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MELTON TOWN CENTRE REVITILISATION PLAN

LAND USE & ECONOMIC ASSESSMENT

MELTON CITY COUNCIL | MAY 2022

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EXECUTIVE SUMMARY

Urban Enterprise was engaged by Urban Fold on behalf of Melton City Council to prepare a Land Use and Economic Assessment to inform the preparation of the Melton Town Centre Revitalisation Plan. The purpose of the Land Use and Economic Assessment is to analyse the existing economic conditions, challenges and opportunities for the Town Centre, which will be used to inform the preparation of the Revitalisation Plan.

STRATEGIC CONTEXT

Key points related to the strategic context are summarised below:

- Existing policies, strategies and research identify the Melton Town Centre as a multifunctional retail strip centre which serves an important community, civic and convenience role for the broader region.
- Strengths previously identified for the centre include its civic presence, gateway location, open space connections, potential development sites and public transport interchange. Key challenges identified for the town centre included movement barriers, land use mix and the public realm.
- State planning policy identifies the MTC as a regionally significant commercial area and a Major Activity Centre, however local policy flags the need to reconsider the retail role as a result of the continued growth of nearby activity centres.
- The Woodgrove Shopping Centre and MTC are separately identified Major Activity Centres in Plan Melbourne despite being very proximate.
- State planning policy supports a diversity of uses, public spaces and community facilities in the MTC, encourages medium and higher density residential development and identifies the need to improve connection to Melton train station.
- Local housing policy supports the provision of diverse and affordable housing stock and more intensive housing development in proximity to activity centres. Melton's housing strategy recognises the lack of large development sites in areas close to good facilities and services.
- Melton's Investment Attraction Strategy (2020) identifies investment opportunities, with areas of focus including professional services, visitor economy, education and health, all relevant to the MTC.
- Nearby Cobblebank is identified in State policy as a future Metropolitan Activity Centre and is expected to receive significant government investment over the medium to long term, representing competition to the MTC for both public and private investment.

SITUATION ANALYSIS

Key points related to the situation analysis include:

- The MTC is located centrally to the established area of Melton and functions as an 'over-sized' neighbourhood retail centre with approximately 36,000sqm of retail floorspace. The uses which attract visitation from beyond the immediate catchment are civic, community and hospitality related.
- The MTC is readily accessible by road, however public transport access is limited to bus services. The lack of fixed rail public transport is a key weakness of the location.
- The centre lacks higher order retail and commercial facilities, a circumstance which is unlikely to change in the future given the close proximity of Woodgrove Shopping Centre and the imminent development of Cobblebank Metropolitan Activity Centre.
- The MTC has experienced a period of low private sector investment and declining visitation, along with a loss of some key businesses. In the context of strong population and employment growth across the wider municipality, it is clear that opportunities to improve economic performance should be considered for the centre.

- As the only substantial strip-based precinct in the western part of the municipality, the outdoor setting creates a clear point of difference to other existing and proposed centres in the area which should be leveraged as part of revitalisation plans.
- The potential relocation of the Melton City Council offices away from the study area would result in a major reduction in employment and daily visitation to the study area which would directly impact the economic performance of the MTC, especially that of hospitality businesses and convenience retailers.

ECONOMIC TRENDS, ISSUES & OPPORTUNITIES

Key points in relation to the economic trends, issues and opportunities are summarised below:

- The retail sector is currently experiencing challenging conditions and major disruptions, particularly in relation to online retailing and the COVID-19 pandemic, suggesting strategic repositioning of Melton Town Centre is required to underpin future economic activity and visitation. Retail alone is no longer sufficient to drive the performance of a MAC.
- Changes to working patterns following the COVID pandemic may present opportunities for a greater local employment role, especially for smaller emerging businesses in professional and other services.
- Greater residential development within the study area can respond to strong population growth and housing needs (especially rental and smaller housing types) while also improving the local market for goods and services in the MTC.
- The population of the primary catchment for the MTC is projected to increase by 12,500 residents over the 20 years to 2041, presenting the opportunity to continue to capture expenditure in retail, services and hospitality.
- The rate and scale of population growth projected in Melton's growth areas will far exceed that of the areas which the MTC serves. This will encourage investment in new activity centres, employment precincts and residential areas outside the study area and poses a threat to investment and visitation attraction to the study area.
- Woodgrove Shopping Centre is located in very close proximity to the MTC. Its size, critical mass of retailers, retail anchors and prevalence of national brands will continue to dominate market share for many retail types over coming years in established areas of Melton.
- The MTC has a business mix that is strongly weighted towards independent businesses, compared with national brands which are common in other centres.
- The MTC will need to be differentiated from existing and planned competing centres in order to avoid direct competition with other larger centres.
- A key advantage at MTC compared with other centres is the natural outdoor setting (at the eastern end of the study area) and the opportunity to foster greater outdoor activity and place-making.

RETAIL & COMMERCIAL DEMAND ASSESSMENT

Key points related to the retail and commercial demand assessment include:

- The Main Trade Area for the MTC is expected to accommodate an additional 25,000 residents by 2041, a 35% increase. This growth will be distributed across a wide spatial area, however, where already strong competition is expected to increase.
- Urban growth areas within the broader MTC catchment are forecast to experience substantial population growth, with an additional 69,800 new residents expected to locate in these areas over the next 20 years. This scale of growth is equivalent to the current population of the Main Trade Area.
- Given the highly competitive retail environment, current levels of local escape expenditure are unlikely to be substantially reduced through new retailers in the MTC.
- It is important that a critical mass of convenience focused retailers is retained and that the overall retail and economic role of the town centre remains differentiated from competing centres.

- Retail modelling found that supportable retail floorspace could increase by between 6,100sqm and 10,800sqm by 2041 depending on the market share and performance of the centre over a period of relative uncertainty.
- Core retail growth is not expected to be a driver of revitalisation – rather, revitalisation aims should include local retailers becoming beneficiaries of broader actions and changes in and around the centre.
- Population growth in nearby urban growth areas will generate $931m in additional spending per annum by 2041. This presents the opportunity for the precinct to capture a proportion of the additional retail expenditure, but only if the MTC capitalises on points of difference and is readily accessible from the growth areas.
- Capturing future demand for commercial floorspace across Melton will be a key to the revitalisation for the town centre, particularly given the challenging conditions identified for the retail sector.
- The potential loss of the Council offices would be likely to have a significant impact on the commercial floorspace profile of the town centre. If the offices are to be relocated, ensuring an appropriate mix of land uses are established that replace its economic role and impact will be critical to the future revitalisation of the town centre.
- The Revitalisation Plan should promote conditions which support non-retail commercial activity, including:
  - Sub-precincts where small businesses are encouraged and prioritised;
  - Streetscape and other amenity which is attractive to workers, including open spaces;
  - Promoting a mix of commercial and hospitality uses which complement each other in areas that are not prioritised for core retail activity;
  - Opportunities for health and community support services to located in the centre proximate to existing community service providers and medical centres, especially within walking distance (and providing high quality walking and active transport connections between these services); and
  - Maximising public transport accessibility to the centre, especially connections to Melton station.

DEVELOPMENT OPPORTUNITIES

Key findings with regard to development opportunities in the study area are summarised below:

- The Residential Growth Zone in the study area could accommodate intensification throughout parts of the study area, however development will rely on a large number of individual landowners and is likely to be slow.
- There is a distinct lack of larger strategic development sites in residential zones in the Study Area, meaning that substantial increases in local population will only be achieved if strategic redevelopment sites in other zones are identified.
- Strategic urban renewal sites exist in the MTC, primarily at the eastern end of the study area, including two strategic council-owned sites. These sites are generally proximate to open space and natural amenity and could accommodate a mix of uses, including residential, retail and commercial.
- The Industrial 3 Zone area at the corner of Palmerston Street and Barries Road presents a logical candidate for urban renewal and rezoning for residential use should be investigated.

ISSUES & OPPORTUNITIES

T1. ISSUES, WEAKNESSES AND THREATS

No.	Issue
1	Structural change in the retail sector requires a greater diversity of land uses to sustain activity centres. These changes cannot be resisted, so the challenge is to support an ongoing transition to other uses while retaining a successful local retail role.
2	The relocation of the Council offices would substantially reduce employment and visitation in the MTC, a key threat to the local economy.
3	The lack of strategic sites for residential development is likely to limit local population growth without intervention and identification of opportunities for residential intensification.
4	The lack of fixed rail public transport is a key competitive disadvantage which will increase over time as new centres emerge on the rail network.
5	Proximity to Woodgrove will limit attraction of larger retail anchors, limiting any opportunities to reduce escape expenditure.
6	Strong competition from new greenfield activity centres for investment attraction presents a threat to improving premises and attracting new development to the MTC.
7	Lack of retail and other anchors leaves the centre susceptible to overall declines in visitation.

Source: Urban Enterprise.

T2. OPPORTUNITIES AND FOCUS FOR REVITALISATION

No.	Opportunity
1	Increase the local residential catchment by facilitating greater residential development within the study area. This will support existing businesses and respond to demand for rental and other housing.
2	Increase the duration of stay within the centre through continued public realm works, rebalancing space to dwell versus space for movement.
3	The strong community, health education and services role can be capitalised on to drive ongoing visitation, however focus on social assistance should be balanced with overall health, allied health, recreation and family services to support ongoing visitation to the centre from a diverse range of age groups and socio-economic cohorts.
4	Post-pandemic changes to working locations could support growth in demand for local working space, such as co-working and incubator which would align with the 'independent' business mix.
5	Capitalise on Council owned land to initiate urban renewal, an increase in local residential population and new commercial and hospitality space over the medium term.
6	The outdoor "place" presents the opportunity to differentiate the centre from competing centres and promote blending of indoor / outdoor activity and private / public realm, especially for hospitality businesses.
7	Establish a clear point of difference and place brand based on the themes of independent business, diverse communities and events, outdoor hospitality and natural setting.
8	Directly address public and active transport gaps, especially connections to the Melton train station.
9	Lower rents in the MTC compared with shopping centres enables independent businesses to establish within the catchment. Facilitation of new and growing independent businesses should be further encouraged, potentially through a satellite of Western BACE.
10	Significant population growth planned within the municipality presents an opportunity for the MTC to capture retail expenditure from these new residents by creating a unique 'destination', primarily for independent / niche grocers, hospitality and cultural events.

Source: Urban Enterprise.

The focus of economic revitalisation should be on the following:

- The overarching priority should be to foster a rich mix of uses for significant social, environmental and economic benefits. Activity centres that offer a good blend of uses and transit arrangements generally support higher levels of business and other activities, resulting in lower car usage and enabling multipurpose trips. Such centres make it easier for people to gain access to a wider range of goods and services, employment opportunities, entertainment and community facilities, an especially important outcome in this relatively disadvantaged community.
- Other areas of focus include:
  - Increasing the length of time and number of stops people take in the centre.
  - Activating the local economy at different times of the day and night, requiring support, investment and activation of dedicated outdoor hospitality locations.
  - Increasing the local residential catchment to support existing and new businesses.
  - Capturing retail expenditure from the planned population growth in the broader municipality by leveraging the centre's unique attributes, especially hospitality, events and niche businesses.
  - Fostering both a neighbourhood retail role and a strong hospitality role in distinct parts of the centre.
  - Facilitating an increase in local employment, especially within professional services and emerging businesses, to replace the likely lost employment due to relocation of council offices.
  - Strengthening movement connections between MTC, Melton East, Woodgrove and the Melton Train Station for ease of visitation across all locations. Improving the eastern approach to MTC through to Melton Highway should be also be a priority.
  - Facilitating investment in new premises, which should include a combination of residential and commercial spaces, ideally in mixed use developments, within walking distance to activity centre, community services and education.

Considering the ongoing challenges facing the retail sector, these areas of focus primarily relate to strengthening the diversity of uses within the centre and the local population base so that the retail sector is the beneficiary, rather than the driver of, revitalisation.

T3. ECONOMIC DEVELOPMENT INITIATIVES

No.	Initiative	Justification / benefits
1	Investigate establishment of a community market or regular events in the town centre, such as a Community Grocer model (low income fresh food market), night market, cultural market and so on.	• Improve footfall and overall visitation. • Night market would improve safety and vibrancy at night and support other night time traders.
2	Support night-time economic activity in a specific sub-precinct through infrastructure improvements, lighting, wider footpaths for outdoor dining and identifying and supporting regular and suitable night time events for the precinct.	• Improve visitation during the night • Strengthen vibrancy/safety of the centre
3	Address public and active transport gaps, especially connections to the Melton train station, including consideration of night-time transport options.	• Improve visitation and length of stay • Maintain and enhance role and brand as a differentiated activity centre
4	Ensure marketing initiatives promote the town centre as a differentiated offer to other centres, with a particular focus on positioning the centre as a destination for diverse communities, independent businesses and visitors seeking community connections.	• Highlight differentiated role to local catchment • Capture visitation from growth area residents
5	Build and strengthen a trader group for the town centre to enable coordinated marketing initiatives.	• Highlight differentiated role to local and broader catchment • Better understand and respond to business challenges
6	Extend streetscape improvements throughout the town centre relevant to the role of each sub-precinct to improve amenity and experience for locals and visitors, especially to encourage walking, active transport and dwell time. This should capitalise on the natural setting at the eastern end of the study area and reconsider the role of land within the High Street road reserve.	• Improve amenity • Strengthen key point of difference (i.e. outdoor centre)
7	Investigate feasibility of establishing a co-working space or additional office space within the town centre, potentially as a satellite of the Western BACE.	• Strengthen local business base • Replace likely employment loss due to Council office relocation
8	Proactively investigate opportunities to redevelop strategic sites, including Council owned sites.	• Increase local resident population • Facilitating both public and private sector investment • Provide new premises for businesses to respond to overall growth in catchment demand.
9.	Develop policy to ensure Council investment and service provision in MTC is maintained and strengthened through proactive intervention, (avoiding transfer of investment and services to growth areas).	• Support the ongoing service role of the MTC and regular visitation. • Address possible visitation decline during high urban growth phase.

Source: Urban Enterprise, 2022.

1. INTRODUCTION

1.1. ENGAGEMENT

Urban Enterprise was engaged by Urban Fold on behalf of Melton City Council to prepare a Land Use and Economic Assessment to inform the preparation of the Melton Town Centre Revitalisation Plan. The development of a long-term plan for the Town Centre is a critical piece of integrated economic and planning work that will facilitate improvements to the precinct and guide future development and the identity for the centre.

The purpose of the Land Use and Economic Assessment is to analyse the existing economic conditions, challenges and opportunities for the Town Centre, which will be used to inform the preparation of the Revitalisation Plan.

1.2. PROJECT SCOPE

The scope of this study is as follows:

1. **Strategic and location context** – a summary of strategic planning and economic policy and strategies which provide guidance on economic priorities and spatial planning directions.
2. **Existing situation** - a baseline analysis of the existing property, land use, demographic, business and employment uses in the study area.
3. **Economic analysis** – an analysis of the economic trends impacting the town centre including competing centres, retail demand and other macroeconomic trends.
4. **Development potential** – assessment of potential development sites within the study area via analysis of key property characteristics such as ownership, lot sizes, vacancies and reinvestment potential.
5. **Issues and opportunities** – an analysis of the issues and opportunities for the town centre including recommended economic development and infrastructure initiatives for the study area to support the desired economic role and place brand.

1.3. STUDY AREA

The study area for the project is shown in Figure 1. The Study Area includes the Melton Town Centre and surrounding land.

The study area is bounded by Church Street/Oldershaw Road to the north, Coburns Road to the west, Barries Road to the south and Toolern/Little Blind Creek to the east. Analysis within this report is focused on the economic activity within the town centre - statistical boundaries have been selected that closely align with the study area boundary.

F1. STUDY AREA

Source: Google Maps Satellite, 2022, Urban Enterprise.

2. STRATEGIC CONTEXT

2.1. INTRODUCTION

This section summarises the state, regional and local strategies and studies which provide both general strategic planning context and specific analysis and recommendations for the economic role that Melton Town Centre could perform within the context of western Melbourne.

2.2. KEY POINTS

- **Existing policies, strategies and research identify the Melton Town Centre as a multifunctional retail strip centre which serves an important community, civic and convenience role for the broader region.**
- **Strengths previously identified for the centre include its civic presence, gateway location, open space connections, potential development sites and public transport interchange. Key challenges identified for the town centre included movement barriers, land use mix and the public realm.**
- **State planning policy identifies the MTC as a regionally significant commercial area and a Major Activity Centre, however local policy flags the need to reconsider the retail role as a result of the continued growth of nearby activity centres.**
- **The Woodgrove Shopping Centre and MTC are separately identified Major Activity Centres in Plan Melbourne despite being very proximate.**
- **State planning policy supports a diversity of uses, public spaces and community facilities in the MTC, encourages medium and higher density residential development and identifies the need to improve connection to Melton train station.**
- **Local housing policy supports the provision of diverse and affordable housing stock and more intensive housing development in proximity to activity centres. Melton's housing strategy recognises the lack of large development sites in areas close to good facilities and services.**
- **Melton's investment attraction plan identifies investment targets including professional services, amenity industries, education, health and small and emerging businesses, all relevant to the MTC.**
- **Nearby Cobblebank is identified in State policy as a future Metropolitan Activity Centre and is expected to receive significant government investment over the medium to long term, representing competition to the MTC for both public and private investment.**

2.3. LOCAL POLICY

MELTON RETAIL & ACTIVITY CENTRES STRATEGY

The Melton Retail and Activity Centres Strategy (2014) provides strategic direction for Council regarding planning and support for retailing and activity centres throughout the municipality.

The strategy is guided by the following principles:

- Ensure equity of access to services and jobs;
- Improve sustainability of urban development;
- Improve local employment opportunities;
- Provide for community focal points;
- Encourage the viability of services; and
- Improve the quality of service.

Although currently defined as a Major Activity Centre (MAC), the strategy expects Melton Town Centre's retail function to be that of a large neighbourhood centre as a result of the growth of nearby activity centres.

The town centre is identified in the strategy as a multifunctional retail strip centre with a high proportion of health, community and professional services. Recommendations within the strategy specific to Melton Town Centre include:

- Assist the formation of a traders' group for the Melton Town Centre; and
- Review the existing High Street structure plan in the light of changes to competitive conditions and zoning.

MELTON PLANNING POLICY

The Melton Planning Scheme (Clause 21.06) outlines planning policy for activity centres within the municipality. The policy identifies Melton TC as a Major Activity Centre (MAC), and outlines the role and function of a MAC as follows:

- A broad mix of integrated sub regional land uses such as retail (discount department store as well as supermarkets and specialty stores), office, business, community (e.g. education, health and recreation), entertainment and residential in order to generate a breadth of employment choices for the City of Melton. As a target the non-retail floor space of a fully developed activity centre should be 40% of the total floor area.
- Residential development (usually above ground floor level) and medium and higher density residential housing in close proximity to provide access particularly to small households.
- Approximately 35,000 square metres of conventional retail floor space and up to 20,000 square metres of restricted retail floor space as a guide for activity centres based on a catchment of approximately 50,000 people.

Relevant activity centre objectives within the scheme include:

- To establish and support a network of viable activity centres that provide access to a wide range of goods and services appropriate to their role and function within the hierarchy
- To ensure activity centres develop as genuine mixed use areas.
- To ensure all residents have access to a range of essential services and convenience goods including fresh produce within a reasonable distance of their homes (and preferably within walking distance).
- To support retailing within rural or tourism enterprise areas of economic importance.

HIGH STREET TOWN CENTRE STRUCTURE PLAN

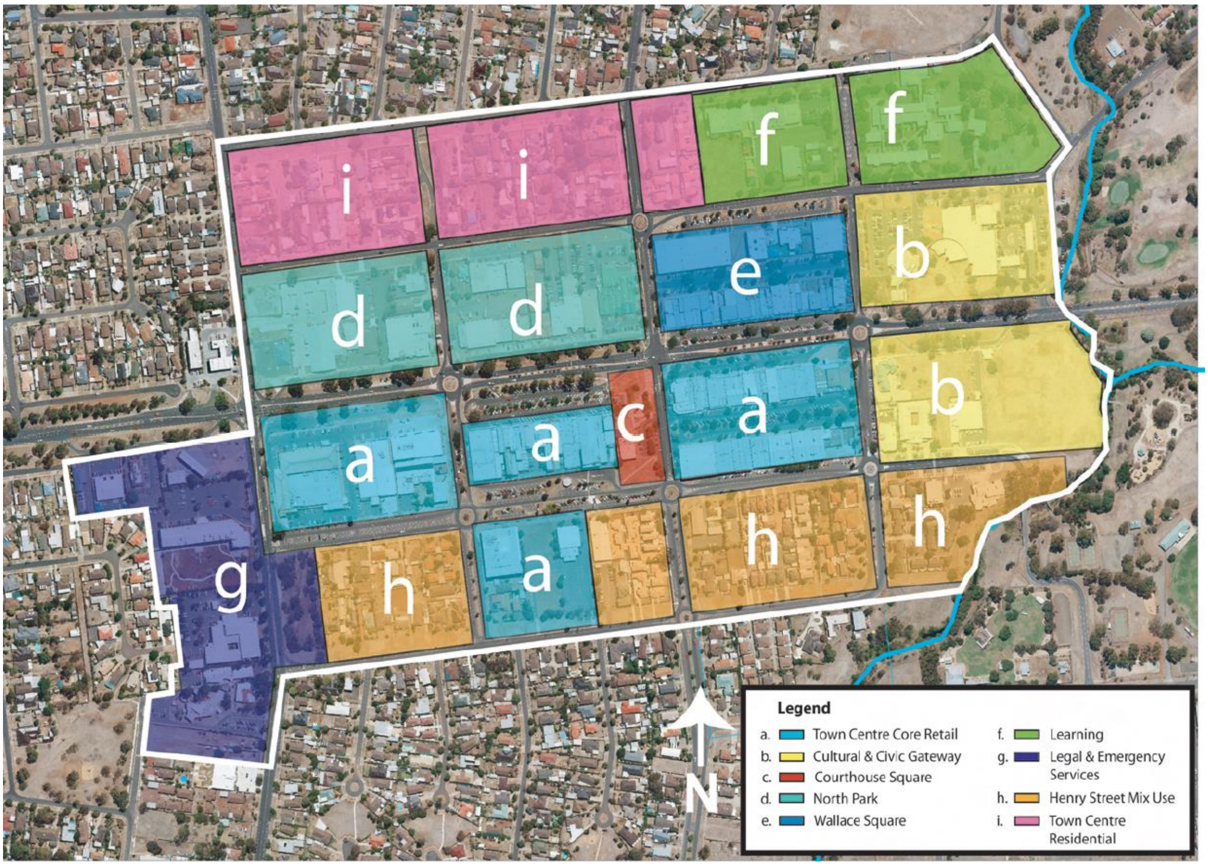
The High Street Town Centre Structure Plan (2007) provides a framework for land use within the precinct and seeks to encourage investment to support the centre's role as a focal point for the local community.

The plan groups the centre into a range of land use precincts shown in Figure 2. Strengths identified within the plan for the centre include its civic presence, gateway location, open space connections, potential development sites and public transport interchange. Key challenges outlined in the plan were movement barriers, land use mix (i.e. ensuring a diversified land use mix as the retail role declines) and the public realm.

The plan was underpinned by the following objectives:

- To reinforce the role of the centre as the principal civic and institutional heart of the Shire;
- To support the expansion of commercial activity within the centre;
- To achieve high quality built form in all new development within the centre; and
- To enhance access to the centre through a series of improvements to pedestrian and vehicular mobility.

F2. HIGH STREET LAND USE PRECINCTS



Source: High Street Town Centre Structure Plan, Melton City Council, 2007

Relevant strategic directions include:

- Defining high quality and usable public spaces;
- Improved access and movements in and around the centre;
- Supporting the development of a vibrant retail core;
- Enhancing the community and civic presence in the centre;
- Encouraging high quality residential development in the centre; and
- Establishing the centre as a major transport interchange.

Relevant opportunities identified within the structure plan include:

- The development of an arts and culture facility, improvements to the Melton Library, state and federal government services, expansions of the Melton Civic Centre, Magistrates Court and emergency services;
- The intensification of the density of development within the centre, with development of strategic sites and multi-storey buildings (including residential above ground floor) up to five storeys;
- Exploration of the potential for limited expansion of the core retail precinct within the town centre to the south;
- Reinforcement of the Courthouse Square as a public community space of regional importance; and
- The likely future development/redevelopment of a number of strategically important sites.

MELTON ECONOMIC DEVELOPMENT & TOURISM PLAN 2014-2039

The Melton Economic Development and Tourism Plan provides a strategic framework to guide economic development activity within the municipality. The plan includes the following five themes:

1. Business growth and attraction;
2. City promotion and tourism
3. Innovation and technology
4. Learning and capacity building; and
5. Planning for future growth.

The plan includes specific objectives and actions under each of the strategic priority areas identified within the document. Relevant strategic objectives include the following:

- Promote and facilitate business activity and investment across the City to support the creation of a diverse range of local employment opportunities;
- Develop a local tourism industry which continues to add value to the local economy; and
- Maximise opportunities for economic development and growth in strategic planning processes.

MELTON INVESTMENT ATTRACTION STRATEGY

The Melton Investment Attraction Strategy (2020) seeks to develop a city shaping vision and action plan for growing jobs and investment in the City of Melton. The Strategy aims to deliver on a vision for a more diverse and resilient economy with strong jobs growth supported by clear strategic directions.

The strategic directions for the Strategy include:

1. Understanding how infrastructure will successfully deliver employment precincts;
2. Transforming the structure of the labour force to deliver a more diverse economy; and
3. Achieving the job target through catalyst infrastructure under a preferred delivery scenario.

A target of 100,000 new local jobs drives the key directions of the Strategy. The Strategy is primarily focussed on Melton's planned and new economic precincts, however, the second strategic direction identifies professional services as a target growth industry for Melton in the future, a sector which could be accommodated through greater development and diversity in the Melton Town Centre.

MELTON HOUSING DIVERSITY STRATEGY

The Melton Housing Diversity Strategy (2014) provides a 20-year framework to guide housing growth with the municipality's established residential areas. The framework identifies the number and types of housing needed to house future population growth and the capacity and suitability of different residential locations to accommodate different rates of housing change.

The strategy identifies the following relevant challenges within the municipality:

- Provision of diverse and affordable housing stock;
- Attracting investment to the established areas when there is a significant amount of land available for greenfield development;
- Preserving neighbourhood character;
- Access to appropriate infrastructure, facilities, services and transport options; and
- Limited examples of large development or redevelopment sites existing in areas close to good facilities and services.

The strategic direction of the strategy is underpinned by the following five key housing themes:

1. Affordability;
2. Character;
3. Housing Diversity;
4. Infrastructure, Services & Transport; and
5. Housing Design Innovation.

Relevant objectives within the strategy include:

- To recognise the important role of housing diversity;
- To promote affordable housing options for households of all income levels;
- To provide a sufficient range of social, retirement, aged-care and special needs housing types throughout the City of Melton in appropriate locations;
- To encourage initiatives and investment that promote the City of Melton's established residential areas as places to live and invest;
- To promote opportunities for site consolidation and support more intensive residential development close to activity centres and major public transport nodes; and
- To encourage innovative housing design and development.

In addition, House Rules (Housing Character Assessment and Design Guidelines, 2015) sets out character statements and guidelines for residential land in the study area.

2.4. STATE & REGIONAL POLICY

PLAN MELBOURNE

Plan Melbourne identifies Major Activity Centres (MAC) as locations where policy supports investment and job creation to ensure that employment grows outside the central city. MACs help achieve improved access to jobs through the delivery of medium-high density housing closer to jobs and public transport.

The Melton Town Centre and the nearby Woodgrove Shopping Centre are separately identified in Plan Melbourne as Major Activity Centres.

Plan Melbourne places strong emphasis on the role of 'neighbourhoods', introducing the concept of the **20-minute neighbourhood** to planning in Victoria. The concept encourages jobs, services, community uses and transport to be planned within a 20 minute walk of residents. To achieve this, Plan Melbourne set out the range of services, housing, employment and transport that should be provided in these neighbourhoods. provided in these neighbourhoods.

The 20-minute neighbourhood concept is critical to the way in which planning policy is shaping the next phase of growth and change in both established and growth areas of Melbourne. The key elements are summarised in Figure 3.

F3. 20 MINUTE NEIGHBOURHOOD CONCEPT

Source: Plan Melbourne, DEWLP, 2017.

WESTERN METRO LAND USE FRAMEWORK PLAN (DRAFT)

The Western Metro Land Use Framework Plan (draft) provides a regional approach to land use planning, guiding the application of Plan Melbourne. The regional 2050 vision for the western metro region is shown in Figure 4. It is noted that the Plan is yet to be finalised and is the subject of current submissions by Council.

By 2051 the region's population is projected to almost double from around 1 million to 1.90 million. By 2031, employment is projected to increase from 294,550 to 445,550 jobs. A significant share of the population and employment growth is expected to occur in Melton's greenfield areas. This growth will have significant implications for the Melton Town Centre that will need to be considered as part of the Revitalisation Plan.

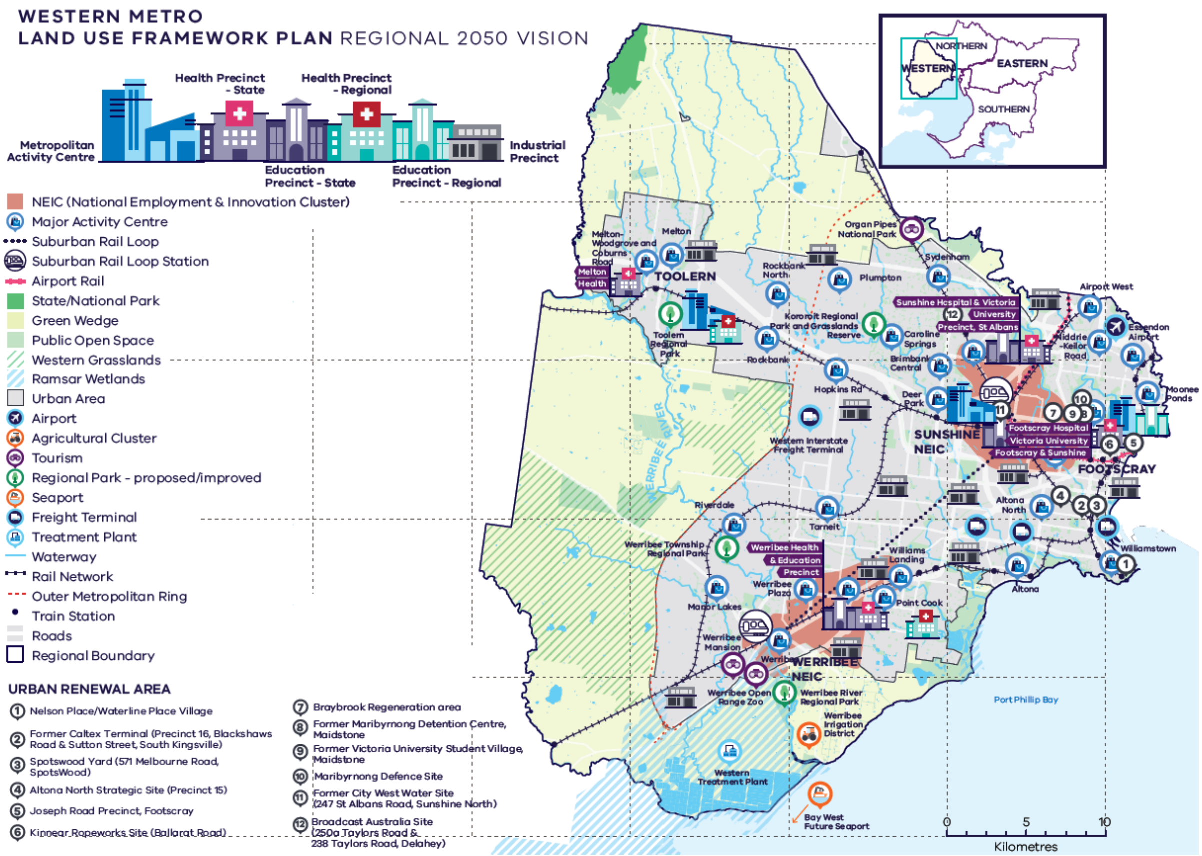
Of greatest relevance to this study is the 'Productivity' chapter of the Plan, which includes the following relevant directions:

- Support the development of a strong network of activity centres to provide jobs closer to where people live; and

- Ensure the Western Growth Corridor accommodates longer term industrial and commercial development opportunities.

The plan also provides an assessment of the major activity centres across each municipality, with the analysis of Melton and Woodgrove provided in Table 4. The future role and strategic opportunities identified in the plan for both centres are of relevance for the Revitalisation Plan.

F4. WESTERN METRO REGION LAND USE FRAMEWORK PLAN 2050 VISION



Source: 2050 Vision, Western Metro Land Use Framework Plan, DELWP 2021 (draft)

T4. MELTON TOWN CENTRE – WESTERN METRO LAND USE FRAMEWORK PLAN

Existing attributes	What needs to be considered	Future role/strategic opportunities
Melton Town Centre		
• Strip-based centre on High Street • A regional commercial role with retail and services such as health, community, civic and wholesaling	• Regionally-significant industrial precinct to the east • Heritage significance	• Continue to provide a diversity of uses, public spaces and community facilities • Encourage medium and higher density residential development • Develop a better connection to Melton Station
Woodgrove		
• Two separate freestanding shopping centres • Regional retail function • State-significant health precinct at Melton Health • Bus services	• Connection to Melton Town Centre and Melton Station • Flooding risk in part of the activity centre	• Continue role as a retail centre and health precinct • Encourage greater provision of community facilities • Increase mixed-use development to build on existing retail role

Source: Western Metro Land Use Framework Plan, DELWP 2021 (draft)

Toolern (now referred to as Cobblebank) is also identified within the plan as a future Metropolitan Activity Centre with state-significant commercial land and regionally significant industrial land to the north. This future activity centre is located approximately 6km south-east of the Melton Town Centre. Strategic opportunities and the future role outlined in the plan for Cobblebank relevant to the Melton Town Centre include:

- Establish role as primary activity centre and transport hub for Cobblebank and wider community including the peri-urban areas;
- Promote a range of regional and local employment, civic, retail, education, medical, residential, recreational and entertainment uses and a mixture of shops, offices and dwellings.

The Revitalisation Plan will need to consider the future role of Cobblebank (as well as other proximate activity centres) and the likely impact this will have on the Melton Town Centre.

MELBOURNE INDUSTRIAL AND COMMERCIAL LAND USE PLAN

The Melbourne Industrial and Commercial Land Use Plan (MICLUP, DELWP, 2020) provides an overview of current and future needs for industrial and commercial land across metropolitan Melbourne and puts in place a planning framework to support state and local government to more effectively plan for future employment and industry needs, and better inform future strategic directions.

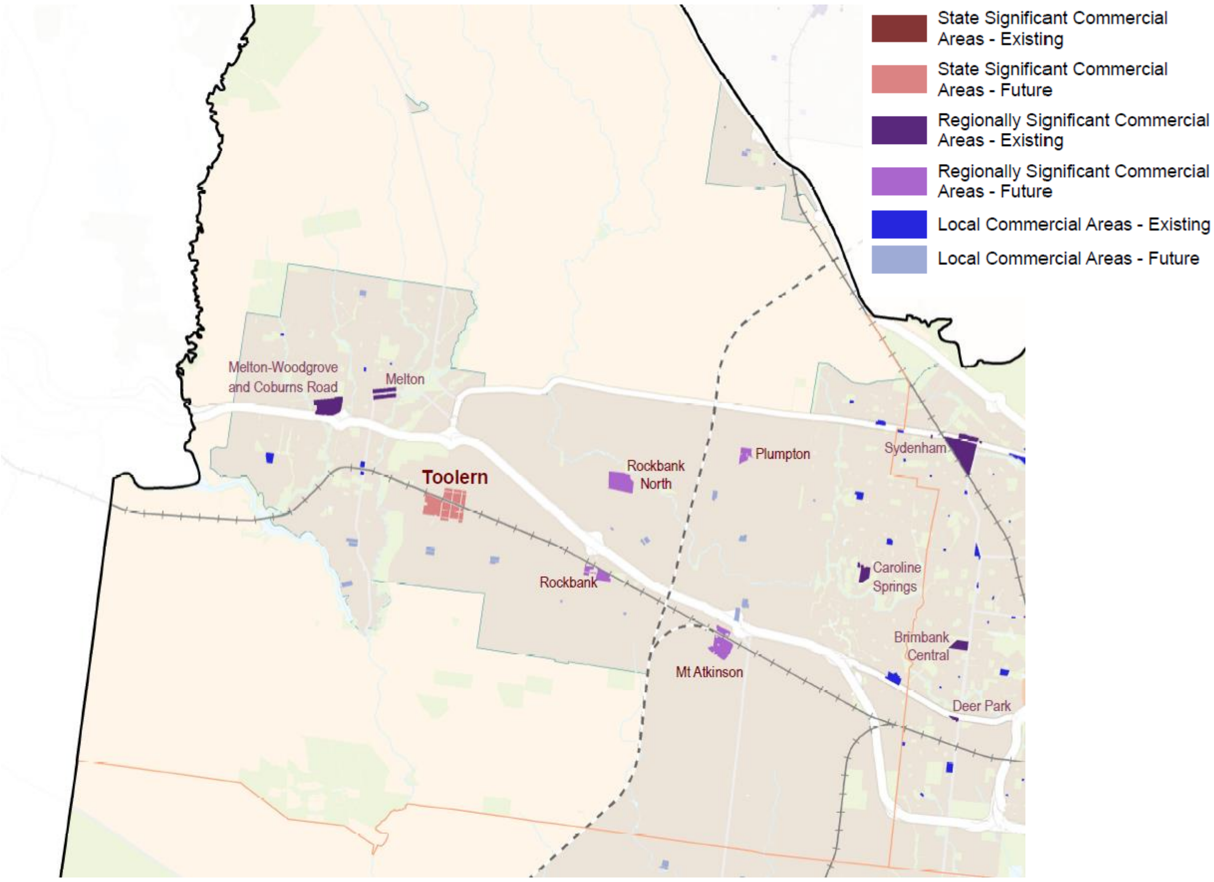
MICLUP categorises commercial and industrial areas as of State, Regional or Local significance and sets out planning policy directions for each category. The categorisation for Melton Town Centre (and surrounding areas) is summarised in Figure 5.

Melton Town Centre is identified as an existing regionally significant commercial area. Woodgrove Shopping Centre is also classed as regionally significant commercial land, while Toolern/Cobblebank is identified as a future state significant commercial area.

Rockbank and Rockbank North are categorised as future regionally significant commercial areas. The future role and scale of nearby activity centres and employment precincts will influence the nature of future development and economic activity within the Melton Town Centre.

In terms of floorspace demand, MICLUP includes projections that there will be demand for an additional 348,000sqm of commercial floorspace in Melton (LGA) over the period 2016 – 2031.

F5. COMMERCIAL LAND IN WESTERN MELBOURNE (MICLUP CATEGORISATION)



Source: MICLUP, extracted by Urban Enterprise, 2020

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3. SITUATION ANALYSIS

3.1. INTRODUCTION

This section provides an existing situation analysis for Melton Town Centre having regard to the location characteristics, land use role and mix, employment profile and business mix.

3.2. KEY POINTS

- **The MTC is located centrally to the established area of Melton and functions as an 'over-sized' neighbourhood retail centre with approximately 36,000sqm of retail floorspace. The uses which attract visitation from beyond the immediate catchment are civic, community and hospitality related.**
- **The MTC is readily accessible by road, however public transport access is limited to bus services. The lack of fixed rail public transport is a key weakness of the location.**
- **The centre lacks higher order retail and commercial facilities, a circumstance which is unlikely to change in the future given the close proximity of Woodgrove Shopping Centre and the imminent development of Cobblebank Metropolitan Activity Centre.**
- **The MTC has experienced a period of low private sector investment and declining visitation, along with a loss of some key businesses. In the context of strong population and employment growth across the wider municipality, it is clear that opportunities to improve economic performance should be considered for the centre.**
- **As the only substantial strip-based precinct in the western part of the municipality, the outdoor setting creates a clear point of difference to other existing and proposed centres in the area which should be leveraged as part of revitalisation plans.**
- **The potential relocation of the Melton City Council offices away from the study area would result in a major reduction in employment and daily visitation to the study area which would directly impact the economic performance of the MTC, especially that of hospitality businesses and convenience retailers.**

3.3. LOCATION

The Melton Town Centre is situated on High Street approximately 46km north-west of the Melbourne CBD. The town centre is centrally located within the established area of Melton and is in close proximity to:

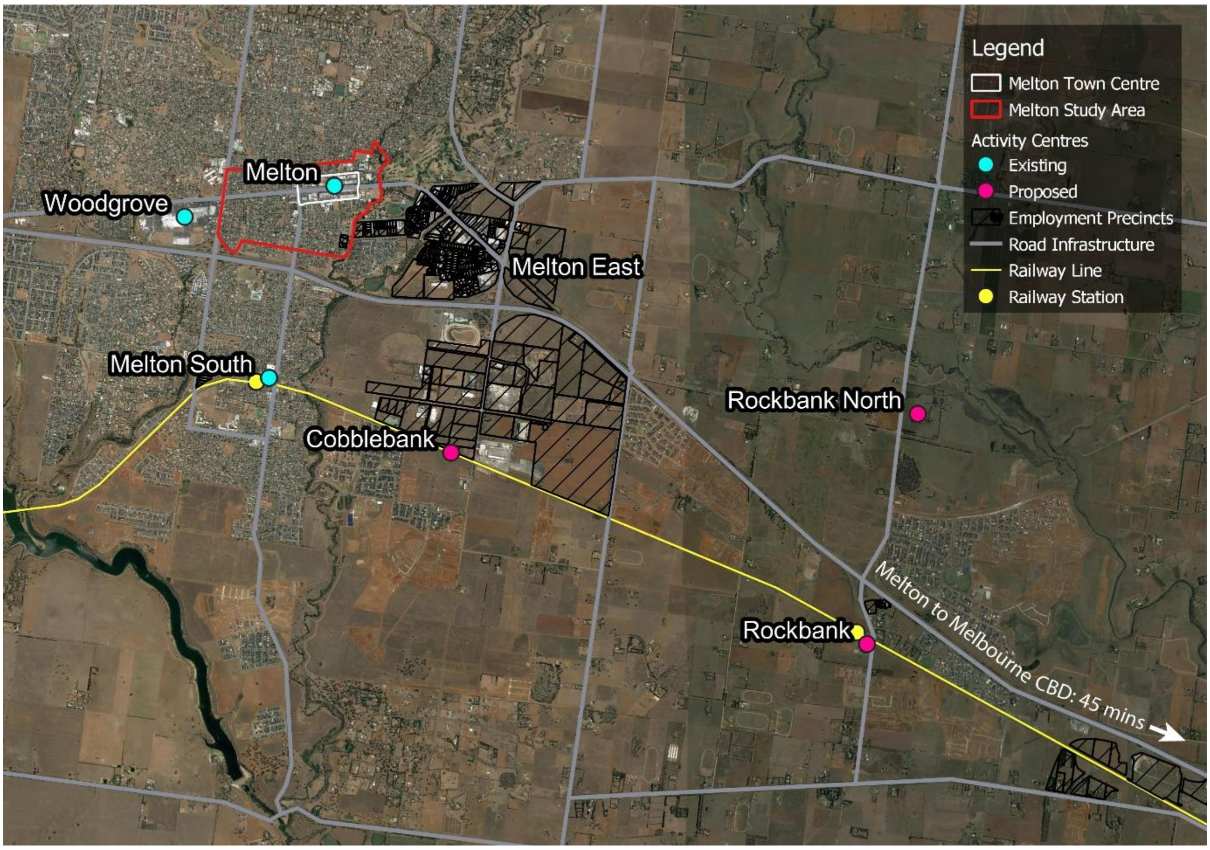
- Woodgrove Shopping Centre (1.5km west);
- The Melton Industrial Precinct (1.5km south-east);
- Several primary and secondary schools; and
- The Western Freeway (1km to the south).

Public transport access to the study area is reliant on bus services, with Melton Train Station located 3km south of the town centre in Melton South. The town centre operates as a public transport interchange for the Melton township, with a number of local and inter-regional bus routes servicing the centre.

Urban growth areas surround the established suburb of Melton, with major residential precincts, employment precincts and activity centres projected to develop within 5km of the Study Area, especially to the east.

Figure 6 shows the location context of the study area, including existing and proposed activity centres which will influence the economic role of the MTC.

F6. LOCATION CONTEXT MAP, MELTON TOWN CENTRE



Source: Google Maps, 2022, Urban Enterprise.

3.4. LAND AREA AND PLANNING ZONES

Land in the Study Area is primarily within the Commercial 1 Zone, Residential Growth Zone, General Residential Zone and Public Use Zone as shown in Figure 7. Table 5 summarises the land area by zone within the study area.

Zoning has the following attributes:

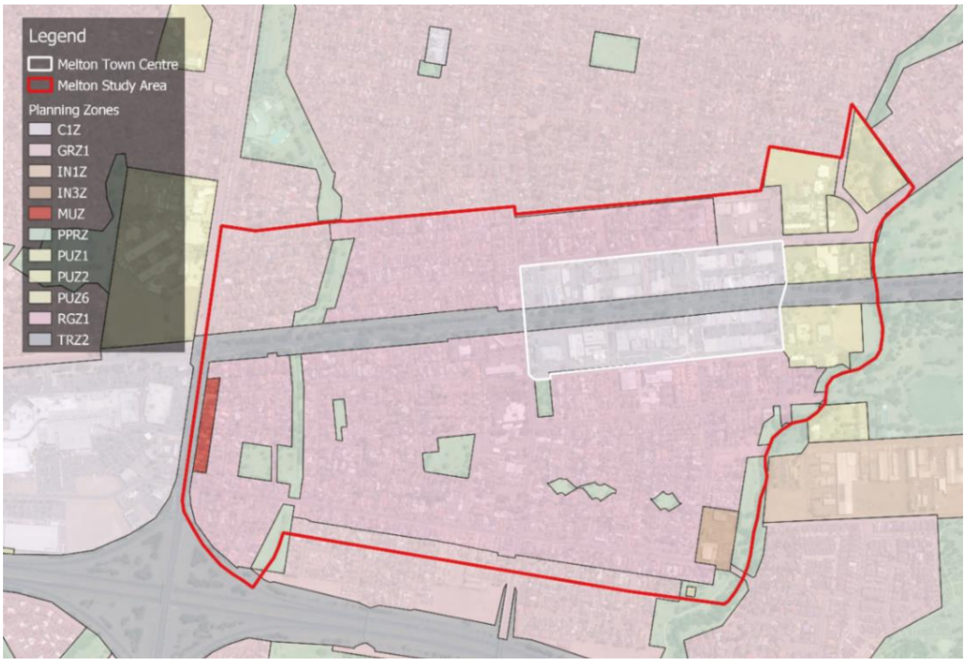
- The majority of land (75%) is in the Residential Growth Zone or General Residential Zone (GRZ sections are located in the north-west and north-east corners of the Study Area);
- The Commercial 1 Zone applies to the town centre covering 9.4 hectares;
- Public land is prominent, with more than 5 hectares in the Public Use Zone 6 (Local Government);
- There is a relative lack of diversity in the zones which support business and economic use, with only the Commercial 1 Zone and small peripheral sections of Mixed Use Zone and Industrial 3 Zone; and
- A key difference across the zoning, other than residential zones promoting the development of residences and commercial zones supporting business and economic uses, is that the development of buildings in residential areas is limited to a specific height, whilst commercially zoned areas do not have a height limit.

T5. LAND AREA BY ZONE

Zone	Total Area (ha)	% of total
RGZ1	69.95	64%
GRZ1	11.86	11%
PPRZ	11.02	10%
C1Z	9.4	9%
PUZ6	5.17	5%
IN3Z	1.16	1%
MUZ	0.9	1%
PUZ1	0.06	0%
Total	**109.52**	**100%**

Source: Google Maps Satellite, 2022, Urban Enterprise.

F7. MELTON STUDY AREA ZONING MAP



Source: Google Maps Satellite, 2022, Urban Enterprise.

3.5. EXISTING LAND USE

An audit of existing land uses was prepared in February 2022 based on Council's rates database and refined through analysis of desktop information. For each property, the current land use was identified and categorised, with property details including floorspace, zone and land area matched to the Council property database.

The existing land use profile is depicted in Figures 8 and 9.

Analysis of the existing land use profile of the study area shows that the study area comprises five core land use roles:

1. Community, civic, health and education services;
2. Convenience and speciality retail;
3. Hospitality and entertainment;
4. Commercial offices; and
5. Residential.

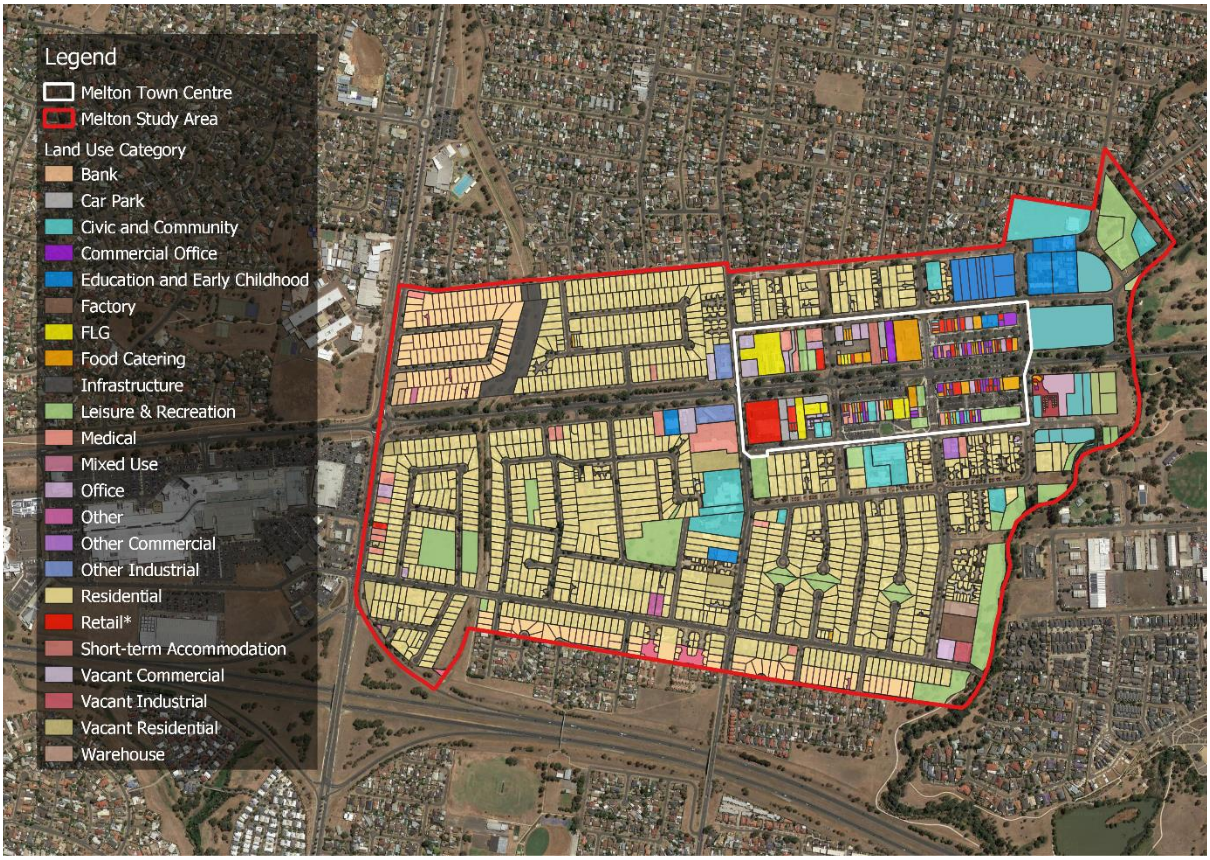
The primary economic role of the study area is as a convenience retail and community services precinct that also serves a secondary hospitality, commercial and retail services role.

Community, civic and health services uses are located throughout the town centre and surrounds, with a concentration at the eastern end of the study area including Council offices, aged care, community services and schools. There is also a cluster of civic and health uses west of Station Road, while the Melton Library and Learning Hub situated on McKenzie Street functions as a visitation driver for the centre.

Convenience and specialty retail uses are prevalent across the centre, including three supermarkets (IGA, Foodworks and Aldi), with a particular concentration south of High Street between Station Road and Palmerston Street. The MTC also accommodates smaller **commercial** uses throughout, including real estate agents, legal services and accounting businesses.

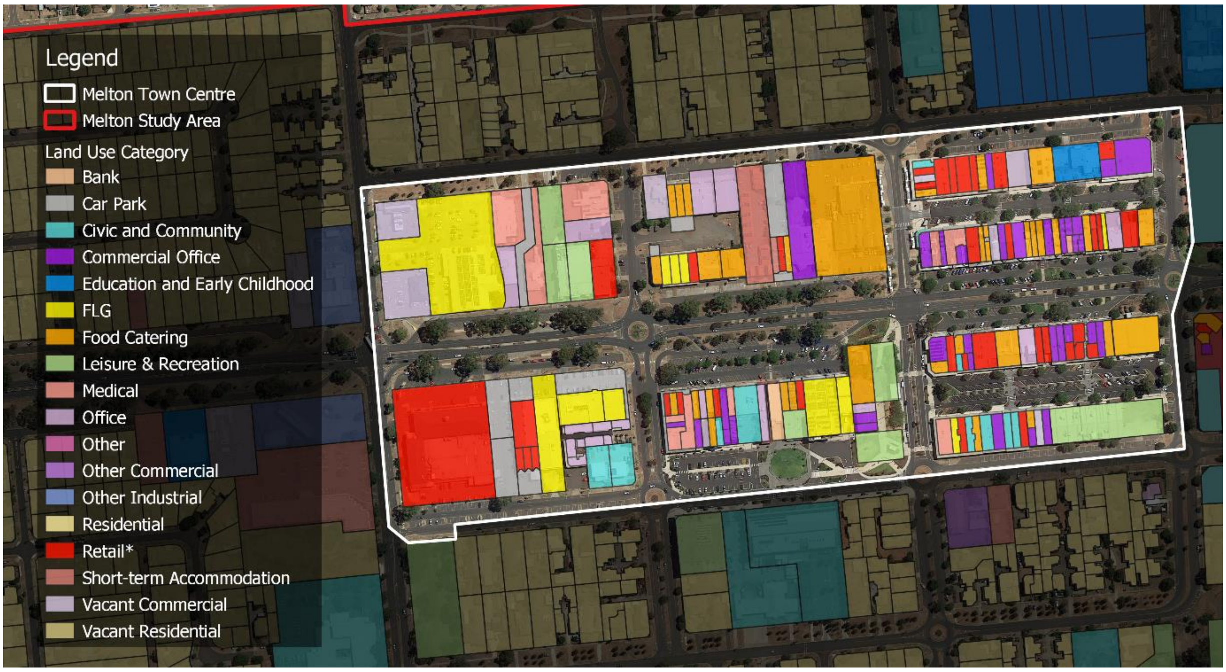
A large number of **hospitality** businesses, primarily takeaway food, are located in Bakery Square and east of the **entertainment** precinct (amphitheatre/court house area), as well as Wallace Square. There are small clusters of **retail service** uses situated within both Wallace and Bakery Square, particularly hair, beauty and personal care businesses.

F8. STUDY AREA SPATIAL LAND USE MAP



Source: Google Maps Satellite, 2022, Urban Enterprise.

F9. TOWN CENTRE SPATIAL LAND USE MAP



Source: Google Maps Satellite, 2022, Urban Enterprise. Retail * = retail that is not further defined.

TOWN CENTRE FLOORSPACE

Table 6 shows a detailed breakdown of land uses within the Commercial 1 Zone. It is estimated that the study area currently accommodates includes approximately 36,000sqm of retail floorspace and 25,000sqm of commercial floorspace.

The Food, Liquor and Groceries (FLG) category accounts for a significant share of the retail floorspace in the town centre, primarily within the three supermarkets and a number of smaller international grocers. Food catering also occupies a significant amount of floorspace throughout the study area, with a substantial number of takeaway restaurants located along High Street and within Bakery and Wallace Square.

Commercial offices (e.g. real estate agents, lawyers, accountants etc.) perform a secondary role in the activity centre (approximately 7,500sqm). The study area also has a strong health and community role with approximately 4,600sqm of floorspace occupied by medical uses as well as 3,300sqm floorspace for civic, community and education uses.

T6. COMMERCIAL 1 ZONE FLOORSPACE DETAIL

Land Use Category	Total Floorspace (sqm)	% of total
Retail	35,889	56%
FLG	16,858	26%
Food Catering	11,939	18%
Retail*	7,092	11%
Commercial	25,207	39%
Commercial Office	7,462	12%
Medical	4,617	7%
Office*	4,250	7%
Vacant Commercial	1,602	2%
Mixed Use	1,474	2%
Bank	415	1%
Short-term Accommodation	906	1%
Leisure & Recreation	4,481	7%
Civic, community and education	3,296	5%
Civic and Community	2,835	4%
Education and Early Childhood	461	1%
Total	64,637	100%

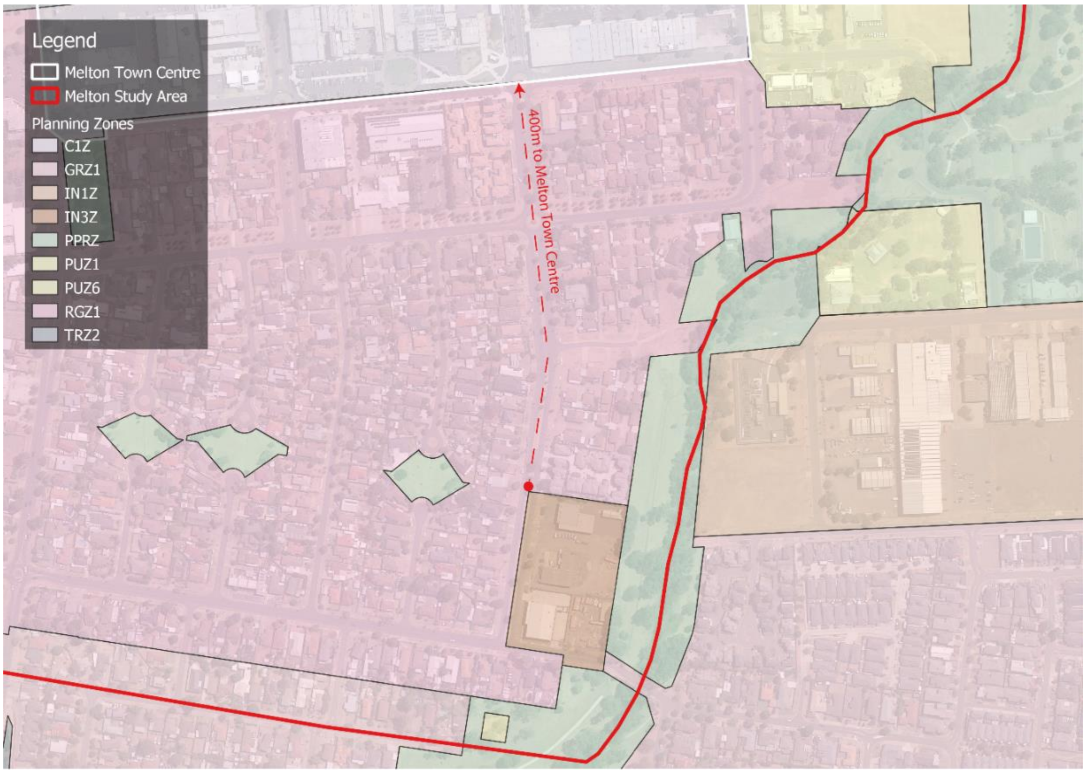
Source: Council (2021), analysed by Urban Enterprise. Retail * = retail not further defined.

INDUSTRIAL LAND

A small section of land in the Industrial 3 Zone is located in the south-eastern section of the study area as shown in Figure 10.

This area is located approximately 400m south of the MTC and accommodates four premises including the Melton Justice Service Centre, two underutilised sites and the Evolve Christian Church. None of the uses appear to be industrial in nature and two of the premises are in poor condition, appearing rarely used.

F10. INDUSTRIAL AREA MAP



Source: Google Maps Satellite, 2022, Urban Enterprise.

3.6. BUSINESSES

Business information for the study area has been collected using Australian Business Register (ABR) and Google business data. Where possible, this business data has been analysed and verified to arrive at a current estimate of the number and type of businesses within the Melton Town Centre.

It is estimated that there are currently 409 businesses operating in the study area. The most prominent business types by sector are as follows:

- Accommodation & food services (15%);
- Retail Trade (14%);
- Health Care & Social Assistance (12%);
- Other Services (11%); and
- Professional, Scientific & Technical Services (9%).

Analysis of key sub-sectors (ANZSIC Level 2) that comprise each of Melton Town Centre's high-business-count industries shows that:

- Within the accommodation and food services industry, the subsectors with the most businesses are cafes and restaurants (30) and takeaway food services (21);
- Specialisations within retail trade include supermarkets and grocery stores (9) and specialised food retailing (5);
- The health care & social assistance industry has a varied business mix, with 10 dental services businesses, 9 allied health services businesses, 8 general practice medical service business and 7 other social assistance service businesses;
- The 'other services' industry is dominated by hairdressing and beauty services businesses (22); and
- Over 50% of all professional, scientific and technical services businesses are within the sub-sectors of legal services (12) and accounting services (7).

F11. BUSINESS BY INDUSTRY, MELTON TOWN CENTRE, 2022

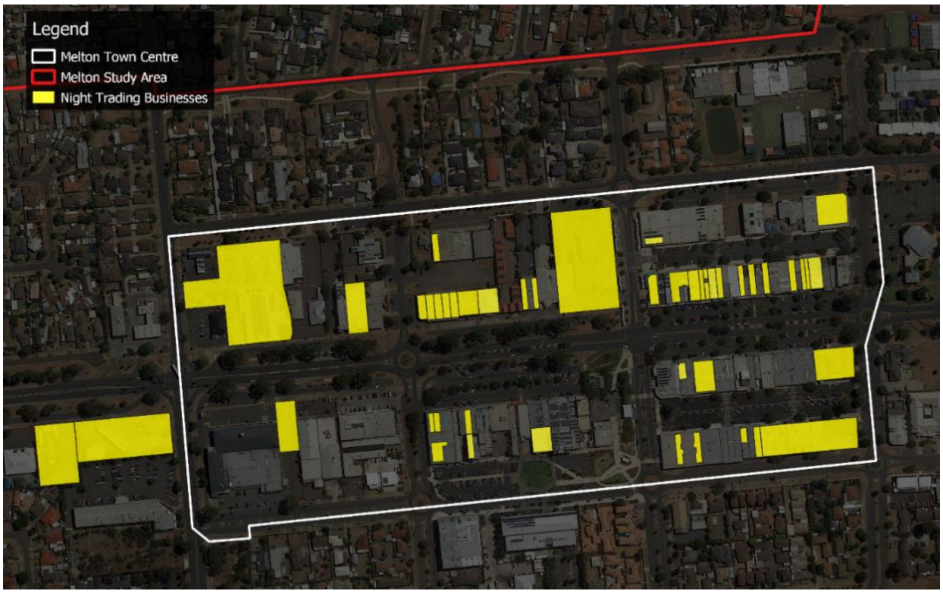
Source: Business Database, Melton, ABR 2022, derived by Urban Enterprise 2022.

NIGHT-TIME ECONOMY

Google business data has been used to estimate the balance of day time and night time economic activity within the study area. Day-time businesses are classified as businesses that close before or at 6pm, whilst night-time businesses are defined as those that close after 6pm. Overall, 24% of businesses are open at night, with a cluster (as shown in Figure 12) of such businesses north of High Street, particularly within Wallace Square.

It is noted that the majority of the accommodation and food services businesses primarily serve a takeaway food role, with limited dining capacity. This limits the level of footfall in the town centre at night and suggests that although there are clusters of businesses operating during the evening, there is unlikely to be a high level of vibrancy/activity associated with these clusters. An opportunity for revitalisation is to increase the overall dining capacity within the town centre.

F12. NIGHT TRADING BUSINESSES MAP



Source: Google Maps Satellite, 2022, Urban Enterprise.

3.7. EMPLOYMENT

Table 7 shows employment by industry for all workers in the study area, compared with the City of Melton proportions. In 2016, the study area supported 2,880 jobs, 12% of the municipal employment.

Local employment included 585 public administration and safety jobs (20% of total, mostly within Council's main offices on High Street) and 503 health care and social assistance jobs (17%). Employment in retail trade (14%) and accommodation and food services (13%) is also prominent.

T7. EMPLOYMENT BY INDUSTRY, STUDY AREA

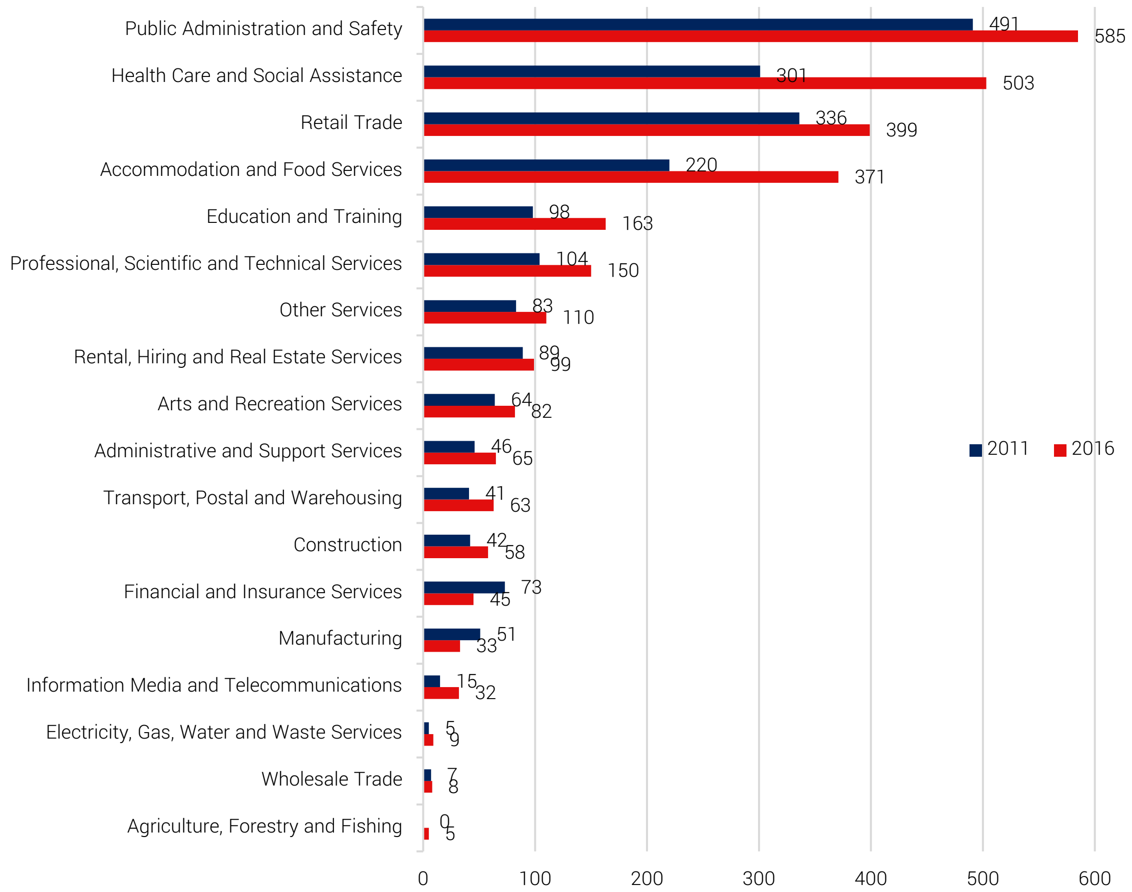
Industry	Study Area	City of Melton
Public Administration and Safety	20%	7.7%
Health Care and Social Assistance	17%	10%
Retail Trade	14%	14%
Accommodation and Food Services	13%	8.2%
Education and Training	5.7%	14%
Professional, Scientific and Technical Services	5.2%	3.3%
Other Services	3.8%	4.0%
Rental, Hiring and Real Estate Services	3.4%	1.4%
Arts and Recreation Services	2.8%	1.6%
Administrative and Support Services	2.3%	2.8%
Transport, Postal and Warehousing	2.2%	4.9%
Construction	2.0%	11%
Financial and Insurance Services	1.6%	1.5%
Manufacturing	1.1%	4.6%
Information Media and Telecommunications	1.1%	0.7%
Electricity, Gas, Water and Waste Services	0.3%	0.5%
Wholesale Trade	0.3%	3.5%
Agriculture, Forestry and Fishing	0.2%	1.0%
Mining	0.0%	0.3%
Total Jobs	2,880	24,683

Source: Employment by Industry, ABS Census of Population and Housing, 2016. Employment figures for the Melton Town Centre Study Area are based on the four destination zones (DZs) that most closely align with the study area boundaries. Further information regarding the statistical boundaries of these DZ can be found in Appendix A.

Between 2011 and 2016, the main changes in employment in the area (as shown in Figure 13) were:

- Employment in the Melton Town Centre as a proportion of total employment in the entire LGA fell from 13% to 12%;
- The most significant increases in jobs occurred in the industries of health care and social assistance (+202) and accommodation and food services (+151).
- Jobs in public administration and safety (+94), education and training (+65) and retail trade (+63) also increased, reflecting both the business mix in the study area and the City of Melton's recent rapid population growth.
- Employment in financial and insurance services declined (-28), as many banks relocated to nearby centres.

F13. EMPLOYMENT BY INDUSTRY (WORKERS), MELTON TOWN CENTRE STUDY AREA, 2011 AND 2016



Source: Employment by Industry, ABS Census of Population and Housing, 2011 & 2016.

MELTON CITY COUNCIL OFFICES

The employment data highlights the importance of the Council offices to the current economic role of the Melton town centre - the Council office is the largest employment destination in the precinct and therefore drives substantial weekday visitation to the centre. In 2016, there were more public administration employees in the study area than all other professional services-related employment combined.

Council may consider the opportunity to relocate its offices to the Cobblebank Metropolitan Activity Centre at some point in the future.[1] This relocation would have a significant economic impact on the Melton Town Centre due to the substantial loss of employment, as well as the corresponding visitation and economic activity to the precinct from these workers.

If the offices were ultimately relocated, ensuring an appropriate mix of land uses are established to offset the loss associated with the relocation would be critical to the future economic performance of the town centre. Relocation of the offices would require specific attention to ensure successful revitalisation.

[1] It is noted that no formal commitment to a relocation has occurred, however, the potential move was identified in the Cobblebank Metropolitan Activity Centre UDF.

3.8. ECONOMIC PERFORMANCE

LOCAL VIEWS ON PERFORMANCE

Consultation was recently undertaken with local businesses as part of a broader place-making study currently underway by the Place Agency for Council.

Key findings from the consultation relevant to this assessment are summarised below:

- The role and performance of the centre has changed significantly since the development of Woodgrove Shopping Centre, primarily through a reduction in retail anchor businesses.
- Melton has become more of a services and convenience retail precinct and has experienced a reduction in footfall as Woodgrove has grown.
- Some traders feel that Woodgrove's longer opening hours at night causes customers to utilise the food court at Woodgrove instead of Melton.
- A key advantage for Melton is the cheaper rental prices in comparison to nearby centres.
- Parking for workers is identified as a significant issue by a number of traders, particularly given the poor public transport access to the town centre.
- Bacchus Marsh was identified as a useful case study for an old town centre that is performing strongly.
- Opportunities identified to improve visitation and performance of the centre include events, improved outdoor dining and development of an art gallery.
- The library was identified as a visitation driver for the centre.

Further targeted consultation undertaken by Urban Enterprise for this study with trader representatives and real estate agents identified the following findings:

- Consultees have observed that the growth of Woodgrove has impacted visitation to Melton town centre. The government services that have been established to replace the loss of retailers to Woodgrove do not result in visitors dwelling in the town centre.
- Consultees hold the view that the town centre has no 'destination drivers' and that strategic business establishment is required within the activity centre to create revitalisation.
- The onset of the COVID pandemic has materially impacted footfall in the town centre and there has not been a linear recovery in visitation since movement restrictions and other government limits (e.g. density limits) have been removed.
- Pre-COVID, commercial vacancy rates and business turnover within the town centre were low. Since the pandemic, however, there has been a noticeable increase in vacancy and business turnover.
- Demand for commercial floorspace in the town centre is subdued and primarily from hospitality and professional services businesses.
- Residential property in proximity to the town centre has experienced strong price growth in recent years, with momentum continuing throughout the pandemic. There has been some appetite for residential development of larger blocks in the study area, however, substantial residential redevelopment is yet to meaningfully occur in the study area.

PERFORMANCE INDICATORS

A summary of the town centre's performance across a range of different indicators is provided in Table 8 based on site visit observation, turnover data, property value data and consultation with traders.

T8. TOWN CENTRE PERFORMANCE

Indicator	Performance
Vacancy	The MTC currently has low shopfront vacancy based on a site visit in early 2022, although some businesses appeared temporarily closed (a common occurrence for independent retailers and businesses during and immediately post-COVID pandemic).
Property Values	Discussions with local real estate agents indicated low demand for commercial properties in the town centre in recent years leading to low rent and value growth. By contrast, residential property values in Melton (suburb) increased at an average annual rate of 4.8% between 2011 and 2021, in line with the broader municipality (+4.6% p.a).[2]
Investment	Public investment in recent years has included streetscape redevelopment works in 2018, following the construction of the new Melton Library and Learning Hub in 2013. There are also a number of small investment projects for the town centre proposed as part of the Revitalisation Project. Limited private investment/reinvestment has occurred in recent years – Council advises that there are no known significant planned development/ redevelopments in the study area.
Retail Turnover	Business turnover in the town centre has partially recovered over the past 12 months after suffering a significant reduction in 2020 due to the COVID pandemic. Total consumer spending within the precinct fell from $381 million in 2019 to $372 million in 2020 before increasing to $375 million in 2021.[3]
Footfall/Visitation	Consultation with traders and real estate agents suggested that visitation to the centre has been in decline for a number of years. The transition of a number of major banks and retailers to Woodgrove was identified as a key reason for the gradual fall in visitation and footfall in the town centre.

Source: Urban Enterprise.

Overall, the MTC has experienced a period of low investment and declining visitation, along with a loss of some key businesses. In the context of strong population and employment growth across the wider municipality, opportunities to improve economic performance should be considered for the centre, including those which help to reposition the role of the centre.

[2] Guide to Property Values, Valuer General Victoria, 2021.

[3] Spendmapp.

3.9. ECONOMIC ROLE AND FUNCTION

The current economic role and function of the MTC is summarised as follows:

- From a retail perspective, the centre functions as a large neighbourhood activity centre with a range of smaller supermarkets, retail services and take away food, but an absence of higher order retail anchors.
- The centre accommodates a strong cluster of community, civic and health services which drives visitation to the centre from a broad catchment.
- The current and future role and function of the centre will be heavily influenced by proximity to Woodgrove Shopping Centre which will limit opportunities for major retail and entertainment expansion in the MTC. The level of retail competition will increase further over time once proposed new activity centres (particularly Cobblebank) are fully developed.
- Although defined in policy as a regionally significant commercial precinct, the centre currently serves a more localised economic role, although the community, civic and hospitality role could be defined as sub-regional.
- As the only substantial strip-based precinct in the western part of the municipality, the outdoor setting creates a clear point of difference to other existing and proposed centres in the area which should be leveraged as part of revitalisation plans.

4. ECONOMIC TRENDS, ISSUES AND OPPORTUNITIES

4.1. INTRODUCTION

This section provides analysis of the broader economic conditions influencing activity centres in the area and existing and future competition.

4.2. KEY POINTS

- **The retail sector is currently experiencing challenging conditions and major disruptions, particularly in relation to online retailing and the COVID-19 pandemic, suggesting strategic repositioning of Melton Town Centre is required to underpin future economic activity and visitation. Retail alone is no longer sufficient to drive the performance of a MAC.**
- **Changes to working patterns following the COVID pandemic may present opportunities for a greater local employment role, especially for smaller emerging businesses in professional and other services.**
- **Greater residential development within the study area can respond to strong population growth and housing needs (especially rental and smaller housing types) while also improving the local market for goods and services in the MTC.**
- **The population of the primary catchment for the MTC is projected to increase by 12,500 residents over the 20 years to 2041, presenting the opportunity to continue to capture expenditure in retail, services and hospitality.**
- **The rate and scale of population growth projected in Melton's growth areas will far exceed that of the areas which the MTC serves. This will encourage investment in new activity centres, employment precincts and residential areas outside the study area and poses a threat to investment and visitation attraction to the study area.**
- **Woodgrove Shopping Centre is located in very close proximity to the MTC. Its size, critical mass of retailers, retail anchors and prevalence of national brands will continue to dominate market share for many retail types over coming years in established areas of Melton.**
- **The MTC has a business mix that is strongly weighted towards independent businesses, compared with national brands which are common in other centres.**
- **The MTC will need to be differentiated from existing and planned competing centres in order to avoid direct competition with other larger centres.**
- **A key advantage at MTC compared with other centres is the natural outdoor setting (at the eastern end of the study area) and the opportunity to foster greater outdoor activity and place-making.**

4.3. ECONOMIC TRENDS

The following broad economic trends are impacting local economies and should be considered as part of future planning for the study area.

RETAIL SECTOR

The retail sector has been experiencing a long term structural shift in the way people shop, including:

- Household finances have come under pressure in recent years due to low wages growth and declining wealth, which previously resulted in depressed consumer sentiment and inclination to spend, particularly on discretionary items such as retail. However, the combination of government stimulus and easing COVID-19 restrictions has improved consumer confidence and household spending recently.
- Digital and online retailing is become more prevalent with the online share of retail spend in 2020 reaching 16.3%. The year-on-year growth in online shopping to 31 December 2020 was 57%[4], presenting major challenges to many traditional retail sectors such as clothing, books and banking. Some retail centres and strips are responding to online competition by seeking to improve the shopping "experience", something that cannot be replicated online. This includes a greater focus on hospitality, entertainment and meeting places co-located with retailers.[5]
- An offshoot to the e-commerce boom is the emerging role of social media platforms as a tool to advertise and showcase products, as well as a platform to directly sell products. Accenture estimates that the social commerce industry will grow three times as fast as traditional e-commerce, from $492 billion in 2021 to $1.2 trillion by 2025.
- The impact of the COVID-19 pandemic has been significant on the retail shopping trends, accelerating the prevalence of online retailing. In addition to digital retail, there has been a shift towards regionalisation and "shop local" campaigns, in which consumers seek to access goods closer to their home and are willing to spend more on local sourced products.[6]
- In response to the recent economic trends within the retail industry described above, retail centres and strips are increasingly adopting a 'place-based' approach to expand the role of strips to include civic and recreational destinations for communities. Traders are working with local Councils to improve 'place-making' initiatives to promote a mix of retail and amenities. This aims to better leverage existing community assets such as public open space, recreation and civic spaces, which aims to increase foot traffic and community dwellers, with a view to benefitting retailers and retail strips.

Given the challenging conditions and major disruptions to the retail sector, strategic repositioning of Melton Town Centre is required to underpin future economic activity and visitation. Retail alone is no longer sufficient to underpin economic performance of an activity centre.

[4] Inside Australian Online Shopping, e-commerce industry report, Australia Post, 2021

[5] Retail Trends: What is Digital's Impact on the Retail Sector, PWC, 2017

[6] Australian Retail Outlook 2021, KPMG, 2021

POPULATION & HOUSING

There are a number of population and housing trends that are likely to influence Melton Town Centre over the medium to long term:

- Greater Melbourne has experienced very high rates of population growth for many years – with the exception of a short term reduction due to international border closures, this is expected to continue over the medium to long term. Population growth, particularly in the western growth corridor, is driving strong demand for a variety of housing types, including higher density living which is currently relativity limited in Melton.
- Victoria's ageing population presents both challenges and opportunities for policymakers, government and the community. This shift in age demographics towards an older age profile will increase the demand for health and aged care services, as well as appropriate housing for older demographics (primarily smaller dwellings).
- Australian housing has become increasingly expensive, while home ownership rates are falling, especially among the young and the poor. House prices have risen as interest rates have hit record lows, while tax and welfare settings and rapid migration fed demand. Housing affordability has become a national issue and is currently the subject of a Federal Parliamentary inquiry. Ensuring the local housing market provides adequate and affordable housing for all people is a key objective for Melton City Council within its Housing Strategy, however the lack of strategic redevelopment sites near activity centres is an ongoing challenge.
- Urban growth areas are located throughout the City of Melton – these areas will continue to accommodate residential development and investment in areas outside the immediate catchment of the study area and will provide alternatives to residential intensification opportunities within and near the study area.

Future development within the town centre will need to consider the implications of these population and housing trends to ensure an appropriate mix of housing, businesses and services exists within the activity centre.

COMMERCIAL

Suburban office markets have seen an increase in overall demand across Melbourne in the medium term as many businesses seek to capitalise on cheaper rent in non-CBD locations. This trend has led to strong demand for city fringe offices and some middle ring commercial locations, however demand is yet to materially impact outer urban locations such as Melton.

The COVID-19 pandemic has substantially impacted vacancy and occupancy rates for office space, with many office-based workers operating from home, starting a trend towards more flexible working arrangements for office workers. Colliers research indicates a 3.7% increase in flexible workspace supply in non-CBD geographies.[7] Although the full impact of the pandemic on office space demand is yet to be fully understood, including the extent to which this trend will endure beyond the pandemic, the trend towards more workers undertaking working hours within residential properties and generally spending more time working and living closer to home could result in an increase in demand for smaller businesses within Melton, which is traditionally a commuter location with relatively low employment retention.

Council's economic development and investment strategies promote an increase in local employment, particularly in professional services, a sector which is well suited to the smaller premises and diverse land use mix available in the study area.

[7] Flexible Workspace Trend Forecast 2022, Colliers

4.4. CATCHMENT AREA PROFILE AND GROWTH

Demographics, local labour force and projected growth and change are important factors influencing the nature of business, retail and activity needs and opportunities within the study area.

4.4.1. DEMOGRAPHICS

The demographic characteristics of the area surrounding the study area are summarised in Table 9 and Figure 14. The Melton community is characterised by:

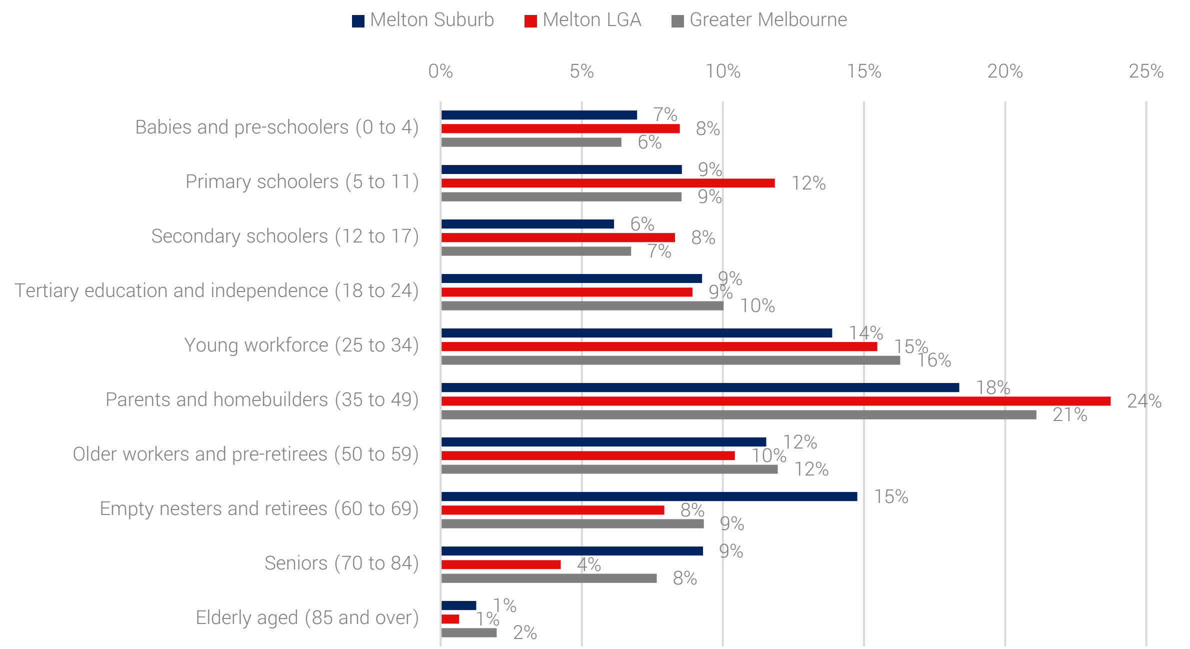
- Relative disadvantage and lower incomes than the municipal and metropolitan averages;
- Lower household sizes and a higher incidence of lone person households; and
- An older age profile when compared with broader areas, especially empty nesters, retirees and seniors aged between 60 and 84 years.

T9. DEMOGRAPHIC SNAPSHOT, 2016

Area	SEIFA[1]	Ave household size	Weekly household income (median)	Household Type (% of households)		
				Couples with Children	Couples without Children	Lone Person
Melton Suburb	876	2.5	$977	24%	20%	28%
City of Melton	994	3.0	$1,542	43%	20%	15%
Greater Melbourne	1021	2.6	$1,539	33%	23%	22%

Source: ABS Census of Population and Housing, Profile Id, 2016. 1. The national average index score is 1,000. Any higher score means a lower level of disadvantage (or higher level of advantage).

F14. AGE PROFILE BY SERVICE GROUPS, 2016

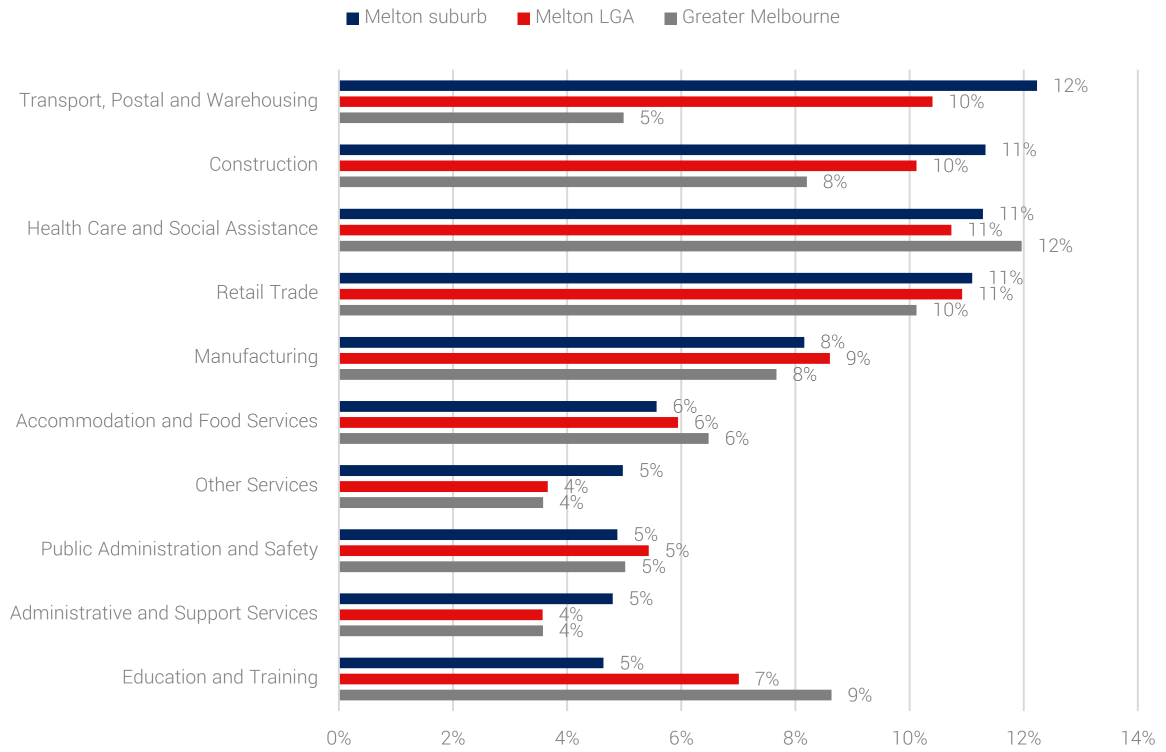


Source: ABS Census of Population and Housing, Profile Id, 2016

4.4.2. LABOUR FORCE

A greater proportion of Melton suburb residents are employed in industrial industries and occupations (especially labourers, machinery operators and workers in the transport and construction sectors), as well as administrative and health care roles, compared with the overall municipality.

F15. EMPLOYMENT BY INDUSTRY (TOP 10), 2016



Source: ABS Census of Population and Housing, Profile Id, 2016.

T10. OCCUPATIONS, 2016

Occupation	Melton suburb	City of Melton	Greater Melbourne
Managers	7%	10%	13%
Professionals	9%	15%	25%
Technicians and Trades Workers	16%	15%	13%
Community and Personal Service Workers	13%	11%	10%
Clerical and Administrative Workers	15%	16%	14%
Sales Workers	10%	11%	10%
Machinery Operators and Drivers	15%	11%	6%
Labourers	14%	10%	8%
Not stated or inadequately described	1%	2%	2%

Source: ABS Census of Population and Housing, Profile Id, 2016.

4.4.3. POPULATION GROWTH AND LOCATIONS

Figure 16 shows three broad catchment areas within which population growth and change will influence activity centres in the western section of the City of Melton, including the study area, including:

- A primary catchment, which comprises established areas north of the Western Freeway including Melton, Melton West, Harkness and Kuranjang;
- A secondary catchment, which comprises established and growth areas south of the Western Freeway and west of Toolern Creek, including Melton South and Brookfield; and
- A broad section of the municipality further east where several urban growth areas are planned or under development, including Cobblebank, Melton East, Warrensbrook, Rockbank and Rockbank North.[8]

Population growth in this broad area is planned to occur mostly in the urban growth areas that are not within the immediate catchment of the MTC, with an additional 72,000 residents projected in Melton's growth areas over the period 2021 to 2041 (within the broad catchment).

The primary catchment of the MTC is expected to experience growth at an average annual rate of 1.3% per annum, resulting in an additional 12,500 residents over the next 20 years, although it is noted that some of this growth is expected to occur in the Melton East PSP to the immediate east of the established suburb of Melton.

As shown in Table 8, the rate and scale of population growth projected in Melton's growth areas will far exceed that of the areas which the MTC serves. This will encourage investment in new activity centres, employment precincts and residential areas outside the study area.

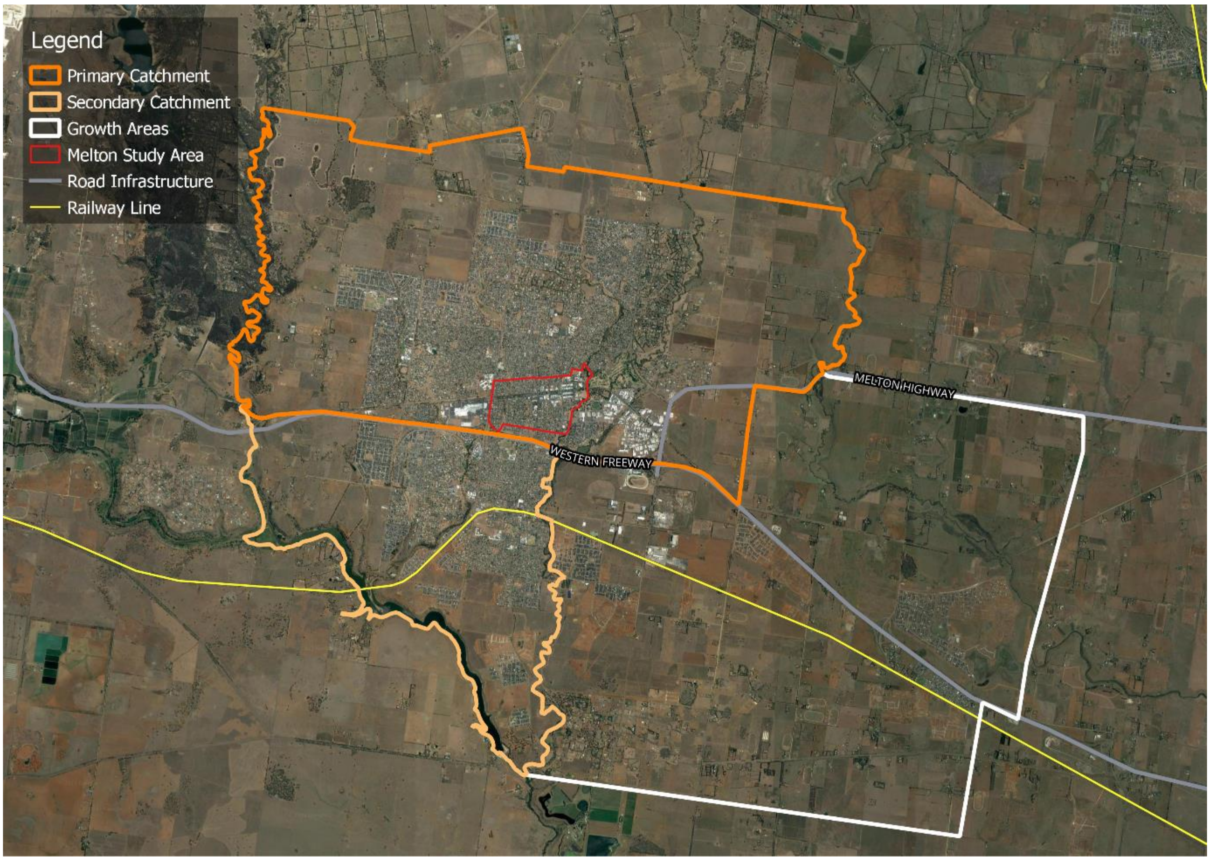
T11. POPULATION GROWTH PROJECTIONS 2021-2041

Location	2021	2031	2041	2021-2041	AAGR
Melton	8,786	9,570	12,529	+3,743	1.8%
Kurunjang	11,633	13,096	13,082	+1,449	0.6%
Melton West	9,215	9,617	12,991	+3,776	1.7%
Harkness	13,067	13,360	16,651	+3,584	1.2%
Primary Catchment	42,701	45,643	55,253	+12,552	1.3%
Brookfield	11,267	14,455	17,878	+6,611	2.3%
Melton South	11,273	12,761	12,869	+1,596	0.7%
Weir Views	4,497	9,975	12,162	+7,665	5.1%
Secondary Catchment	27,037	37,191	42,909	+15,872	2.3%
Cobblebank - Strathtulloh	6,890	17,285	29,671	+22,781	7.6%
Thornhill Park	3,164	8,223	15,641	+12,477	8.3%
Rockbank	3,263	9,615	19,550	+16,287	9.4%
Fieldstone	55	117	4,521	+4,466	24.7%
Grangefields	82	96	5,333	+5,251	23.2%
Bonnie Brook	141	1,721	5,285	+5,144	19.9%
Aintree	7,077	11,922	12,794	+5,717	3.0%
Selected Growth Areas	20,672	48,979	92,795	+72,123	7.8%

Source: Forecast ID, 2022.

[8] Other urban growth areas are planned in the City of Melton further east, such as Fraser Rise, Deanside and Truganina, however these are less proximate to the MTC and therefore unlikely to influence economic opportunities in the centre.

F16. MELTON TOWN CENTRE RETAIL CATCHMENT & SELECTED GROWTH AREAS

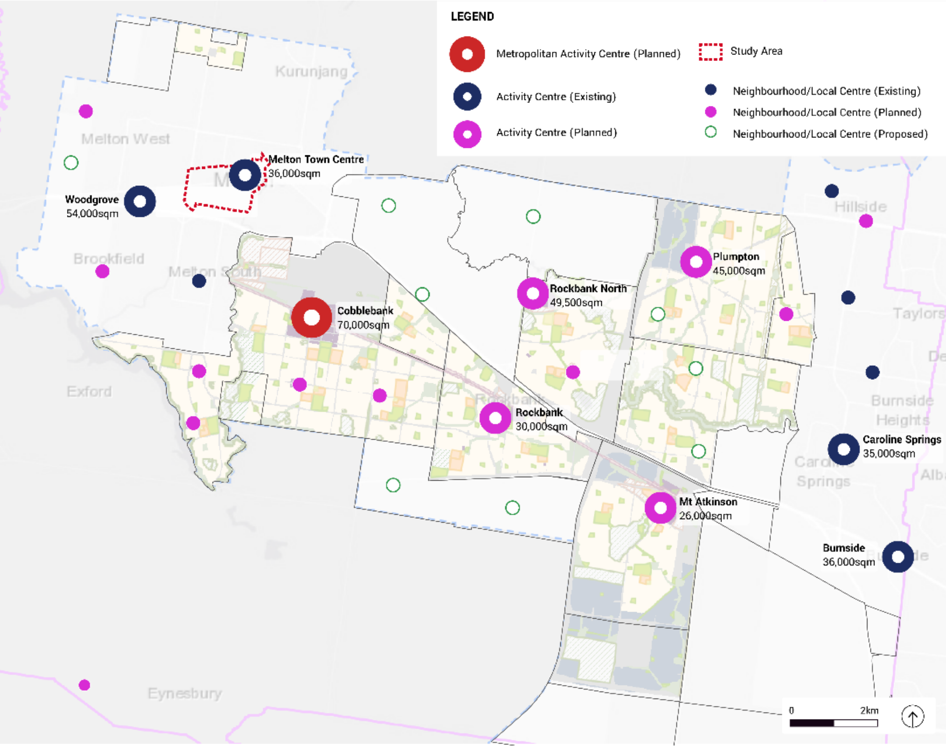


Source: Urban Enterprise, based on Forecast ID small area boundaries.

4.5. COMPETING CENTRES

Figure 17 shows the activity centre hierarchy in the City of Melton based on existing and planned retail floorspace. The role and extent of competition with the MTC is summarised in Table 12.

F17. ACTIVITY CENTRE HIERARCHY MAP



Source: Urban Enterprise, 2022.

T12. COMPETING CENTRES SUMMARY

Activity Centre	Type of Activity Centre (Plan Melbourne / Melton Planning Scheme)	Description
Existing		
Woodgrove	Major Activity Centre / Activity Centre	Sub-regional shopping centre 1-2km west of Melton Town Centre. 54,000sqm of retail floorspace, four supermarkets, two discount department stores, clothing, speciality food, hospitality and other retail services. Health and community services, recreation and entertainment.
Melton South	Neighbourhood Activity Centre / Neighbourhood Centre	3km south of MTC, 8,600sqm floorspace, including a full-line supermarket, takeaway food, hospitality and other retail services. Close to train station.
Caroline Springs	Major Activity Centre / Activity Centre	Three supermarkets, discount department stores, clothing, speciality food, hospitality and other retail services. Substantial commercial, education, community, health and recreation role.
Planned		
Cobblebank	Metropolitan Activity Centre / Metropolitan Activity Centre	The largest Activity Centre proposed within the corridor on the Melton Train line, approximately 6km south-east of Melton Town Centre. The UDF[9] envisages that the centre will ultimately accommodate 70,000 sqm of retail floorspace (a cap of 30,000sqm of shop floorspace currently applies before a permit is required). 25,000sqm commercial floorspace, 16,000sqm civic, 30,000sqm education and residential development is also planned. Potential future location of Council offices and major hospital development.
Rockbank	Major Activity Centre / Activity Centre	9km south-east of Melton Town Centre. Proposed retail floorspace of 30,000sqm before a permit is required, plus 7,500sqm of office/commercial floorspace. Other land uses proposed include restaurants, mixed use development, civic and community facilities and education.[10]
Rockbank North	Major Activity Centre / Activity Centre	9km east of Melton Town Centre. Proposed retail shop floorspace of up to 36,500sqm before a permit is required, along with commercial space, mixed use development, civic facilities, education facilities and residential development.
Mt Atkinson	Major Activity Centre / Activity Centre	16km south-east of Melton Town Centre. Proposed retail floorspace of 26,000sqm (cap before a permit is required). A significant business/large format retail precinct (35,000-40,000 sqm) is also proposed adjacent to the MAC.[11]
Plumpton	Major Activity Centre / Activity Centre	11km east of Melton Town Centre. Proposed shop floorspace of 45,000sqm before a permit is required, plus 20,000sqm restricted retail space.[12]

Source: Urban Enterprise, based on Plan Melbourne, PSPs, Urban Growth Zone Schedules, Clause 21.06 of the Melton Planning Scheme and Melton Retail and Activity Centre Strategy.

[9] Cobblebank Metropolitan Activity Centre (Toolern Town Centre) UDF, 2019; UGZ Schedule 3.

[10] Rockbank Major Town Centre Urban Design Framework, 2019; UGZ Schedule 7.

[11] Mt Atkinson and Tarneit Plains Commercial and Industrial Land Review, JLL, 2015; UGZ Schedule 9.

[12] VPA, Plumpton Precinct Structure Plan, 2017; UGZ Schedule 11.

WOODGROVE SHOPPING CENTRE

Woodgrove is a large enclosed shopping centre anchored by Kmart, Big W, Harris Scarfe, three full-line supermarkets and a dining precinct. The centre also includes around 180 specialty stores including fashion, homewares and fresh produce, as well as food court dining and a cinema.

The centre was upgraded and expanded in 2013 which more than doubled the previous floorspace. Woodgrove is now the largest activity centre in the municipality with 54,000sqm of retail floorspace.

A Draft Woodgrove Development Plan which would facilitate further development of the centre is currently under review by Melton City Council.

Consultation with QIC representatives was undertaken for this study, with the following key findings regarding the existing and intended future role of Woodgrove:

- The retail mix of Woodgrove is very different to that of the Melton Town Centre, with mostly national brand retailers and higher rents in Woodgrove compared with lower rents and independent businesses in the town centre. This limits the extent of any direct competition.
- Shoppers in the catchment are both price and brand conscious, seeking known brands and value for money.
- Public transport accessibility is a key weakness of Woodgrove and the Melton Town Centre – improving connections to both Melton Station and Melton Town Centre is a key objective.
- The Woodgrove site has substantial areas of underutilised land which are currently the subject of masterplanning and investment attraction. The primary area of expansion is expected to be to the south of the existing centre either side of Barries Road. There is a 7 hectare parcel of land south of Barries Road that is the key expansion site.
- There is a preference to diversify the land use mix in the future to create a genuine mixed-use precinct. Key land uses being considered include education, health, residential and other forms of accommodation. There is also an objective to improve the entertainment and hospitality offer in the centre.

A comparative analysis between Woodgrove and the Melton Town Centre is shown in Table 13. The analysis highlights the very different characteristics of the two centres. In particular, Melton's outdoor strip-based setting primarily hosts independent retailers and small businesses whilst Woodgrove has an internalised setting comprising national brands and major retailers.

T13. COMPARATIVE ANALYSIS

Indicator	Woodgrove	Melton Town Centre
Major Tenants / Businesses	• Coles • Woolworths • Kmart • JB Hi-Fi • Big W • Rebel Sport • Melton Health Services	• Melton City Council • IGA • Aldi • Foodworks • Melton Library & Learning Hub • Melton Medical & Dental Centre • First Choice Liquor
Floorspace	• 54,000sqm retail	• 36,000sqm retail • 25,000sqm commercial • 3,000sqm community and civic
Retail Offer	National brands and major retailers	Independent retailers and small businesses
Setting	Large format shopping centre with internal offer. Primarily a car-based centre with substantial car parking facilities. Limited vegetation within the centre.	Strip-based centre with recent investment in streetscape works and local open space. Prominent large native vegetation, especially at eastern end of study area. Proximate to a range of schools and community facilities.

Source: Urban Enterprise.

These fundamental differences provide a guide for future development and revitalisation of the Melton Town Centre. Planning for the MTC should seek to capitalise on key points of difference from Woodgrove, in particular its strip-based and outdoor setting, as well as retaining and attracting independent retailers and hospitality businesses, rather than attempting to compete for major retail investment.

COMPETITION ISSUES

The following issues stem from the current and planned competitive network of centres:

- Five new higher order activity centres are planned between Melton and Caroline Springs – these centres are all located in urban growth areas and the greenfield development setting will be attractive to major retail and institutional investment.
- Woodgrove Shopping Centre is located in very close proximity to the MTC. Its size, critical mass of retailers, retail anchors and prevalence of national brands will continue to dominate market share for many retail types over coming years in established Melton.
- Cobblebank is likely to present challenges to the ongoing economic role of the MTC, primarily as a new destination for employment and institutional investment, including major health and civic developments.
- The MTC has a business mix that is strongly weighted towards independent businesses, compared with national brands which are common in other centres.
- The MTC will need to be differentiated from existing and planned competing centres in order to avoid direct competition with other larger centres.
- A key advantage at MTC compared with other centres is the natural outdoor setting (at the eastern end of the study area) and the opportunity to foster greater outdoor activity and place-making.

5. RETAIL AND COMMERCIAL DEMAND

5.1. INTRODUCTION

This section provides analysis of the scale of future retail and commercial demand in the catchment and implications for the retail and commercial role of the MTC. All values shown in this section are expressed in constant 2022 dollars.

5.2. KEY FINDINGS

- **The Main Trade Area for the MTC is expected to accommodate an additional 25,000 residents by 2041, a 35% increase. This growth will be distributed across a wide spatial area, however, where already strong competition is expected to increase.**
- **Urban growth areas within the broader MTC catchment are forecast to experience substantial population growth, with an additional 69,800 new residents expected to locate in these areas over the next 20 years. This scale of growth is equivalent to the current population of the Main Trade Area.**
- **Given the highly competitive retail environment, current levels of local escape expenditure are unlikely to be substantially reduced through new retailers in the MTC.**
- **It is important that a critical mass of convenience focused retailers is retained and that the overall retail and economic role of the town centre remains differentiated from competing centres.**
- **Retail modelling found that supportable retail floorspace could increase by between 6,100sqm and 10,800sqm by 2041 depending on the market share and performance of the centre over a period of relative uncertainty.**
- **Core retail growth is not expected to be a driver of revitalisation – rather, revitalisation aims should include local retailers becoming beneficiaries of broader actions and changes in and around the centre.**
- **Population growth in nearby urban growth areas will generate $931m in additional spending per annum[13] by 2041. This presents the opportunity for the precinct to capture a proportion of the additional retail expenditure, but only if the MTC has a point of difference and is readily accessible from the growth areas.**
- **Capturing future demand for commercial floorspace across Melton will be a key to the revitalisation for the town centre, particularly given the challenging conditions identified for the retail sector.**
- **The potential loss of the Council offices would be likely to have a significant impact on the commercial floorspace profile of the town centre. If the offices are to be relocated, ensuring an appropriate mix of land uses are established that replace its economic role and impact will be critical to the future revitalisation of the town centre.**
- **The Revitalisation Plan should promote conditions which support non-retail commercial activity, including:**
    - **Sub-precincts where small businesses are encouraged and prioritised;**
    - **Streetscape and other amenity which is attractive to workers, including open spaces;**
    - **Promoting a mix of commercial and hospitality uses which complement each other in areas that are not prioritised for core retail activity;**
    - **Opportunities for health and community support services to be located in the centre proximate to existing community service providers and medical centres, especially within walking**

[13] Based on current per capita retail expenditure of the primary catchment applied to the estimated additional population of the nominated Growth Areas in 2041.

distance (and providing high quality walking and active transport connections between these services); and

- **Maximising public transport accessibility to the centre, especially connections to Melton station.**

5.3. RETAIL CATCHMENT

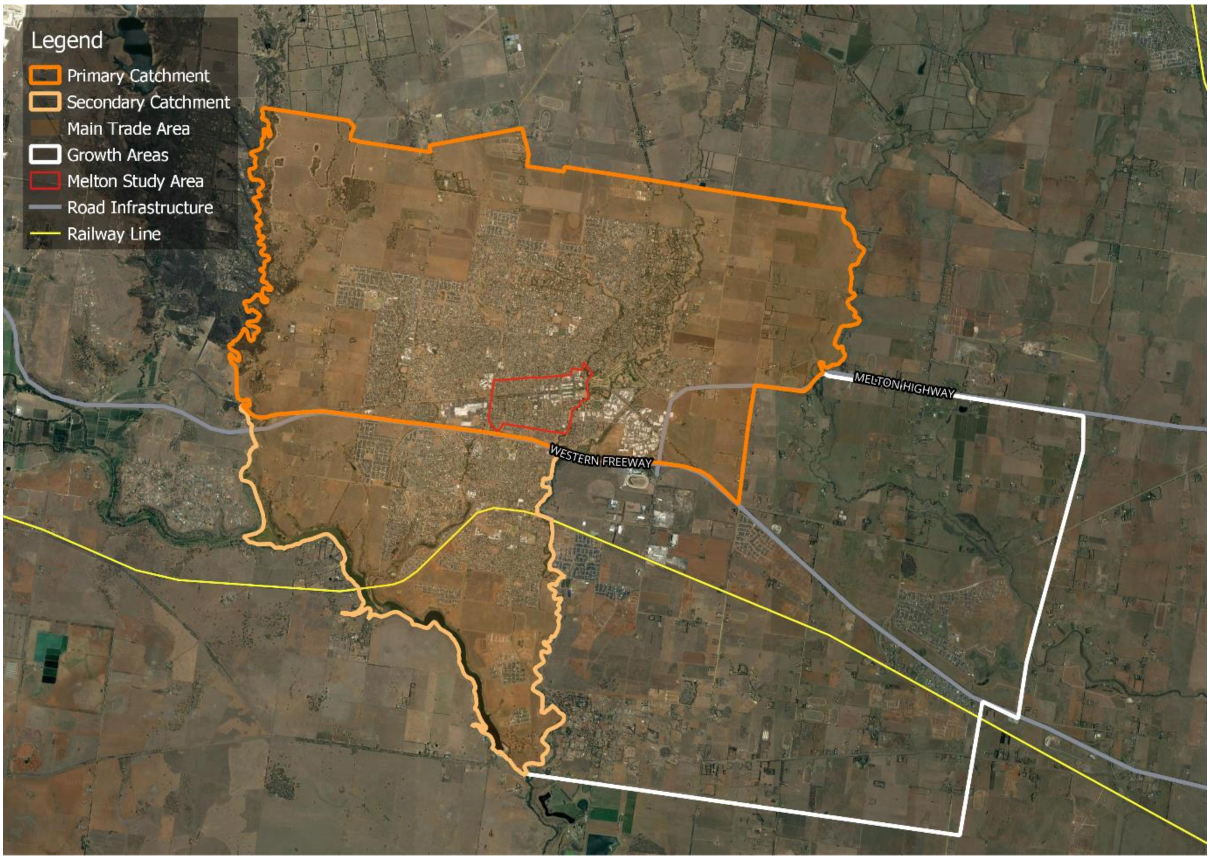
A retail catchment has been established to identify the existing and future scale of retail expenditure in the area. The catchment has regard to:

- The nature and scale of the retail offering;
- Proximity and access to nearby resident and worker populations;
- Access to the retail centre (e.g. road, rail, pedestrian links); and
- The proximity and offering of competing retail centres in the region.

Figure 18 shows the adopted Primary and Secondary Catchments for the MTC, reproducing Figure 16. References to the Main Trade Area are references to the Primary and Secondary Catchments combined. Although some trade will be drawn from outside these areas, the vast majority of regular expenditure will originate in these areas.

It is noted that the Main Trade Area for the MTC overlaps substantially with the trade area of Woodgrove Shopping Centre given the very close proximity of the two centres.

F18. MELTON TOWN CENTRE RETAIL CATCHMENT



Source: Google Maps Satellite, 2022, Urban Enterprise.

5.4. POPULATION

Table 14 shows population forecasts for each catchment, as well as the projected growth in the designated Growth Areas. There is expected to be an additional 27,200 residents in the MTA between 2022 and 2041, of which 12,200 are expected to be located in the primary catchment.

It is noted that the Primary Catchment area includes the western edge of the Melton East PSP area. This development includes approximately 2,200 dwellings between 2029 and 2051, and is likely to represent approximately 25% of dwelling growth in the primary catchment. Although these residents will support some retail spending in the Melton town centre, they will also have access to other centres within and adjacent to the Melton East PSP area.

The Growth Areas are forecast to experience substantial population growth, with an additional 69,800 new residents expected to locate in this area over the next 20 years. This scale of growth is equivalent to the current population of the Main Trade Area.

T14. POPULATION PROJECTIONS, 2022-2041

Catchment	2022	2026	2031	2036	2041	CHANGE 2022-2041	
						#	AAGR
Primary	43,002	44,237	45,643	50,233	55,253	+12,251	1.3%
Secondary	27,931	32,129	37,191	39,622	42,909	+14,978	2.3%
Main Trade Area	70,933	76,366	82,834	89,855	98,162	+27,229	1.7%
Growth Areas	22,954	35,123	48,979	67,610	92,795	+69,841	7.6%

Source: Forecast id analysed by Urban Enterprise, 2022

5.5. RETAIL EXPENDITURE

Retail expenditure of Main Trade Area residents has been estimated using Marketinfo, an industry standard resource which uses micro-simulation to estimate expenditure of residents based on a range of demographic variables.

As shown in Table 15, it is estimated that residents of the primary catchment have an average annual retail expenditure of approximately $13,300 per person, while the secondary catchment has a slightly higher per person retail expenditure of around $13,600. These levels are substantially lower than the Greater Melbourne average ($15,100 per person), reflecting the relative economic disadvantage of the catchment community overall.

It is estimated that the catchment has a total retail spend of $952 million per annum as shown in Table 16.

T15. RETAIL EXPENDITURE PER PERSON, 2022

Retail Category	Primary	Secondary	Greater Melbourne
Food, Liquor and Groceries	$6,591	$6,789	$6,864
Food Catering	$1,624	$1,591	$2,086
Apparel, Homewares and Leisure	$3,287	$3,323	$4,028
Bulky Goods	$1,434	$1,459	$1,613
Retail Services	$392	$392	$549
Total	$13,327	$13,555	$15,140

Source: MarketInfo 2016, Urban Enterprise, 2022.

T16. TOTAL RETAIL EXPENDITURE 2022

Area	Population	Expenditure per person	Total Expenditure
Primary Catchment	43,002	$13,327	$573.1M
Secondary Catchment	27,931	$13,555	$378.6M

Total	70,933		$951.7M

Source: MarketInfo 2016, Urban Enterprise, 2022.

5.6. EXISTING PERFORMANCE & MARKET SHARES

Table 17 shows that existing Melton Town centre retailers have a total estimated retail turnover of $236 million. This estimate is based on a range of data sources including Spendmapp, Property Council data and Urban Enterprise analysis of retail types and observed performance. Turnover excludes non-retail businesses.

Table 15 shows a summary of the estimated market share of Melton Town Centre retailers within the Primary and Secondary Catchment once allowance from sales to non-catchment residents are accounted for. Using Spendmapp data, it is estimated that approximately 20% of all retail turnover in the centre is to non-catchment residents, including passing trade, visitors and workers.

It is estimated that Melton town centre retailers capture approximately 20% of the available expenditure in the catchment, including 25% of the primary catchment spending and 12% of the secondary catchment retail expenditure (Table 18).

T17. ESTIMATED RETAIL TURNOVER, MELTON TOWN CENTRE, 2022

Retail Category	Floorspace	Approximate Turnover Density ($/sqm)	Approximate Turnover
Food, Liquor and Groceries	16,858	$8,700	$146.7M
Food Catering	11,939	$5,100	$60.9M
Apparel, Homewares and Leisure	3,638	$5,000	$18.2M
Bulky Goods	1,910	$3,000	$5.7M
Retail Services	1,544	$3,000	$4.6M
Total	35,889	$6,579	$236.1M

Source: Urban Enterprise based on Melton property database, Spendmapp and Property Council Shopping Centre data.

T18. MARKET SHARES, MELTON TOWN CENTRE, 2022

Summary table	Total Resident Expenditure	Expenditure at MTC	MTC Market Share
Turnover from catchment residents	$951.7M	$189.1M	20%
Primary catchment	*$573.1M*	*$145.4M*	*25%*
Secondary catchment	*$378.6M*	*$43.6M*	*12%*
Turnover drawn from outside catchment (20%)		$47.1M	
MTC Retailer Annual Turnover		$236.1M	

Source: MarketInfo 2016, Urban Enterprise, 2022.

ESCAPE EXPENDITURE

It is estimated that approximately $432 million of the primary catchment's retail expenditure is escaping to other retail locations. The highest levels of escape expenditure are expected in the retail categories of apparel, homewares and leisure, bulky goods and retail services, whereas the market shares for food catering and food, liquor and groceries are not low given the strong competition from supermarkets at Woodgrove.

In this context, there is limited scope to reduce the escape expenditure of local residents. This is because Woodgrove is well established as the major brand retail location with discount department stores and apparel, homewares and leisure stores, and higher food-related market share would require the attraction of a major supermarket which is also not likely given the proximity of all major full-line brands in Woodgrove. Similarly, bulky goods stores are progressively increasing in number at the nearby industrial area (corner of High Street and Melton Highway) and will also have opportunities to locate in certain growth area settings as well (eg. Cobblebank).

A relatively low level of retail services expenditure is currently captured. Although this presents an opportunity to reduce escape expenditure if the centre can attract more spending and business growth in this category, many of these retail types (e.g. hairdressers, beauty salons, dry cleaning, clothing alterations, etc) rely on there being a critical mass of convenience retail types to drive exposure, awareness and visitation.

Given the highly competitive environment for non-food retail in particular, escape expenditure is unlikely to be substantially reduced, and therefore is unlikely to be a sound economic strategy for the centre. It is important, however, that a critical mass of convenience focused retailers is retained and that the overall retail and economic role of the town centre remains differentiated from competing centres.

5.7. SUPPORTABLE FLOORSPACE

A model of supportable floorspace growth in the study area over the period 2022 to 2041 has been prepared as a guide to the scale of retail floorspace growth that planning should seek to accommodate over the period. The model results are shown in Table 19.

The model comprises the following two scenarios:

- **Base scenario:** assumes that current conditions prevail, including market share and retail mix.
- **Market share reduction scenario:** assumes a gradual reduction in market share for the town centre due to increased competition from Cobblebank, Woodgrove and online retail.

Under these assumptions, supportable retail floorspace could increase by between 6,100sqm and 10,800sqm by 2041.

T19. SUPPORTABLE RETAIL FLOORSPACE PROJECTIONS, MELTON TOWN CENTRE

	2022	2031	2041
Population[1]	70,933	82,805	95,222
Catchment retail spending	$951.7M	$1,112.0M	$1,278.8M
Base Scenario			
Expenditure captured by in store retailers			
Turnover from primary catchment	$145.4M	$154.3M	$176.9M
Turnover from secondary catchment	$43.6M	$58.1M	$67.0M
Catchment market share	*20%*	*19%*	*19%*
Turnover from outside catchment	$47.1M	$52.9M	$60.8M
Total turnover	$236.1M	$265.2M	$304.7M
Floorspace			
Supportable Retail Floorspace	35,889	40,595	46,643
Additional Floorspace		+4,706	+10,753
Market Share Reduction Scenario			
Expenditure captured by in store retailers			
Turnover from primary catchment	$145.4M	$154.9M	$163.7M
Turnover from secondary catchment	$43.6M	$54.8M	$53.0M
Catchment market share	*20%*	*19%*	*17%*
Turnover from outside catchment	$47.1M	$52.2M	$54.0M
Total turnover	$236.1M	$262.0M	$270.7M
Floorspace			
Supportable Retail Floorspace	35,889	39,920	41,969
Additional Floorspace		+4,030	+6,080

Source: MarketInfo 2016, Urban Enterprise, 2022. 1. Note these population figures have removed the Melton East PSP population estimate (approx. 1,156 dwellings) from the primary catchment.

The assessment of supportable floorspace does not take into account any turnover which could potentially be attracted from population growth in Melton's growth areas. Growth in these areas will result in new retail expenditure in the order of $931m per annum[14] by 2041. This presents as a significant opportunity for the precinct to a proportion of the additional retail expenditure, however only certain retail types will be able to attract spending from the broader growth corridor.

5.8. OTHER COMMERCIAL LAND USES

Commercial floorspace currently makes up 39% of the floorspace in the Commercial 1 Zone. Small businesses, particularly those occupying shopfronts, are an important part of the current economic role of the MTC and provide services to both residents and other businesses in the area.

Discussions with local real estate agents indicated there are currently low levels of demand for commercial floorspace at present in the town centre, however a number of opportunities exist to drive uptake of commercial floorspace in the future. Capturing future demand for commercial floorspace will be a key to the revitalisation for the town centre, particularly given the challenging conditions identified for the retail sector.

The following economic conditions and trends could influence the commercial role of the study area:

- The COVID pandemic has led to more flexible working arrangements for office workers, which is resulting in increased demand for 'satellite' offices as well as co-working spaces in suburban areas. Given the substantial distance of Melton to the concentrations of white-collar employment within and near the Melbourne CBD, a proportion of office workers living in the Melton area are likely to have an appetite for working spaces in proximity to their residential location. The town centre presents as a strong candidate to accommodate these floorspace uses given its strategic location, outdoor amenity and hospitality offer.
- Given the broad transition of the metropolitan economy away from industrial industries towards population services and knowledge-based sectors, the town centre is well-positioned to harness this trend as its catchment becomes more educated and the share of 'white collar' jobs increases. Council's investment plan promotes the attraction of professional service businesses which are well suited to the town centre and would improve overall employment retention.
- The lower rent environment in the town centre represents a key point of difference in accommodating new and growing businesses. Most other commercial spaces currently available in the catchment are in shopping centres or local retail environments which are not well suited to smaller commercial businesses, given the settings and/or rent levels.
- Given the lower socio-economic characteristics of the catchment area, ensuring small independent businesses are able to locate in the town centre is an important objective to support local job and business creation. This could also include not-for-profit (NFP) businesses and social enterprises across areas such as arts, recreation, disability support and social equality that are less likely to seek premises in greenfield or retail-centric locations.

If the proportion of commercial floorspace remains at current levels relative to overall activity centre floorspace, the total increase in supportable commercial floorspace would equate to between 4,300sqm and 7,600sqm (based on projected growth in supportable retail floorspace).

The potential loss of the Council offices would have a significant impact on the commercial floorspace profile of the town centre. If the offices are to be relocated, ensuring an appropriate mix of land uses are established that replace its economic role and impact will be critical to the future revitalisation of the town centre. Section 6 contemplates potential alternative uses for the site.

The Revitalisation Plan should promote conditions which support non-retail commercial activity, including:

- Sub-precincts where small businesses are encouraged and prioritised;

[14] Based on current per capita retail expenditure of the primary catchment applied to the estimated additional population of the nominated Growth Areas in 2041.

- Streetscape and other amenity which is attractive to workers, including open spaces;
- Promoting a mix of commercial and hospitality uses which complement each other in areas that are not prioritised for core retail activity;
- Opportunities for health and community support services to located in the centre proximate to existing community service providers and medical centres, especially within walking distance (and providing high quality walking and active transport connections between these services); and
- Maximising public transport accessibility to the centre, especially connections to Melton station.

6. DEVELOPMENT OPPORTUNITIES

6.1. INTRODUCTION

Although revitalisation can occur in many forms, reinvestment and redevelopment is critical to attracting and retaining visitation to the centre.

This section provides a brief assessment of characteristics of land in the study area which could influence the way future development could be accommodated. The assessment was undertaken using Council property and landownership information, aerial photography and site visits.

6.2. KEY POINTS

- **The Residential Growth Zone in the study area could accommodate intensification throughout parts of the study area, however development will rely on a large number of individual landowners and is likely to be slow.**
- **There is a distinct lack of larger strategic development sites in residential areas, meaning that substantial increases in local population will only be achieved if strategic redevelopment sites in other zones are identified.**
- **Strategic urban renewal sites exist in the MTC, primarily at the eastern end of the study area, including two strategic council-owned sites. These sites are generally proximate to open space and natural amenity and could accommodate a mix of uses, including residential, retail and commercial.**
- **The Industrial 3 Zone area is a possible candidate for urban renewal and rezoning for residential use should be investigated, subject to assessment of industrial land demand and supply.**

6.3. PUBLIC LAND

Revitalisation requires consideration of public sector investment opportunities as well as the availability of public land for private development in strategic locations as a catalyst for broader centre re-investment.

The Study Area has substantial areas of land in Council ownership as shown in Figure 20. Given the relatively limited private development that has occurred in the precinct in recent years, strategic council owned sites will play an important role in revitalisation.

In particular, the following publicly owned sites in strategic locations are noted:

1. **Melton Civic Centre:** the potential relocation of the Council offices would result in a large Council-owned site (approximately 2ha) located at the gateway to the centre from the east and at the interface to the Toolern Creek and Melton Golf Club. This is the interface of highest amenity within the centre due to substantial native vegetation, natural setting and access to walking paths and the open space network. Repurposing and redevelopment presents as a key opportunity for revitalisation of the town centre. Alternatively, relocation of the offices without reinvestment and attraction of replacement visitation could critically compromise revitalisation efforts.
2. **Property on the southern side of High Street adjacent to Toolern Creek (Police Paddock) –** this site is currently undeveloped but is used as an events space. The site is strategically located in proximity to the town centre and has similar (possibly enhanced) location attributes to the Council offices. Approximately 1.3ha of the site is unimproved. .

The size and setting of these sites are highly conducive to urban renewal, including residential uses. Western sections are suitable to accommodate incremental expansion of the existing commercial areas, while the public landownership (especially of the council offices site) enables consideration of some uses with direct (public facility) or indirect (affordable housing, subsidised business space) public outcomes alongside market-led outcomes. It is noted that both sites are zoned PUZ and would require rezoning to facilitate the types of redevelopment contemplated.

F19. COUNCIL OWNED LAND

Source: Council Owned Parcels – Melton CBD, Melton Shire Council, 2022.

6.4. PRIVATE LAND

RESIDENTIAL

Residential redevelopment and population growth will be critical to sustaining the existing retail and convenience role of the MTC in the context of challenging economic conditions and strong competition from other centres.

The most direct way to support local spending is to facilitate population growth in the immediate, walkable catchment of the centre, an outcome which is strongly encouraged by planning policy for Major Activity Centres.

Figure 21 shows the existing lot sizes in residential zones of the study area and Table 20 shows the number of lots within each size category by zone. Figure 22 shows the CIV to SV ratio for all properties in the study area within the GRZ1, RGZ and C1Z zones. Lower ratios generally indicate better development opportunities.

Observations are:

- The study area includes a substantial number of residential lots with lower value improvements and lot sizes exceeding 600sqm. Most of these lots are in the Residential Growth Zone and could accommodate residential intensification throughout much of the study area, however, development will rely on a large number of individual landowners and is likely to be slow.
- There is a distinct lack of larger strategic development sites in residential areas, meaning that substantial increases in local population will only be achieved if strategic redevelopment sites in other zones are identified. Most RGZ lots over 1,000sqm are occupied by education, civic, commercial or health uses.

F20. RESIDENTIAL LOT SIZES

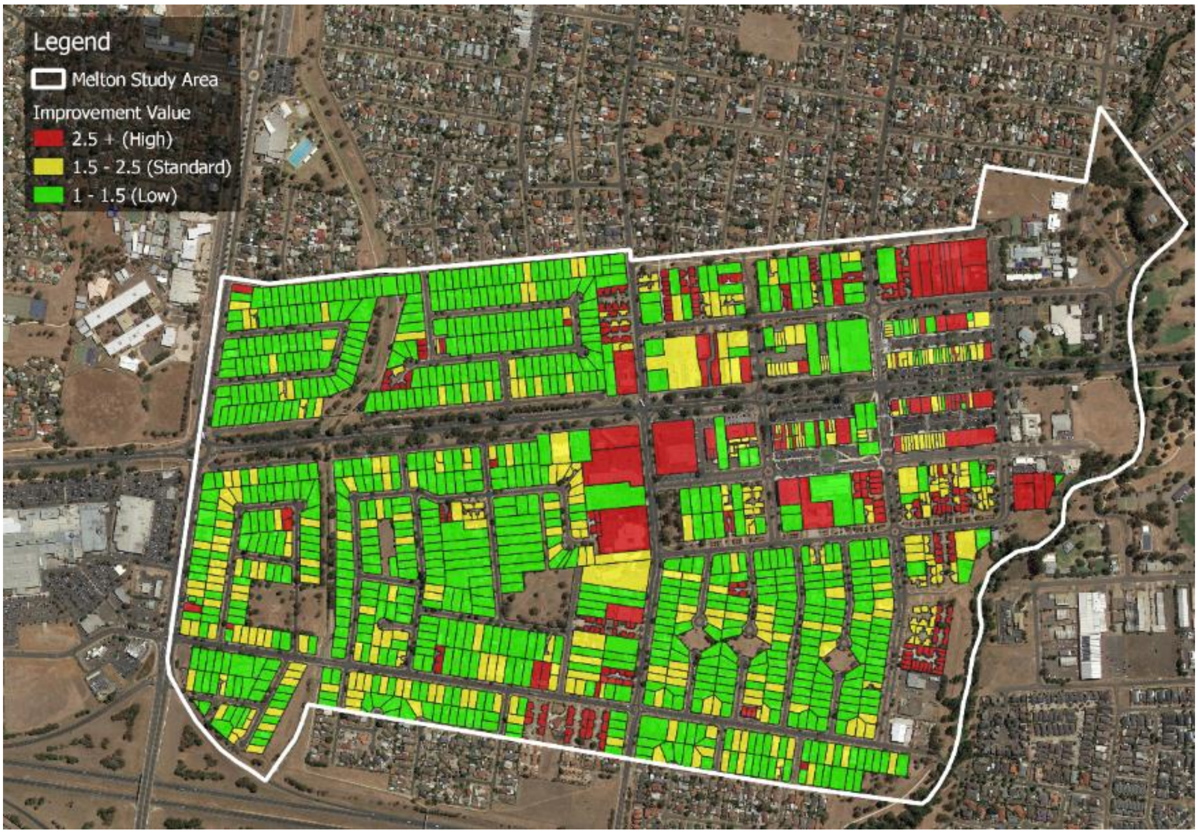
Source: Google Maps Satellite, 2022, Urban Enterprise.

T20. RESIDENTIAL LOTS BY SIZE SUMMARY

Lot Size (sqm)	GRZ1	RGZ1	Total
0-300	40	387	427
300-600	120	496	616
600-1,000	54	315	369
1,000+	18	89	107
Total	232	1,287	1,519

Source: Melton City Council Rates Database analysed by Urban Enterprise, 2022.

F21. IMPROVEMENT VALUE RATIO BY PROPERTY



Source: Google Maps Satellite, 2022, Urban Enterprise.

6.5. STRATEGIC DEVELOPMENT SITES

Strategic sites have been identified as shown in Figure 23 and Table 21 based on the preceding analysis. These sites present opportunities for public and private redevelopment to assist in the revitalisation of the Melton town centre.

F22. STRATEGIC REDEVELOPMENT SITES

Source: Google Maps Satellite, 2022, Urban Enterprise.

T21. STRATEGIC DEVELOPMENT SITES SUMMARY

No.	Zone	Area (ha)	Description
1	PUZ6	1.30	Council owned vacant site. Strategic opportunity for new development, including a mix of residential, hospitality and retail space.
2	PUZ6	1.99	Council owned site. If Council offices relocate, highly strategic opportunity for urban renewal and a range of outcomes to support revitalisation, including residential (including possibly affordable housing), employment (including supported space, potentially as a satellite for the existing BACE centre) and public facilities.
3	C1Z	0.29	A large, relatively underutilised site currently accommodating a ten-pin bowling / entertainment centre. Strategic opportunity for a new retailer and/or mixed use redevelopment given location on Bakery Square and proximity to recent public open space and public realm investment.
4	C1Z	0.05	Possible new thoroughfare connecting library and High Street.
5	C1Z	1.99	This section of the C1Z contains buildings with relatively low site coverage, lower value improvements, limited permeability and large format businesses that are better suited to bulky goods precincts or other peripheral commercial locations. As part of the retail 'core', more intensive land uses and non-vehicle street based activity should be encouraged here.
Total		5.62	

Source: Urban Enterprise, 2022.

In addition to the town centre sites identified above, the Industrial 3 Zone area in the southern part of the study area is considered a potential candidate for urban renewal and rezoning.

7. ISSUES & OPPORTUNITIES

7.1. INTRODUCTION

This section summarises the key issues and opportunities facing the town centre. Recommendations on the focus for revitalisation and economic development and infrastructure initiatives are provided.

7.2. ISSUES AND OPPORTUNITIES

Table 22 summarises the main issues, weaknesses and threats identified in this study.

T22. ISSUES, WEAKNESSES AND THREATS

No.	Issue
1	Structural change in the retail sector requires a greater diversity of land uses to sustain activity centres. These changes cannot be resisted, so the challenge is to support an ongoing transition to other uses while retaining a successful local retail role.
2	The relocation of the Council offices would substantially reduce employment and visitation in the MTC, a key threat to the local economy.
3	The lack of strategic sites for residential development is likely to limit local population growth without intervention and identification of opportunities for residential intensification.
4	The lack of fixed rail public transport is a key competitive disadvantage which will increase over time as new centres emerge on the rail network.
5	Proximity to Woodgrove will limit attraction of larger retail anchors, limiting any opportunities to reduce escape expenditure.
6	Strong competition from new greenfield activity centres for investment attraction presents a threat to improving premises and attracting new development to the MTC.
7	Lack of retail and other anchors leaves the centre susceptible to overall declines in visitation.

Source: Urban Enterprise.

Table 23 summarises the key opportunities and focus for revitalisation.

T23. OPPORTUNITIES AND FOCUS FOR REVITALISATION

No.	Opportunity
1	Increase the local residential catchment by facilitating greater residential development within the study area. This will support existing businesses and respond to demand for rental and other housing.
2	Increase the duration of stay within the centre through continued public realm works, rebalancing space to dwell versus space for movement.
3	The strong community, health education and services role can be capitalised on to drive ongoing visitation, however focus on social assistance should be balanced with overall health, allied health, recreation and family services to support ongoing visitation to the centre from a diverse range of age groups and socio-economic cohorts.
4	Post-pandemic changes to working locations could support growth in demand for local working space, such as co-working and incubator which would align with the 'independent' business mix.
5	Capitalise on Council owned land to initiate urban renewal, an increase in local residential population and new commercial and hospitality space over the medium term.
6	The outdoor "place" presents the opportunity to differentiate the centre from competing centres and promote blending of indoor / outdoor activity and private / public realm, especially for hospitality businesses.

No.	Opportunity
7	Establish a clear point of difference and place brand based on the themes of independent business, diverse communities and events, outdoor hospitality and natural setting.
8	Directly address public and active transport gaps, especially connections to the Melton train station.
9	Lower rents in the MTC compared with shopping centres enables independent businesses to establish within the catchment. Facilitation of new and growing independent businesses should be further encouraged, potentially through a satellite of Western BACE.
10	Significant population growth planned within the municipality presents an opportunity for the MTC to capture retail expenditure from these new residents by creating a unique 'destination', primarily for independent / niche grocers, hospitality and cultural events.

Source: Urban Enterprise.

The focus of economic revitalisation should be on the following:

- The overarching priority should be to foster a rich mix of uses for significant social, environmental and economic benefits. Activity centres that offer a good blend of uses and transit arrangements generally support higher levels of business and other activities, resulting in lower car usage and enabling multipurpose trips. Such centres make it easier for people to gain access to a wider range of goods and services, employment opportunities, entertainment and community facilities, an especially important outcome in this relatively disadvantaged community.
- Other areas of focus include:
  - Increasing the length of time and number of stops people take in the centre.
  - Activating the local economy at different times of the day and night, requiring support, investment and activation of dedicated outdoor hospitality locations.
  - Increasing the local residential catchment to support existing and new businesses.
  - Capturing retail expenditure from the planned population growth in the broader municipality by leveraging the centre's unique attributes, especially hospitality, events and niche businesses.
  - Fostering both a neighbourhood retail role and a strong hospitality role in distinct parts of the centre.
  - Facilitating an increase in local employment, especially within professional services and emerging businesses.
  - Strengthening movement connections between MTC, Melton East Industrial Precinct, Woodgrove and the Melton Train Station for ease of visitation across all locations. Improving the eastern approach to MTC through to Melton Highway should be also be a priority.
  - Facilitating investment in new premises, which should include a combination of residential and commercial spaces, ideally in mixed use developments, within walking distance to activity centre, community services and education.

Considering the ongoing challenges facing the retail sector, these areas of focus primarily relate to strengthening the diversity of uses within the centre and the local population base so that the retail sector is the beneficiary, rather than the driver of, revitalisation.

7.3. ECONOMIC DEVELOPMENT INITIATIVES

Potential economic development initiatives are summarised in Table 24.

T24. ECONOMIC DEVELOPMENT INITIATIVES

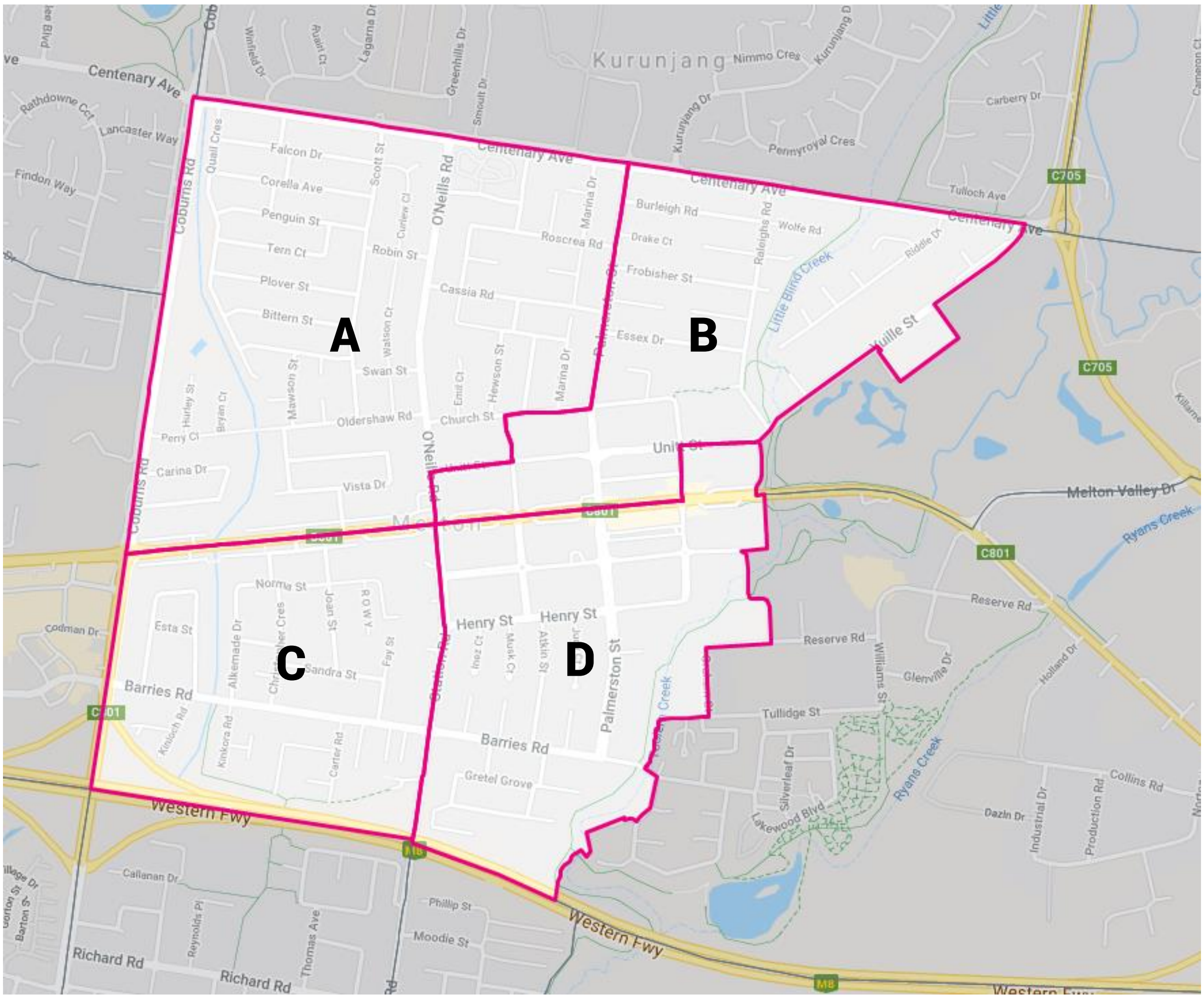
No.	Initiative	Justification / benefits
1	Investigate establishment of a community market or regular event in the town centre, such as a Community Grocer model (low income fresh food market), night market, cultural market and so on, making use of existing spaces including the Amphitheatre.	• Improve footfall and overall visitation. • Night market would improve safety and vibrancy at night and support other night time traders.
2	Support night-time economic activity in a specific sub-precinct through infrastructure improvements, lighting, wider footpaths for outdoor dining and identifying and supporting regular and suitable night time events for the precinct.	• Improve visitation during the night • Strengthen vibrancy/safety of the centre
3	Address public and active transport gaps, especially connections to the Melton train station, including consideration of night-time transport options.	• Improve visitation and length of stay • Maintain and enhance role and brand as a differentiated activity centre
4	Ensure marketing initiatives promote the town centre as a differentiated offer to other centres, with a particular focus on positioning the centre as a destination for diverse communities, independent businesses and visitors seeking community connections.	• Highlight differentiated role to local catchment • Capture visitation from growth area residents
5	Build and strengthen a trader group for the town centre to provide coordinated marketing initiatives.	• Highlight differentiated role to local catchment • Better understand and respond to business challenges
6	Extend streetscape improvements throughout the town centre relevant to the role of each sub-precinct to improve amenity and experience for locals and visitors, especially to encourage walking, active transport and dwell time. This should capitalise on the natural setting at the eastern end of the study area and reconsider the role of land within the High Street road reserve.	• Improve amenity • Strengthen key point of difference (i.e. outdoor centre)
7	Investigate feasibility of establishing a co-working space or additional office space within the town centre, potentially as a satellite of the Western BACE.	• Strengthen local business base • Replace likely employment loss due to Council office relocation
8	Proactively investigate opportunities to redevelop strategic sites, including council owned sites.	• Increase local resident population • Facilitating both public and private sector investment • Provide new premises for businesses to respond to overall growth in catchment demand.
9.	Develop policy to ensure Council investment and service provision in MTC is maintained and strengthened through proactive intervention. Objectives could include avoiding transfer of investment and services to growth areas, ongoing funding of a Place Manager to implement the revitalisation plan and so on.	• Support the ongoing service role of the MTC and regular visitation. • Address possible visitation decline during high urban growth phase.

Source: Urban Enterprise, 2022.

APPENDICES

APPENDIX A DATA AREAS

F23. STUDY AREA DESTINATION ZONES



Source: REMPLAN Map Builder

T25. DESTINATION ZONES WITHIN STUDY AREA

Map ID	Suburb	Destination Zone Code	Notes
A	Melton	au2016dz_213561553	Includes one section of land outside study area: - GRZ1 zone land north of Oldershaw Rd
B	Melton	au2016dz_213561556	Includes one section of land outside study area: - GRZ1 zone land north of Church Street, 1A Raleighs Rd and 2B Raleighs Rd
C	Melton	au2016dz_213561548	Includes one section of land outside study area: - GRZ1 zone land south of Barries Rd
D	Melton	au2016dz_213561554	Includes one section of land outside study area: - GRZ1 zone land south of Barries Rd

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