that have occurred in that period in the distribution and nature of retailing and activity centres in the City of Maribyrnong and surrounding areas.

The project has been designed to develop a rigorous strategic planning framework for the network of activity centres in the municipality, as part of Maribyrnong's Municipal Strategic Statement.

2. Context

The update of the Retail and Activity Centre Policy Review has been undertaken in the context of a number of planning studies and policies, development approvals, and the current dynamics of retailing and individual centres in Maribyrnong. These include:

- Population and housing statistics for the City of Maribyrnong
- Structure Plans, Urban Design Frameworks and Transport Strategies prepared or in preparation for Footscray Transit City, Highpoint, Central West, West Footscray, and Seddon
- The Footscray Transit City Retail Study (2009)
- Approved or proposed development applications in and adjacent to all of the municipality's activity centres

The preparation of the updated Retail Development and Activity Centre Policy Framework recognises and builds on these existing studies, strategies and development approvals, and contributes to a holistic vision for the future development of the City's network of activity centres.

3. Structure of the Report

The Report is presented in two parts:

- Volume 1: Issues and Recommended Policy and Strategies
- Volume 2: Analysis of and Strategies for Individual Activity Centres

Volume 1 is organised into the following four sections:

- Current Situation
- Anticipated Trends
- Potential Opportunities
- Recommended framework and strategies for a revised Retail Development and Activity Centre Policy

4. Current Situation

This Chapter analyses the current situation in Maribyrnong with respect to:

- State and local policies and strategies related to retail development and activity centres
- Retailing and socio-demographic characteristics of the municipality
- The network of activity centres in Maribyrnong within the context of Melbourne's Western Region

4.1 Policy and Strategy Context

Existing planning policies and strategies relating to retail development and activity centres are examined in terms of both local policies adopted by Maribyrnong City Council and State planning policies and strategies.

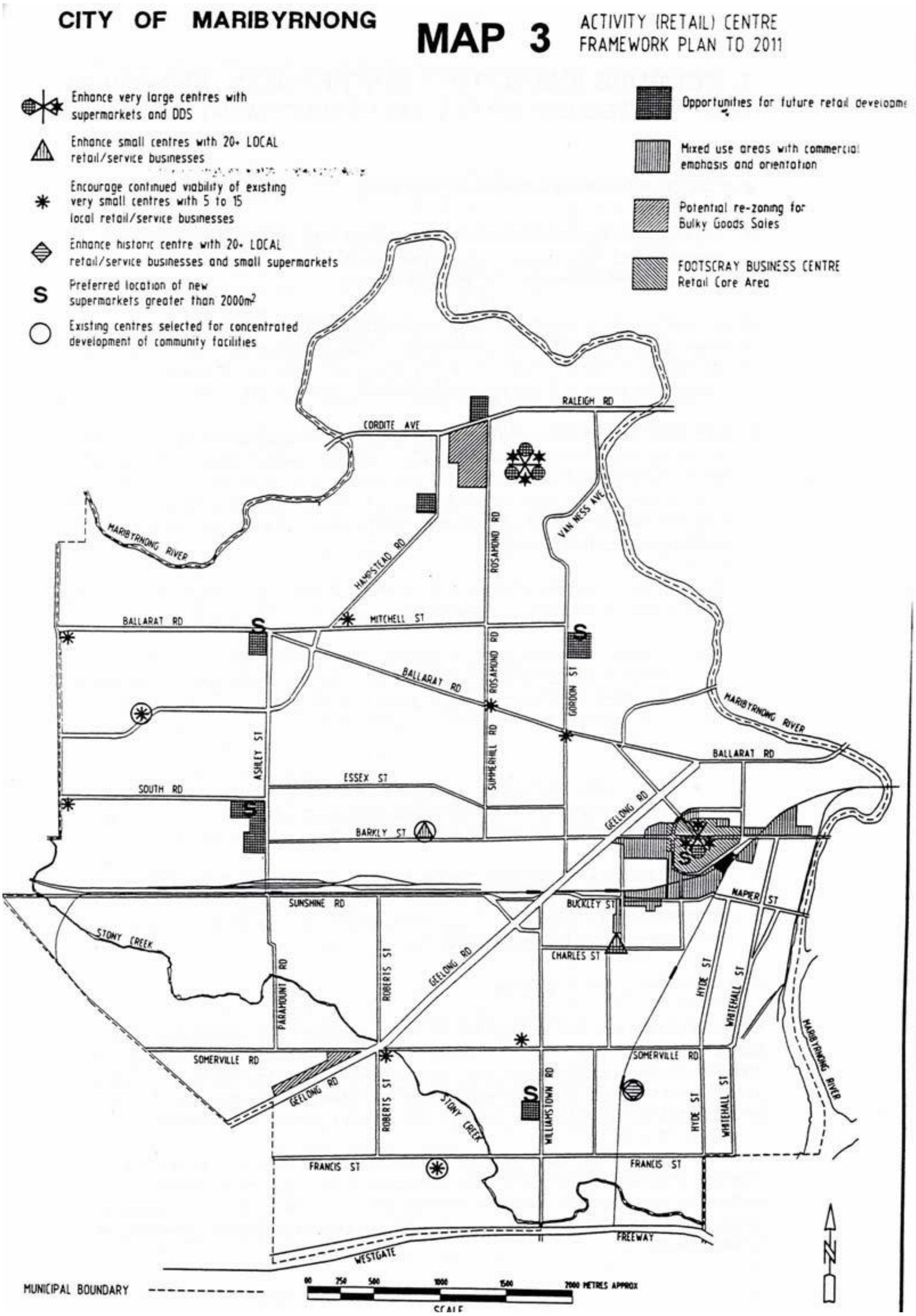
Local Planning Policies and Strategies

Retail Development and Activity Centre Policy

Maribyrnong City Council's Retail Development and Activity Centre Policy, adopted on 23 February 1998, contains:

- background information on the retail characteristics of the municipality as whole within its regional context as well as an outline of its major shopping centres, and bulky goods precincts
- dominant trends in retail activity in the municipality
- State Government policy and Council's Corporate Plan at that time
- An outline of the main retail and activity centre issues facing the municipality including:
    - *the future regional and local roles and functions of the Highpoint and Footscray centres*
    - *the manner in which Yarraville centre will co-exist with a likely new centre to be built on Williamstown Road*
    - *The approach to be taken to the other local centres that are too small, scattered and fragmented to be really viable as they stand*
    - *The approach to be taken to neighbourhoods in the western part of the municipality that do not have a real retail, service or activity focus*
    - *The potential opportunities arising from major housing development and population growth in the north-western and northern parts of the City over the next 15 years*
    - *Council's response to the increasing pressure for the development of new supermarkets in the City frequently on isolated sites as opposed to within centres*
    - *The approach to be taken to the real dilemma of static or declining small local centres and priorities for capital spending in circumstances of extremely limited resources*
    - *The form and extent of Council's role in dealing with these issues*
- A future vision for the City's two main centres (Footscray and Highpoint) as well as its supermarkets, small centres and convenience retailing
- An Activity (Retail) Centre Framework Plan to 2011 – illustrated in Figure 1
- A Retailing and Activity Centre Policy, Principles and Strategies for Future Development including:
    - The major assumptions behind the policy
    - The general aims of the policy.

Figure 1
Activity (Retail) Centre Framework Plan to 2011



- A series of general policy statements
- An adopted activity centre framework plan
- Recommended future Council strategies and actions
- Specific principles, policies and future Council strategies and actions for each of the Highpoint, Footscray, Yarraville, Seddon, Barkly Village (West Footscray), centres
- A local policy for the other smaller centres
- Recommended policies to deal with proposed new large supermarkets, bulky goods retailing, as well as convenience shops, highway restaurants, take-away food shops and service stations or mixes of these uses
- policies and future Council strategies and actions to deal with infrastructure development in centres
- policies and future Council strategies and actions in relation to marketing and promotion of centres.

The update of the policy is considered necessary by Council due to the significant changes that have occurred to the planning of Melbourne, current retail trends, and changes that have since occurred in the distribution and nature of retailing in Maribyrnong. The further refinement of the policy is the major focus of this project.

Municipal Strategic Statement

The Municipal Strategic Statement (MSS) adopted in December 1999 and outlined in Clause 21 of the Maribyrnong Planning Scheme (approved in August 2001) provides a general profile, key issues and directions relating to the municipality's physical, social, economic and environmental development.

Relevant matters to this study highlighted in the Municipal Profile in Clause 21.01 are:

- *In 1995, there were 105 hectares (3% of Maribyrnong's total land area of 3,130 hectares) zoned and used for business and commercial activity, mostly in the form of shopping and business centres*
- *The City hosts the two largest and most important shopping, business and entertainment centres (Footscray Business Centre and Highpoint Shopping and Entertainment) in the Western Metropolitan Region*
- *Other shopping centres in the City are quite small and struggling to survive*
- *Some smaller centres provide needed and valued services, and their important social and cultural roles in the community need to be preserved*
- *In particular, Yarraville, Seddon and Barkly Village have the potential for development of individual character and greater social and cultural roles*.

One of the Key Issues highlighted in Clause 21.02 of the MSS builds on the 1998 Retail Development and Activity Centre Policy. It refers to:

- Changing patterns of retailing – where a number of trends are operating, including:
  - A change in the nature of retailing at the Footscray business centre from comparison shopping (now dominated by Highpoint) to convenience food shopping, niche marketing (e.g., the Asian influence) and regional entertainment and services (especially health services)
  - Stagnation or decline in local retailing in most of the small centres, which is being replaced by non-local specialised retailing, restaurants and other businesses. In these centres, there is a need for flexibility in dealing with non-retail applications
  - High demand for bulky goods retailing in some industrial areas – particularly on Geelong Road, Ballarat Road and in the vicinity of Highpoint

- Pressure for supermarket development in locations distant from existing centres
- Retail floor area expansion at Highpoint as existing approvals are taken up

The Major Development Opportunities Plan outlined in this section and illustrated in Figure 2 highlights the extent of major retail development sites in the municipality at that time.

Clause 21.03 of the MSS outlines a Vision for 2011 and associated Strategic Framework Plan.

The Vision incorporates:

- *A city which will have a greater residential focus*
- *A reduction in the amount of land devoted exclusively to industrial activity*
- *Other significant and very noticeable changes such as for the Maribyrnong River, in the shopping and activity centre network, significant development in and around the existing tertiary education establishments, and along Stony Creek*
- *Important infrastructure development*
- *New forms of economic activity*

With respect to retailing and activity centres, the Vision states that *"there will be significant changes to the shopping and activity centre network, including major developments in some shopping centres, the creation of a small number of new small centres and increases in other commercial activity. This will result in more equitable access to shopping and associated community facilities*". This study will examine the extent to which this vision has been achieved.

The Physical Framework Plan, illustrated in Figure 3, outlines the location of four different types of 'activity centres':

- The Major Regional Activity Centre at the Highpoint Shopping and Entertainment Centre
- The Major Activity Centre at Footscray with a "complex mix of regional retailing and other activities"
- Seven Significant Activity Centres with "local retailing and community facilities"
- Several Mixed Use Areas with "commercial, industrial and residential activity in specified locations" including sections of Somerville Road and Williamstown Road.

Clause 21.04 provides Objectives, Strategies and Implementation measures for the key land use elements in Maribyrnong. The most relevant section to this project is Clause 21.04-6 Activity Centres and Retailing. The Clause contains an Activity (Retail) Centre Framework Plan - illustrated in Figure 4 in this report.

The Plan highlights 18 existing activity centres and five opportunity sites for future retail development. The activity centres identified are Footscray Business Centre/Footscray Central with its mixed retail and entertainment activities; the Major Regional Activity Centre at Highpoint; Yarraville Village; and 15 Small Centres "with up to 20 local retail/service businesses". The five opportunity sites are the Maribyrnong Defence Site, and the areas now developed or being developed at Central West, Waterford Gardens, Edgewater, and the Yarraville Square Centre.

Four groups of objectives are enunciated to address the key issues of activity centres:

Figure 2

City of Maribyrnong Major Development Opportunities

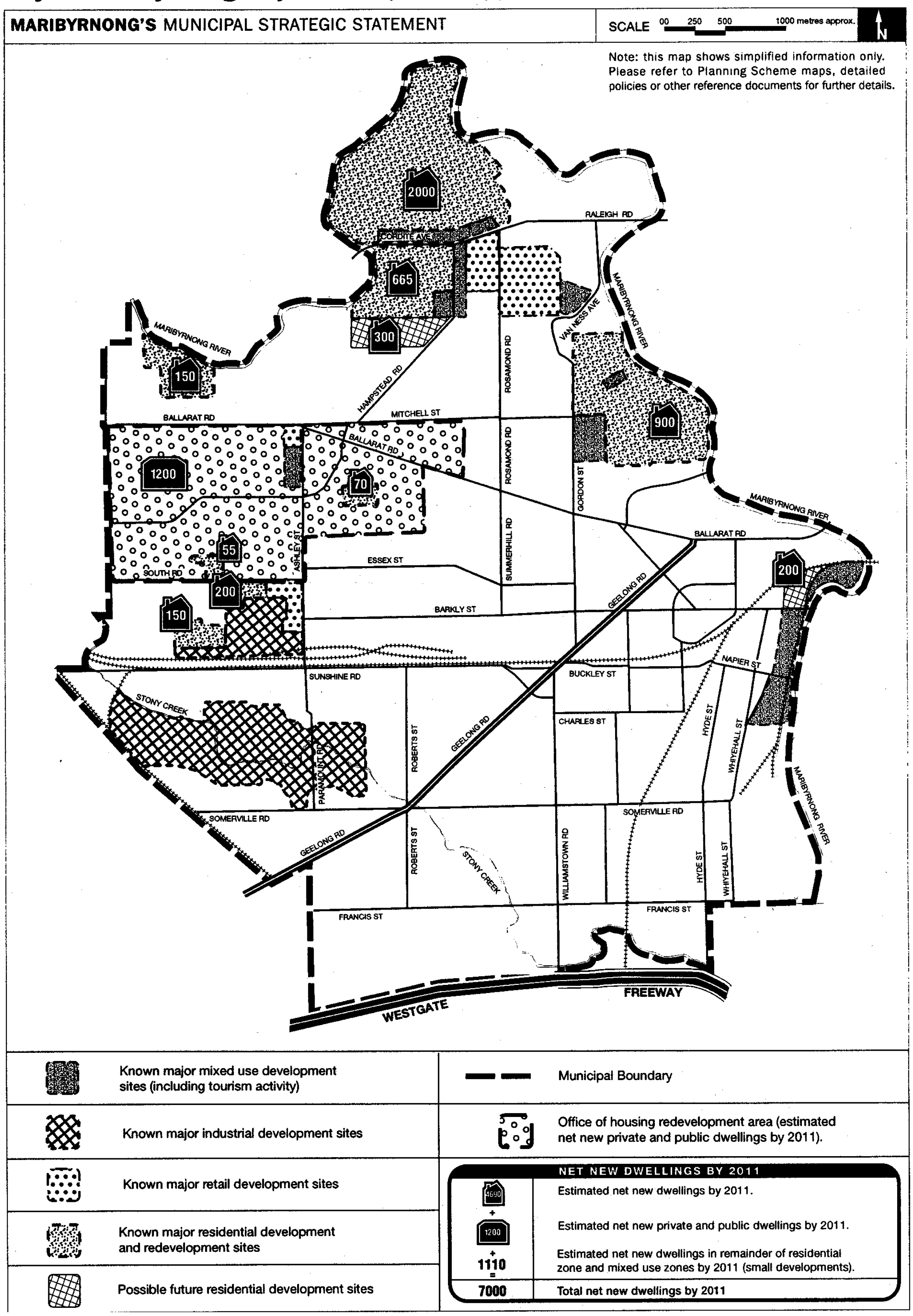


Figure 3

City of Maribyrnong Vision 2011 – Physical Framework Plan

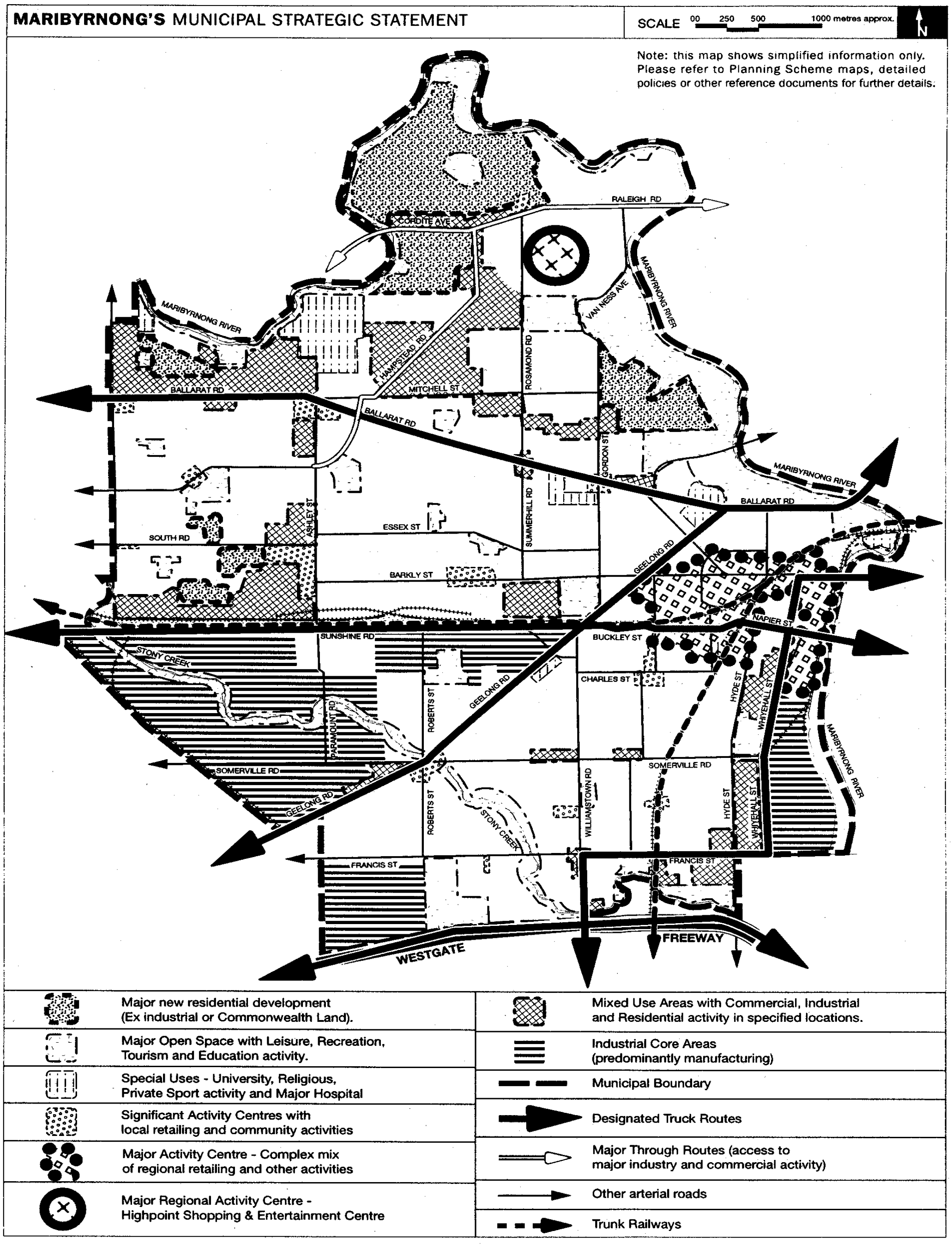
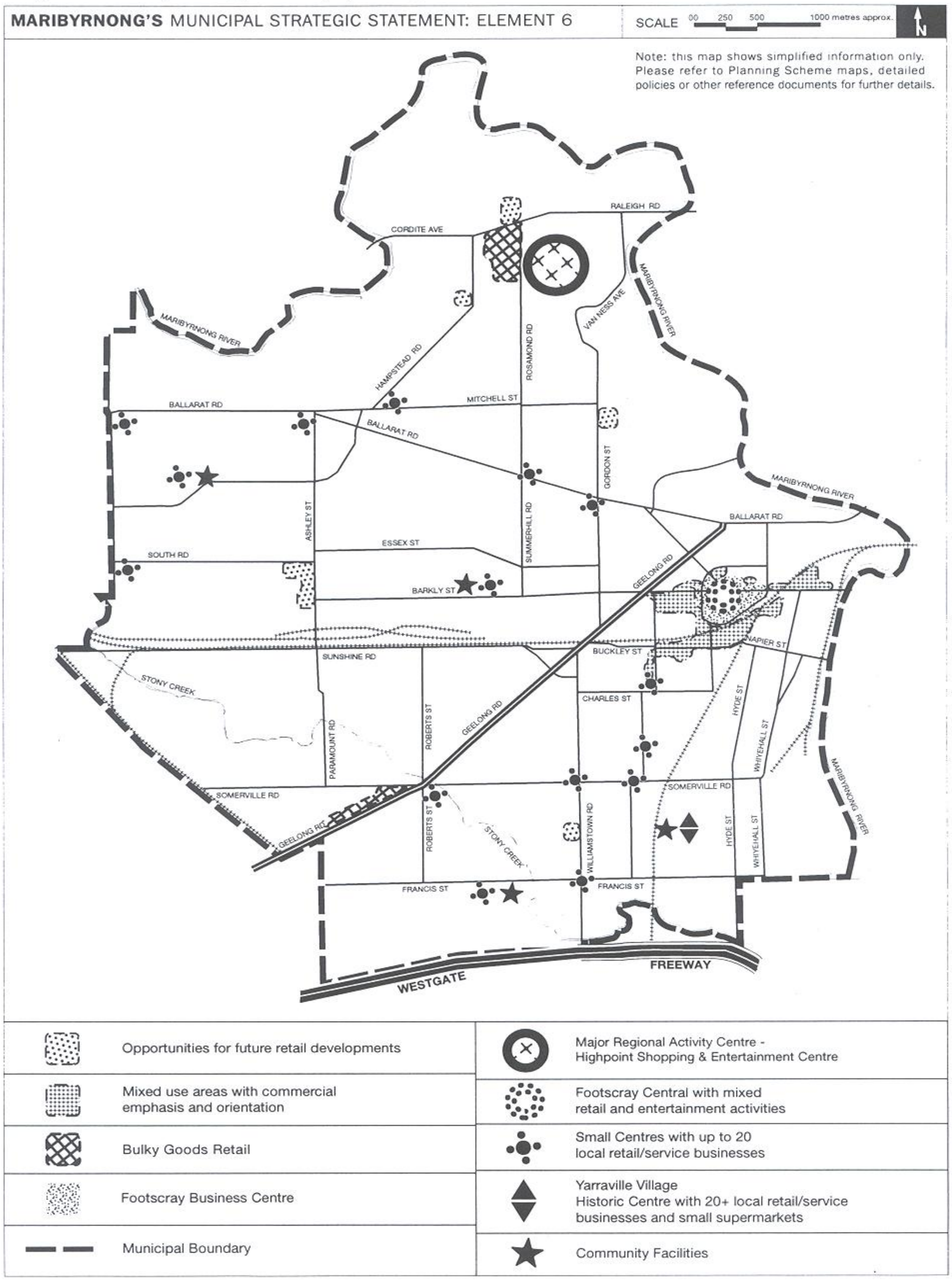


Figure 4

City of Maribyrnong Activity (Retail) Centre Framework Plan



Environmental Objectives

- *Create centres which are physically attractive, well maintained and clean, and which minimise the impact if litter on the environment*
- *Create centres which provide friendly and safe access pathways, good lighting, quality landscaping, street furniture, conveniences and activity spaces for people to meet*
- *To ensure that any development of the contaminated land at 1-3 High Street Yarraville for a proposed shopping centre protects the community, worker safety and the environment during development and in the long term*

Economic Objectives

- *Enhance the city's pre-eminence as the western Region's most important comparison goods shopping d focus offering a complete retail experience*
- *Achieve complimentary roles and functions for the city's two largest regional centres (Footscray Central and Highpoint Shopping Centre)*
- *Facilitate 30,000 square metres of new retail floor space and additional non-retail floor space at Highpoint Shopping Centre*
- *Recognise and consolidate the major role played by the Highpoint Shopping Centre as a regional retail centre in the provision of regional retail and entertainment facilities*
- *Encourage the development and redevelopment of the Highpoint Shopping Centre, as a mix of retail and entertainment facilities and ancillary uses*
- *Encourage and facilitate the role of the Highpoint Shopping Centre as a location for major comparison shopping facilities*
- *Ensure that the uses and development within the Highpoint Shopping Centre are compatible with the future development of the Sunshine, Footscray, Werribee and Moonee Ponds Activity Centres*
- *Assist the city become the Western Region focus for a wide range of quality multi-cultural restaurants, entertainment venues and night-time activity*
- *Achieve a better spread of large modern supermarkets throughout the city including possible development of two new supermarkets*
- *Facilitate a viable network of small convenience goods centres and outlets, with a range of goods and services, which are easily accessible by a wide range of transport*

Cultural/Social Objectives

- *Develop the city's major activity centres as regional arts, recreation and leisure nodes*
- *Ensure all residents are within reasonable walking or cycling distance of centres with a mix of local convenience shopping and services, leisure and entertainment opportunities, and community services and facilities*
- *Enhance distinctive cultural and social character in the different centres*
- *Revitalise the Footscray Centre as the civic heart of the city*

Infrastructure/Development Objectives

- *Ensure all centres have sufficient on and off-street parking to meet proven needs*
- *Place an emphasis on the future development of shared parking, not individually provided parking*
- *Make a priority of upgrading activity centre access roads, pathways and public transport facilities*

The strategies outlined in this Clause to achieve the objectives comprise:

- Planning Land Use Strategies
- Corporate Strategies

Planning Land Use Strategies

Implement the Physical Framework Plan (illustrated in Figure 4 above)

Corporate Strategies

- *Implement the Retail Development and Activity Centre Policy*
- *Encourage the clustering of new retail development (including any new supermarkets), leisure, recreation and entertainment activity, health and community facilities, services and new sustainable job opportunities in existing and planned new centres with good access*
- *Encourage the development of higher density housing in and around centres*
- *Encourage effective and restaurant development at ground floor level outside the retail core of centres*
- *Form coalitions of owners, traders and other business leaders, infrastructure agencies, the Council and other levels of government to plan and fund centre infrastructure improvement, revitalisation, management, maintenance marketing and promotion*

The strategies are to be implemented by:

- *Applying Council's Retail Development and Activity Centres Policy as well as its Development Contributions Policy, and the Footscray Central Urban Design Framework*
- *Applying the Mixed Use Zone and Business 1, 2 and 4 Zones to identify future retail areas and activity centres in Footscray and Maribyrnong, and encourage retail development in existing centres in Footscray, West Footscray, Yarraville and Seddon*
- *Applying the Business 4 Zone to recognise the bulky hoods development opposite Highpoint*
- *Applying the Business 2 Zone to the new retail centre at the south west corner of Ashley Street and Ballarat Road*
- *Facilitating the adoption of litter control practices and programs at retail centres*

The MSS currently is being reviewed and updated by Maribyrnong City Council. This report is designed to inform the Activity Centre Section of the revised MSS.

Local Planning Policies

The Local Planning Policies in the Maribyrnong Planning Scheme are organised by zone. The policy clauses relevant to this study are:

- 22.03 Business 1 Zone and Business 4 Zone Policy
- 22.04 Business 2 Zone and Comprehensive Development Zone Land Use and Development Policy
- 22.05 Business 3 Zone Land Use and Development Policy

Within Clause 22.03, there is a general policy (22.03-1) followed by specific policies for:

- Highpoint Shopping and Entertainment Centre (22.03-2)
- Footscray Business Centre (22.03-3)
- Yarraville Centre (22.03-4)
- Seddon Centre (22.03-5)

- Barkly Village (22.03-6)
- Other Centres in the Business 1 Zone (22.03-7)
- New Large Supermarkets (22.03-8)
- Bulky Goods Retailing (22.03-9)

State Planning Policies and Strategies

State Planning Policy Framework

The State Planning Policy Framework (SPPF) identifies land use and development policies that apply in all planning schemes throughout Victoria. It provides a range of policies and implementation strategies that seek to give guidance to planning and responsible authorities in implementing the objectives of the Planning & Environment Act for the fair, orderly and sustainable use and development of land.

Policies relevant to retail development and activity centres in Maribyrnong are included in the following clauses of the State Planning Policy Framework:

- Clause 12 Metropolitan Development
- Clause 13 Principles for Land Use & Development
- Clause 14 Settlement
- Clause 15 Environment including Heritage
- Clause 16 Housing
- Clause 17 Economic Development
- Clause 18 Infrastructure
- Clause 19 Particular Uses and Development including Design & Built Form.

Relevant clauses relating to this study are contained in Clauses 12 (Metropolitan Development), and 17 (Economic Development) particularly 17.01 (Activity Centres) and 17.02 (Business).

Clause 12 on Metropolitan Development incorporates, in statutory form, the key components of *Melbourne 2030*, the Government's metropolitan planning strategy for more sustainable urban growth, released in October 2002.

The main focus of *Melbourne 2030* is to establish a more compact city, particularly through a network of mixed use and higher density activity centres that are integrated by an effective public transport system. There are five key directions in *Melbourne 2030* that are relevant to this study:

- Direction 1 - A More Compact City
- Direction 2 – Better Management of Metropolitan Growth
- Direction 5 – A Great Place To Be
- Direction 6 – A Fairer City
- Direction 8 – Better Transport Links

These directions are expressed as objectives and strategies in Clauses 12.01, 12.02, 12.05, 12.06, and 12.08. The directions are relevant to retail and activity centre development in Maribyrnong by:

- Establishing an urban growth boundary so that Melbourne develops in a more compact way and that the development of new areas on the fringe is more controlled, as well as better co-ordinated and serviced
- Establishing a network of activity centres which are expected to take a larger share of new development, including higher density housing, than otherwise would occur with less controlled outward suburban sprawl
- Discouraging out-of-centre development
- Establishing a Principal Public Transport Network that links the various activity centres
- Encouraging high quality urban design, protecting cultural identity, neighbourhood character and sense of place, improving community safety, and protecting heritage places and values
- Encouraging a wide rage of arts, cultural and entertainment facilities including cinemas, restaurants nightclubs, and live theatres at Principal and Major Activity Centres

This study will examine the extent to which these Directions are being achieved in Maribyrnong's activity centres and other retail areas.

Figure 5 illustrates the *Melbourne 2030* Plan showing the network of activity centres and the Principal Public Transport Network for the western part of the metropolitan area.

Clause 12.01-2 outlines the classification of activity centres into five types – Central Activities District, Principal, Major, Specialised and Neighbourhood Activity Centres. This classification differs from the traditional centre classification which is based more on a retail hierarchy related to the overall retail size of a centre, type of retail anchors, and retail catchment area. This different approach has important implications for Maribyrnong that traditionally has linked its activity centre policy primarily to retailing and the hierarchy of retail centres in the municipality.

In Clause 17 (Economic Development), the objective for activity centres as outlined in Clause 17.01 is:

"To encourage the concentration of major retail, commercial, administrative, entertainment and cultural development into activity centres (including strip shopping centres) which provide a variety of land uses and are highly accessible to the community".

According to Clause 17.01-2 (General implementation), activity centres should be planned to:

- *Provide a range of shopping facilities in locations which are readily accessible to the community*
- *Incorporate and integrate a variety of land uses, including retail, office, education, human services, community facilities, recreation, entertainment and residential uses where appropriate*
- *Provide good accessibility by all available modes of transport (particularly public transport) and safe pedestrian and cycling routes, and to encourage multi-purpose trip-making to such centres*
- *Facilitate ease of pedestrian movement between components of centres, public transport interchanges and parking areas*
- *Maximise opportunities for co-location, multiple use and sharing of facilities*
- *Provide child care facilities to a, level consistent with the role of the centres*
- *Minimise the effects of commercial development on the amenity of residential and parkland areas, for example as a result of traffic congestion, noise or overshadowing*
- *Provide attractive environments for community activities*

The emphasis of this framework is on centres that incorporate and integrate a mixture of retail, office, education, entertainment and community service and residential uses where appropriate.

The objective for Business as outlined in Clause 17.02 is:

To encourage developments which meet the community's needs for retail, entertainment, office and other commercial services and provide net community benefit in relation to

Figure 5
***Melbourne 2030* Plan for the Western Region**

accessibility, efficient infrastructure use and the aggregation and sustainability of commercial facilities

Clause 17.02-2 directs commercial facilities to existing or planned activity centres. New freestanding commercial developments may occur in new residential, areas, which have extensive potential for population growth or will accommodate facilities that improve the overall level of accessibility for the community, particularly by public transport.

Melbourne @ 5 Million

The Victorian Government's long-term planning framework for managing Melbourne's growth was updated in December 2008 with the release of *Melbourne @ 5 million*. This strategy document focuses on:

- The creation of a multi-centre city through six new Central Activities Districts. Footscray as well as Box Hill, Broadmeadows, Dandenong, Frankston and Ringwood have been elevated from Principal Activity Centres to this higher order classification. Moving from one centre (the Melbourne Central Business District) to a number of centres is designed to reduce congestion and enable people to spend less time commuting to and from work
- Employment corridors that support the Central Activities Districts by linking activity centres, universities, research and technology precincts, medical precincts, and areas with high employment. Three employment corridors are to be given priority attention by the government: Avalon Airport to Werribee, Melton, Melbourne Airport and Donnybrook (Hume-Mitchell); Caulfield to Dandenong; and Monash University/Chadstone to Box Hill, Austin Hospital and Bell Street.
- The expansion of the outer Melbourne Urban Growth Boundary to accommodate some of the 284,000 new dwellings expected to be built in the growth areas and to maintain housing affordability.
- The amendment of the State infrastructure contribution announced in A Plan for Melbourne's Growth Areas. The Growth Areas Infrastructure Contribution is to be used to provide vital infrastructure and oversee development in the growth areas of Melbourne.

Updated Melbourne 2030 Classification of Activity Centres

With the release of *Melbourne @ 5 million*, the greater Melbourne CBD area and the six suburban centres including Footscray are designated as the Central Activities Districts. Twenty centres are designated as Principal Activity Centres. There are 82 Major Activity Centres, and 10 Specialised Activity Centres. Neighbourhood Activity Centres are not nominated.

The key characteristics of the different types of activity centres are outlined in Table 1:

Table 1: Key Characteristics of Different Types of Activity Centres in Melbourne 2030

Activity Centre Classification	Key Characteristics
Central Activities District	• A mix of activities that generate high number of trips, including business retail, services and entertainment • Generally well served by multiple public transport routes (many being on the rail network), and on the Principal Public Transport Network or capable of being linked to that network • A very large catchment covering several suburbs, and attracting activities that meet metropolitan needs • Potential to grow and support intensive housing

	developments without conflicting with surrounding land uses
Principal Activity Centres	• A mix of activities that generate high number of trips, including business retail, services and entertainment • Generally well served by multiple public transport routes (many being on the rail network), and on the Principal Public Transport Network or capable of being linked to that network • A very large catchment covering several suburbs, and attracting activities that meet metropolitan needs • Potential to grow and support intensive housing developments without conflicting with surrounding land uses
Major Activity Centres	• A mix of activities that generate high number of trips, including business retail, services and entertainment • Generally well served by multiple public transport routes (many being on the rail network), and on the Principal Public Transport Network or capable of being linked to that network • A very large catchment covering several suburbs, • Potential to grow and support intensive housing developments without conflicting with surrounding land uses
Specialised Activity Centres	• Important economic precincts with a link to a major tertiary educational or research institution • Mixed uses, but not competing with nearby Principal and Major Activity Centres. • Not mixed uses that serve a wider catchment and might inhibit their specialised role • Located on the Principal Public Transport Network
Neighbourhood Activity Centres	• Generally, a limited mix of uses meeting local convenience needs • Generally less than 10,000 square metres of retail floor space • Accessible to a viable user population by walking/cycling • Accessibility by local bus services, and public transport links to one or more Principal or Major Activity Centres • Important community focal points, ideally close to schools, libraries, child care, health services, police stations and other facilities that benefit from good public transport

This classification of activity centres differs from traditional centre classification systems which are based more on a retail hierarchy related to the size of centre as well as type and range of shops provided. This has important implications for Council's current Retail Development and Activity Centre Policy that follows the more traditional retailing approach than the mixed use centre emphasis in *Melbourne 2030*.

For the metropolitan area to become more sustainable, *Melbourne 2030* also requires free-standing shopping centres to change their functional orientation and physical appearance to become wider multi-activity centres rather remain as predominantly retail complexes. In the

City of Maribyrnong, this will affect the future role and function of the Highpoint Activity Centre.

With *Melbourne @ 5 million*, the updated *Melbourne 2030* network of key centres in Maribyrnong and in the wider Western Region is outlined in the Table 2:

Table 2: Updated Melbourne 2030 Network of Key Centres in the Western Region

	Maribyrnong	Moonee Valley	Hobsons Bay	Brimbank	Wyndham	Melton
Central Activities District	Footscray Transit City					
Principal Activity Centre	Highpoint	Airport West Moonee Ponds		Sunshine Sydenham Transit City	Werribee Transit City	
Major Activity Centre	Central West	Union Road Ascot Vale Keilor Road Niddrie North Essendon Racecourse Road Flemington	Altona Altona North Williamstown	Deer Park Brimbank Central St Albans	Hoppers Crossing Werribee Plaza	Caroline Springs Melton High Street Woodgrove and Coburns Road
Specialised Activity Centre	Victoria University Footscray				Werribee Animal and Food Research Precinct	

Maribyrnong, similar to its two neighbouring municipalities of Moonee Valley and Brimbank, is distinctive in that it is dominated by two key centres. However, unlike any of its neighbours, Maribyrnong has only one Major Activity Centre. The implications of this configuration are discussed in more detail in Section 4.3 of this report.

Retail Policy Review

The Minister for Planning announced the State Government's Retail Policy Review in May 2007.

The key purpose of the Retail Policy Review was to examine existing policy and statutory frameworks in the Victoria Planning Provisions (VPP) and planning schemes, which guide planning and development of, and investment in, retail activity in Victoria. To achieve this the review considered all aspects of the statutory framework that support retail policy, including land use definitions, zoning controls and other related provisions applying to retailing in planning schemes.

The Review recognised that there will be a significant demand for retail floorspace in metropolitan Melbourne over the next 25 years. Its also acknowledges the desire to manage and accommodate the likely growth required across the network in appropriate locations. This was considered critical to maintaining a competitive retail sector. Overall, it was estimated that there will be a need for approximately 40% more retail floorspace than currently provided.

Planning for the network of 120 Principal Activity Centres (PACs) and Major Activity Centres (MACs) would help cater for likely growth and change.

A Discussion Paper on the Review was released in October 2008. The Paper highlighted that current policies were generally sound, however much greater guidance and direction was required on how policy objectives were to be achieved on the ground in the context of retail development. Six key issues and challenges were outlined, as well as 17 proposed responses to address the issues and challenges. Each of these proposed responses aimed to improve the way the planning, design and location of future retail investments was approached across Victoria.

The Discussions Paper indicated that the following four key principles guided the Review:

Principle 1 *– Retail planning policy and controls should be consistent with and support activity centre policy and provide clarity and certainty on the appropriate location of retail facilities.*

Principle 2 *– Planning policies and controls should allow capacity for growth and change in retailing.*

Principle 3 *››– Planning policies and controls should not limit retail competition or innovation, or distinguish between or favour particular forms of retailing unless there is a clear public policy case for doing so.*

Principle 4 *– Planning policies and controls should ensure retail development proposals pay particular attention to the public realm (both public and private spaces) and contribute to a sense of place and the role of the activity centre as a focus for the community.*

The following six key issues and challenges were identified, together with the proposed responses:

Managing growth and the network of centres *– We need improved information to prioritise regional and local planning to manage and accommodate growth in retail floorspace likely to be required across the network.*

Proposed responses

- Undertake a program of improved monitoring and reporting on retail development.
- Work with councils and the industry to develop Regional Retail Assessments.
- Provide greater assistance to councils in preparing municipal strategies that provide for future retail growth.
- Work with councils to ensure structure planning for activity centres provides for adequate retail growth.

Facilitating appropriate development in appropriate locations *– We need planning tools that are better aligned to achieving policy outcomes and support development when it is in appropriate locations.*

Proposed responses

- Refine planning policies to provide greater clarity and guidance for retail proposals.
- Undertake adjustments to the Business 1 Zone and schedule to allow better delivery of policy outcomes.

- Encourage councils to investigate and implement non-regulatory mechanisms as well as planning controls to deliver the desired outcomes for a centre.

Managing restricted retail premises *– We need to move toward a system that does not distinguish between or favour particular forms of retailing.*

Proposed response

- Maintain the existing definition of 'restricted retail premises' in planning schemes and the VPP.

Managing retailing in industrial areas *– We need to ensure that retailing in industrial areas does not occur unless there is a sound strategic basis.*

Proposed responses

- Amend industrial zones so that restricted retail premises become a prohibited use.
- Develop transitional arrangements and work with councils to deal with restricted retail premises that are currently located within industrial areas.

Managing new centres and major retail proposals *– We need to provide greater clarity about how or when we would consider retail in a new centre location and support development within the existing network of centres.*

Proposed responses

- Develop and implement Retail Assessment Criteria based on a sequential test approach.
- Develop criteria to be applied when considering a request for a new centre or to reclassify a centre.
- Continue to provide advice and assistance to councils in planning for major retail proposals.

Improving design outcomes*– We need to ensure the design of new retail facilities and centres is well integrated and contributes to and enhances the public realm.*

Proposed responses

- Finalise the *Interim Design Guidelines for Large Format Retail Premises*.
- Undertake a review of design guidelines for retail developments and where possible consolidate this advice, improve the content and minimise any duplication.
- Update the *Activity Centre Design Guidelines* to incorporate design objectives and guidance on the development of new activity centres.
- Continue to provide assistance and advice to developers and councils on the design of major retail development.

In summary, the proposed approach developed through the Review sought to provide greater clarity in relation to the policy and statutory framework around which retail development proposals are to be considered and assessed. A more pro-active approach to planning for retail was considered to be required so as to achieve better 'on-the-ground' outcomes with greater support and guidance.

This Discussion Paper was released for public feedback until 27 February 2009.

4.2 Retailing and Socio-Demographic Characteristics of the City of Maribyrnong

Retailing

Retailing is a dynamic industry and a very important part of the economy of the City of Maribyrnong. It is one of the largest employment sectors in the municipality, currently providing approximately 6,200 jobs in about 846 individual businesses. This represents approximately 18% of Maribyrnong's estimated 35,000 jobs and 20% of its 5,392 business establishments.

The retailing sector in Maribyrnong comprising shopfront retailing and vehicle sales generates annual turnover in excess of $ 1.1 billion.

In 1998, it was estimated in the Maribyrnong Retail Development and Activity Centre Policy that there were was 235,000 square metres of retail floorspace in the City of Maribyrnong. With the population of the City at that time at approximately 59,000, this represented 3.98 square metres per person. This was considered to be twice as much retail floorspace per person as the Melbourne average of approximately 2.0 square metres at the time.

In 2009, it is estimated that there is 323,900 square metres of retail floorspace. With the current population of the City at approximately 63,140, this represents 5.1 square metres per capita, or over double the current Melbourne average of less than 2.0 square metres per capita.

In a general sense, it is considered that Maribyrnong's total current retail floorspace more than adequately meets the overall needs of the municipality's residents. In fact, to sustain the high level of retail floorspace requires a considerable level of patronage from residents outside the municipality. It is estimated that 50% to 60% of that floorspace provision is due to spending from residents outside the municipality. This large amount of "inward expenditure" reflects particularly the dominant comparison retailing role provided in Maribyrnong by the Highpoint Shopping Centre and adjacent homemaker centres and big box retailing outlets.

With respect to the remainder, however, there are concerns that there is an oversupply of sustainable retail floorspace in some centres. For example, the Footscray Retail Study (January 2009) highlights that there is a 30,000 sq m oversupply of retail goods floorspace, particularly in areas such as discount department store and other household goods, bulky goods, supermarkets, and take away food, cafes and restaurants.

Supermarket and related food retailing is a very important part of the retail industry, accounting for approximately 50% of retail spending. As a result, municipalities normally would have a high proportion of their total retailing provision devoted to convenience outlets related to grocery and other daily or weekly shopping to meet the basic needs of their residents. This is not the case in Maribyrnong. Of the total 323,000 square metres of retail floorspace in the municipality, it is estimated that only about 100,000 square metres are dedicated to convenience retailing. The balance is geared more heavily than usual to non-convenience, non-food retailing where consumers compare goods before purchasing, particularly higher order goods.

Rather than having the problem of "escape expenditure" experienced in many municipalities where more retail dollars go out than come in, the City of Maribyrnong has the distinctive advantage of net inward expenditure, with resulting positive effects for the local economy.

Retail activity in Maribyrnong is undertaken in different environments:

- a variety of activity centres from the larger centres at Highpoint (including its bulky goods precincts) and Footscray to smaller neighbourhood and local centres (having at least a group of about 10 businesses)
- a few older style highway and other main road clusters of car sales, showrooms and other retail outlets along selected parts of Ballarat Road, Geelong Road, Somerville Road, and Barkly Street
- small stand alone retail outlets (milk bars, small specialty shops)

Most retailing in the City of Maribyrnong is undertaken in activity centres. There is relatively little out-of-centre retail development. As a result, the overall retailing pattern is very consistent with the objectives in *Melbourne 2030* to attract and consolidate as much development of this kind in centres.

However, with respect to the network of centres, there is not an even distribution of retail services throughout the City to allow all members of the community, including the aged and those without cars, to have convenient and *equal access to quality retailing services*. Although better quality retailing has been delivered to a few of the newer centres such as the Braybrook Shopping Centre, Yarraville Square and Waterford Gardens so as to increase the level of service to the community, the provision of retailing generally in many of Maribyrnong's centres is poor. For example, the Footscray Transit City Retail Study (January 2009) indicates that the Footscray centre has less than half the market share in its main trading area that it should have for traditional retail activity – particularly for supermarket and discount department store shopping. Furthermore, the centre has approximately 30% of the turnover of the Highpoint shopping complex, but has more than 60% of the retail floorspace. In essence, the Footscray centre is currently trading well below accepted industry benchmarks. This overall situation is discussed in more detail in Section 4.3.

The major exception to this situation is the retailing provided at the Highpoint Activity Centre. This centre encompasses the Highpoint shopping and entertainment complex as well as the bulky goods precincts along Rosamond Road, and is the dominant retail focus in the City. The activity centre has a total retail floorspace of approximately 149,200 square metres, or almost half of the municipality's total retail floorspace. This is made up of 104,100 square metres at the shopping and entertainment complex, 21,600 square metres at the Highpoint Homemaker Centre, 13,500 square metres at the Harvey Norman Centre, and over 10,0000 square metres of other main road retailing.

The Highpoint complex is a major retailing and entertainment destination with high quality shops and services. It is classified by the Property Council of Australia as one of only four "super regional" centres in metropolitan Melbourne (and the only one in Melbourne's Western Region), alongside Chadstone, Southland and Fountain Gate. It contains major brand comparison retailing outlets including a Myer department store, three discount department stores (Target, Big W and Harris Scarfe), as well as a Toys R Us, Rebel Sport, Borders Books and other brand specialty stores such as The Body Shop, Colorado, Dick Smith Electronics, Dunklings, Esprit, Just Jeans, Katies, Portmans, Roger David, Sanity, Sportsco, Sportsgirl, Sussan, and Witchery. The complex provides major entertainment and leisure facilities including Hoyts 8 Cinemas, Taverner Drive Thru, Playtime Electronic Games, and a public library.

The Highpoint Homemaker Centre and Harvey Norman Centre also are important retailing destinations within the activity centre. The Highpoint Centre contains major brand furniture and homewares stores including Fantastic and Easy Living Furniture as well as The Good

Guys and Retravision. Harvey Norman, Bunnings, and Dick Smith's Power House are key magnets within the other cluster.

The retail dominance of the Highpoint Activity Centre is further exemplified by the fact that the activity centre in total had an annual retail turnover in 2008 of over $ 900 million of which the Highpoint complex contributed over $ 750 million.

Apart from Highpoint, there is generally low quality retailing in many of the other centres. There is a strong emphasis on discount shops, and there are many of the same types of retail outlets in most smaller centres. Retailers appear stale and tired. There is very little evidence of fresh new retail concepts. Retail turnover generally is below benchmark industry standards.

Retail activity conducted outside of the activity centres is generally marginal and, in many cases, declining. There are showrooms and other bulky goods retail outlets along short sections of:

- Ballarat Road, between Duke and Ashley Streets
- Geelong Road – primarily the north side between the Sunshine railway line and Geelong Street
- Barkly Street west of Geelong Road

Unlike the MSS that in Clause 21.02 suggests that there will be high demand for bulky goods retailing in older industrial areas such as Geelong Road and Ballarat Road, this type of development along these major roads has been very constrained. Most of the development here comprises older style, low quality and relatively small stand-alone operations or clusters with little synergy between the types of products sold. The most successful businesses are the car sales. There are no high profile main brand stores such as Bunnings, Mitre 10, Megamart, JB Hi Fi, or Officeworks in these clusters. Nor are there any designated homemaker centres with major furniture outlets, freestanding superstores ("category killers), factory outlets, or other high profile bulky goods precincts similar to the types that have established along Rosamond Road Highpoint or at Whitehorse Road Nunawading. It is recommended that the current situation be retained, with no encouragement given to further bulky goods retail provision on Geelong Road and Ballarat Road.

The key focus in Maribyrnong for peripheral sales and bulky goods retailing is within the wider Highpoint Activity Centre. The only other bulky goods focus is the stand-alone Officeworks outlet at the corner of Williamstown Road and Thomas Street. However, that is not a bulky goods precinct as such, but a small destination cluster where Officeworks is linked to a specialty auto store and a KFC.

In Maribyrnong, there once were many stand alone milk bars/grocery stores or very small clusters of convenience and specialist shops scattered throughout the municipality. There still are a few of these operations, but they are very limited in number and decreasing. Now, most are peripheral businesses attracted by low rent. To survive, they need to be idiosyncratic businesses that attract a high volume of sales from a very wide area. Almost all of the operations in Maribyrnong are not of that type. As a result, many of these stand alone shops or small clusters have converted or are changing to other uses particularly non-retail. Conversions over the last five years in Maribyrnong include the small cluster in Roberts Street south of Geelong Road in Yarraville, and the small group of about six shops in the Mixed Use Zone in Beachley Street in Braybrook

There was a concern expressed in the 1998 Retail Development and Activity Centre Policy Report about increasing pressures for new supermarket developments outside of existing centres. Reference was made to the five stand-alone supermarket proposals at that time at:

- Yarraville (corner of High Street and Williamstown Road)
- South Braybrook (corner of South Road and Ashley Street)
- North Braybrook (corner of Ballarat Road and Ashley Street)
- Australian Defence Industry Waterford Green Estate (Wests Road)
- Australian Defence Industry Edgewater Estate (Gordon Street)

The question was raised whether the Maribyrnong community with its lower average income levels could support all of these supermarkets.

Since 1998, all of the developments have proceeded. There are supermarkets at all five sites, including a more recent IGA supermarket at Waterford Gardens. All of the new supermarkets are being well patronised by the communities in which they are located, indicating a level of consumer demand for this type of store. This is primarily because the new stores are larger brand name supermarkets - Safeway at North Braybrook (Braybrook Shopping Centre); Coles at Yarraville Square; Aldi at South Braybrook (Central West) and Edgewater; IGA at Waterford Gardens) than what existed previously in these neighbourhoods, and some of these newer supermarkets are better quality “full line” stores which customers generally prefer.

The new developments have not resulted in the closure of any existing supermarkets in Maribyrnong, although they have caused a re-adjustment in trading patterns, resulting in a more competitive environment for smaller supermarkets and convenience stores.

The important structural aspect of these stores is that, in all five sites, they did not develop as stand alone supermarkets outside of an activity centre, as feared in 1998. The supermarkets or convenience stores have become the anchors of new major or neighbourhood centres in the municipality. This is discussed further in the next chapter.

Socio-Demographic Characteristics

The retailing patterns of Maribyrnong’s activity centres particularly its neighbourhood and local centres are influenced by the demographic and socio-economic characteristics of those living in each centre’s trade area or catchment. This section analyses the current socio-demographic conditions of the municipality as well as key neighbourhoods within it.

At the 2006 ABS Census, the population within the City of Maribyrnong (an area of 31 square kilometres) was 63,140. This represented a population density of 2,036 persons per square kilometre which was much higher than the neighbouring municipalities of Melbourne (1,400 persons per sq m), Brimbank (1,364), and Hobsons Bay (1,298), but lower than Moonee Valley (2,498).

The average annual population growth in Maribyrnong over the previous five years was 1.2% and 0.2% in the five years before that. These increases reversed previous trends of -0.8% between 1991 and 1996, and -0.3% between 1986 and 1991.

Maribyrnong’s population is distributed among eight suburbs. These are Maribyrnong, Maidstone, Braybrook, West Footscray, Footscray, Kingsville, Seddon, and Yarraville. In 2001, the City’s population was concentrated primarily in the suburbs of Yarraville (20.3% of the population), Footscray (19.5%), and West Footscray (15.9%). This pattern continued in 2006. From 1991 to 2006, the suburbs that experienced the largest increases in residential growth were Maribyrnong, Footscray, Braybrook and Maidstone. This was due to the development of a significant number of higher density townhouses as dual occupancies or as part of large estates in these suburbs.

Tables 4 and 5 provide key socio-economic data from the ABS 2001 and 2006 Censuses for the municipality. These data are compared against averages for the Melbourne Statistical Division.

Table 4: ABS 2001 Census Data for the City of Maribyrnong

Characteristic	City of Maribyrnong Numbers	City of Maribyrnong %	Melbourne Stat Div % or No.
Age Distribution			
0-4	3,820	6.4	6.4
5-17	7,976	13.4	17.4
18-24	6,238	10.5	10.2
25-34	11,545	19.4	16.0
35-49	13,700	23.1	22.5
50-59	5,387	9.1	11.5
60-69	4,399	7.4	7.3
70-84	5,327	9.0	7.3
85 and over	1,014	1.7	1.4
Total	59,406	100.0	100.0
Average Age	35.0	-	36.0
Country of Birth			
English speaking countries	33,378	56.2	73.0
Non-English speaking countries	20,957	35.3	21.3
Australia	30,630	51.6	65.7
VIetnam	6,760	11.4	4.7
United Kingdom	1,599	2.7	2.4
All other countries	15,346	25.9	21.5
Not stated	5,071	8.5	5.7
Total	59,406	100.0	100.0
Language Spoken At Home			
Only English	28,435	47.9	69.4
Vietnamese	7,672	12.9	4.0
Cantonese	2,456	4.1	3.5
Greek	2,330	3.9	1.9
Italian	2,236	3.8	1.8
Macedonian	1,162	2.0	1.4
All other languages	10,512	17.7	13.2
Not stated	4,604	7.7	4.8
Total	59,407	100.0	100.0
Education – Highest Qualification Obtained			
Postgraduate degree	804	1.6	2.1
Graduate diploma or certificate	917	1.9	1.9
Bachelor degree	5,304	10.7	12.1
Advanced diploma	2,521	5.1	6.5
Certificate level	5,204	10.5	13.8
Studying for first qualification, no qualification, or unrecognised qualification	27,272	55.3	52.1
Not stated	7,335	14.9	11.5
Total	49,357	100.0	100.0
Labour Force Participation for Persons 15 years and Over			
15 to 19	1,221	35.6	46.4
20 to 24	3,080	67.6	77.1
25 to 34	8,803	76.2	79.7
35 to 44	7,319	73.9	78.7

45 to 54	4,415	65.0	77.3
55 to 64	1,564	33.9	50.0
65 and over	330	3.9	6.7
Total labour force	26,732	54.2	60.6
Not in labour force	18,875	38.2	35.4
Not stated	3,750	7.6	4.0
Occupation of Persons in the Labour Force			
Managers & administrators	1,370	5.9	8.3
Professionals	4,897	20.9	20.6
Associate professionals	2,491	10.6	11.4
Tradespersons & related	2,292	9.8	11.8
Advanced clerical & services	670	2.9	3.9
Intermediate clerical, sales & services	3,818	16.3	16.9
Intermediate production & transport	2,669	11.4	7.9
Elementary clerical, sales & service	2,300	9.8	9.7
Labourers & related	2,327	9.9	7.4
Inadequately described/not stated	568	2.4	2.1
Total	23,402	100.0	100.0
Gross Weekly Personal Income			
Negative and nil	2,847	5.8	6.6
$ 1 to $ 119	2,875	5.8	6.9
$ 120 to $ 299	15,588	31.6	24.2
$ 300 to $ 499	7,296	14.8	15.7
$ 500 to $ 699	6,074	12.3	13.9
$ 700 to $ 999	5,336	10.8	12.6
$ 1000 to $ 1499	2,659	5.4	7.3
$ 1500 and over	993	2.0	4.6
Not stated	5,690	11.5	8.1
Total	49,358	100.0	100.0
1st Quartile (lowest)	14,023	28.4	24.7
2nd Quartile	13,415	27.2	23.3
3rd Quartile	11,473	23.2	24.7
4th Quartile (Highest)	10,446	21.2	27.3
Household Type			
Family Households			
* Couple with children	5,999	26.7	36.8
* Couple without children	4,755	21.1	23.5
* One parent family	2,910	12.9	10.7
* Other family	570	2.5	1.6
Total Family Households	14,234	63.3	72.6
Group	1,330	5.9	4.2
Lone person	6,922	30.8	23.2
Total	22,486	100.0	100.0
Average Household Size	2.41		2.63
Tenure of Occupied Dwellings			
Fully owned	8,546	35.6	41.9
Being purchased	5,155	21.5	28.1
Rented - government	1,523	6.4	2.9
Rented – private and other rental type	6,304	26.3	19.9
Other tenure type	514	2.1	2.2
Not stated	1,942	8.1	5.1
Total	23,984	100.0	100.0
Gross Weekly Household Income			
Negative and nil	224	1.0	0.7
$ 1 to $ 199	1,460	6.5	3.6
$ 200 to $ 299	2,054	9.1	6.3
$ 300 to $ 499	3,856	17.1	13.9

$ 500 to $ 699	2.567	11.4	10.7
$ 700 to $ 999	3.084	13.7	14.2
$ 1000 to $ 1499	3,305	14.7	17.2
$ 1500 to $ 1999	1,988	8.8	11.8
$ 2000 and over	1,316	5.9	10.0
Not stated	2,632	11.7	11.6
Total	22,486	100.0	100.0
1st Quartile (lowest)	6,394	32.2	22.4
2nd Quartile	4,973	25.0	23.5
3rd Quartile	4,552	22.9	25.6
4th Quartile (Highest)	3,935	19.8	28.6
SEIFA Disadvantage Index			

Source: ABS 2001 Census, DSE Melbourne in Fact 2001

Table 5: ABS 2006 Census Data for the City of Maribyrnong

Characteristic	City of Maribyrnong Numbers	City of Maribyrnong %	Melbourne Stat Div % or Numbers
Age Distribution			
0-4	4,147	6.57	6.3
5-17	7,919	12.54	16.5
18-24	6,918	10.96	10.2
25-34	12,823	20.31	14.9
35-49	15,201	24.07	22.6
50-59	6,252	9.90	12.2
60-69	3,917	6.20	8.1
70-84	4,904	7.77	7.7
85 and over	1,060	1.68	1.6
Total	63,141	100.0	100.0
Average Age	34.0	-	37.0
Country of Birth			
English speaking countries	35,812	56.9	71.2
Non-English speaking countries	21,532	34.2	22.0
Australia	33,060	52.36	64.2
Vietnam	6,131	9.71	1.6
China	1,651	2.61	1.5
All other countries	16,713	26.46	25.8
Not stated	5,584	8.84	6.9
Total	63,140	100.0	100.0
Language Spoken at Home			
Only English	31,452	49.81	68.1
Vietnamese	7,497	11.87	2.0
Cantonese	2,430	3.85	1.8
Greek	2,188	3.47	3.2
Italian	1,917	3.04	3.3
Mandarin	1,360	2.15	1.7
All other languages	11,656	18.46	14.2
Not stated	4,641	7.35	5.6
Total	63,141	100.0	100.0
Education – Highest Qualification Obtained			
Postgraduate degree	2,133	4.04	2.67
Graduate diploma or certificate	1,145	2.17	1.62
Bachelor degree	8,300	15.71	11.64
Advanced diploma	3,640	6.89	6.21
Certificate level	5,751	10.89	11.47
Studying for first qualification, no qualification, or unrecognised qualification	21,229	40.19	57.1
Not stated	7,131	13.50	9.29
Total	52,821	100.0	100.0

Labour Force Participation for Persons 15 Years and Over			
15 to 19	1,192	37.43	44.3
20 to 24	3,597	65.60	73.6
25 to 34	9,951	77.60	78.3
35 to 44	8,221	75.92	77.9
45 to 54	5,545	70.31	78.6
55 to 64	2,057	43.18	54
65 and over	303	4.04	8
Total labour force	30,866	58.43	61.1
Not in labour force	17,364	32.87	32.4
Not stated	4,595	8.70	6.5
Occupation of Persons in the Labour Force			
Managers	3,027	10.72	12.48
Professionals	6,817	24.13	22.57
Technicians & trades	3,237	11.46	13.57
Community & personal service	2,488	8.81	8.13
Clerical & administrative	4,322	15.30	15.88
Sales	2,552	9.03	10.23
Machinery operators and drivers	2,158	7.64	6.37
Labourers	2,946	10.43	8.74
Inadequately described/not stated	700	2.48	2.04
Total	28,244	100.0	100.0
Gross Weekly Personal Income			
Negative and nil	4,130	7.82	8.1
$ 1 to $ 149	3,784	7.16	7.4
$ 150 to $ 249	8,833	16.72	13.2
$ 250 to $ 399	6,106	11.56	11.6
$ 400 to $ 599	6,275	11.88	12.9
$ 600 to $ 799	5,223	9.89	10.6
$ 800 to $ 999	4,255	8.06	8.4
$ 1000 to $ 1299	4,100	7.76	8
$ 1300 to $ 1599	2,090	3.96	4.2
$1600 to $ 1999	1,177	2.23	2.6
$ 2000 and over	1,205	2.28	4
Not stated	5,644	10.68	9.1
Total	52,822	100.0	100.0
1st Quartile (lowest)	12,752	27.1	25.0
2nd Quartile	12,651	26.9	25.0
3rd Quartile	11,127	23.7	25.0
4th Quartile (Highest)	10,448	22.2	25.0
Household Type			
Family Households			
* Couple with children	6,277	25.55	24.1
* Couple without children	5,632	22.92	35.18
* One parent family	3,092	12.58	10.96
* Other family	583	2.37	1.52
Total Family Households	15,584	63.43	71.76
Group	1,801	7.33	4.46
Lone person	7,184	29.24	23.78
Total	24,569	100.0	100.0
Average Household Size	2.4	-	2.63
Tenure of Occupied Dwellings			
Fully owned	6,601	27.28	34.7
Being purchased	7,410	30.62	36.3
Rented - government	1,554	6.42	2.81
Rented – private and other rental type	7505	31.02	22.57
Other tenure type	109	.5	1.0
Not stated	1,017	4.2	3.0
Total	24,196	100.0	100.0
Gross Weekly Household Income			

Negative and nil	205	1.3	1.0
$ 1 to $ 149	294	1.9	1.2
$ 150 to $ 249	311	2.0	1.0
$ 250 to $ 349	550	3.5	2.2
$ 350 to $ 499	1,320	8.5	6.3
$ 500 to $ 649	1,411	9.1	8.4
$ 650 to $ 799	870	5.6	4.9
$ 800 to $ 999	983	6.3	6.3
$ 1000 to $ 1199	1,614	10.4	11.0
$ 1200 to $ 1399	996	6.4	7.0
$ 1400 to $ 1699	1,199	7.7	8.6
$ 1700 to $ 1999	1,057	6.8	7.4
$ 2000 to $ 2499	1,360	8.7	8.3
$ 2500 to $ 2999	849	5.4	6.8
$ 3000 and over	777	5.0	7.2
Not stated	1788	11.5	12.3
Total	15,584	100.0	100.0
1st Quartile (lowest)	6,907	31.8	25.0
2nd Quartile	5,529	25.4	25.0
3rd Quartile	4,905	22.6	25.0
4th Quartile (Highest)	4,384	20.2	25.0

Source: ABS 2006 Census

From this information, the key features in the City of Maribyrnong compared with metropolitan Melbourne averages, are:

- A 6% increase in Maribyrnong's population from 59,407 in 2001 to 63,141 to 2006, compared with a metropolitan increase of 1.5 % for the same period

- A slightly younger population compared with metropolitan Melbourne as a whole. The average age in the municipality in 2006 is 34 (compared to 37 in metropolitan Melbourne) and the proportion of people in the different age groups is similar to the metropolitan Melbourne average with 49.7% of persons 34 years of age or younger (compared with 50.0% for metropolitan Melbourne), 32.2% of persons between 35 and 59 (compared with 34.0% for metropolitan Melbourne) and a slightly higher 18.1% of persons 60 years of age or older (compared with 16.0% for metropolitan Melbourne).

- A continuing greater proportion of the Maribyrnong population as a whole born outside Australia (39% compared with 33% for metropolitan Melbourne in 2006) and in non-English speaking countries (34% compared with 22% for metropolitan Melbourne in 2006). About 10% of these people were born in Vietnam, compared to 1.6% for metropolitan Melbourne.

- A continuing very multicultural and multilingual society demonstrated by the fact that in 2006 only 50% speak only English at home compared with 68% for metropolitan Melbourne as a whole

- Increasing educational qualification levels with 40% of the Maribyrnong population having obtained a postgraduate, graduate or bachelor degree, advanced certificate or diploma in 2006 compared with 30% in 2001

- Higher educational qualification levels in 2006 with 40% of the Maribyrnong population having obtained a postgraduate, graduate or bachelor degree, advanced certificate or diploma compared with 34% of the metropolitan Melbourne population

- Continuing lower labour force participation rates in 2006 particularly in the 15-19, 20-24, 35-44, 45-54, 55-64, and 65 and over age groups compared with metropolitan Melbourne

- A similar proportion in 2006 of residents employed as managers and professionals (34.9% compared with 35.1% for metropolitan Melbourne), a lower proportion of technicians and tradespersons (11.5% compared with 13.6%), a higher proportion in community and personal service (8.9% compared with 8.1%), and a lower proportion of clerical. sales, machinery operators and transport workers (32.0% compared with 34..5%). These figures represent the significant changes occurring as a result of gentrification of key parts of Maribyrnong.

- Continuing lower average per capita income (measured by gross weekly wages) in the municipality in 2006 with 27.1% in the lowest quartile (compared with 25.0% for metropolitan Melbourne as a whole); 26.9% in the second lowest quartile (compared with 25.0% for metropolitan Melbourne as a whole) and 22.2% in the highest quartile (compared with 25.0% for metropolitan Melbourne as a whole). However, the gap between the Maribyrnong and Melbourne metropolitan figures closed in 2006

- A continuing overall lower average household size of 2.4 in 2006 compared with 2.6 for metropolitan Melbourne. This is due to the lower proportion of family households (63.4% compared with 71.8% for metropolitan Melbourne) and the much higher proportion of lone person households (29.2% compared with 23.8%)

- Continuing lower levels of home ownership in 2006 with 57.9% of occupied dwellings being owned or purchased compared with 71.0% for metropolitan Melbourne. In comparison, 37.4% of occupied dwellings (an increase from 2001) are being rented compared with 25.4% for metropolitan Melbourne

- Continuing lower household income in the municipality in 2006 with 31.8% in the lowest quartile (compared with 25.0% for metropolitan Melbourne as a whole); 25.4% in the second lowest quartile (compared with 25.0% for metropolitan Melbourne as a whole) , 20.2% in the highest quartile (compared with 25.0.% for metropolitan Melbourne as a whole) and 22.6% in the second highest quartile (compared with 25.0.% for metropolitan Melbourne as a whole). However, the gap between the Maribyrnong and Melbourne metropolitan figures closed in 2006

There are significant differences among Maribyrnong's eight residential suburbs. These differences are reflected to varying degrees in the neighbourhood and local centres situated within each suburb.

Yarraville is the largest suburb in the municipality. It is one of the most intensely developed with 12,726 residents in 2006 - an increase of 5.6 % from the 12,047 residents in 2001. The population of the suburb represents 20.2% of the municipality's population. Residential development dates from the late 19th century and includes a diverse range of Victorian, Edwardian, Inter-war styles as well as newer housing including 1970's walk up flats and 1990's infill development. Because of its proximity to the Melbourne CAD, relative affordability and village ambience, the Yarraville suburb has become an attractive inner city location for more affluent young people. The gentrification in Yarraville is reflected particularly in the Yarraville and Yarraville Square Neighbourhood Centres.

Footscray is the second largest suburb in the municipality (11,401 residents in 2006, a decrease of 1.5% from the 11,575 residents in 2001). Residential development dates from the 19th century and includes a diverse range of Victorian, Edwardian, Federation, Inter-war and Post-war styles as well as newer housing including 1950's to 1970's walk up flats and infill development, together with post 1990's multi-unit and townhouse developments.

West Footscray is the third largest suburb in the municipality with 9,776 residents in 2006, an increase of 3.4% from the 9,450 residents in 2001. Residential development has occurred primarily from the 1930's onwards. Housing consists predominantly of Inter-war, Californian Bungalow, Post-war architectural styles as well as 1970's to 1990's infill development. The suburb contains a significant private rental component. In 2006, there was a substantial proportion of young families with pre-school and teenage children as well as lone person households.

Maribyrnong is the fourth largest and strongest growing suburb with 8,242 residents in 2006 - an increase of 40.5 % from the 5,866 residents in 2001. This represented 13.1% of the municipality's population – an increase from 10.4% in 2001.

Braybrook had 6,940 residents in 2006 - an increase of 6.0% from the 6,546 residents in 2001. This representing 11% of the municipality's population – the same proportion as in 2001. Housing is very mixed. There is a high proportion of privately-owned detached dwellings as well as a significant amount of public housing, much of which has been redeveloped over the last 10 years. Housing is newer with architectural styles varying from the 1950's detached dwellings to post-1990s infill development. The Braybrook suburb population is younger than the rest of the municipality. There are significant numbers of young families with pre-school and teenage children.

Maidstone is just about as large as Braybrook with 6,050 residents in 2006 - a decrease of 1.9 % from the 6,165 residents in 2001. The suburb represents 9.6% of the municipality's population – a decrease from 10.4% in 2001. Like Braybrook, housing in Maidstone is very mixed with a high proportion of privately owned detached dwellings as well as a significant amount of public housing, much of which has been redeveloped over the last 10 years. Architectural styles vary from post-war detached dwellings to some infill development from the 1980's onwards. Like Braybrook, Maidstone has a high average household size. There are significant numbers of young families with young children as well as households with five or more persons.

Seddon is one of the smaller suburbs with 4,651 residents in 2006 - an increase of 6.0% from the 4,388 residents in 2001. This represented 7.4% of the municipality's population. Residential development dates from the late 19^{th} century and includes a diverse range of Victorian, Edwardian, and Federation styles as well as newer housing including 1950's to 1970's walk up flats. The average household size is relatively small - 2.3 in 2006 compared with the municipal average of 2.4. In 2006, there was a substantial proportion of young families and middle age adults.

Kingsville is the smallest suburb with 3,351 residents in 2006 - a decrease of 1.2% from the 3,393 residents in 2001. The suburb's population represents only 5.3% of the municipality's population – a decrease from 5.7% in 2001. Housing is mixed and consists of Victorian, Federation, Inter-war and Post-war architectural styles. The form of existing development leaves little potential for redevelopment. The suburb contains a substantial proportion of young adults - many in lone person households.

At 31 March 2008, seven of Maribyrnong's eight suburbs had a higher median price that was higher than the $432,500 median for the Melbourne Metropolitan Area. At $350,000, Braybrook was the only suburb with a lower median.

The highest median in the municipality continues to be the suburb of Maribyrnong at

$666,000 - 2.7% up from the previous quarter and 20.42% higher than a year before. Second highest median price was at Yarraville with $566,250 - up 5.84% compared to the December 2007 quarter and 19.74% compared to March 2007. Kingsville had a median price of $558,000 - a 7.31% increase compared to December 2007 and 17.56% increase compared to a year before.

Since March 2003, the suburb of Maribyrnong has consistently out performed all other suburbs in the municipality, while Kingsville, Seddon and Yarraville have all, at different times, out performed each other for second place.

These socio-demographic features have had important implications for Maribyrnong's retail development and activity centres:

- Increased demand for more comfortable and convenient centres in which to shop, work, and meet people, as a result of an older society

- Stronger ethnic niches in some centres resulting from increasing multiculturalism among both the business operators and catchment area of the centres

- A few neighbourhood and local centres with a stronger take-away food and liquor offer as well as leisure outlets as a result of changing lifestyles and more disposable income

- A few café, bar, restaurant and lifestyle oriented centres such as Yarraville, Seddon and Edgewater as a result of increased gentrification in adjacent neighbourhoods

The implications of these general characteristics for Maribyrnong is a community that:

- Requires a convenient and diverse range of local products and services
- Wants quality and value
- Will support independent and unique businesses
- Wants a safe and comfortable environment with clean public toilets, good seating and lighting in the larger centres
- Wants activity centres in which to socialise
- Requires activity centres that are easy to access and are pedestrian friendly
- Expects ease of mobility in and around the different businesses in a centre

Forecasts of new housing development over the 10 years between 2001 and 2011, prepared by id consulting, indicate an increase of 5,643 dwellings or 22% of the 2001 stock of 25,764 dwellings. The Maribyrnong suburb is expected to absorb over 50% of the forecast increase with 2,927 new dwellings. Footscray is expected to receive the next largest amount with 1,231 new dwellings or 22% of the forecast increase. The significant residential increases in these suburbs are likely to have the most profound effect on the size and business mix of the activity centres in these areas.

Smaller residential increases over the 10 year period are forecast in the other suburbs – 481 new dwellings (8.5% of the total expected increase) in Braybrook; 475 (8.4%) in Maidstone; 169 (3.0%) in Seddon; 162 (2.9%) in West Footscray; 128 (2.3%) in Yarraville; and 70 (1.2%) in Kingsville.

4.3 The Local and Regional Network of Activity Centres

Regional Network

Activity centres in the City of Maribyrnong are influenced by their proximity to the Melbourne CAD; their relationships with residential neighbourhoods, other employment clusters (such as industrial areas) and major transport routes; and their location with respect to other centres, particularly the designated Principal and Major Activity Centres, within the Western Region. The regional context of Maribyrnong's centres has been illustrated previously in Figure 5.

Key characteristics of the regional context are:

- A more scattered pattern of activity centres than in the northern, eastern or southern regions of Melbourne. The large industrial areas in the region as well as the more limited extent of public transport corridors and hubs have influenced this pattern.

- Generally poor transit orientation. There are four railway lines running through the region – the Williamstown line on its eastern boundary; the Werribee line on its southern boundary; the Sunshine/Melton line extending east-west through the middle of municipality; and the Broadmeadows line (to be extended soon to Craigieburn) extending north-south along the eastern edge of the region. These railway lines have had a more limited influence on the development of activity centres in the Western Region compared with the other metropolitan regions – only nine (39%) of the 23 Principal and Major Activity Centres in the region are located adjacent to a train station on one of these lines. Footscray is the only one of Maribyrnong's three Principal and Major Centres with a train station in the heart of the centre; Yarraville is the only neighbourhood centre with a railway station

  There are only three tram lines in the region and they serve limited parts of its inner areas, particularly in Moonee Valley. As a result, tram limes have not had a significant influence on the development of activity centres in the region. Footscray, Ballarat and Gordon, Edgewater, and to a lesser extent Highpoint are the only activity centres in Maribyrnong connected directly to the tram line (82) that runs through the north-eastern part of the municipality.

- The strong influence of major roads. Several major highways traverse the region including the West Gate Freeway, Western Ring Road, Ballarat Road (Western Highway), and Geelong Road. Other major roads such as Sunshine Road, Somerville Road, Williamstown Road, Ashley Street, and Duke Street cross key parts of Maribyrnong and adjoining municipalities. These roads influence the accessibility to and the shape of many activity centres. In Maribyrnong, the majority of centres are on or immediately adjacent to busy roads.

- Domination by the Principal and Major Activity Centres relative to smaller neighbourhood or local centres. Three adjoining municipalities in the region – Maribyrnong, Brimbank and Moonee Valley – each have two designated Principal Activity Centres. No other region in Melbourne has such a concentration of Principal Centres.

- Fewer neighbourhood or local centres with a good convenience retailing role throughout the region, compared with other Melbourne regions. This has been influenced historically by the limited development of the public transport network in the western suburbs (from which small traditional strip shopping villages have developed, as evidenced in other parts of Melbourne) and the more recent tendency to develop larger shopping centres, primarily enclosed complexes. In a small municipality such as Maribyrnong, the dominance of the Footscray Central Activity District and Highpoint Principal Activity Centre has restricted the number and viability of smaller convenience-oriented centres.

Activity centres in the City of Maribyrnong are influenced by the network of centres outside the municipality particularly in the neighbouring Cities of Melbourne, Moonee Valley, and Brimbank. Key activity centres that compete with and thereby shape centres within Maribyrnong are:

Melbourne Central Activities District (CAD)

The Melbourne CAD, located less than five kilometres from the City of Maribyrnong, is the State's largest and most varied activity centre. It contains one of the nation's largest concentrations of business, tourism, cultural, entertainment, research and government activity. It also is a major hub of transport and communications networks and the State's gateway to the global economy.

Through *Melbourne 2030*, the CAD is being planned and managed to retain its position as the prime office and retailing centre for the metropolitan area as well as a major destination for visitors. Large scale sport and entertainment facilities of State or national significance will be located within the CAD.

The proximity and range of corporate office space, higher order retailing, leisure and entertainment facilities in the CAD limit the opportunities for these types of services to be provided in centres within Maribyrnong.

Moonee Ponds Principal Activity Centre

Moonee Ponds is the premier shopping and business centre in the City of Moonee Valley. Located only about two kilometres from the north-eastern edge of the City of Maribyrnong, the centre has over 570 premises, occupying a floor area of close to 115,000 square metres and employing almost 4,000 people. In addition to extensive retailing and commercial activities including two full line supermarkets and distinctive speciality shops, the centre is an important community hub with the offices of Moonee Valley City Council, the Clocktower centre, police station, courthouse, and Queen's Park.

With its range of brand name speciality shops as well as commercial and leisure facilities, the Moonee Ponds centre draws customers from the City of Maribyrnong, particularly the northern parts, looking for quality and distinctive comparison shopping as well as interesting cultural experiences. There is a proposal to establish a KMart in the centre. If this development occurs, it will attract further customers from Maribyrnong looking for value-oriented comparison shopping at a discount department store, and limit the opportunities for Highpoint to expand further into this category.

Sunshine Principal Activity Centre

The Sunshine Principal Activity Centre within the City of Brimbank is a major regional shopping and business centre. Situated less than two kilometres from the western boundary of the City of Maribyrnong, the Sunshine centre has a total of about 380 retail, commercial and community service premises, occupying a floor area of over 120,000 square metres.

The major components of the centre are:

- Sunshine Marketplace, a shopping complex comprising over 70 businesses, and an eight cinema complex with a total floor area of about 33,700 square metres
- Sunshine Plaza, a shopping complex currently undergoing redevelopment comprising over 65 businesses, with a total retail floor area of about 21,000 square metres
- Traditional shopping and business strips of Hampshire Road, Devonshire Road, City Place, Sun Crescent and adjacent streets

With its Big W, two full-line supermarkets, eight cinemas, and range of brand name speciality shops, the Sunshine Activity Centre draws customers from the City of Maribyrnong, particularly its western sector, looking for entertainment, value-oriented comparison shopping at the discount departments stores and major chains, as well as weekly convenience shopping at the two major supermarkets.

Neighbourhood Centres in the Cities of Moonee Valley and Melbourne

There are a few key neighbourhood centres such as Union Road Ascot Vale and Kensington close to the eastern boundary of the City of Maribyrnong that offer more of a lifestyle shopping and leisure experience. This type of experience does not exist in most of the neighbourhood centres in Maribyrnong. Yarraville and Seddon would be the main exceptions.

Maribyrnong residents who are attracted to a strong café culture and experiential shopping are most likely to go to these centres than most of the neighbourhood centres in Maribyrnong.

Direct Factory Outlets at Essendon Airport

Direct Factory Outlets (DFO) opened at Essendon Airport in mid-2005. The complex, located about five kilometres from the northern part of the City of Maribyrnong, is a new destination shopping concept for the Western Region. It contains over 100 factory outlet stores with specialities in women’s fashion, men’s fashion, children’s clothing, footwear, lingerie, sleepwear, handbags, luggage, sporting goods/apparel, homewares, furniture, manchester, jewellery and accessories.

This type of concept does not exist in the City of Maribyrnong, and the range of quality brand outlet stores available at competitive prices offers a real alternative to the comparison shopping facilities available at Highpoint and Footscray for those that are prepared to travel the extra distance.

Growing Principal and Major Activity Centres in Melbourne’s Outer Western Region

There are a few key centres in Melbourne’s Outer West such as Sydenham Transit City (including Watergardens), Werribee Transit City and Werribee Gardens. These centres provide convenience and comparison shopping facilities that are impacting on the outer catchment areas of the Highpoint Shopping and Entertainment Centre and Footscray CAD.

As these centres continue to grow and diversify offering similar ranges of stores and services available at Highpoint, it is expected that they will impact further on Highpoint’s tertiary catchment areas in the outer west and constrain future opportunities for Footscray.

Local Network

The existing network of activity centres in the City of Maribyrnong consists of:

- One Central Activities District (Footscray Transit City) as designated in *Melbourne @ 5 million*
- One Principal Activity Centre (Highpoint) as designated in *Melbourne 2030*

- One Major Activity Centre (Central West) as designated in *Melbourne 2030*
- One Specialised Activity Centre (Victoria University Footscray) as designated in *Melbourne 2030*
- Six existing and two planned Neighbourhood Centres, each providing a convenience retailing role particularly as a result of having a reasonably-sized brand supermarket and associated convenience-oriented businesses
- Twelve existing Local Centres, each providing a smaller retailing and service role for a local community
- Five existing Small Destination Centres with a specialist retail or commercial role that draws most of its customers from beyond the local neighbourhood

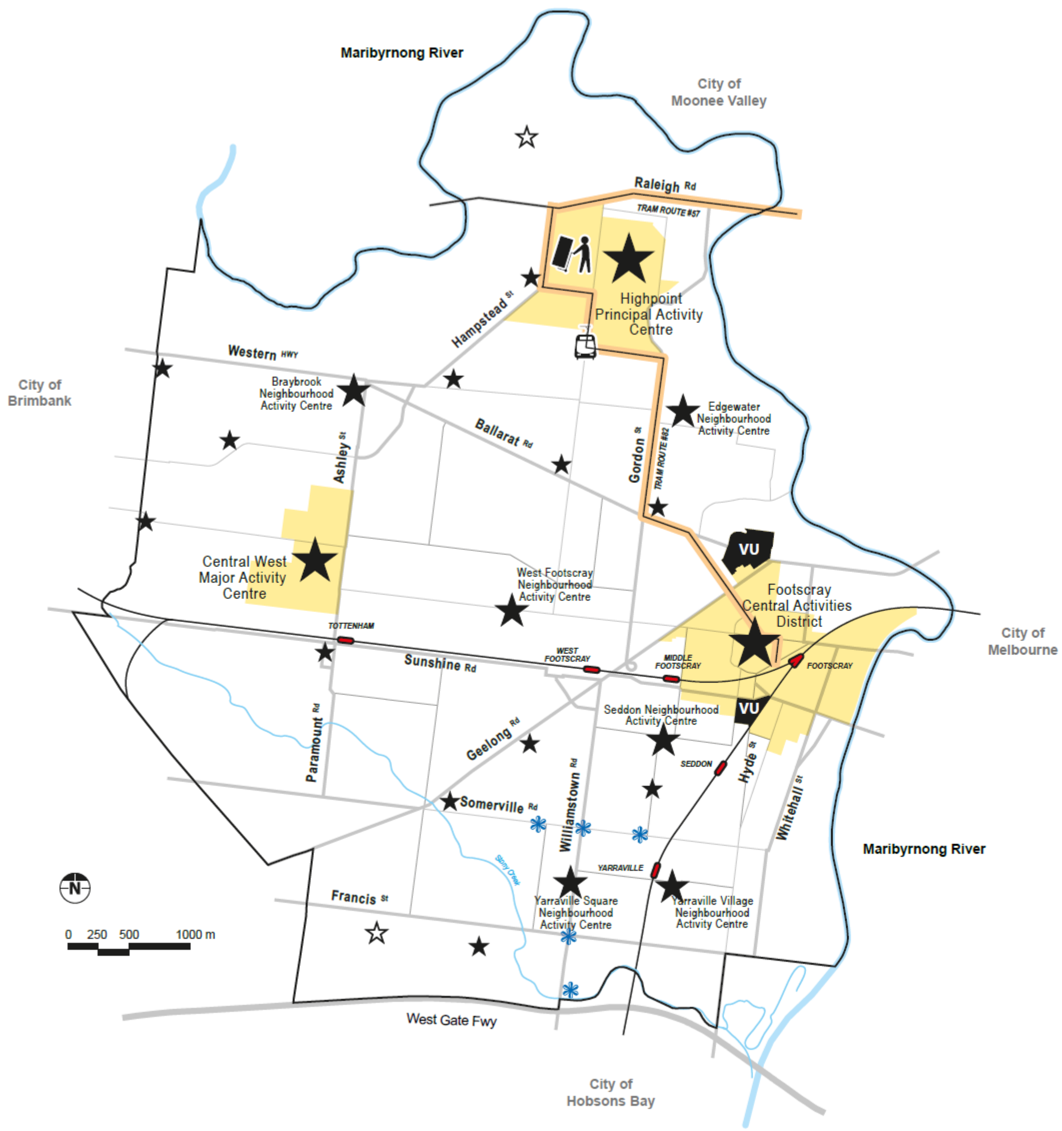
The network of 29 existing or planned activity centres in the municipality is illustrated in Figure 7.

The network builds on the 18 existing centres and three opportunity sites for future retail development (now developed as the Central West, Yarraville Square, and Waterford Gardens centres) outlined in the Activity (Retail) Centre Framework Plan in Clause 21.04-6 of the existing Maribyrnong MSS (24 August 2001).

The eight centres that are analysed in this updated review, but not covered in that Framework Plan are:

- The Specialised Centre of Victoria University at Footscray (with its two campuses)
- The existing Neighbourhood Centre at Edgewater
- The two proposed new Neighbourhood Centres at Yarraville Gardens (Bradmill site) and the Maribyrnong Defence Site
- The two Local Centres of Tottenham and Geelong Road & Wales Street
- The two Small Destination Centres of Somerville Road between Wales and Coronation Street, and the Western Gateway Centre based around the Officeworks outlet.

Figure 7 Existing Network of Activity Centres in the City of Maribyrnong



Existing Retailing Centres in the City of Maribyrnong

Principal Activity Centre and Central Activities District	Local Activity Centres	Victoria University	Municipal Boundary
Major Activity Centre	Future Activity Centre	Small Destination Centre	TRAIN STATIONS
Neighbourhood Activity Centres	Bulky Goods retail	Tram Corridor	

Table 6 outlines the retail and non-retail size of each of the existing 27 centres, its magnets or major uses as well as its primary role. A summary of the two other proposed centres is outlined at the end of the table. More detailed information on each centre is provided in a separate Volume 2 Report.

Table 6: Key Characteristics of Maribyrnong's 29 Activity Centres

Activity Centre	Retail	Non Retail	Total	Main Uses	Primary Role
Central Activities District					
Footscray	86,100	138,000	224,100	Footscray Market Footscray Plaza including K Mart Forge's (although closing down soon) Asian groceries and markets (e.g., Little Saigon Market), specialty shops, cafes and restaurants throughout the centre Commercial services Medical centres Municipal offices Nicholson Campus of Victoria University	Diverse commercial, diverse convenience and specialist retailing, educational, health and community services roles Community meeting place
Principal Centre					
Highpoint	149,200	57,300	206,500	Department and discount department stores - Myer, Target, Big W, Harris Scarfe – the major focus of department and discount department stores in the Western Region Brand speciality shops particularly in fashion, music, toys, gifts and jewellery Major brand electrical and homewares stores - Harvey Norman, Dick Smith Powerhouse, Bunnings, and The Good Guys Major brand furniture stores - Fantastic and easy Living Furniture Leisure and recreational uses particularly the Hoyts Cinema and other entertainment uses at the Highpoint shopping complex as well as the new Maribyrnong Aquatic Centre	Upmarket comparison retailing with strong niches in fashion and clothing, personal and household goods, as well as personal services Major destination retailing in homewares, home improvement supplies, electronics and office products Not local convenience retailing Leisure and entertainment (cinema complex, bowling alley, pokies and electronic games. Cafes and take-away food outlets Community meeting place
Sub Total	**235,300**	**195,300**	**430,600**		
Major Centres					
Central West	**21,700**	**163,200**	**184,900**	Coles & Aldi Supermarkets, The Warehouse , Spare Change, Warehouse Sales, banks and gym at Central West Plaza Britz, Boral, DLS Logistics & Doug Hayes Transport at Business Park Felex Carpet factory, Metso Paper & ESP Machinery at Industrial Park	Mixed use neighbourhood convenience retail and commercial services with strong niches in food and convenience-oriented retail products and services Specialist destination retailing role in furniture, home furnishings and discount clothing Specialist business services

Specialised Centres					
Victoria University Footscray	**500**	**46,660***	**47,160**	* Excludes the Nicholson Campus (29,980 sq m) which is considered part of the Footscray PAC	Principal campus of Victoria University
Neighbourhood Centres					
Yarraville	8,500	7,500	16,000	Two small supermarkets, Yarraville Cellars, Railway Hotel and Irish pub, Sun Theatre, post office, newsagency as well as a range of cafes and restaurants	Mixed use neighbourhood convenience retail, commercial and community services centre with strong niches in food and convenience-oriented retail products and services Commercial services Leisure and health services Neighbourhood meeting place
Seddon	8,500	11,500	20,000	Foodwise Supermarket, Duncan's Liquor, newsagency and Tattslotto, and Bendigo Bank	Mixed use neighbourhood convenience retail and commercial services role with strong niches in food and convenience-oriented retail products Specialist and alternative retail products Commercial services Light industrial including car repairs Neighbourhood meeting place
Barkly Village West Footscray	8,000	7,100	15,100	Sims Supermarket Bharat Traders and other Indian shops Post office Newsagency Library – neighbourhood learning centre Small scale commercial uses	Mixed use neighbourhood convenience retail and commercial services centre with strong niches in food and convenience-oriented retail products Neighbourhood meeting place
Yarraville Square	7,500	500	8,000	Coles Supermarket Liquorland Blockbuster Video Bakers Delight Subway Yarraville Square Pharmacy Bank of Queensland	Neighbourhood convenience retailing role with strong niches in groceries, liquor, specialised and take-away food
Braybrook Shopping Centre	7,500	500	8,000	Safeway Supermarket Large Spotlight store Large Clive Peters store Medical Centre Curwood Pharmacy	Neighbourhood convenience retailing role with strong niches in grocery food as well as health products and services Specialist destination retailing role in fabrics and home appliances
Edgewater	3,200	3,800	7,000	Aldi Supermarket Five fresh food shops Two restaurants Office building of 13 professional services Calibration laboratory	Neighbourhood convenience retailing role with strong niche in groceries and other fresh and takeaway food Small scale commercial services Light industrial
Sub Total	**43,200**	**30,900**	**74,100**		
Local Centres					
Waterford Gardens	1,000	150	1,150	Small IGA convenience supermarket with liquor Pharmacy Variety of takeaway food outlets Medical centre	Local convenience retailing with niches in food and basic retail services Small scale medical services

Mitchell & Hampstead	2,000	600	2,600	Supa IGA Supermarket	Local convenience retailing role with a niche in groceries Small scale peripheral commercial services
Ballarat & Duke	1,600	800	2,400	Braybrook Hotel Blockbuster Video New small IGA supermarket with liquor The Cheesecake Shop Combined post office, Tattslotto, newsagent and cards outlet Two hairdressing salons	Local convenience retailing role with niches in food (particularly take-away food) and other convenience-oriented retail products and services
Ballarat & Summerhill	1,000	900	1,900	The Chicken Palace The Palms Tabaret, Keno & Bingo Medical Centre Pharmacy Doors Plus Highpoint Motors	Small mixed use retailing Small health services role
Ballarat & Gordon	1,400	600	2,000	New small IGA supermarket with liquor McDonalds and KFC Powell Hotel Pizza Hut and Godfather's Pizza Quick Buy Convenience Bar High Point Motors	
Braybrook Village	830	270	1,100	John & Wayne's SupaValue Supermarket Western Cellars Medical centre and Churchill Avenue Community Pharmacy Two community services – Salvation Army Aged Care Program and Youth Enterprise Hub Two take-away food shops	Local convenience retailing role with niches in groceries (including bread and cakes) and liquor Local medical services role Outdoor meeting place and hang-out centre for young people
South & Duke	1,600	100	1,700	Braybrook Supermarket and Cellars as a consolidated business Two Asian grocery stores Newsagency, post office and Tattslotto outlet South Road Medical Centre Greater Discount Chemist	Local convenience retailing with niches in groceries, take-away food and other convenience retail products Local medical services role
Tottenham	1,100	1,700	2.800	Cellarbrations liquor store and drive-through Post office, Tattslotto, and tobacconist Convenience store	Local convenience retailing role with niches in food and liquor products Small scale light industrial and commercial services role Residential role
Geelong Road & Wales Street	1,450	300	1,750	DG Bottle Shop Combined newsagency, Tattslotto, and dry cleaning Milk bar and two other take-away food shops Michael Lee Pharmacy Bros Exhausts Two new commercial offices	Limited local convenience retailing role with niches in liquor, take-away food and chemist supplies Specialist retailing role in auto service as well as glass products and doors
Gamon Street	1,300	750	2,050	Milk bar and Cuoco's Pizza & Pasta Gourmet on Gamon	Local convenience and specialist retailing role with distinct niches in cafes and

				Gravy Train Café Stables Nursery Seddon Uniting Church and Play Group	retail services Community services Minor professional service
Kingsville – Somerville & Geelong Road	1,800	300	2,100	Stand alone Hungry Jacks on the north side of Somerville Road Newsagency, post office and Tattslotto Bottle-o liquor outlet Tony's Pies Kingsville Pharmacy Large Cash Converters Ideal electrical supplies Gym Co fitness equipment	Local convenience retailing role with niches in liquor, take-away food, videos, hairdressing, and chemist supplies Commercial services role
Wembley Avenue	1,600	400	2,000	Liquor Legends Wembley Fresh Fruit & Vegetables Wembley Avenue Meats Maria's Pharmacy including a post office Fresko Kafe Yarraville Library	Local convenience retailing role with niches in food and liquor products Health services role provided by medical centre & pharmacy Local community services role provided by the library
Sub Total	**16,680**	**6,870**	**23,550**		
Small Destination Centres					
Somerville Road – Wales to Coronation	1,000	850	1,850	Somerville Road Fish & Chips Milk bar Sue's Thai restaurant	Small scale destination retailing Vehicle services role
Somerville & Williamstown	1,600	2,800	4,400	KFC, 7 Eleven Cellarbrations Carnovale Pharmacy Post office Zak's Fruit Markets The Western Medical Centre Red Tomato Café Extensive residential	Small mixed use destination retailing Residential Small scale convenience retailing Health services role
Somerville & Gamon	1,100	1,100	2,200	Four real estate companies Sneddon's Restoration Store Fairfax Community Newspaper office Wine Shed Middendorf's Plumbing Supplies	Small mixed use destination retailing Commercial services role focusing on real estate and plumbing operations
Williamstown & Francis	280	3,620	3,900	25 new apartment units McCanns Bathroom Kitchen Supply Liberty petrol station Yarra Hire and trailer hire	Small mixed use destination retailing Small commercial services role
Western Gateway Centre	1,500	250	1,750	Officeworks, KFC Super Cheap Auto outlet Midas car service	Destination retailing role primarily in office products Secondary retailing role in auto products and take-away food Vehicle service role
Sub Total	**5,480**	**8,620**	**14,100**		
Total Existing	**322,860**	**451,550**	**774,410**		
Proposed Neighbourhood Centres					
Yarraville Gardens	**6,040**	**1,400**	**7,440**	Coles supermarket Specialist retail Library and medical centre	Mixed use neighbourhood convenience retail, community and health services roles with a strong niche in food and convenience-oriented retail

					products
Maribyrnong Defence Site	**n.a.**	**n.a.**	**n.a.**	**n.a.**	**n.a.**
Grand Total	**328,900**	**452,950**	**781,850**		

The key characteristics of the network of existing centres in Maribyrnong are:

- Total floorspace of approximately 774,400 square metres in the 27 existing centres with more non-retail floorspace than retail floorspace (451,500 sq m compared with 322,860 sq m) due to the large amounts of non-retail floorspace in the two campuses of the Victoria University as well as other non-retail space primarily in the Footscray, Central West, and Highpoint centres

- A reasonable distribution of centres across the municipality. A diverse and dense network of centres in the south-eastern part of the municipality, (particularly in Footscray, Yarraville, Seddon and Kingsville) followed by a fair distribution of centres in the central-west areas of Braybrook and West Footscray. An increasing range of existing and potential centres in the northern part of Maribyrnong as a result of redevelopments at Edgewater and proposed centre for the Maribyrnong Defence Site.

- The dominance of the Footscray Central Activities District and Highpoint Principal Activity Centre. These two centres contain approximately 56% of total floorspace and 73% of retail floorspace in all of Maribyrnong's 27 activity centres. Highpoint is a major asset to the City of Maribyrnong in providing a range of high profile brand and upmarket retail shops as well as several key entertainment facilities. Footscray is very important in providing a range of more cosmopolitan shops reflecting the ethnic diversities of the municipality, as well as a variety of health and community services. The two centres have restricted the number and viability of smaller convenience-oriented centres.

- Generally poor transit orientation. Footscray is the only one of Maribyrnong's three CADs, Principal and Major Activity Centres with a train station in the heart of the centre; Yarraville is the only neighbourhood centre with a railway station. Footscray has three tram lines connecting directly in the centre, with the 82 tram line also servicing the Ballarat Road-Gordon Street Local Centre and the periphery of the Highpoint centre.

- Strong influence of major roads. The majority of centres are on or immediately adjacent to busy roads, and concentrate on exposure to passing car traffic rather than more intimate interaction with pedestrians. This affects the capacity of centres to be attractive community meeting places. Several centres on busy roads (e.g., the small centres on Somerville Road west of Williamstown Road) appear to be dying.

- Only one designated Major Activity Centre, with a unique mixture of a retail centre, business park and industrial park. However, not the kind of Major Centre envisaged by *Melbourne 2030.* A limited range of comparison retailing outlets (e.g., lack of a brand name discount department store or mini-major store); lack of cafés and restaurants in the centre, limited range of commercial services – e.g., no accountants, legal services, no health, leisure or community services within the centre, no higher density housing within or adjacent to the centre; poor integration of the Business Park with the retail plaza; not a strong community focus; a very car-based centre - not pedestrian friendly; poor transit orientation – poor linkages with the Tottenham Railway Station and other public transport services

- The high occupancy rate and low vacancy rate of most centres

- The small size and retail focus of most of the neighbourhood and local centres. These centres are the weakest element in Maribyrnong's activity centre network. As a result, the lack of centres with a critical mass of convenience retailing outlets (e.g., supermarket or grocery store, newsagency, post office, milk bar, bakery or hot bread shop, take-away food outlet, chemist, butcher, green grocer, video outlet, bank or ATM facility, hairdressing salon/barber shop, and liquor outlet) necessary to fully service local neighbourhoods.

- The lack of distinctive or well known brand retail shops in most of the smaller centres. In addition, many of the local centres offer the same types of shops (e.g., similar range of take-away food)

- The combination of retailing (including a pharmacy) and a small medical centre in several of the neighbourhood and local centres

- The predominance of a small supermarket in most of the neighbourhood and local centres. This is caused to a large extent by the concentration of the major full-line brand supermarkets (Coles and Safeway) in only four centres – the Footscray CAD and Highpoint PAC, and the Braybrook and Yarraville Square Neighbourhood Centres.

- The introduction of small new and better supermarkets at two Local Centres in the northern part of the municipality - IGA Express supermarkets with liquor at Waterford Gardens as well as at Ballarat and Duke

- The limited range of commercial services in all centres except for Footscray, Yarraville, Seddon, Edgewater and the small cluster at Somerville Road and Gamon Street

- The lack of community services in most centres. Apart from Footscray and the Highpoint Activity Centres, the only centres to have community services are the Yarraville and Barkly Village Neighbourhood Centres, and the Local Centres at Braybrook Village (with its Salvation Army office and Youth Enterprise Hub) and Wembley Avenue (with its library). This represents less than 25% of activity centres in Maribyrnong. Many community services are located separately outside of activity centres.

- The predominance of quick drop-in and take-away centres among the major, neighbourhood and smaller centres. This characteristic is displayed particularly at the Braybrook, Yarraville Square, and to a lesser extent Barkly Village Neighbourhood Centres as well as at most of the local centres – e.g., Waterford Gardens, Mitchell & Hampstead, Ballarat & Duke, Braybrook Village, South & Duke, Tottenham, Geelong Road & Wales Street, and Kingsville.

- A large proportion of very small, utilitarian and older neighbourhood and local centres which are not attractive, are not community meeting or browsing places, and do not have a strong café or restaurant culture. These contrast with the few new centres (e.g., Yarraville Square and Edgewater) that offer more attractive and modern retailing environments

- The lack of shop top housing and other forms of more intensive housing in and immediately adjacent to centres. Footscray is the only real exception to this pattern.

- As a result, only a very few community-oriented mixed use major, neighbourhood or local centres with a sense of place and community, as envisaged by *Melbourne 2030*. The key neighbourhood and local centres that best meet *Melbourne 2030*'s objectives are Yarraville, Seddon, Barkly Street West Footscray, and Edgewater.

- The declining role of several Small Destination Centres (e.g., Somerville & Wales, Williamtown & Francis) in Maribyrnong due to the loss of key magnet businesses, associated increases in vacancies, and continued poor appearance on very busy roads.

- A key exception to this trend over the last four years has been the centre at Ballarat Road and Gordon Street that has enhanced its local convenience retailing role with the introduction of a new small IGA supermarket with liquor. A similar situation has the potential to evolve at the centre at the intersection of Ballarat Road and Summerhill Road, with an emerging mixed use centre comprising retailing, health and entertainment services.

5. Anticipated Trends

This Chapter analyses anticipated trends in relation to:

- The continuing shift from a manufacturing and defence oriented economy in Maribyrnong
- Demographic and socio-economic changes likely to occur in Maribyrnong and associated changes in consumer shopping behaviour
- Retail industry changes
- Commercial industry changes
- Activity centre development

5.1 Continuing Shift from a Manufacturing and Defence Economy

There is an ongoing shift from a manufacturing and defence-based economy to more of a services based economy in the City of Maribyrnong.

Industrial development will continue to be important, but it will be confined to four core precincts south of Sunshine Road. Major manufacturing industries will continue to be chemicals and derivatives, metals, heavy engineering, food processing, vehicle parts and components as well as transport and warehousing.

There will be continuing redevelopment of former industrial and defence areas for new forms of housing as well as retail and commercial clusters. Key among these is the current redevelopment of the former Maribyrnong ammunitions site into the Edgewater residential estate with supporting neighbourhood centre and future redevelopment of the Defence Site Maribyrnong for a mix of uses. These redevelopments will continue to contribute to the population growth in the northern part of the municipality and provide local employment as well as a variety of goods and services.

The effects of these economic shifts within Maribyrnong will be:

- The significant redevelopment of former industrial areas into mixed use residential, retail and commercial services clusters

- Over the medium to longer term, the location of most of the new housing in the north-east section of Maribyrnong on former industrial sites and former Department of Defence land.

- The development of two new neighbourhood centres (Edgewater and Maribyrnong Defence site) in the northern part of the municipality

- The decline of small light industrial operations in older activity centres such as Footscray, Barkly Village, Yarraville and Seddon

- The growth of “new economy” businesses in a few key activity centres in the municipality

5.2 Socio-Demographic Trends and Projected Changes

The key socio-demographic trends and projected changes in the City of Maribyrnong over the next 20 years and beyond, arising from the economic changes, are:

- a substantial increase in population. According to the Department of Sustainability and Environment projections outlined in Victoria in Future (2004), the population of the municipality by 2011 is projected to grow by approximately 14,000 persons to 74,000 – a 23% increase from 2001. At 30 June 2007, the population was 67,825. Maribyrnong was ranked as the eighth fastest growing municipal population in Victoria and in terms of the size of its growth, Maribyrnong was ranked 12th in the State. By 2030, Maribyrnong's population is projected to grow by 30,000, or a 50% increase from 2001. As a result, the City will have a much greater residential focus than is evident today. Over the next six years, most of the population gain is expected to be in the suburbs of Maribyrnong, Braybrook, Footscray, and Maidstone

- A substantial increase in households. According to *Melbourne 2030*, 620,000 new dwellings will be established across metropolitan Melbourne between 2001 and 2030 of which 149,100 new dwellings (with 287,000 people) will be established in the Western Region. This represents an overall increase in the Western Region's share of metropolitan population from 15.4% in 2001 to 18.1% in 2030. According to the draft Western Regional Housing Statement, the City of Maribyrnong is expected to accommodate 10,575 of these new dwellings. This represents 7% of the increase in the Western Region.

- A continuing ageing of the population, although a high proportion of new residents are expected to be younger people

- An increasingly multicultural society with a diverse ethnic structure in the municipality. This builds on both the 2001 and 2006 profiles of 40% and 39% respectively of residents being born outside of Australia and representing more than 135 different countries and more than 80 languages.

- A more educated and qualified society

- Smaller households, as well as more single person and non-family households. These trends, very pronounced in the 2001 and 2006 Censuses, will continue.

- More professional people living in the municipality

- Increased gentrification, particularly in areas of the municipality where there is a predominance of Victorian, Federation and Edwardian housing stock and new development

- Diverging trends in household income – many households increasingly dependent on two incomes, but others based on Government benefits

- Increased female participation rates in the workforce

- As a result of dual income households and increase female participation rates in the workforce, a continuing higher incidence of couples delaying child bearing

- Increased part-time and casual employment resulting in a more fluid working week extending for longer hours each day and across seven rather than five days

- More people working from home

- Over-employment in some sectors of the workforce; under-employment in others

- Time poorness among those who are working long hours

- Different types of shoppers depending on shopping for basic ‘needs’ or ‘wants’ (convenience vs destination shopping)

- Less home preparation of food and more demand for take-away food or out-of-home dining experiences

- Greater interest in and emphasis on technology, information and communication

- Greater consumer understanding and expectations of products and services provided in shops and other businesses

- Increasing mobility within Melbourne, Australia and to overseas countries. Not the same attachment to one place for a long period of time, as happened in the past

- A greater emphasis on ‘quality of life’ issues including lifestyle and experiential shopping

- Increased recreation, leisure and entertainment

These trends will generate considerable changes in Maribyrnong’s retail development and activity centres:

- The influx of new residents will result in increased gentrification of several neighbourhoods and associated activity centres

- An increasing older society will demand more comfortable and convenient centres in which to shop, work, and meet people.

- There will continue to be stronger ethnic niches in some centres resulting from increasing multiculturalism

- There will be an increasing propensity for consumers to shop for best value. Best value is more than the price and quality of goods. It encompasses a myriad of “feel good factors” about a centre ranging from the style of centre and overall quality of shops to friendly staff, ample and easily accessible parking, to clean toilets.

- Shopping will increasingly become more of a multi-faceted experience encompassing interacting socially with people, establishing or building up a sense of belonging, finding out what is new, exercising, receiving sensory stimulation and pleasure, and satisfying other needs. Only a few centres in the City of Maribyrnong are responding well to this myriad of needs.

- With many being increasingly time poor, consumers will shop in stores and precincts that are convenient and that they know, buy as they need rather than stock up, buy near work and several times a week for food on their way home, prefer stores that are well merchandised and where self-selection is facilitated.

- As a result of the increasingly sophistication of consumers, patrons expect “best of kind” in their neighbourhood centres.

Only a few activity centres in Maribyrnong are providing the kind of experience that meets shoppers’ new requirements.

5.3 Retail Industry Trends and Changes

There is a range of retail industry forces and changes that have an influence on Maribyrnong's retailing environment and activity centres. Some of the key forces are:

- The continuing development and expansion of major shopping complexes such as Highpoint
- The increasing range of non-retail facilities such as banking facilities, health clubs, and cinemas in these complexes, making them multi-purpose destination and social meeting places
- The increasing linkages between retailing and leisure/entertainment venues at the very large activity centres
- New supermarket formats exemplified by Aldi, IGA Express and Coles Xpress on the one hand with their smaller stores and more limited range of items) and Coles and Safeway /Woolworths on the other with their larger stores with a greater range of fresh food and grocery items as well as a newer range of convenience-retailed facilities.
- New discount store formats such as the new Cosco store at Docklands
- The growth of specialist concept stores and the decline of traditional department stores
- The growth of factory outlet clusters and centres
- The continuing development of homemaker centres or bulk goods clusters adjacent to shopping complexes or in stand-alone locations along main roads. Associated with this is the decline in traditional highway showrooms and associated peripheral sales stores.
- The increasing number of 'category killer' chains and stores specialising in niche markets and providing a comprehensive range of products in a particular segment of the market. Examples include Ikea, Bunnings, Harvey Norman, Officeworks, and Cosco
- The rapid expansion of food catering outlets including cafes, restaurants, fast food take-away outlets, and shops providing pre-prepared meals.
- A growing amount of Internet retailing particularly in categories such as computer hardware and software, music/CDs, travel bookings, books and toys
- The decline of more traditional stand-alone milk bars and the growth of new format convenience stores (7 Eleven stores, Coles Express, IGA Express) and the location of some of these stores in petrol stations.
- The increasing popularity of main street environments

The results of these trends in Maribyrnong will be:

- Creation of new types of retail environments at Highpoint and Footscray

- The continued dominance of Highpoint in providing upmarket comparison retailing facilities and services for the Western Region

- The continuation of the homemaker centre and bulky goods precincts in Rosamond Road at Highpoint for at least another 10 years. This will be the major precinct in Maribyrnong for this form of retailing. Other highway retailing or peripheral sales areas are likely to decline further as the strength of the Highpoint precinct increases.

- Development of lifestyle retailing niches and new concept stores in a few centres undergoing gentrification

- A growing entertainment/leisure niche in a few key centres (particularly Highpoint, Footscray, Yarraville, Seddon and Edgewater) with more eating out and alfresco dining as part of that experience

- The further decline of traditional stand-alone milk bars and highway showrooms

- The development of new mixed use neighbourhood centres particularly in Maribyrnong's residential growth areas

- More small brand name supermarkets at local activity centres

5.4 Commercial Industry Changes and Trends

There is a range of commercial industry forces and changes that have an influence on Maribyrnong. Some of the key forces are:

- The continuing dominance of the Melbourne CAD and eastern and south-eastern suburbs in metropolitan office accommodation. Melbourne's northern and western suburbs account for only 2.5% of Melbourne's total office floorspace and 8% of total suburban office floorspace. The majority of Melbourne's suburban office space is located on the CAD fringe, inner eastern, middle-eastern and south-eastern suburbs, and is likely to continue to be located in those locations for the next 10 years.

- The increasing concentration of Melbourne's professional workforce in the CAD and inner eastern suburbs

- Citylink which has improved linkages between the inner western suburbs and the Melbourne CAD and eastern suburbs

- The outsourcing of functions from large companies based particularly in the Melbourne CAD, and the consequent rise of new smaller firms in inner suburban areas to service those companies

- The increasing migration of professional workers and senior management into inner and inner middle suburban areas and the desire by an increasing proportion of those workers to work closer to home rather than in the CAD

- Advances in communication technology and changes in work patterns particularly for women resulting in head or regional offices in the inner and middle eastern and south-eastern suburbs being a preferable alternative to offices in the CAD

The implications of these trends for Maribyrnong are:

- A limited amount of corporate office development. Future offices in the municipality will be primarily those servicing the needs of local residents and the demand for office space will be linked directly to the growth in resident population in Maribyrnong

- Most future commercial growth in Maribyrnong will focus on local rather than metropolitan-oriented businesses and will most likely occur in the Footscray CAD and smaller activity centres with higher socio-economic population profiles. There will continue to be exceptions to this, building on the relocation of destination commercial businesses such as Lonely Planet in the past to cheaper and very accessible sites in the municipality

5.5 Activity Centre Trends

The key trends in activity centres in Melbourne as well as national and international trends are:

- A greater emphasis on developing mixed use centres rather than just retail centres

- State Government priority and increased resource allocations to a few key centres. This has been demonstrated recently by the creation of six new Central Activity Districts with Footscray designated as the only CAD in the Western Suburbs. $ 52.1 million allocated to the Footscray CAD in the 2007-08 State budget

- A stronger focus on developing a distinctive brand or niche in each centre

- More single private ownership of centres

- Increased housing intensification within and adjacent to more activity centres

- More community infrastructure in centres rather than at other stand-alone locations

- Greater emphasis on creating a sense of place and community identity in centres through better urban design, streetscape improvements, social infrastructure and other pro-active Government approaches (e.g., promotion of living within the Melbourne CBD through Melbourne City Council 's Postcard 3000 program)

- A strong transit orientation and better transit services in all Principal and Major Centres

- More controls limiting out of centre development including destination places with poor connections to public transport

The implications of these trends for Maribyrnong are:

- Pressures to redevelop the Highpoint Activity Centre as a mixed use centre with higher density housing within and adjacent to it

- Increased desire for the Highpoint and Footscray centres to develop distinctive but complementary niches that enable each of them to flourish without undermining the other

- Pressures to create better mixed use neighbourhood and local centres throughout the municipality

- A concern that single ownership centres such as at Braybrook and Yarraville Square have a very limited mixture of uses beyond retailing, a limited public realm, and a poorly developed sense of place as a community meeting place

- The desire for future retail development including bulky goods and peripheral sales to be within or on the edge of centres rather than outside of centres

- Pressures to redevelop centres at all levels in the municipality with a greater sense of place and community

- The desire to limit out of centre development and reduce the influence of small destination centres in the municipality with poor connections to public transport and a declining role

6. Potential Opportunities and Policy Development

This Chapter builds on the analysis of the current situation in Maribyrnong and anticipated trends by outlining potential opportunities and principles for future retail development and activity centre policy in the municipality.

6.1 Lessons from Relevant International and National Case Studies

Our work on the *Melbourne 2030 Activity Centres Review* (*Technical Report No 8*) for the former Department of Infrastructure documents important international and national case studies and lessons relevant to future opportunities related to retailing and activity centres.

The critical ingredients from the case studies in successful policies and practices are:

- Emphasis on the clustering of uses including retailing in activity centres rather than stand-alone developments
- Priority to mixed use centres with a sense of place and community
- Designation or targeting of a small number of major mixed use centres that are, or will become, well served by public transport – i.e., priority to a few key transit-oriented centres
- Provision of expansion opportunities in the transit-oriented centres, particularly adequate and suitable land
- Availability of a network of both larger transit-oriented centres encompassing major activities and smaller centres for convenience shopping and other local activities
- Emphasis in the planning of the internal structure of centres on compactness, pedestrian-friendly layouts and mixing of land uses, together with development assistance particularly through the assembly of appropriate sites
- Regulatory planning policies that restrain developments such as retail developments that should be located in centres from locating outside of centres**.**
- Supportive transit policies including the provision of high-quality, integrated public transport services connecting activity centres within their respective regions
- Consistent commitment to activity centre policies by local and State level governments, over a significant period of time, ensuring that government agencies themselves locate people-attracting activities in centres.

6.2 Key Principles arising from *Melbourne 2030* and Our Review of Maribyrnong's Retail Development and Activity Centres

The key principles underlying a new local policy framework, arising from *Melbourne 2030* and the review of Maribyrnong's retail development and activity centres, are:

- Future retail development in Maribyrnong should be in accord with the recommendations arising from the State Government's Retail Policy Review and be directed into activity centres. There is very little significant retailing currently occurring outside of centres in the municipality, and this pattern should be reinforced.

- Activity centres should focus more on a mixture of uses rather than just retailing

- The current Maribyrnong policy emphasis on both retail development and activity centres should be changed in favour of a policy that focuses only on activity centres. As retail development is occurring and is being encouraged to occur primarily in activity centres, there is no need for a special reference to retail development. Furthermore, by highlighting retail development (and not other forms of development) and linking it with activity centres, the current policy is not helpful in bringing about the desired mixed use changes in activity centre development

- The City of Maribyrnong should remain the primary focus in the Western Region for comparison goods retailing, entertainment facilities as well as health and financial services.

- The Footscray Central Activities District and Highpoint Principal Activity Centre are critical elements in maintaining that focus. The two centres should specialise in ways that develop complementarities - in role, functions and marketing - rather than direct competition.

- It is important to facilitate the development of an activity centre network which provides a variety of easily accessible, pleasant and safe places in which people can gather, socialise, shop for a range of needed goods and services at competitive prices, be entertained, and make use of many kinds of community and leisure services and facilities without having to travel far

- It is important to encourage business and residential communities to work together with the Council to bring about improvements to individual activity centres -- particularly those centres which are working well as a community or neighbourhood focus now, or have the potential to work better as a community or neighbourhood focus in the future.

- There should be an even distribution of convenience-oriented retail and commercial services throughout the municipality to allow all members of the community, including the aged (likely to increase) and those without cars, to have equal access to basic goods and services

- Small specialist destination retail/commercial strips along major roads not connected well to public transport should be strongly discouraged. These developments should be considered as “out of centre development”.

- The viability of established centres containing significant community and private assets should not be substantially prejudiced by new developments elsewhere

- The quality of retailing and commercial facilities and associated customer service should be improved

- An optimum level of employment should be encouraged in all activity centres. More non-retail buses are to be facilitated at all types of centres to increase the level of employment in centres

- Future retail and commercial developments should, in addition to providing needed services, enhance the appearance, amenity, safety and convenience of the activity centre precincts in which they are built

- New development should be accompanied by balanced infrastructure development

- Organisational structures (including voluntary advisory groups and partnerships) for co-operative centre business plans, infrastructure development, centre improvement and marketing should be developed by traders and the community with the Council as soon as possible.

6.3 Strategic Directions

The recommended key directions in a new policy are:

- Greater diversity of uses in all activity centres
- A stronger business and land use mix in the neighbourhood and local centres geared to servicing a wider range of local resident needs
- Development of distinctive centre “brands” or “niches” so as to encourage diversity between activity centres in Maribyrnong
- More non-retail activities in activity centres and better interaction with retail uses. More commercial development geared to servicing local needs.
- More intensive residential development within and adjacent to all the Principal and Major Activity Centres
- No more “out of centre” development
- A new Activity Centre framework
- Strategies to improve the land use structure of centres, business development and centre management, public realm improvements including key physical and social infrastructure, and enhancement of private buildings and spaces

6.4 New Activity Centre Framework

The recommended planning framework for Maribyrnong’s centres is based on the following six types of activity centres, building on *Melbourne 2030* and our analysis of the existing and desired future dynamics in centres throughout the municipality:

- Central Activities District
- Principal Centres
- Major Centres
- Specialised Centres
- Neighbourhood Centres
- Local Centres with a convenience retailing role

The framework is illustrated in Figure 8. The network of centres and their desired future roles are outlined in Table 7.

The key differences between this framework and the existing framework in the 1998 Retail Development and Activity Centre Policy as well as the 2006 Review Report are:

- The specific recognition of the Footscray Central Activities District, as well as the Principal, Major, Specialised and Neighbourhood Centres in accordance with the criteria and designations in *Melbourne 2030* and *Melbourne @ 5 million*

- A clearer distinction between the different types of smaller centres as indicated in the 1998 Policy – i.e., differentiating between the larger and more diverse Neighbourhood Centres (as envisaged by *Melbourne 2030*) and smaller Local Centres with an existing and desired future convenience retailing role

- The inclusion of a larger number of more diverse and robust centres (the emerging new centres at Edgewater, Yarraville Gardens and Maribyrnong Defence site) so as to ensure that the municipality has a better distribution of convenience-oriented retail and commercial services to allow all members of the community equal access to basic goods and services

- The deletion of the Small Destination Centres, recognised in the 2006 Review Report, from the framework. There are now only five of these centres in the City of Maribyrnong (reduced from 7 in the 2006 Report). All of them are along busy roads or at major intersections, and have poor transit orientation. Most of them present very poorly. A few have increasing vacancy rates with the loss of key anchors. Others continue to have a few convenience retailing uses that would be better located in nearby local or neighbourhood centres. They are not the type of centres encouraged by *Melbourne 2030.* It is considered that they are a form of “out of centre development”. Recognition of these centres in the framework gives them some legitimacy and opens the door for proposals for new forms of these ‘centres’ in other parts of the municipality.

Figure 8
Recommended Activity Centre Framework for the City of Maribyrnong

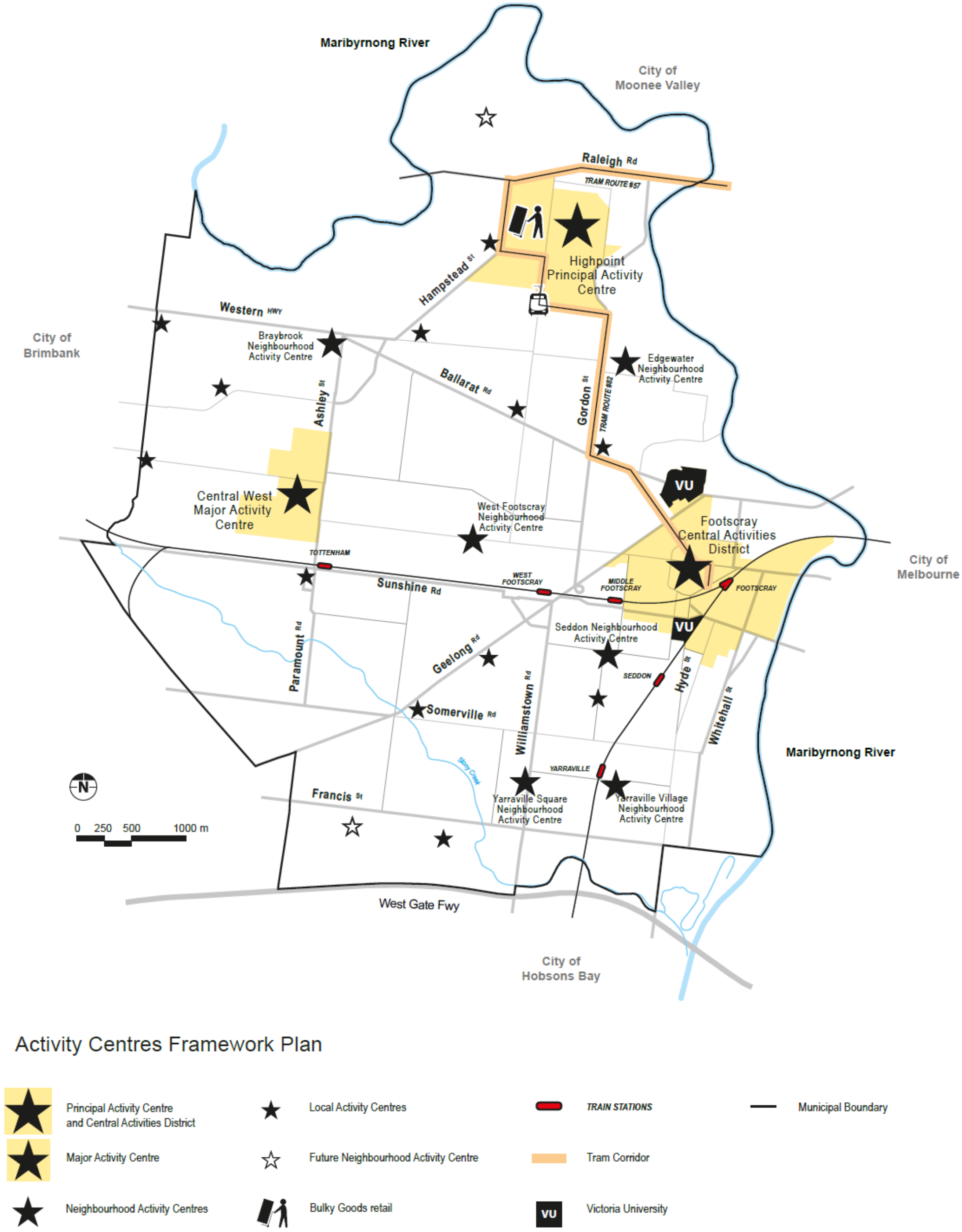


Table 7: Future Roles of Maribyrnong's Activity Centres

Activity Centre	Recommended Future Roles and Specialist Niches
Central Activities District	
Footscray Transit City	The major cosmopolitan mixed use centre in the Western Region A regional hub for convenience and specialist comparison retailing as well as commercial, civic, health, and educational activities Higher density residential uses within and immediately adjacent to the centre
Principal Activity Centres	
Highpoint	High order comparison retailing and leisure activity centre Not local convenience retailing Continued diversification of retailing with an emphasis on new and innovative comparison retailing products Possible diversification into corporate offices and hotel facilities Higher density residential activities within and immediately adjacent to the centre
Major Centre	
Central West	A more dynamic mixed use retail, commercial, light industrial and community services centre which becomes the major activity centre focus for the western part of the municipality
Specialised Centre	
Victoria University Footscray	Continued development of the pre-eminent tertiary education and research centre in the Western Region
Neighbourhood Centres	
Yarraville	Enhancement of its role as a trendy and intimate mixed use retail and commercial centre Continued diversification of its commercial, health and community services roles More residential development within and around the centre
Seddon	Consolidation and enhancement of its role as a mixed use retail and commercial centre Development of a stronger community-oriented centre and village feel More residential development within and around the centre
Barkly Village West Footscray	Consolidation and enhancement of its role as a mixed use retail, commercial and community services centre with a specialist niche catering for Indian and Asian communities Development of a stronger village feel More residential development within and around the centre building on the redevelopment of the South Pacific Tyre site into Banbury Village
Yarraville Square	Maintenance of its strong convenience retailing focus on groceries and other day-to-day and weekly goods and

	services More residential development around the centre
Braybrook Shopping Centre	Maintenance of its strong convenience retailing focus on groceries as well as specialist retail destination niches in fabrics and home appliances More residential development around the centre
Edgewater	Consolidation and enhancement of its distinctive role as a new style of mixed use retail, commercial and medical centre with a sense of spaciousness Development of a stronger community-oriented centre and village feel
Yarraville Gardens	Development of a new mixed use neighbourhood centre on the Bradmill site
Maribyrnong Defence Industry	Development of a new mixed use neighbourhood urban village centre on the site
Local Centres	
Waterford Gardens	Maintenance of its mixed use convenience retailing and health services role
Mitchell & Hampstead	Enhancement of its convenience retailing role building on the existing supermarket Development of a stronger local community-oriented centre
Ballarat & Duke	Enhancement of its convenience retailing role building on the new supermarket Development of a stronger local community-oriented centre
Ballarat & Summerhill	Enhancement of its mixed use convenience retailing, health and community services role
Ballarat & Gordon	Enhancement of its convenience retailing role building on the new supermarket
Braybrook Village	Enhancement of its mixed use convenience retailing, health and community services role
South & Duke	Enhancement of its mixed use convenience retailing and health services role Development of a stronger local community-oriented centre
Tottenham	Maintenance of its mixed use retail and commercial services role
Geelong Road & Wales Street	Maintenance of its mixed use retail and commercial services role
Gamon Street	Enhancement of its specialist retailing and community services role which give the centre a sense of place and community
Kingsville - Somerville & Geelong Road	Maintenance of its mixed use retail and commercial services role
Wembley Avenue	Maintenance of its mixed convenience retailing role

6.5 Strategies to Strengthen the Network of Activity Centres

The following section proposes a number of strategies for strengthening the network of activity centres in Maribyrnong. The strategies are formulated for a number of key elements that are considered critical in ensuring that the network of centres operates effectively and performs to its true potential. Further details for individual centres are outlined in Volume 2.

Specific strategies are formulated for:

- Planning and land use structure
- Business development, marketing and centre management
- Public realm improvements including key physical and social infrastructure
- Enhancement of private buildings and spaces

6.5.1 Planning and Land Use Changes

Planning and land use structural change are critical to the development of a vibrant, diverse and sustainable network of activity centres.

The key strategies to achieve this are:

- support clusters of centres of different sizes and business mixes throughout the municipality, each performing different but complementary roles
- Develop Central West as a stronger mixed use and community-oriented Major Activity Centre
- encourage the development of new or expanded Neighbourhood Centres in the growing northern part of the municipality
- develop and market a niche role for each activity centre
- encourage day-to-day retail uses particularly on the ground floor in the core of all centres with a defined convenience retailing role
- encourage specialist retail or commercial uses in centres without a strong local convenience retailing role
- encourage a range of professional and commercial uses in centres the Principal and Major Centres
- facilitate the filling of gaps in particular uses in centres so as to strengthen the niche role of centres
- encourage the redevelopment of key under-utilised sites in centres
- continue to encourage housing diversity in all centres and around the designated Principal, Major and Neighbourhood Centres
- discourage out of centre development

Implementation Program

- Prepare a Planning Scheme Amendment that outlines changes in the MSS to reflect the conclusions and recommendations for all activity centres, and includes local policies for each type of activity centre
- Give priority to the Footscray Principal Activity Centre, Central West Major Activity Centre and all the existing and proposed Neighbourhood Centres

6.5.2 Business Development, Marketing and Centre Management

Retaining, expanding and attracting key businesses across the network of centres are critical to their ongoing success. Managing and marketing all the centres effectively also are very important.

The key strategies to achieve this are:

- Work with businesses and business associations in centres across the municipality to retain and expand existing key businesses
- Facilitate the attraction of destination businesses to fill gaps in individual centres
- Facilitate other economic development and marketing programs to assist centres to market their particular advantages such as their niche business mix, distinctive character or customer service approach, convenience, or local accessibility
- Investigate the feasibility of introducing special levy marketing and development programs (with centre co-ordinators) in the Footscray Transit City, Central West Major Activity Centre, and the Yarraville, Seddon and Barkly Street West Footscray Neighbourhood Centres

Implementation Program

- Integrated business retention, expansion and attraction program for the network of centres
- Co-ordinated marketing program for the network of centres in conjunction with the business associations in individual centres
- Investigation of special levy programs in the Footscray, Central West, Yarraville, Seddon and West Footscray centres

6.5.3 Streetscape Improvements in Public Spaces

Public spaces in all of Maribyrnong's activity centres are critical to developing a sense of place and a sense of community.

The key strategies for enhancing the public realm are:

- Improve the appearance, comfort, and safety of public spaces particularly in the Principal Major and Neighbourhood Activity Centres
- Increase opportunities for social interaction in centres
- Provide a more defined central focus for the community in each of the Major and Neighbourhood Centres
- Continue to undertake priority streetscape improvements in the Principal and Neighbourhood Centres as well as Local Centres performing a strong convenience retailing role
- Develop legible entrances and gateways to all centres
- Develop a co-ordinated centre identification signage program to be applied to the different types of centres
- Provide appropriate street tree planting, paving and street furniture in centres
- Adopt the community safety principles in all centres
- Encourage priority improvements in the Principal, Major and Neighbourhood Centres as indicated in the following Implementation Program:

Implementation Program

Activity Centre	Recommended Improvements in Public Spaces
Principal Centres	
Footscray Transit City	• Better connectivity to and improvement of the Footscray Railway Station and adjacent precinct • Consistent and rationalised signage and street furniture • Better weather protection of key areas • Better lighting • Extended and improved footpath areas and landscaping • More outdoor eating areas on footpaths • Enhancement of gateway entrances • Continued development of linkages to the Maribyrnong River
Highpoint	• Creation of formal, attractive and interesting open space areas throughout the wider centre • Development of a “main street” boulevard treatment along Rosamond Road • More outdoor eating areas in new precincts created on the main roads particularly Rosamond Road • Enhancement of gateway entrances • Continued development of linkages within the centre and to the Maribyrnong River • More attractive and consistent landscaping along major roads in and on the edge of the centre
Major Centre	
Central West	• Implementation of improvements outlined in the Central West Structure Plan
Specialised Centre	
Victoria University Footscray	• Creation of formal, attractive and interesting open space areas throughout the two campuses • Enhancement of gateway entrances • Continued development of linkages within and between the two campuses and the Footscray Transit City • More attractive and consistent landscaping along major roads on the edge of the campuses
Neighbourhood Centres	
Yarraville	• Establishment of new signage identifying the boundaries/entrances of the centre • Landscaping and street furniture to improve the public spaces in the centre, link the different precincts, and develop a stronger sense of place and community • Further development of outdoor eating areas in conjunction with the existing food businesses
Seddon	• Establishment of new signage identifying the boundaries/entrances of the centre • Landscaping and street furniture to improve the public spaces in the centre, link the different precincts, and develop a stronger sense of place and community in line with the Seddon Urban Design Framework • Development of some outdoor eating areas in conjunction

	with the existing food businesses
Barkly Village West Footscray	• Establishment of new signage identifying the boundaries/entrances of the centre • Landscaping and street furniture to improve the public spaces in the centre, link the different precincts, and develop a stronger sense of place and community
Edgewater	• Establishment of new signage identifying the boundaries/entrances of the centre • Landscaping and street furniture to improve the public spaces in the centre, link the different precincts, and develop a stronger sense of place and community
Yarraville Gardens	• Streetscape and other improvements as indicated in the supporting documentation to Maribyrnong Planning Scheme Amendment C63
Maribyrnong Defence Site	• Streetscape and other improvements as indicated in the Concept Plan being developed by VicUrban for the site

The key focus for the local centres is that group of centres with an ongoing strong convenience retailing role:

- Waterford Gardens
- Edgewater
- Mitchell & Hampstead
- Ballarat & Duke
- Braybrook Village
- South & Duke

The improvements recommended for these centres are as follows:

- Establishment of new signage identifying the centre
- Landscaping and street furniture to improve the public spaces in each centre and to develop a stronger sense of place and community

6.5.4 Enhancement of Private Buildings and Spaces

Private buildings and spaces are important to activity centres in terms of their image and amenity.

The key strategies for enhancing private buildings and spaces within the Maribyrnong's centres are:

- Encourage the cleaning or painting of the exterior of buildings in all activity centres to create a clean fresh image
- Control and co-ordinate the signage on private buildings so that it fits the desired image of the centre
- Facilitate more active frontages in all centres but particularly those with a strong convenience retailing role
- Encourage appropriate weather protection in front of buildings in centres with a strong convenience retailing role
- Encourage quality buildings at gateway entrances to each centre, particularly the Principal, Major and Neighbourhood Centres

- Encourage a clearly defined built form at the core of centres with an important retailing role
- Protect and improve building in centres that contribute to the heritage quality of the centre
- Encourage priority improvements in the Principal, Major and Neighbourhood Centres as indicated in the following Implementation Program:

Implementation Program

Activity Centre	Recommended Improvements in Private Buildings and Spaces
Principal Centres	
Footscray Transit City	• Continued improvement in the presentation of buildings and adjacent spaces • More innovative multi-storey mixed use development in appropriate places
Highpoint	• Continued improvement in the presentation of buildings and adjacent spaces • More innovate multi-storey mixed use development in appropriate places
Major Centre	
Central West	• Landscaping and street furniture to further improve the external spaces in the centre and develop a stronger sense of place and community
Specialised Centre	
Victoria University Footscray	• Continued improvement in the presentation of buildings and adjacent spaces • More innovative multi-storey development in appropriate places
Neighbourhood Centres	
Yarraville	• Continued improvement in the presentation of buildings and adjacent spaces to highlight the heritage qualities of the centre
Seddon	• Improvement in the presentation of buildings and adjacent spaces to create a more modern feel in accordance with the Seddon Urban Design Framework
Barkly Village West Footscray	• Improvement in the presentation of buildings and adjacent spaces to create a more modern feel in accordance with the Urban Design Framework
Yarraville Square	• Landscaping and street furniture to further improve the external spaces in the centre and develop a stronger sense of place and community
Braybrook	• Landscaping and street furniture to further improve the external spaces in the centre and develop a stronger sense of place and community
Edgewater	• Continued development and redevelopment of buildings and adjacent spaces to highlight the unique sense of place of this new neighbourhood centre
Yarraville Gardens	• Establishment of high quality buildings and spaces
Maribyrnong Defence Site	• Establishment of high quality buildings and spaces

The priority for improvements to private buildings and spaces in the Local Centres are the following centres with a strong convenience retailing role:

- Waterford Gardens
- Edgewater
- Mitchell & Hampstead
- Ballarat & Duke
- Braybrook Village
- South & Duke
- Wembley Avenue

6.6 Monitoring and Review

To remain robust, it is recommended that the Activity Centre Policy be reviewed at least every five years. This will ensure that it can reflect changes in retail, commercial and residential development activity; other economic and social changes; as well as State Government and Maribyrnong City Council policy changes.

Key Performance Indicators

To assist the monitoring and evaluation process, the following Key Performance Indicators (KPIs) are recommended for the overall network of centres in Maribyrnong as well as individual centres:

Overall Network

- Improvement in public transport services to the network of centres
- Achievement of clusters of centres with distinct but complementary roles
- Enhanced range of quality retail, commercial, and community services across the network
- Improved local accessibility to centres providing a range of basic goods and services
- Achievement of new housing starts in or adjacent to centres in accordance with the targets set in the Regional Housing Statement
- Achievement of an overall improvement in the economic, social and environmental performance of centres in the network

Individual Centres

- Improvement in the transit orientation of each centre
- Achievement of the desired role for each centre
- Improvement in the activity mix in each centre
- Improvements in centre performance
- Development or strengthening of a sense of place and community in each centre
- Enhancement in retail, commercial, and community service provision
- Attraction of intensive housing within or adjacent to the centre
- Achievement of Melbourne 2030's economic performance criteria
- Achievement of Melbourne 2030's social performance criteria including opportunity to address imbalances in access to jobs/goods services
- Achievement of Melbourne 2030's environmental performance criteria including opportunity/need to improve the physical state of the public realm and to meet infrastructure needs

7. Revised Activity Centres Policy

Using the structure of the 1998 Policy as a base as well as the detailed analysis and strategies outlined in this report, it is recommended that a revised Activity Centres Policy be prepared for the City of Maribyrnong under the following headings:

- Objectives of the Policy
- Background including current policy and development situation
- Anticipated Trends
- Future Vision
- Policy, Principles and Strategies covering the whole network of centres, as well as for the Principal, Major, Specialised, Neighbourhood and Local Activity Centres
- Monitoring and Review of the Policy