Glen Eira Economic Analysis and Forecasting Study

Prepared for
Glen Eira City Council

12 February 2018

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Contents.

1. Executive Summary

The City of Glen Eira appointed the Study Team to prepare this assessment of the municipality's activity centres in December 2016 for the purpose of establishing a 'foundation for the hierarchy of centres, and achieve a vibrant, dynamic and sustainable vision for the future of Glen Eira'.

This assessment analyses a range of information, data and observations drawn from a number of sources and perspectives to identify a variety of market influences including consumer and industry trends, macroeconomic conditions and Glen Eira's changing urban form.

The key tasks undertaken in preparing this assessment were:

- A review of relevant land use policies, residents' demographic and socio economic characteristics, and retail industry trends that together influence the role and function of Glen Eira's activity centres.
- Surveying residents' shopping behaviour, activity centres' business and land use mix, and the catchment area of Glen Eira's three urban villages.
- Forecasting future supportable retail floorspace within Glen Eira.
- Preparing individual assessments for all urban villages and neighbourhood centres.
- Assessing the viability of Glen Eira's Commercial 2 and Industrial zoned precincts to support ongoing employment and commercial activity.
- Identifying economic development initiatives that may be undertaken by Council to support the performance and viability of Glen Eira's activity centres.

1.1 Context

Glen Eira's activity centre network comprises three urban villages (Bentleigh, Elsternwick and Carnegie), the Phoenix Precinct in Caulfield, 10 neighbourhood centres, and 23 local centres. Plan Melbourne has designated the first four centres together with the Glen Huntly Activity Centre as major activity centres.

The municipality's activity centre network is comprised almost entirely of traditional strip retail centres with the exceptions being the Carnegie Central shopping centre and a small peripheral sales precinct along Dandenong Road. Residents do however have ready access to Chadstone and Southland shopping centres, bulky goods precincts in Moorabbin and Mentone and the Moorabbin Airport DFO, all located just beyond Glen Eira's municipal boundary.

Glen Eira's pattern of retail development is generally consistent with that of other inner metropolitan municipalities, and reflects the dominance of Chadstone and Southland shopping centres, together with the historical role of Glen Eira's shopping strips in meeting the retail needs of residents.

Glen Eira's activity centres are well serviced by public transport, with all three urban villages, and six of the 10 neighbourhood centres, having a train station. Trams also service activity centres within the north-west portion of the municipality, while buses service most neighbourhood centres.

The Glen Eira Planning Scheme and Plan Melbourne provide broad planning direction for Glen Eira's activity centre network.

1.2 Demographic Analysis

Glen Eira experienced moderate population growth over the period 2006-2016, growing at a rate of 1.5% per annum, which is consistent with that of similarly located municipalities. This resulted in its population increasing by 20,538 residents, from 128,474 to an estimated 149,012 over the period. Over 2016-2026, Glen Eira's population growth rate is forecast to slow with an increase of 17,746, followed by a further slowing to 13,644 additional residents over 2026-36.

While the overall age profile of Glen Eira's residents is not expected to change significantly, there will be some notable changes at a local level. This includes a strong increase in the proportion of the population aged over 60 years in McKinnon, Bentleigh, Bentleigh East, Caulfield South, Murrumbeena and Ormond. Conversely, Carnegie and Bentleigh East are forecast to experience growth in the proportion of residents aged under 18 years. These changes reflect the life cycle of local households, and will impact upon the level of household expenditure available to be captured by Glen Eira's activity centres.

Glen Eira has an increasingly diverse ethnic mix which will influence the character of its activity centres, given the tendency for ethnic groups to favour particular locations. Glen Eira's Southern Asian and Chinese Asian communities both experienced strong population growth over 2011-2016.

Glen Eira's residents predominantly work in white collar occupations with 35% working in professional occupations, followed by managers (16.5%)and 'clerical and administrative' jobs (13.5%). As a result, 25% of Glen Eira's working residents work within the City Melbourne, followed by Glen Eira (21.4%).

Glen Eira has one of the highest population densities within metropolitan Melbourne, 25% dwellings accounted for by 'flats, units and apartments', a level which is only exceeded by the inner city municipalities of Melbourne. Port Phillip, Stonnington and Yarra.

1.3 Retail Trends and Consumer Behaviour

Victoria's retail sector has shown improved growth over recent years reflecting an upward trend in consumer confidence, as well as strong growth in house prices having a 'wealth income affect' for existing homeowners. There has however been a number of structural changes over the past decade, including online retailing and the digital revolution which have impacted significantly upon both fashion retailing, and 'newspaper and book' retailing,. As a result, growth in these sectors has not recovered from the impact of the Global Financial Crisis.

1.3.1 Residents' Shopping Behaviour

A survey of 402 Glen Eira residents provides an insight into their shopping behaviour and use of activity centres.

Fresh food and grocery shopping is a weekly activity for nearly all residents, and establishes a strong connection with their preferred shopping location. Over 73% of survey respondents primarily shop at centres within Glen Eira for fresh food and groceries, with a further 18% shopping at nearby centres. The key factors influencing respondent's choice of centre are the convenience of centres and proximity to where they live, and to a much lesser extent the variety of stores within a centre.

While the major supermarket chains are used by most residents, around 30% also shop at smaller grocery stores. The choice of where to buy fresh produce however is more evenly split between supermarkets and specialty retailers. Overall, a high proportion of residents (85%)

indicated that they were either satisfied or very satisfied with the current weekly food shopping options in their local area. A similar number were satisfied with their local specialty food offer.

The main centres used by Glen Eira residents for non-food shopping are Chadstone and Southland shopping centres, mainly due to the range of stores offered and convenience / proximity to where they live.

Eating out at cafes and restaurants is a key activity for residents who on average eat out 27 times per year for dinner, 26 times for lunch and 22 times for breakfast or morning tea in their local area.

1.3.2 Business Mix/Floorspace Survey

Identifying the mix of businesses and floorspace within Glen Eira's activity centres provides an understanding of their role and function, as well as exposure to industry trends.

A total of 201,868 m^2 of retail and hospitality floor space was identified within Glen Eira's activity centres. Food retailing accounts for 54,566 m^2, of which the major supermarkets account for 28,852 m^2 or 42%. As a result, the majority (56%) of food retailing floorspace is located within the three urban villages, followed by neighbourhood centres with 31% and local centres with 13%.

Non-food retailing accounts for 40% of total retail and hospitality floorspace within the urban villages, 30% in neighbourhood activity centres and 39% in local activity centres. As a share of total non-food retailing floorspace, urban villages account for 45%, neighbourhood centres 38% and local centres the remaining 17%.

Hospitality related activities, such as cafes and restaurants, occupy an increasing amount of floorspace within Glen Eira's activity centres. Together with takeaway food outlets, they account for 32% of total floorspace within centres.

1.4 Supportable Retail Floorspace

Food Retailing

Total expenditure on food, groceries and liquor (FG&L) by Glen Eira residents is estimated to currently be $780 million, and is expected to increase to $947 million ($2016) by 2036, of which 15% is expected to be directed to non-food retailers (e.g. service stations, takeaway food businesses, online retailers etc.). Based upon telephone surveys, it is estimated that 73% of expenditure on FG&L is currently spent outside of Glen Eira. Similarly, it is estimated that expenditure by non-Glen Eira residents accounts for around 20% of FG&L sales within activity centres.

Food retailing is estimated to currently generate sales of $585 million across Glen Eira's activity centres, with full-line supermarkets[1] estimated to account for $379 million (65%). The three urban villages are estimated to account for 67% of total food retailing turnover, followed by neighbourhood centres with 26% and local centres with 7%.

[1] Full-line supermarkets include the Ritchies Supa IGA in Bentleigh East

It is projected that FG&L sales within Glen Eira's activity centres will increase by $73 million over 2016-2026, which is expected to support an additional 8,890 m^2 of total food retailing floorspace. Based upon the current distribution of sales across supermarkets and specialty food retailers, it is projected that approximately 3,800 m^2 of full-line supermarket floorspace would be supported over this period. Over the period 2016-2036, FG&L sales are forecast to increase by $129 million, with an additional 15,720 m^2 of floorspace being supported, of which full line supermarkets would account for 6,700 m^2.

This estimated additional floorspace however only reflects the impact of population growth, and not any redistribution of sales between supermarkets. For example, a second supermarket within the Elsternwick Activity Centre would not be considered additional floorspace as it would primarily be supported by attracting sales from the existing Coles supermarket which is overtrading, and by attracting expenditure from nearby areas outside the municipality.

Non-Food Retailing

Non-food retailing currently accounts for approximately 83,000 m^2, or 40% of total retail floorspace within Glen Eira's activity centres. Over the past decade, demand for floorspace has been impacted upon by online retailing and the digital revolution. As this trend is likely to continue, albeit at a lesser rate, the requirement for additional floorspace is not expected to increase significantly in the future.

Hospitality

Cafes restaurants and takeaway activities account for 45% of businesses and 32% of ground floor floorspace within Glen Eira's activity centres. Hence this sector is a significant source of growing demand for floorspace. Floorspace demand is expected to grow at a rate of approximately 1,750 m^2 per annum, although this may fluctuate depending upon economic conditions and consumer confidence.

As cafes, restaurants and takeaway food businesses largely function independently of retailers, and are often destinations in their own right, there is the flexibility to be accommodated on the periphery of centres within new apartment developments.

1.5 Individual Centre Assessments

Glen Eira's activity centres have been assessed individually with respect to their role as activity centres and the potential for future development.

1.6 Underutilised Land Review

Glen Eira's Commercial 2 and Industrial zoned precincts have been assessed to determine their viability for the purpose for which they are zoned. Given that Glen Eira has a notable shortage of local white collar jobs compared to other municipalities, existing Commercial 2 zoned precincts represent a key opportunity for this to be addressed.

The neighbouring City of Bayside has successfully created local white collar employment opportunities for its residents with the Bayside Business Employment Area offering a variety of high quality professional jobs. High profile Commercial 2 precincts along the Nepean Highway in Elsternwick and Moorabbin offer similar opportunities for Glen Eira residents.

Glen Eira's limited number of industrial zoned areas, outside of Virginia Park, are expected to continue to be sought after by a range of activities including automotive services, building trades and small wholesalers. These precincts will continue to offer a competitive advantage for these types of businesses over more distant industrial areas within the neighbouring Kingston and Monash.

1.7 East Village

The East Village precinct represents a strategically significant development opportunity for Glen Eira. While there is not the capacity for the site to continue as an employment precinct in its entirety, there will be the opportunity for a range of commercial activities which may include:

- A neighbourhood activity centre to provide access to a full-line supermarket and associated specialty retailing for future residents of East Village, as well as existing residents within the surrounding area. Such a centre will address an observed gap in the provision of supermarkets within this location.
- Commercial offices, with potential occupants being attracted by the future amenity of East Village. This may include a range of business types and sizes including major corporations.
- Health services ranging from smaller providers located within an office suite development, through to purpose-built medical centres and potentially a larger facility such as a day hospital.

1.8 Economic Development Initiatives

Economic development is a core responsibility of local government listed in the Local Government Act. Retail activity centres are a fundamental component of any municipality and their influence extends well beyond the services they provide.

Digital transformation is impacting retail centres at the same time as demographic change, sluggish growth and volatile economic conditions. Our investigations indicate that overall retail trading in Glen Eira is subdued and impacted by a number of additional factors including the presence of major competitive forces. A protracted downturn in one or more centres accompanied by increased vacancies can set in train a downward spiral that is expensive and difficult to address.

The most pressing challenge facing Glen Eira is the scale of infrastructure works that have taken place or are in progress. The LXRA has indicated that the total value of works is just under $1 billion in Glen Eira. Residential apartment construction in and around activity centres is presents further challenges.

Suggested Economic Development priorities include:

- Ensuring that the remaining level crossing removal works deliver maximum benefit to each activity centre where works are taking place. If it is done right, the investment is a catalyst for retail rejuvenation.
- Investigating options for better engagement with retailers including the digital engagement, additional retail trader groups and coordinating the sector with quarterly retail forums.
- Building trust by ensuring that maintenance and cleaning issues documented in the report are followed through.
- Active engagement in Policy development such as the Community Plan to ensure the role of retail activity centres is reflected.
- Encouraging the development of more employment in the Municipality by development of employment nodes including co-working spaces.
- Working with Statutory Planning to ensure development projects in and around retail centres do not constitute an ongoing blight on the centre.

  Developing a program of monitoring including retail vacancy measurement that enables early detection of deteriorating trading conditions.

2. Introduction

In December 2016, the Glen Eira City Council appointed the Study Team to prepare this assessment of activity centres within Glen Eira. The Study Team members, together with their area of responsibility, comprised:

- Blair Warman (Blair Warman Economics) – Urban and retail economics
- Gary Cattran (Cattran Consulting) – Economic development
- Rob Panozzo (ASR Research) – Social infrastructure planning
- Peter Kelly (Directional Insights) – Consumer market research

This report was initially completed in May 2017 and subsequently updated in February 2018 to incorporate 2016 Census data.

2.1 Project Objectives

The Project Brief Identified the overall purpose of the analysis as being to 'lay the foundation for the hierarchy of centres, achieving a vibrant, dynamic and sustainable vision for the future of Glen Eira' with supporting objectives being:

- To obtain an accurate economic context of existing commercial centres.
- To better understand the existing roles and hierarchy of centres.
- To define the varying activity centre designations and characteristics.
- To assess individual activity centres and identify what community services are needed to support the centres (including East Village and Ormond Station).
- To provide a forecast of future retail expenditure in Glen Eira including types

The Project Brief identified four broad themes to be investigated by the study being:

- Activity Centre Review
- Underutilised Land Review
- Future Jobs in Glen Eira
- Social Infrastructure in Glen Eira

2.2 Report Format

This report addresses the economic aspects of the Study with a separate report focused upon social infrastructure provision prepared by ASR Research.

The methodology adopted for the purpose of this study is based upon the requirement for a range of information, data and analysis drawn from a number of sources and perspectives. This reflects the diversity and complexity of the retail sector, which is impacted upon by a range of market influences including consumer and industry trends, macro-economic conditions and a changing urban environment many of which are unable to be quantified.

The structure of this report reflects the adopted methodology and comprises the following components.

2.2.1 Information and Data Review

This part of the study reviewed the existing planning, social and economic context influencing the role and function of Glen Eira's activity centres, with respect to:

- Land-use policies and directions contained within the Glen Eira Planning Scheme and Plan Melbourne.

- Demographic and socio economic characteristics and trends that define Glen Eira's existing and likely future residents and the implications for activity centres.
- Retail industry trends that influence the performance of individual retailers and the overall role and function of Glen Eira's activity centres.

2.2.2 Surveys

In order to better understand the dynamics of Glen Eira's network of activity centres, a number of surveys were undertaken being:

- Telephone survey of Glen Eira residents to identify their use of activity centres, and the extent to which centres within Glen Eira are meeting their needs.
- Business mix/floorspace survey of ground floor activities across all activity centres within Glen Eira to determine the distribution of activities across centres, and to allow the turnover of various areas of retailing to be estimated.
- Trade area surveys of Glen Eira's Urban Villages and competing centres outside the municipality, based upon car park surveys.

2.2.3 Supportable Floorspace Assessment

Future supportable retail floorspace has been estimated based upon the various surveys as well as industry trends impacting upon retail activity within centres.

2.2.4 Individual Centre Assessments

Activity centres have been individually assessed based upon their location and accessibility, role and function, trade area, surrounding land uses and future development opportunities. This provided the basis for a proposed activity centre hierarchy.

2.2.5 Underutilised Land Review

Commercial 2 and industrial zoned land within Glen Eira has been assessed with respect to the longer-term sustainability of industrial and employment activity, and capacity to meet the future requirements of households for both services and employment. In doing so, consideration has being given to the changing nature of employment among Glen Eira's residents, and the availability of local employment opportunities.

2.2.6 Economic Development Initiatives

The performance of Glen Eira's activity centres have been assessed with respect to their current role and industry trends that may impact upon their performance. In doing so, a number of initiatives that may be undertaken by Council have been identified.

3. Context

3.1 Activity Centres

The City of Glen Eira's Municipal Strategic Statement identifies the activity centre hierarchy as comprising:

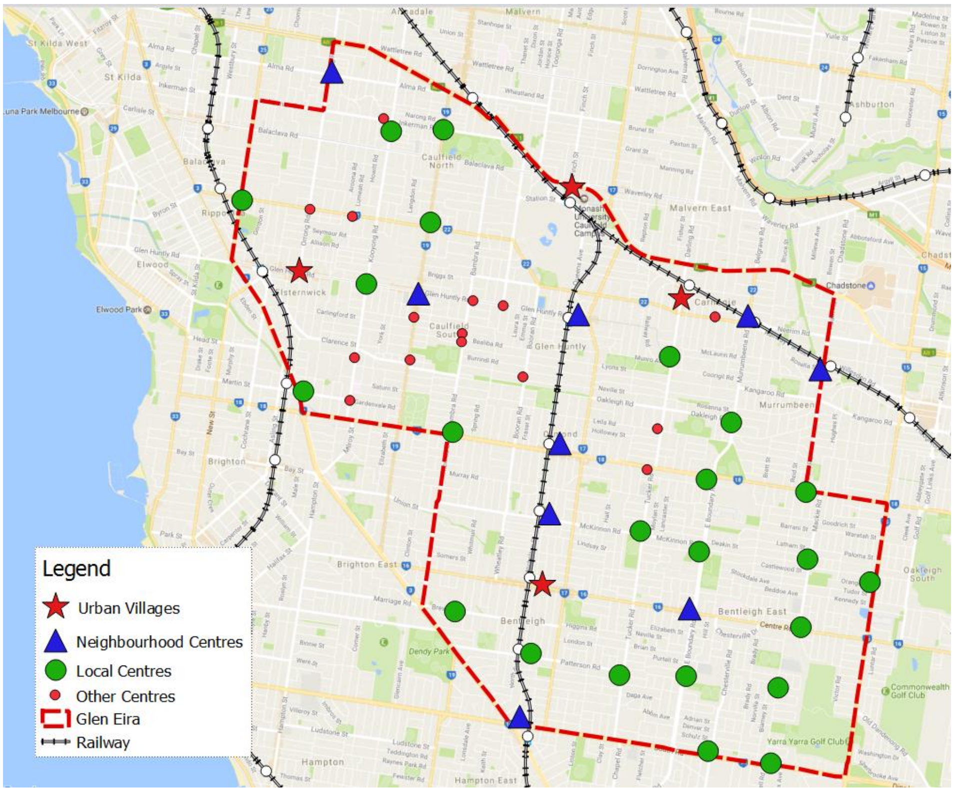
- Three Urban Villages being Bentleigh, Elsternwick and Carnegie, together with the Phoenix Precinct (Derby Road).

- 10 Neighbourhood Centres being:
  Caulfield South
  Bentleigh East
  Ormond
  Glen Huntly
  Caulfield Park
  McKinnon
  Murrumbeena
  Hughesdale
  Moorabbin
  Alma Village

- 23 Local Centres

- Other Centres each comprising a small number of shops.

Figure 1: Existing Activity Centre Hierarchy



Plan Melbourne identifies 121 Major Activity Centres across metropolitan Melbourne, of which five are located within Glen Eira being Bentleigh, Carnegie, Caulfield (Phoenix Precinct), Elsternwick and Glen Huntly. These centres are defined by Plan Melbourne as *'suburban centres that provide access to a wide range of goods and services. They have different attributes and provide different functions, with some serving larger subregional catchments'*.

3.2 Retail Formats

Glen Eira's network of activity centres is almost entirely comprised of traditional strip retailing except for:

- Carnegie Central shopping centre; and
- A small peripheral sales precinct along Dandenong Road in Carnegie.

As the municipality does not have any privately managed regional or sub-regional shopping centres, there are no department stores that would typically anchor such centres, apart from a small format Target discount department store in Bentleigh. However, residents do have access to Chadstone and Southland shopping centres just beyond the municipal boundary, as well as a wide range of bulky goods retailers along the Nepean Highway in Moorabbin and Mentone. The Moorabbin Airport DFO also offers access to a range of non-food retailing.

This pattern of retail development is generally consistent with that of other inner metropolitan municipalities including Bayside, Port Phillip, Kingston and Stonnington, and reflects a number of factors including:

- the dominance of Chadstone and Southland shopping centres, and to a lesser extent the Melbourne CBD for non-food retailing;
- the historical role of strip retailing in providing a wide range of food and non-food retailing; and
- a lack of sufficiently large development sites to allow the development of a sub-regional shopping centre.

3.3 Transport Infrastructure

Glen Eira's urban villages and neighbourhood centres are well serviced by public transport with only four neighbourhood centres not serviced by a railway station, being the Caulfield South, Bentleigh East, Caulfield park and Alma Village activity centres. Centres within the northern portion of the municipality are also well serviced by trams, while bus services running throughout the municipality provide connections to railway stations.

Glen Eira is located adjacent to two major arterial roads, being Nepean Highway and Dandenong Road, both of which provide connections to the Melbourne CBD. Internally within the municipality, a number of arterial roads provide east-west, and north-south access.

Figure 2: Transport Infrastructure

Activity Centre	Train Station	Tram Services	Bus Services	Cycle Path (Off Road)	Major Arterial Road
Bentleigh	✓		✓	✓	
Elsternwick	✓	✓	✓		✓
Carnegie	✓		✓		✓
Phoenix Precinct (Derby Road).	✓	✓	✓		✓
Caulfield South		✓			
Bentleigh East			✓		✓

Activity Centre	**Train Station**	**Tram Services**	**Bus Services**	**Cycle Path (Off Road)**	**Major Arterial Road**
Ormond	✓		✓	✓	✓
Glen Huntly	✓	✓		✓	
Caulfield Park		✓			
McKinnon	✓		✓	✓	
Murrumbeena	✓		✓		
Hughesdale	✓		✓		
Moorabbin	✓		✓		✓
Alma Village			✓		

Figure 3: Public Transport Services

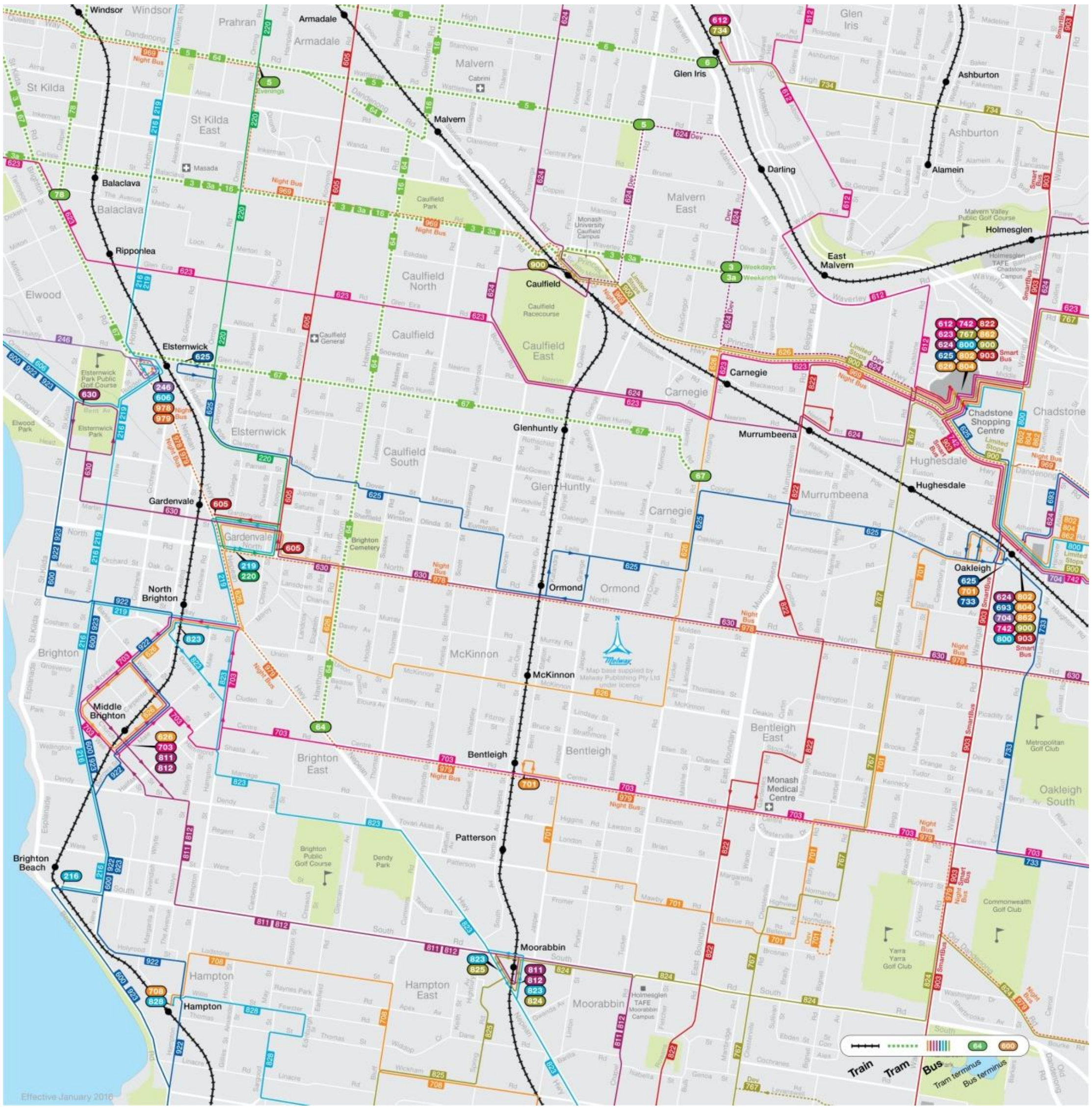
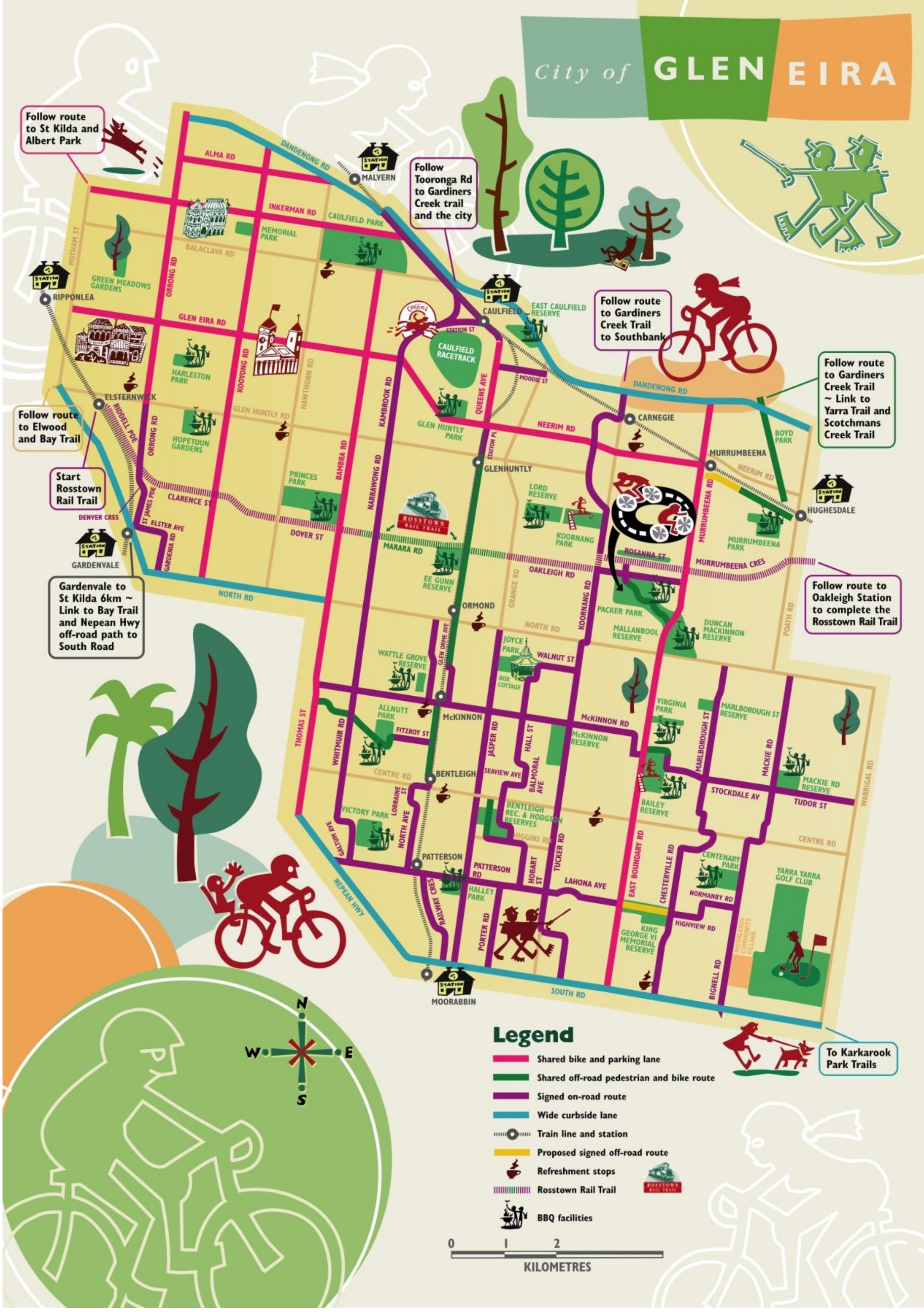


Figure 4: Cycle Paths



3.4 Institutional Uses

The 'Health Care and Social Assistance' sector is the largest employer within Glen Eira, accounting for 7,539 workers in 2016, or 19.5% of local jobs. Within Glen Eira, there are two major hospitals being:

- Caulfield Hospital, specialising in community services, rehabilitation, aged care and aged mental health, is part of the Alfred Health Network.
- Moorabbin Hospital located in Bentleigh East is part of Monash Health, and offers a range of health care services. The Monash Cancer Centre is located within the hospital and operates in partnership with the Peter MacCallum Cancer Centre. The hospital also plays a major role in the education and training of undergraduate and postgraduate medical students, nurses and allied health professionals.

The 'Education and Training' sector is the next largest employer with 6,196 workers in 2016, representing 16% of local jobs. Monash University's Caulfield Campus, located within the Phoenix Precinct, is a key facility. Plan Melbourne has designated Caulfield a Major Activity Centre.

Part A: Information and Data Review

4. Planning Context

Various state and local government planning policies provide direction for the future development of Glen Eira's activity centre network. The common aim of these policies is to promote vibrant and sustainable centres to meet the needs of local residents for retailing and other commercial services, as well as encourage economic development and employment.

In assessing the existing and future role of Glen Eira's activity centres, it is important to reflect these policy guidelines. This section provides a review of relevant policies that have been taken into account in undertaking this assessment.

4.1 Glen Eira Planning Scheme

4.1.1 Municipal Strategic Statement (Clause 21.01)

Glen Eira's Municipal Strategic Statement (MSS) provides an overview of economic activity across the municipality. The MSS is however largely based upon circumstances that existed over a decade ago and therefore may not reflect current conditions. Nevertheless, it still provides a valuable context for understanding key issues impacting upon Glen Eira's activity centres.

Business

Retailing within Glen Eira is characterised by a hierarchy of centres, reflecting the historical development of retail activity initially around railway stations and then along arterial roads. The MSS identifies approximately 167,000 m^2 of retail floorspace, which is distributed across a hierarchy of centres. This is however complemented by Chadstone and Southland shopping centres which together currently offer around 300,000 m^2 of retail floorspace, together with the Chapel Street activity centre with an estimated 100,000 m^2.

Key influences upon commercial activity within Glen Eira are identified in 'Clause 21.02 and include:

- Established commercial areas providing a range of goods and services to surrounding residential areas, plus some local employment.
- Diversity of shopping centres, performing different roles in a hierarchy distributed throughout the City.
- Close proximity to regional facilities such as Chadstone, Southland and Chapel Street.
- Local employment opportunities, especially for small business and proximity to regional employment opportunities.

A number of 'problems and constraints' for commercial activities are also identified, being:

- Structural changes affecting retailing in Melbourne generally.
- The lack of a regional shopping centre and associated loss of spending to centres outside Glen Eira.
- The diffusion of some shopping centres along arterial roads.
- The lack of a clear identity and focus for many of the individual shopping centres.
- The decline of retailing in the small strip centres and associated run down appearance of some of these centres.
- The lack of a coordinated approach to retailing in the City as a whole as well as the management of individual centres.
- The lack of a clear focus or role for many of the commercially based areas of mixed use.

Industry

While recognising the limited amount of industrial activity within the municipality, Glen Eira's MSS identifies the adjoining municipalities of Kingston and Monash as offering numerous employment opportunities.

Virginia Park, at the corner of East Boundary Road and North Road is identified as Glen Eira's largest industrial precinct. The MSS notes that '*given longer term challenges associated with industrial land uses a flexible approach to this area is required to allow for ongoing industrial activity as well as a transition towards office and related uses'*. Smaller industrial areas are identified as being scattered throughout the municipality, primarily along East Boundary Road, North Road and Nepean Highway.

The MSS identifies the opportunity for small-scale service and technology intensive industries to be accommodated within most commercial areas in Glen Eira.

4.1.2 Vision – Strategic Framework (Clause 21.03)

Key land use visions for Glen Eira include, to:

- Identify and consolidate urban villages containing attractive and convenient retailing, community facilities, entertainment, tourist, educational and cultural facilities.
- Promote smaller commercial centres and appropriate mixed use development.
- Stimulate and improve the vitality of Glen Eira's commercial centres

The Strategic Land Use Framework Plan establishes a direction for future land use planning and development. This includes identifying locations where specific land use outcomes will be supported and promoted.

Activity Centres

The Framework Plan identifies a hierarchy of activity centres (refer Figure 5). The plan envisages *'a number of self-contained activity centres that are inter connected with one another which will have social, economic and environmental advantages'*.

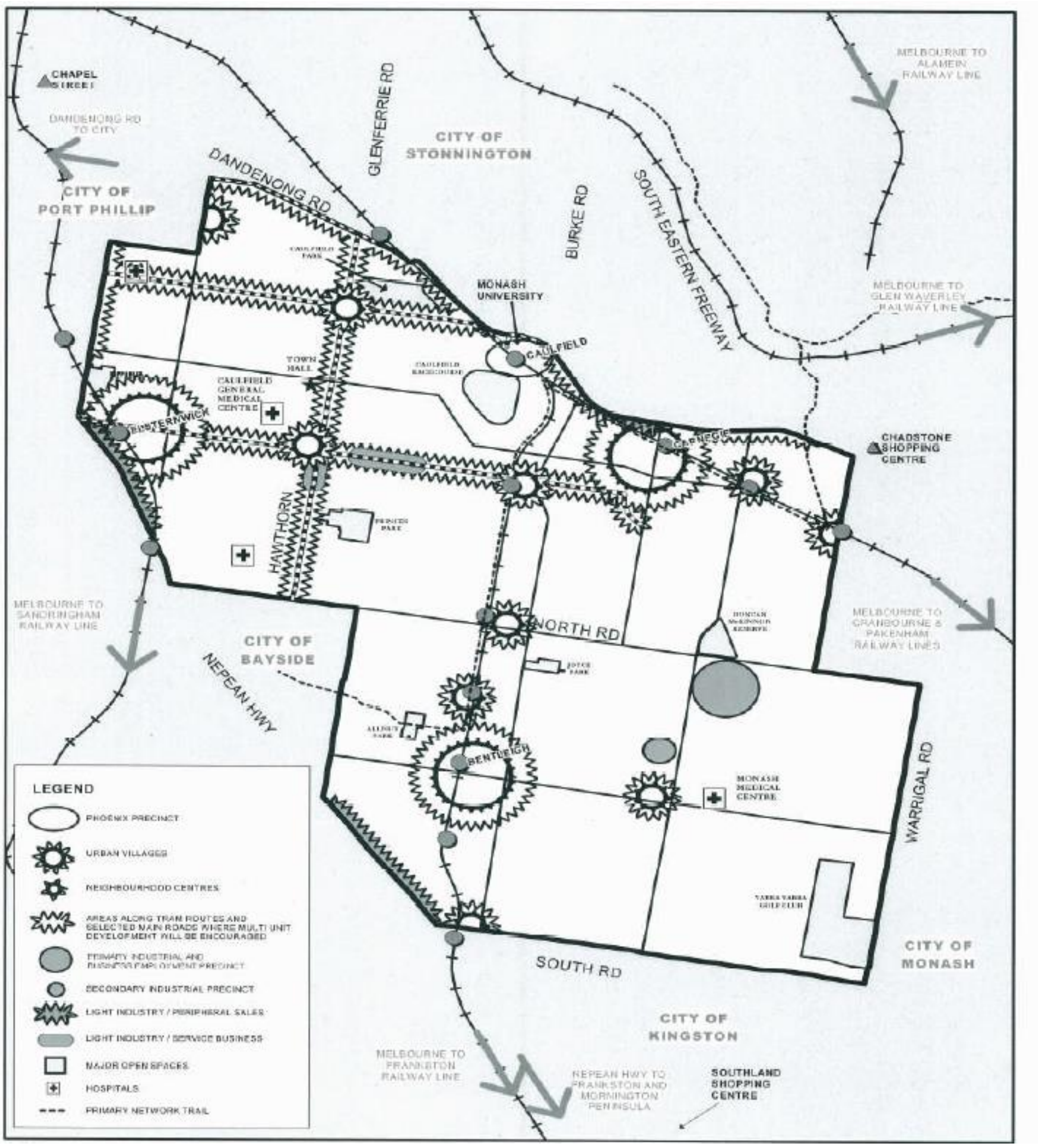
The activity centre hierarchy comprises:

- Urban villages (Elsternwick, Carnegie and Bentleigh) offering 'range of community facilities and activities, a mix of housing and substantial local employment, and linked to other suburban centres by public transport'.
- Neighbourhood centres being focal points for individual neighbourhoods and provide a mix of small-scale convenience retailing and service uses.
- Phoenix Precinct, being a major activity centre incorporating regional facilities (Caulfield Racecourse, Monash University and Caulfield Station) in addition to the Derby Road Shopping Centre.

Major retail uses are encouraged to concentrate within the three urban villages, while smaller neighbourhood centres are focused upon convenience and specialty retailing. Peripheral retailing is encouraged to locate along major highways, particularly Nepean Highway.

Small scale non-retail uses including office, light industrial and service uses are encouraged to locate within 'multi-function urban villages' and other commercial areas not identified in the Framework Plan.

Figure 5: Municipal Strategic Statement (MSS) Framework Plan



Industry

The Framework Plan also encourages the 'growth and development of Virginia Park Business Centre as a local employment node with a mix of uses including offices, manufacturing, warehousing and associated activities such as limited convenience retail to service the worker population'.

The role of Virginia Park as an attractive employment location is expected to be reinforced through meeting ongoing demand for industrial land, as well as transitioning towards '*other office and related uses such as training, research and development and other appropriate activities to complement existing manufacturing operations*'.

Small-scale light industry and service industry is encouraged on existing industrial sites and within commercial centres. Similarly, industrial sites with highway frontage are identified for a mix of light industry and peripheral sales activities. The remaining industrial sites within residential areas are identified for residential uses where appropriate.

4.1.3 Business (Clause 21.06)

This policy aims to consolidate and enhance the role of Glen Eira's three urban villages (Bentleigh, Carnegie and Elsternwick) as the primary location for retailing and community facilities, while also promoting a wider range of commercial uses within smaller centres where there has been a decline in retail activity.

While the competitive impacts of Chadstone and Southland shopping centres is recognised, there is envisaged to be the opportunity for Glen Eira's strip shopping centres to leverage their competitive advantage with respect to convenience and connection to the local community.

Although larger format bulky goods retailers represent an additional form of competition for Glen Eira's retail centres, the policy recognises the need to facilitate such development either on the periphery of existing centres, or along the Nepean Highway and Dandenong Road.

Office uses are seen as complementary to the retail function of centres, and therefore encouraged to locate either above retail premises or on the fringe of centres. Similarly, the policy considers it appropriate for light industrial and service related activities to be located on the periphery of Glen Eira's urban villages.

Key strategies include:

- Maintaining the hierarchy of centres, each with easily definable functions in order to ensure that retail and other activities are provided at each level within the hierarchy, reduce escape expenditure, and encourage the expansion and greater diversity of retail activity.
- Encouraging innovative retail and commercial activities at appropriate levels within the hierarchy of centres, as well as through the development of freestanding sites.
- Promoting small scale office uses that provide services to the surrounding area, consistent with the retail role of centres.

These strategies are implemented by applying a number of specific zonings including the following zones:

- Commercial 1 Zone to part of Virginia Park 'to facilitate the limited development of convenience retail facilities to service the existing and future worker and visitor population'.
- Commercial 2 Zone to service business and light industrial sites and precincts in commercial centres to encourage the integrated development of offices and manufacturing industries and associated commercial and industrial uses.
- Commercial 2 Zone to encourage the growth of bulky goods retailing and peripheral sales activities along highways and on the periphery of centres.
- Mixed Use Zone to existing mixed use areas on the periphery of commercial centres to provide for a range of residential, commercial, industrial and other uses that complement the mixed use function of the locality.

4.1.4 Industry (Clause 21.07)

The changing nature of industrial activity is acknowledged by this policy. While traditional activities are relocating from middle suburban locations such as Glen Eira, small-scale service and technology intensive industries are now able to be accommodated within the municipality's existing commercial areas without impacting upon amenity.

The competitive advantage of the neighbouring municipalities of Kingston and Greater Dandenong as industrial locations is acknowledged, with only Virginia Park identified as a viable industrial location within Glen Eira.

The policy encourages the ongoing role of Virginia Park as an employment location, with 'the intensification of employment generating activities from a broader base of land uses'. It envisages that this will include a transition towards predominantly office uses, but also the potential for 'high technology and research and development activities which may operate with combined office and production components'.

Key strategies include:

- Maintaining Virginia Park and surrounding industrial sites as a key employment node with ongoing opportunities for industrial uses integrated with appropriate commercial development.
- Attracting new high technology industry, particularly in existing industrial areas and in transitional industrial areas at the edge of activity centres.
- Facilitating a mixture of uses, including service, commercial and convenience retailing at the front of the Virginia Park Industrial Estate and industrial uses at the rear of the site.
- Facilitating low impact industrial activities near residential interfaces and more intensive activities only in areas well away from sensitive land uses.

In implementing these strategies, a Business 2 (now Commercial 1) zone and a Business 3 (now Commercial 2) were applied to Virginia Park to 'encourage a transition towards office led employment uses whilst also allowing for ongoing industrial demand'. An Industrial 1 zone applies to the northern portion of the precinct to 'promote this area as the municipality's main industrial precinct'.

A Business 3 (now Commercial 2) zone was applied to a number of service business and industrial sites to 'encourage the integrated development of offices and manufacturing industries, associated commercial and industrial uses and to enable the development of new technology industry'.

4.1.5 Urban Villages Policy (Clause 22.05)

This policy defines Urban Villages as 'local centres with a mix of workplaces, housing, shops and accessible public transport', and seeks to:

- Enhance and further develop urban villages as the focus for community life.
- Encourage competitive retail outlets in viable, lively and interesting strip shopping centres.

The stated objectives of the policy include:

- To create urban villages by co-locating work, leisure, community and residential uses and developments that complement each other.
- To encourage economic and employment generating development which is appropriate to the desired qualities and character of the area.
- To consolidate retail functions within existing strip shopping centres.
- To improve, where possible, community uses (elderly centres, library, etc.) in a manner that respects proximity to retail hub, and the surrounding nature of development.

4.2 Plan Melbourne 2017-2050

Plan Melbourne contains a number of key policy directions of relevance to Glen Eira, which have been briefly summarised below.

4.2.1 20 Minute Neighbourhood

A key element of Plan Melbourne is the concept of a 20-minute neighbourhood, whereby residents have the ability to meet most of their daily requirements within a 20-minute walk, cycle or local public transport trip of where they live. This is supported by policies that aim to:

- create mixed-use neighbourhoods of varying densities; and
- support a network of vibrant neighbourhood activity centres.

4.2.2 Local Employment

Plan Melbourne identifies a need to increase the number and diversity of jobs close to where people live, including suburban employment clusters, health and education precincts and industrial precincts. It envisages that this will be facilitated through taking advantage of land that is available for renewal in the city and suburbs.

4.2.3 Projected Employment Growth: Inner South East Region

Plan Melbourne estimates that there will be an additional 60,000 jobs within Melbourne's inner south-east region over the period 2015-2031, representing an annual growth rate of 1.3% per annum. Key industries supporting this growth will be retail trade, health care and social assistance, professional, scientific and technical services, and education and training.

4.2.4 Commercial Land Supply

A requirement for an adequate supply of commercial land across metropolitan Melbourne to meet the needs of a growing population is identified by Plan Melbourne (Policy 1.1.7). However it is also indicated that while it is desirable for mixed-use development to occur, this can result in residential uses competing with commercial uses and employment opportunities.

4.2.5 Metropolitan Activity Centres

Five centres within Glen Eira (Bentleigh, Carnegie, Caulfield, Elsternwick and Glen Huntly) have been nominated as Metropolitan Activity Centres within Plan Melbourne.

5. Demographic Analysis and Implications

The demographic and socio-economic profile of local residents has a key influence upon the role, function and performance of activity centres. Glen Eira's population is becoming increasingly diverse with a growing number of residents of Indian and Chinese ancestry, together with continued growth in the municipality's established Jewish community. This cultural diversity influences not only resident's shopping behaviour, but also the mix of businesses within centres. Similarly, the age profile of residents and household types will also influence the pattern of demand for retail goods and services.

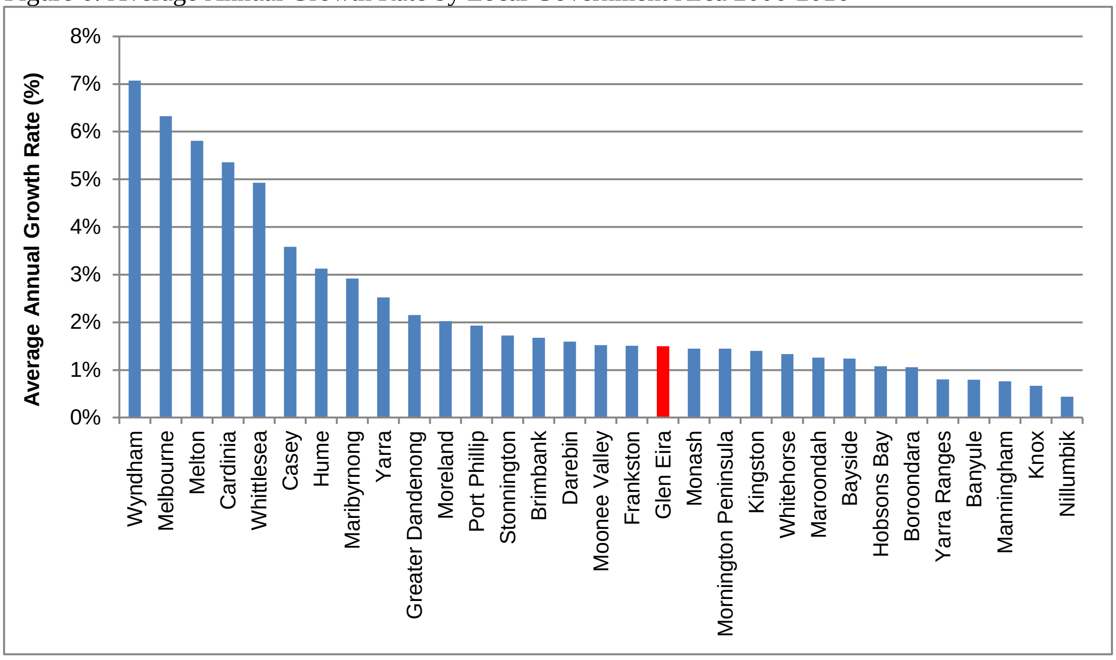
The characteristics of Glen Eira's resident workforce will also influence the requirement for local employment opportunities in order to achieve key economic, social and environmental outcomes. Providing local employment opportunities reduces travel time and costs for households, promotes social well-being, and encourages increased use of activity centres within the municipality.

This section investigates some of the key demographic and socio-economic issues and trends influencing the future role and function of Glen Eira's activity centres.

5.1 Historical Population Growth 2006-2016

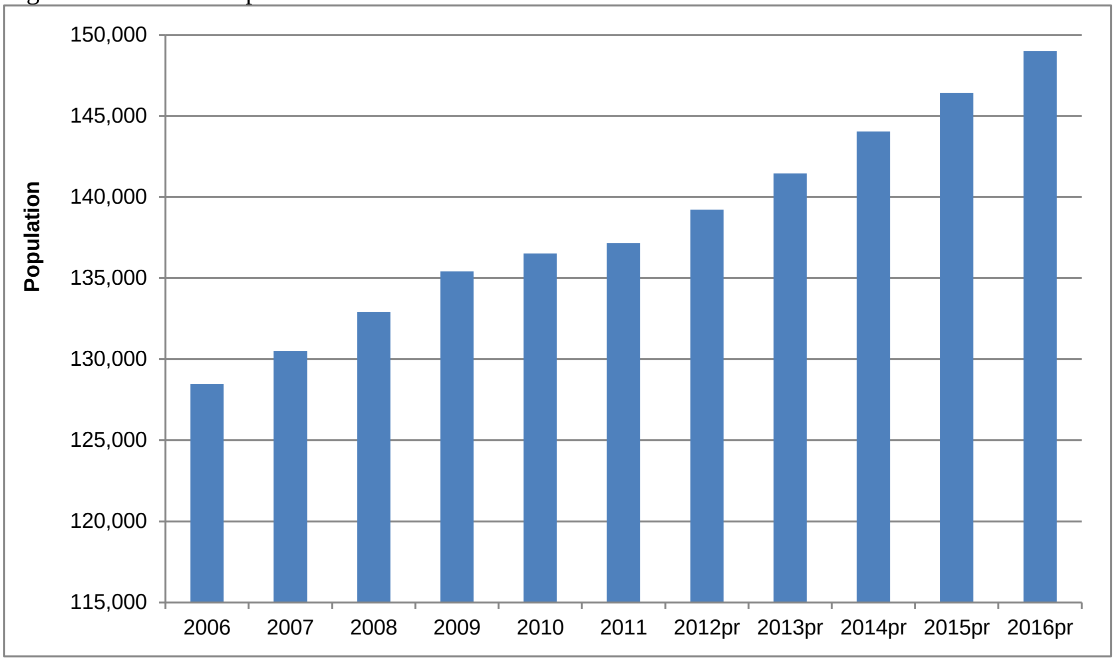
Glen Eira experienced moderate population growth over the period 2006-2016, consistent with that of many other middle suburban locations across Melbourne (refer Figure 6). Over this period its population increased from 128,474 to an estimated 149,012, representing an average growth rate of 1.5% per annum.

Figure 6: Average Annual Growth Rate by Local Government Area 2006-2016



Source: ABS Cat No. 3218.0

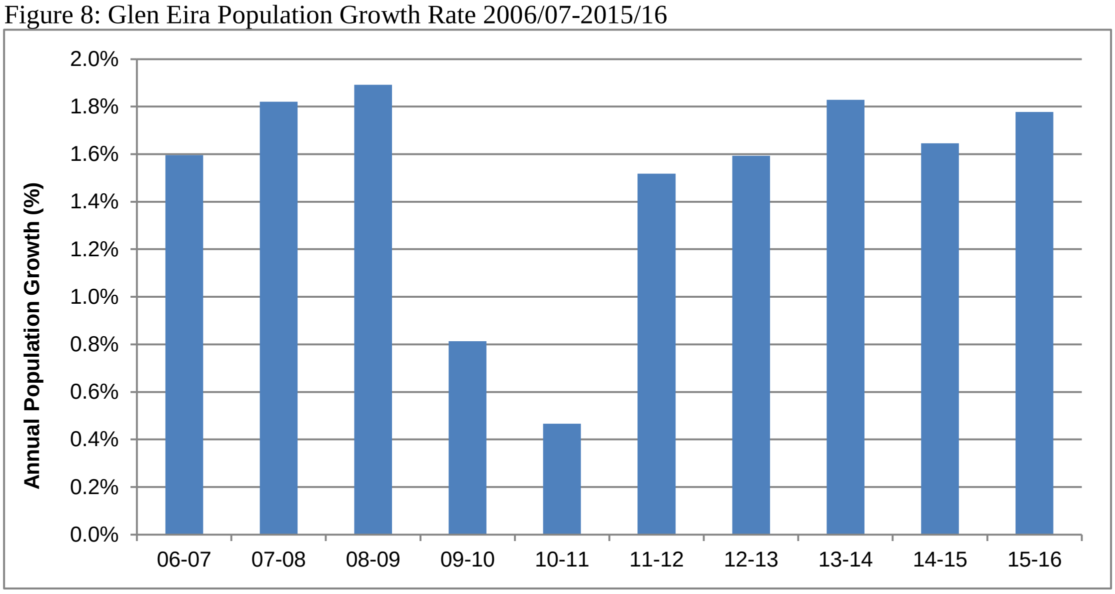
Figure 7: Glen Eira Population 2006-2016



Source: ABS Cat No. 3218.0
p - preliminary r - revised

Within this 10 year period, the rate of population growth did however fall sharply following the onset of the Global Financial Crisis (GFC). As a result of population growth in the years 2009-10 and 2010-11 fell to 0.8% and 0.5% respectively (refer Figure 8). Otherwise, Glen Eira's rate of population growth has generally been between 1.5% and 1.9% per annum.

Figure 8: Glen Eira Population Growth Rate 2006/07-2015/16



Source: ABS Cat No. 3218.0

At a local level, there has been notable differences in average annual population growth rates, which range from 1.1% in Caulfield South to 2.0% in Carnegie (refer Figure 9).

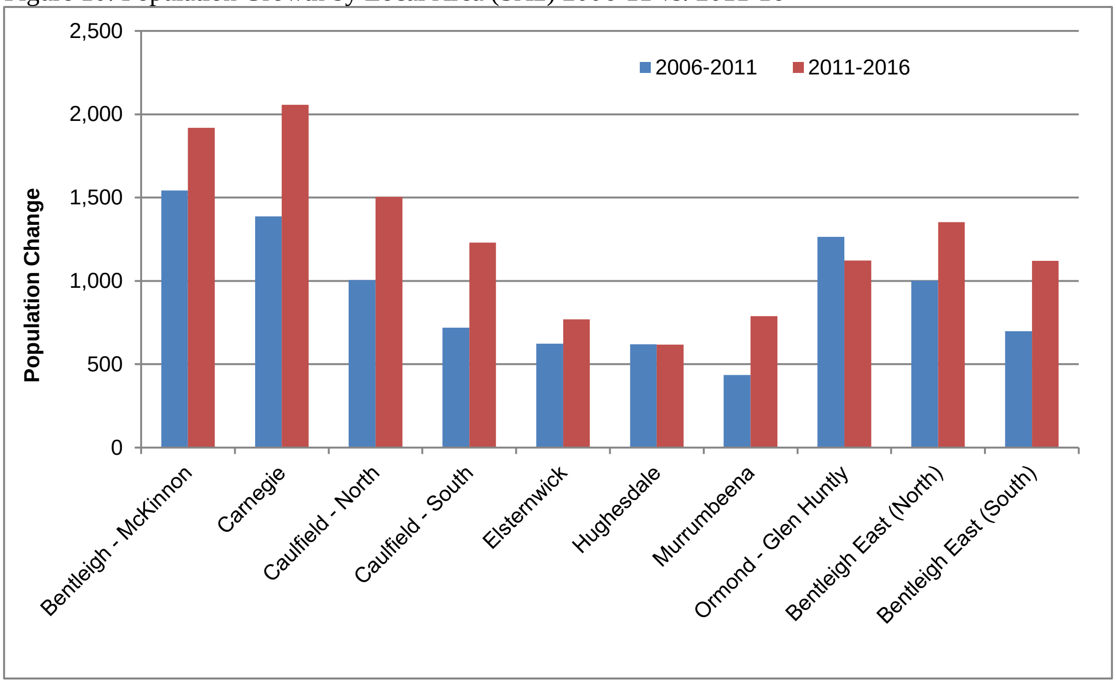
Figure 9: Glen Eira Population Growth by Area 2006-2016

Area	Population Growth (No.)	Average Annual Growth Rate
Bentleigh - McKinnon	3,460	1.6%
Carnegie	3,445	2.0%
Caulfield - North	2,509	1.2%
Caulfield - South	1,948	1.1%
Elsternwick	1,393	1.2%
Hughesdale	1,238	1.7%
Murrumbeena	1,223	1.3%
Ormond - Glen Huntly	2,386	1.9%
Bentleigh East (North)	2,354	1.7%
Bentleigh East (South)	1,820	1.4%
Total Glen Eira	21,776	1.5%

Source: ABS Cat No. 3218.0

There has however been a shift in where population growth has occurred between the pre-and post GFC periods. Nominal population growth has declined in Ormond-Glen Huntly and remained the same in Hughesdale, while locations such as Bentleigh East and Caulfield-North have recorded an increase in population growth (refer Figure 10).

Figure 10: Population Growth by Local Area (SA2) 2006-11 vs. 2011-16



Source: ABS Cat No. 3218.0

5.2 Projected Population Growth

Population forecasts prepared by ID Consultants indicate that the population of Glen Eira is expected to increase from 149,012 in 2016 to 180,626 by 2036 (refer Figure 11). This represents an average annual growth rate of 1% per annum, which is noticeably less than that achieved over

2006-2016 (1.5%). The suburbs of Bentleigh, Bentleigh East, Carnegie, and Caulfield North-Caulfield East are expected to account for over 74% of future population growth within Glen Eira. As a result, future population growth will be focused within the northern and eastern portions of the municipality.

Figure 11: Projected Population Growth by Local Area (SA2) 2016-2036

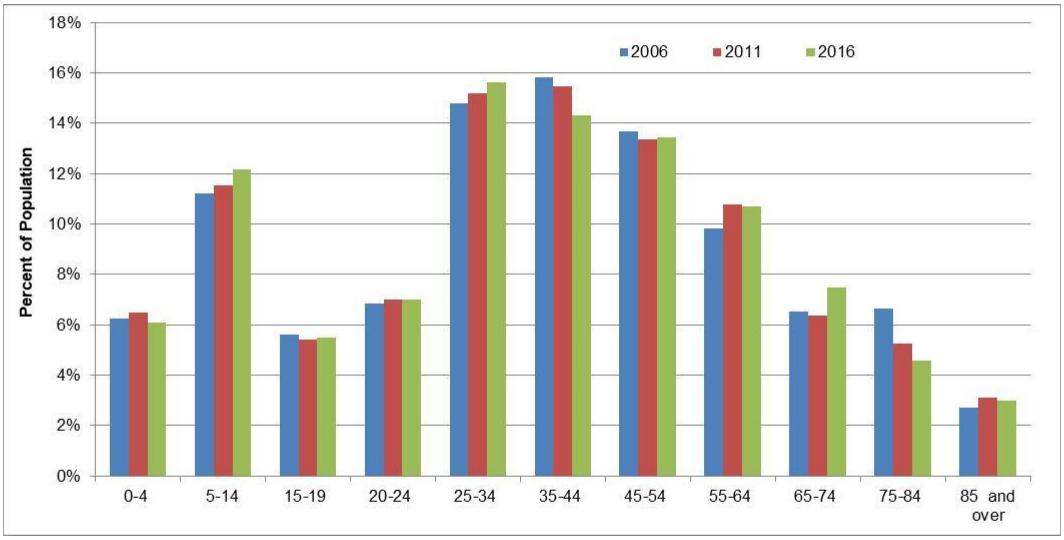
Area	2016	2026	2036	2016-26	2026-36
Bentleigh	17,828	19,515	20,858	1,687	1,343
Bentleigh East	28,813	31,638	33,610	2,825	1,972
Carnegie	18,228	21,254	23,266	3,026	2,012
Caulfield	5,920	6,401	6,792	481	391
Caulfield North - Caulfield East	17,849	23,285	28,061	5,436	4,776
Caulfield South	12,536	13,128	13,852	592	724
Elsternwick - Gardenvale	12,061	13,477	14,390	1,416	913
Glen Huntly	5,318	6,065	6,322	747	257
McKinnon	6,605	7,254	7,566	649	312
Murrumbeena	10,647	11,427	11,823	780	396
Ormond	8,850	9,234	9,614	384	380
St Kilda East	4,358	4,372	4,471	14	99
City of Glen Eira	149,012	167,052	180,626	18,040	13,574

Source: Id Consultants

5.3 Age

The most notable change in the population distribution across age groups over 2011-2016 was a sharp increase in the number of residents aged 65-74 years. This however has been offset by a continued decline in the number of residents in the 75-84 year age groups. In addition, the population of 5-14 year olds continued to increase.

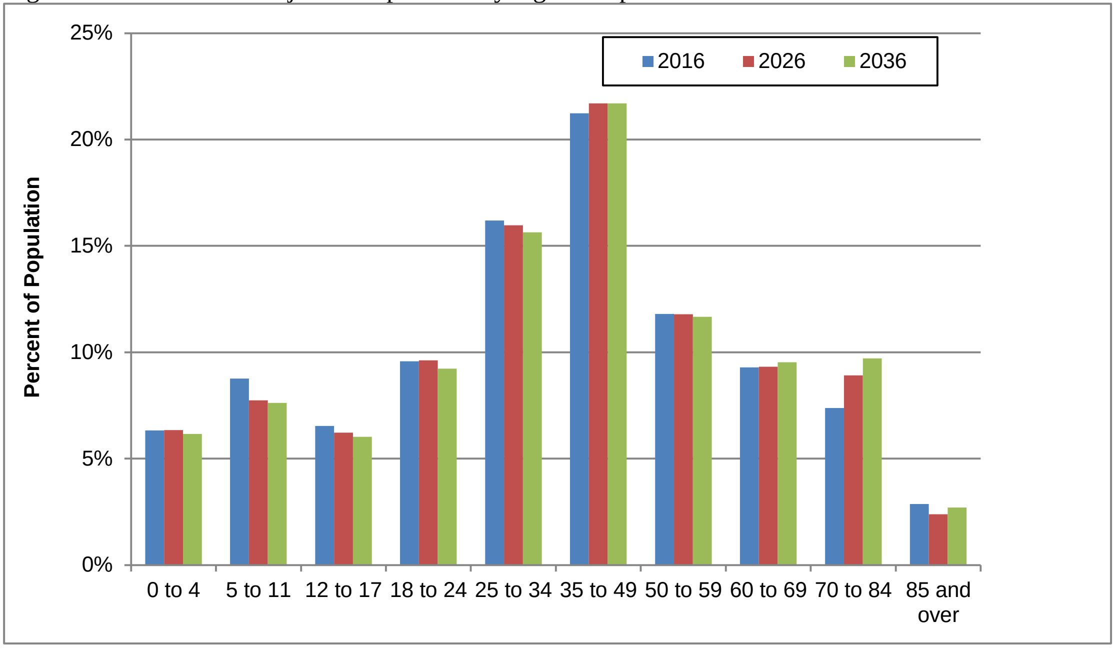
Figure 12: Glen Eira - Population Distribution by Age Group 2006-2016



Source: ABS Census

ID Consultants forecast a slight decline in the proportion of residents in the younger age groups, particularly 12-17 year olds. The population of 25-34 year old is also forecast to decline, while there is a notable increase in the proportion aged 70-84 years forecast over the period to 2036 (refer Figure 13). Otherwise, the age profile of Glen Eira's population is expected to remain relatively stable.

Figure 13: Glen Eira – Projected Population by Age Group 2016-2036



Source: Id Consultants

At a local level however, there is expected to be some significant increases in the proportion of residents within the 'over 60 years' age group, particularly within McKinnon where it is expected to increase from 17.1% to 25.1% over the period to 2036 (refer Figure 14). This represents an increase of 7.9 percentage points. Similarly, the suburbs of Bentleigh, Bentleigh East, Caulfield South, Murrumbeena and Ormond are all expected to experience an increase of at least 3.1 percentage points, compared to an overall increase of 2.4% for Glen Eira.

Figure 14: Projected Proportion of Residents Aged 60 Years and Over 2016-2036

Area (SA2)	2016	2026	2036	Change 2016-2036 (% points)
Bentleigh	20.8%	23.7%	25.6%	4.8%
Bentleigh East	20.0%	22.0%	25.3%	5.3%
Carnegie	16.9%	18.0%	18.8%	1.9%
Caulfield	28.4%	25.8%	25.5%	-2.9%
Caulfield North - Caulfield East	22.6%	19.6%	18.9%	-3.7%
Caulfield South	22.4%	24.9%	25.7%	3.3%
Elsternwick - Gardenvale	19.1%	20.5%	21.5%	2.4%
Glen Huntly	13.9%	12.9%	12.4%	-1.5%
McKinnon	17.1%	19.7%	25.1%	7.9%
Murrumbeena	17.5%	19.1%	20.5%	3.1%
Ormond	15.8%	18.1%	19.9%	4.1%
St Kilda East	14.2%	15.9%	15.8%	1.6%
City of Glen Eira	19.6%	20.6%	21.9%	2.4%

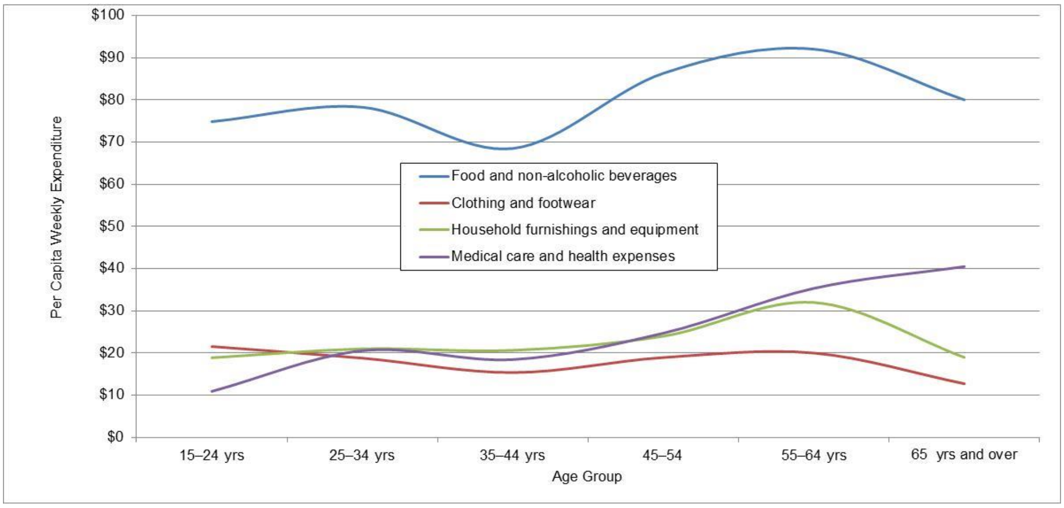
Source: Id Consultants

5.4 Household Composition

The composition of households is also a reflection of the age profile of residents and their life cycle stage. As the population of an area ages due to children leaving home, there is a decline in the number of 'couple families with dependents', coinciding with an increase in the number of 'couples without dependents' and 'lone person households'. This impacts upon the level of household expenditure generated within the area.

The ABS's Household Expenditure Survey (HES) provides an insight into the impact of 'life cycle stage' upon per capita expenditure. The age of the 'reference person' recorded by the HES provides a proxy for 'life cycle stage'. As shown in Figure 15 below, per capita expenditure across the three main retail categories (food, clothing and household goods) generally grows as the age of the reference person increases from 35-44 years to 55-64 years. This coincides with the period during which a household's children grow into young adults and increase their level of retail spending. After this, when the age of the reference person is over 65 years, per capita retail spending declines noticeably as parents retire from the workforce and children leave home. Spending on health care however continues to increase.

Figure 15: Australia – Per Capita Expenditure by Age of Reference Person 2009-2010



Source: ABS Household Expenditure Survey

In terms of absolute numbers, growth in the number of residents aged less than 18 years will be greatest within Carnegie and Bentleigh East (refer Figure 16). Together, these two suburbs will account for 39% of the growth in these age groups over the period to 2036. This would be expected to result in increased per capita expenditure within these locations.

Figure 16: Residents Aged Less than 18 Years

Area	2016	2026	2036	2016-2026	2026-2036
Bentleigh	2,735	2,918	3,091	183	173
Bentleigh East	4,717	4,972	5,121	255	149
Carnegie	1,972	2,339	2,552	367	213
Caulfield	739	739	794	0	55
Caulfield North - Caulfield East	2,128	2,258	2,829	130	571
Caulfield South	1,859	2,018	2,080	159	62
Elsternwick - Gardenvale	1,681	1,819	1,930	138	111
Glen Huntly	445	591	655	146	64
McKinnon	1,268	1,253	1,299	-15	46
Murrumbeena	1,349	1,504	1,578	155	74
Ormond	1,340	1,389	1,431	49	42
St Kilda East	985	1,026	1,000	41	-26
City of Glen Eira	21,219	22,825	24,361	1,606	1,536

Source: Id Consultants

As would be expected, these two suburbs are also forecast to account for a significant portion (31%) of growth in the number of 'couple families with dependents' within Glen Eira (refer Figure 17).

Figure 17: Couple Families with Dependents

Area	2016	2026	2036	2016-2026	2026-2036
Bentleigh	2,379	2,597	2,727	218	130
Bentleigh East	4,054	4,357	4,540	303	183
Carnegie	1,948	2,294	2,518	347	224
Caulfield	700	764	807	65	43
Caulfield North - Caulfield East	2,078	2,638	3,151	560	513
Caulfield South	1,726	1,798	1,859	72	61
Elsternwick - Gardenvale	1,407	1,578	1,691	171	113
Glen Huntly	485	579	600	94	21
McKinnon	1,038	1,092	1,092	54	1
Murrumbeena	1,333	1,448	1,503	115	55
Ormond	1,142	1,194	1,226	51	32
St Kilda East	583	613	641	31	28
City of Glen Eira	**18,871**	**20,952**	**22,354**	**2,080**	**1,403**

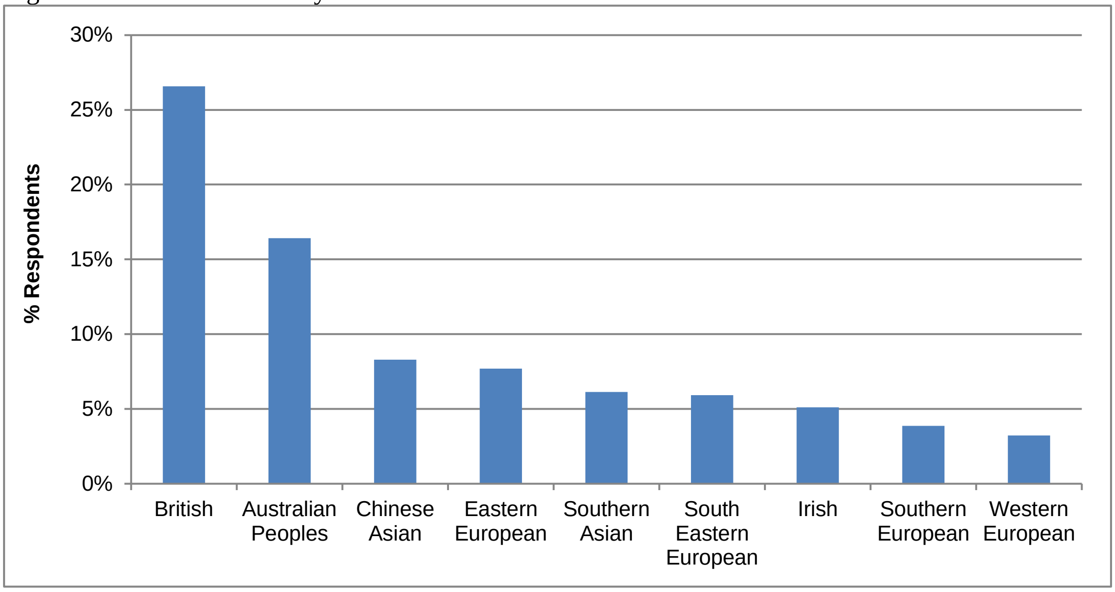
Source: Id Consultants

As indicated in the previous section, the suburbs of McKinnon, Bentleigh, Bentleigh East, Caulfield South, Murrumbeena and Ormond are all expected to experience an above average increase in the proportion of residents aged 'over 60 years'. This would be expected to impact negatively upon per capita expenditure in these areas.

5.5 Ethnicity

The cultural mix of an area's local population often has a significant influence upon local centres, particularly with respect to food retailing. The 2016 Census identifies the ethnicity of Glen Eira's residents as being predominantly British/Australian which accounted for 43% (refer Figure 18), followed by Chinese Asian (8.3%), Eastern European (7.7%), Southern Asian (6.1%) and South Eastern European (5.9%).

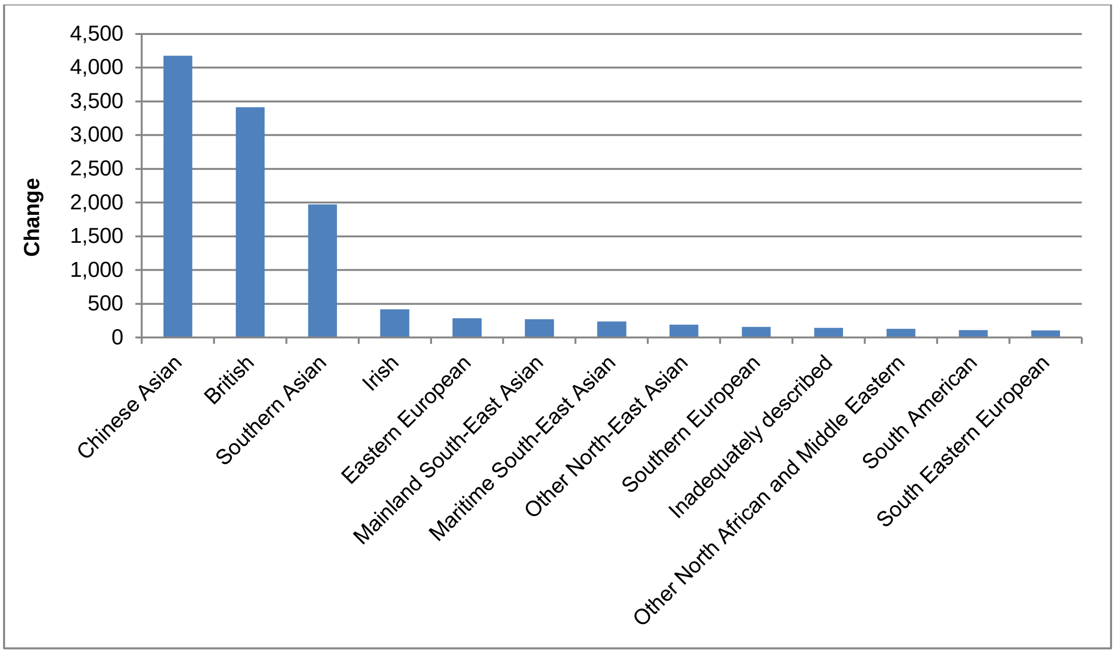
Figure 18: Glen Eira Ancestry* 2016



Source: ABS Census
*First response

Residents of Chinese Asian ancestry showed the strongest growth over 2011-2016 with 4,177 additional residents in Glen Eira, followed by British and Southern Asian residents with 3,412 and 1,972 additional residents respectively (refer Figure 19).

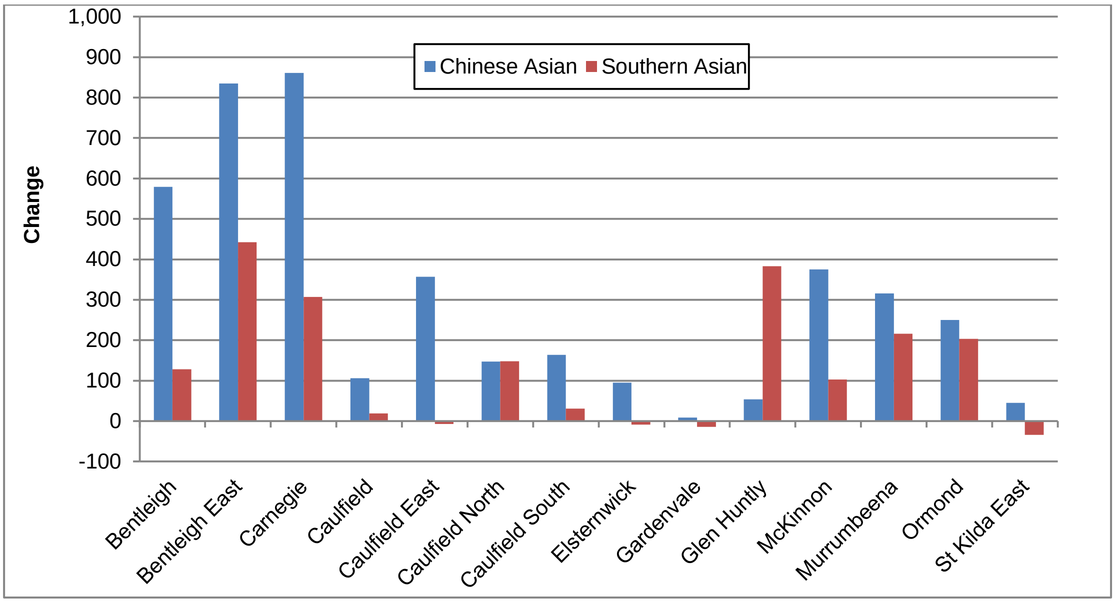
Figure 19: Glen Eira Ancestry - Change 2011-2016



Source: ABS Census

The population of these groups has tended to be concentrated in particular areas of Glen Eira, which anecdotally has been reflected in the character of a number of shopping precincts.

Figure 20: Glen Eira Ancestry - Change 2011-2016 by Suburb

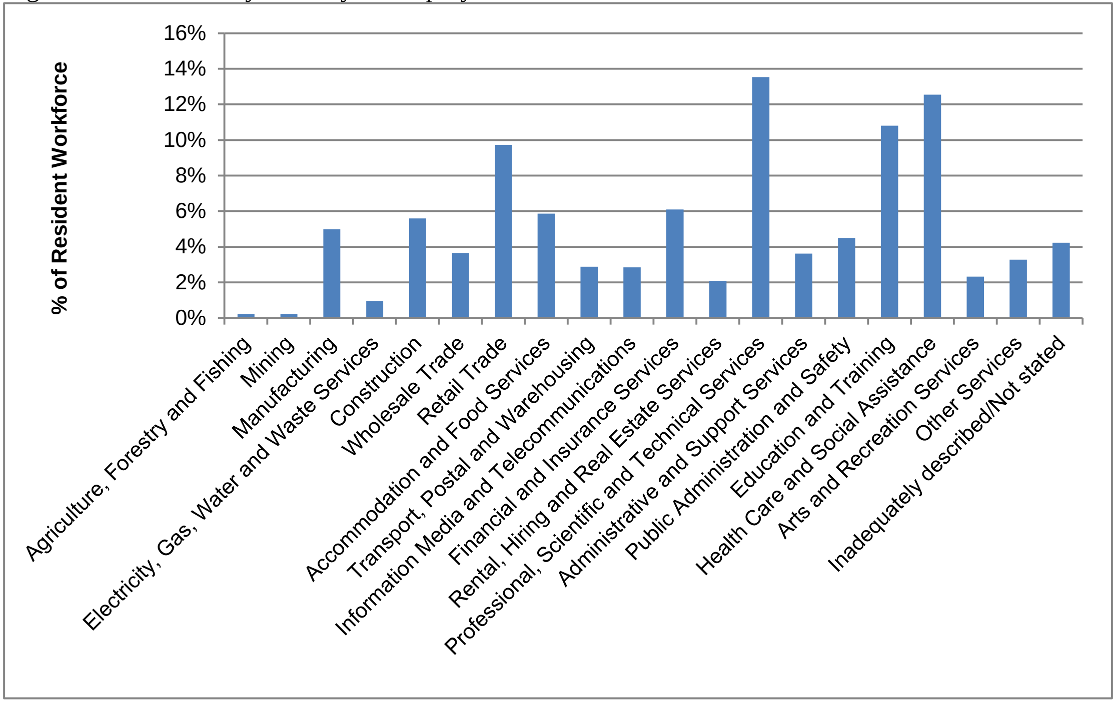


Source: ABS Census

5.6 Employment

The majority of Glen Eira's residents are employed in the Professional, Scientific and Technical Services (13.5%), Health Care and Social Assistance (12.5%) Retail Trade (9.7%) and Education and Training sectors (10.8%), which together account for 47% of resident workers (refer Figure 21).

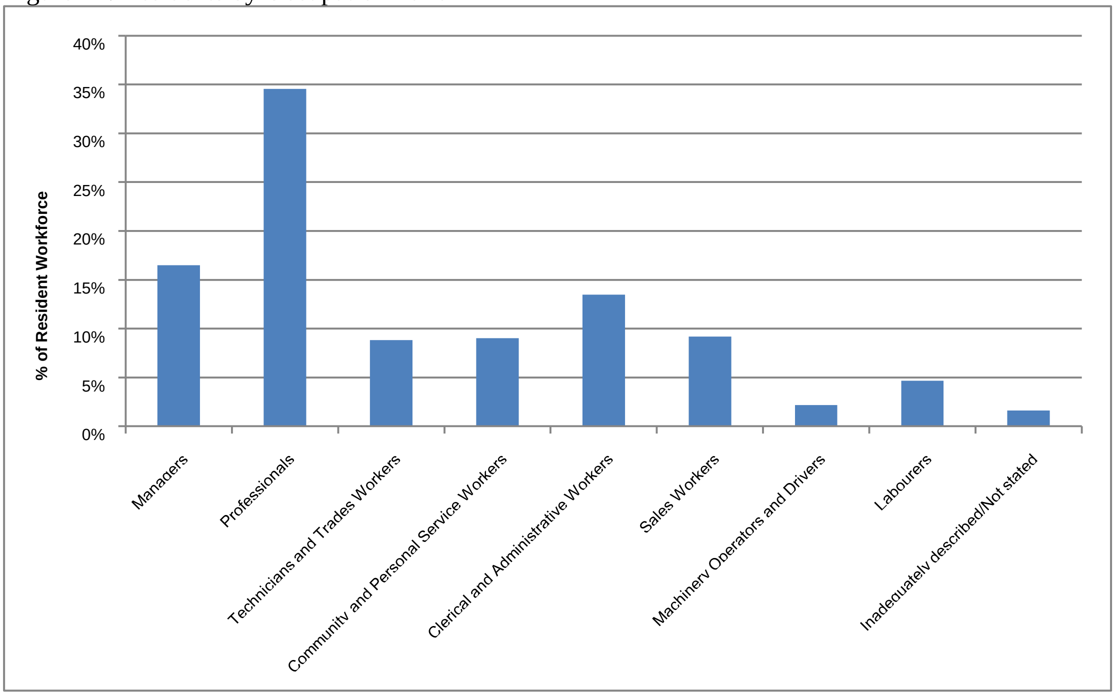
Figure 21: Residents by Industry of Employment 2016



Source: ABS Census

Glen Eira's residents are predominantly professionals, accounting for 34.6% of resident workers, consistent with the relatively high socio-economic profile of the population (refer Figure 22). This is followed by managers (16.5%), and 'clerical and administrative workers' (13.5%). Hence 65% of working residents are employed in typical white collar occupations, with blue collar workers accounting for only 16% of working residents.

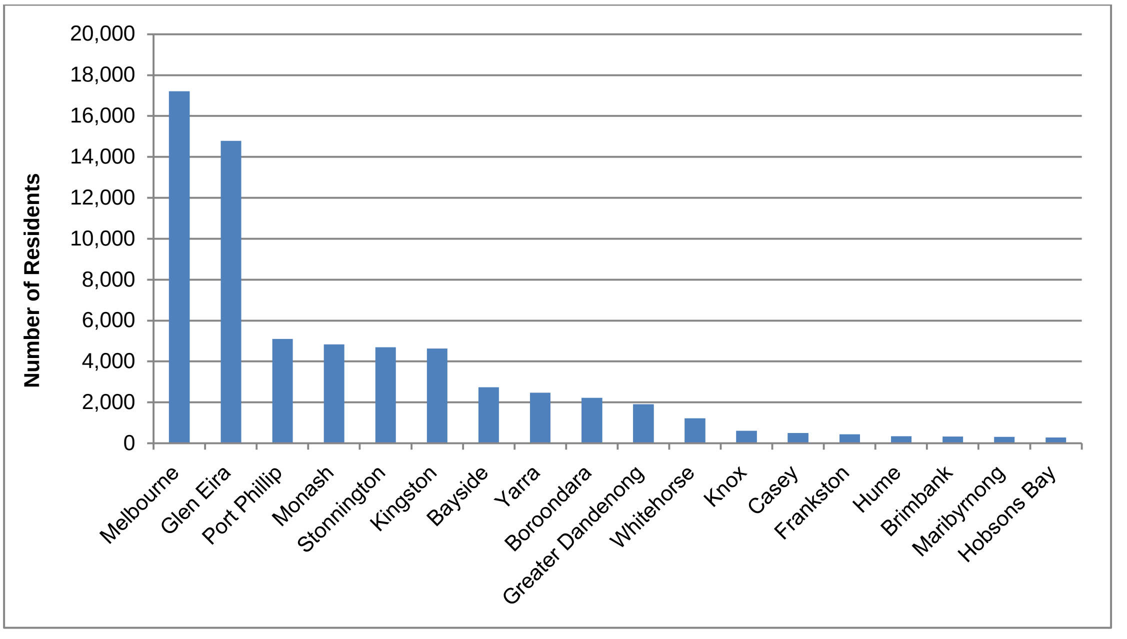
Figure 22: Residents by Occupation 2016



Source: ABS Census

Given the predominance of white collar workers within Glen Eira, it is not surprising that 17,218 residents (24.9% of workers) worked within the City of Melbourne in 2016 (refer Figure 23). This is followed by Glen Eira which accounted for a further 14,793 residents (21.4%).

Figure 23: Glen Eira Residents Workplace Location (LGA) 2016

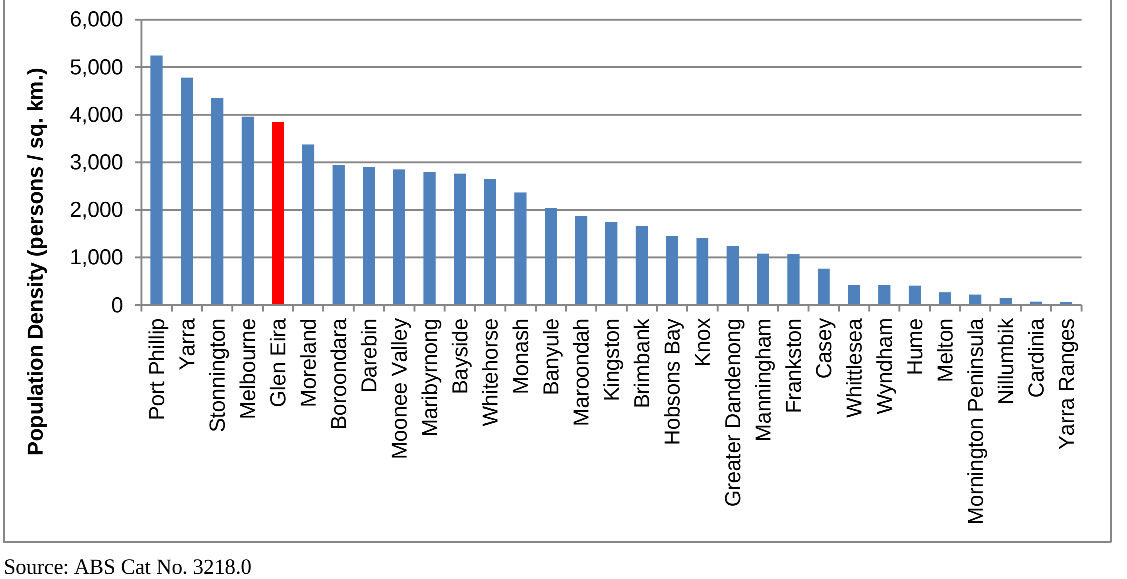


Source: ABS Census

5.7 Housing

Glen Eira's population density is one of the highest in metropolitan Melbourne, ranking fourth across the 31 municipalities, and only exceeded by the inner city areas of Port Phillip, Yarra and Stonnington (refer Figure 24). With 3,851 residents per square kilometre, Glen Eira is notably higher than the adjacent municipalities of Bayside (2,761), Monash (2,367) and Kingston (1,741).

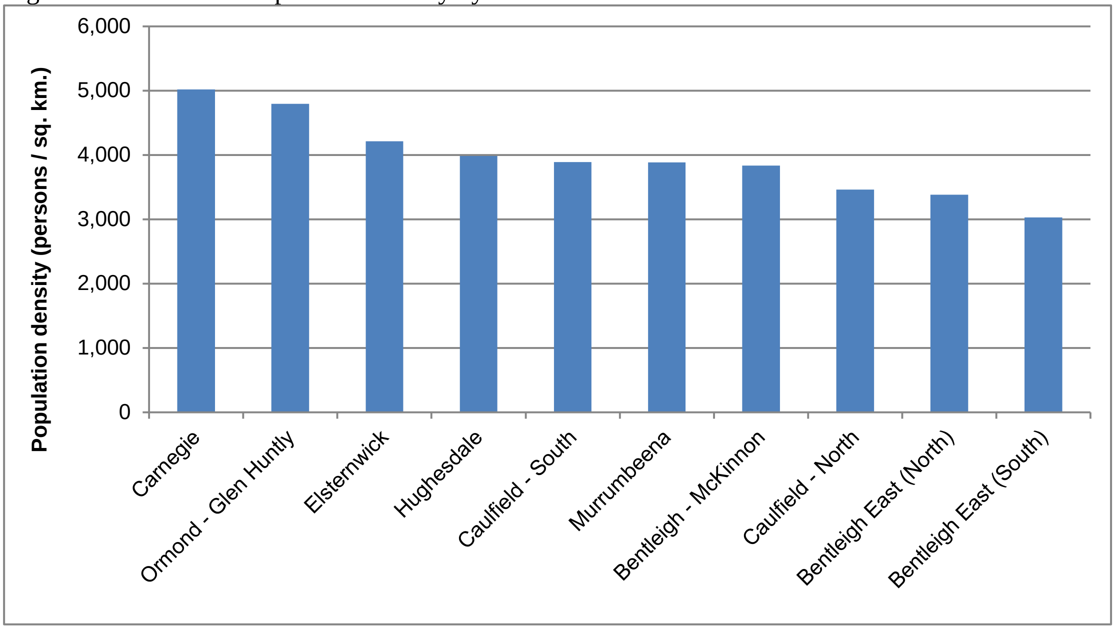
Figure 24: Population Density by LGA 2016



Source: ABS Cat No. 3218.0

Within Glen Eira, population densities range from 5,022 persons per square kilometre in Carnegie down to 3,031 persons in Bentleigh East (South) (refer Figure 25).

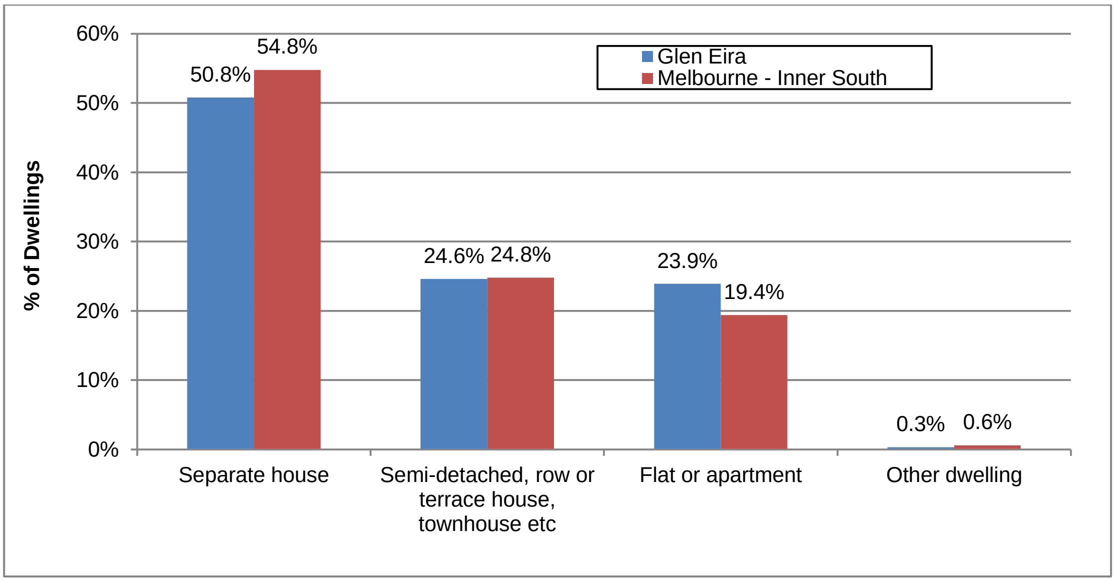
Figure 25: Glen Eira - Population Density by Location 2016



Source: ABS Cat No. 3218.0

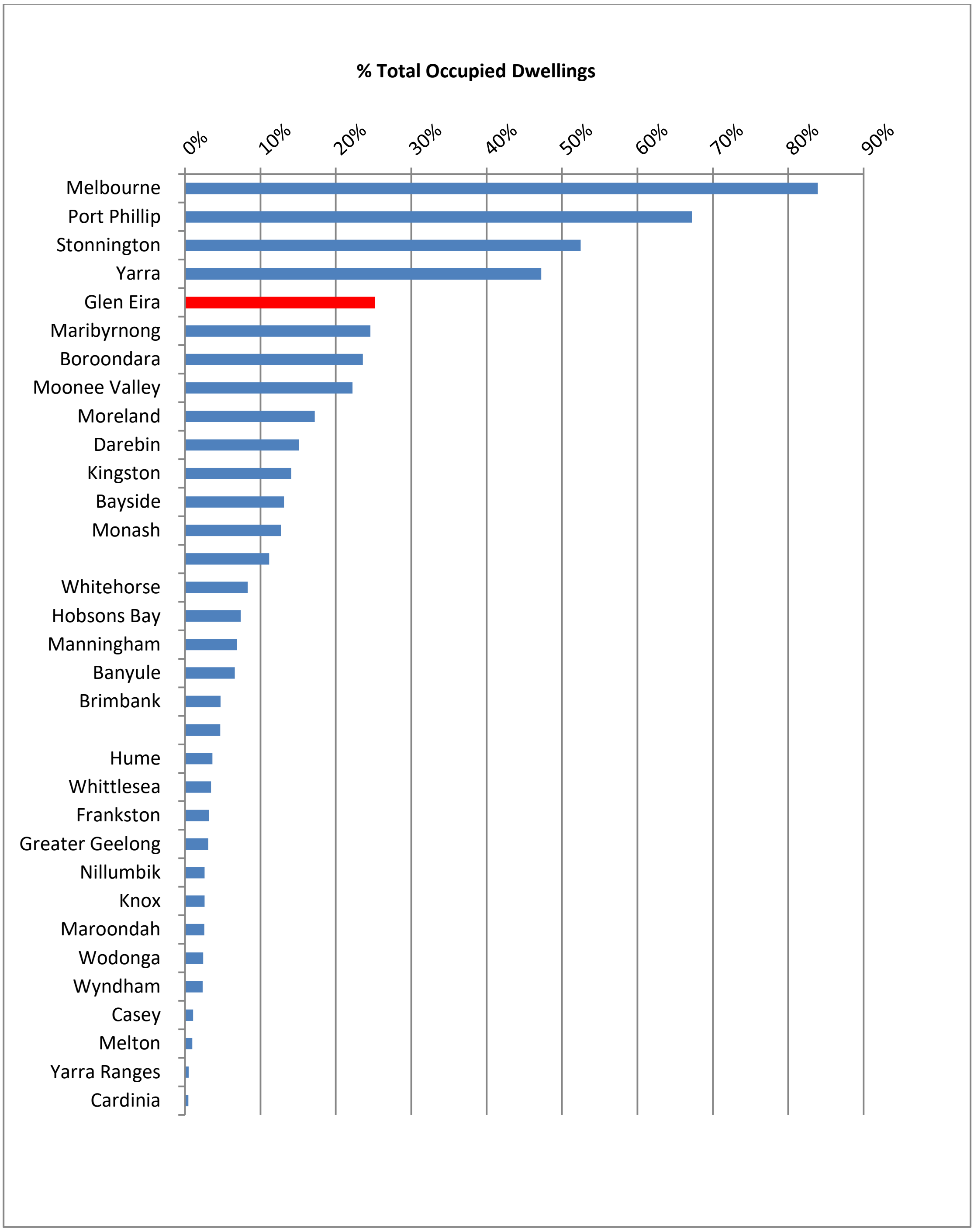
While Glen Eira's higher population density is partly due to lesser area being allocated to industrial uses, it also reflects a higher proportion of dwellings being flats or apartments. In 2016, 23.9% of dwellings within Glen Eira were flats or apartments, compared to only 19.4% within Melbourne's Inner South region (refer Figure 26).

Figure 26: Dwelling Mix Glen Eira vs. Inner South Region 2016



Source: ABS Quickstats

Figure 27: Flats, Units and Apartment – Share of Total Dwellings by LGA 2016



Source: ABS Census

5.8 Demographic / Socio Economic Profile

The demographic and socio-economic profile of households can have a significant influence upon the performance of retail centres, particularly when there is a disproportionate concentration of certain groups in a centre's trade area. This is most noticeable when there is a shift in the characteristics of households associated with their stage in the life cycle. For example, as households mature, with adult children leaving home and parents entering retirement, there is typically a fall in household expenditure. Similarly, as ageing households are replaced by younger families, there is often a significant increase in expenditure which supports the gentrification of local shopping precincts.

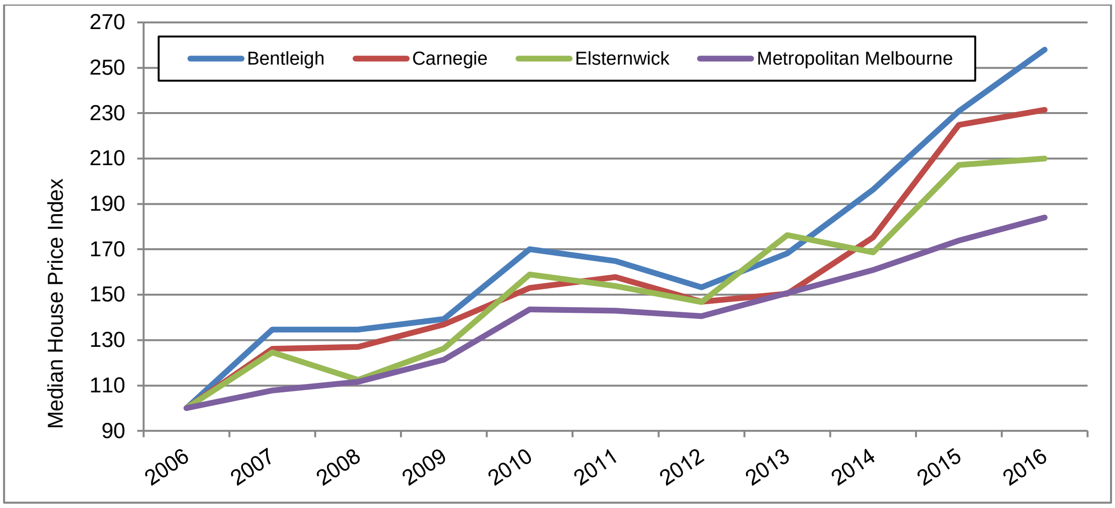
Structural changes in the economy may also impact upon the socio-economic profile of residents. For example, the gentrification of inner and middle suburban areas reflects their proximity to growing inner city employment opportunities.

While Census data provides measures of household and personal income, this may sometimes be misleading where there is a significant number of households, such as retirees, that do not receive an income. However, in high socio economic areas such as Glen Eira, many retirees may be self-funded and therefore have access to significant funds to purchase retail goods and services. In addition, Census data does not provide an up-to-date indication of changes in the socio economic profile of residents as it is only undertaken every five years.

A more meaningful indicator is median house prices, as it provides an indication of the purchasing capacity of new households moving into an area. Similarly, for existing homeowners, house prices may have a 'wealth income effect' whereby rising house prices cause homeowners to feel wealthier and therefore spend more.

The following figure shows median house prices within the suburbs of Bentleigh, Carnegie and Elsternwick relative to metropolitan Melbourne. It indicates that since 2012 median house prices have risen at a noticeably greater rate than metropolitan Melbourne. Over the past decade, median house prices in these locations have increased by around 130-150% compared to 90% across metropolitan Melbourne.

Figure 28: Glen Eira – Median House Prices (Urban Village Suburbs)



Source: Department of Environment, Land, Water and Planning

6. Retail Sector Trends and Consumer Behaviour

In addition to local demographic factors, the level of retail activity within Glen Eira's activity centres is also influenced by broader industry trends. These trends reflect a range of events including the impact of short-term macroeconomic conditions upon consumer confidence, through to permanent structural changes within the retail sector such as online retailing. This section provides an analysis of these trends.

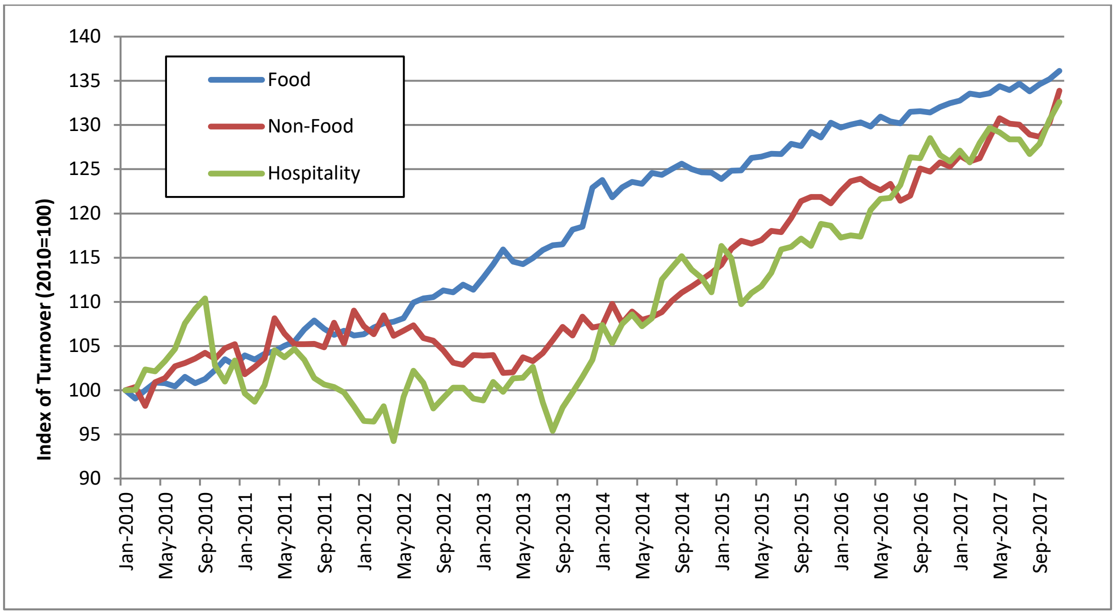
6.1 Industry Turnover

Victoria's retail sector has largely recovered from the impact of the Global Financial Crisis (GFC) upon consumer confidence and discretionary non-food retail expenditure. However, while total food retailing turnover has grown by 33% since 2010, this reflects a 16% growth in Victoria's population, and a 16% increase in prices (consumer price index). Hence, there has been no real growth in the value of retail turnover over this period.

As Figure 29 indicates, both the non-food and hospitality (cafes, restaurants and takeaway) sectors stagnated over the period 2010-2013 before growing strongly by around 30%. The greater volatility of turnover within these sectors reflects their reliance upon discretionary spending by households which is influenced by economic conditions and consumer sentiment..

At an industry level, bricks and mortar retailers have faced increasing competition from online retailers, which has primarily impacted upon non-food retailers. Within Glen Eira, non-food retailers also face competition from Chadstone and Southland shopping centres as well as the Melbourne CBD.

Figure 29: Victoria - Index of Turnover by Broad Sector (2010=100)

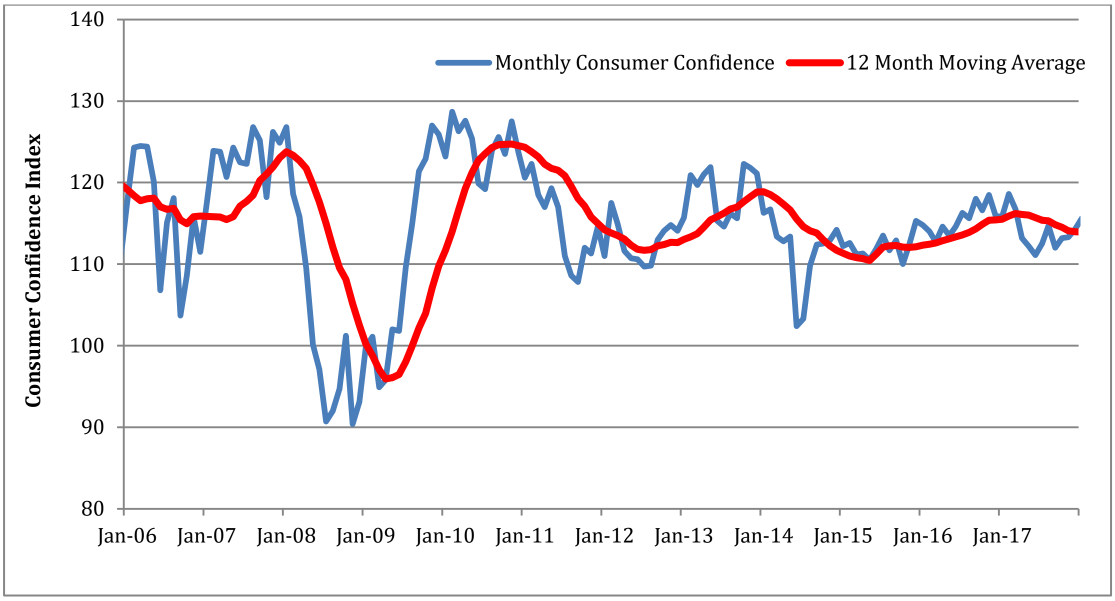


Source: ABS Cat No.8501.0

6.2 Consumer Confidence

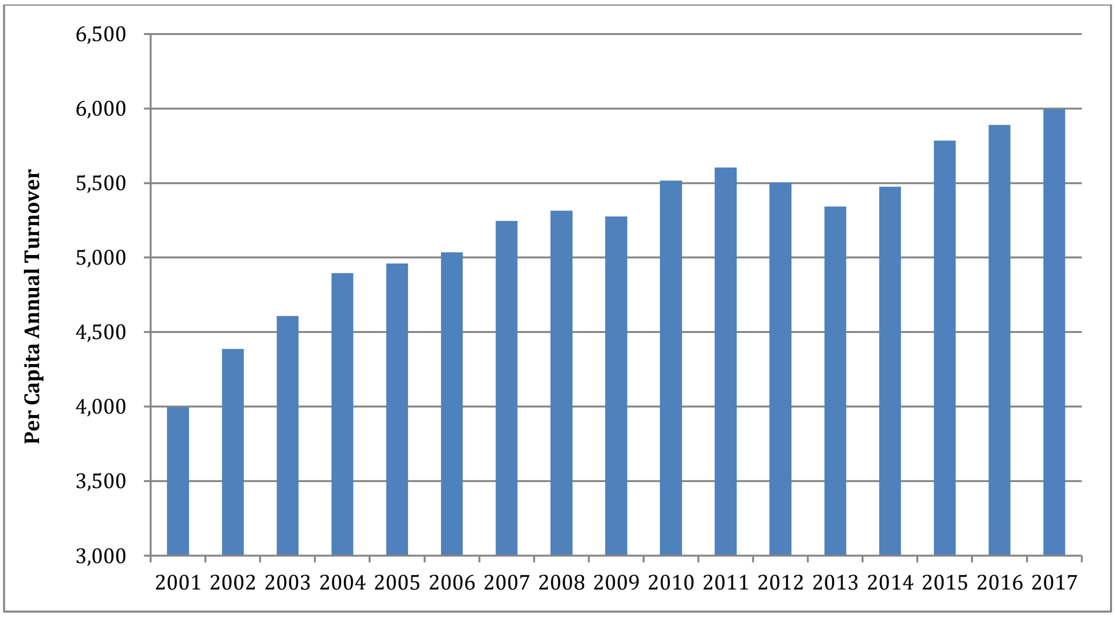
Consumer confidence is currently around its long-term average with a trending down in the 12 month moving average over the past 12 months (refer Figure 30). Prior to this recent weakening there was a period of growing confidence with increasing per capita expenditure on non-food retail goods over 2013-2017 (refer Figure 31). It has also coincided with rising median house prices across Melbourne, which has created a 'wealth income effect' for existing homeowners, and supported spending on discretionary non-food retail goods (refer Figure 32). Given that the housing market now appears to be reaching its cyclical peak, together with Amazon establishing a local presence, the current weakening in consumer sentiment may result in a slowing in retail sales growth in the future.

Figure 30: Australia Consumer Confidence Index 2006-2017



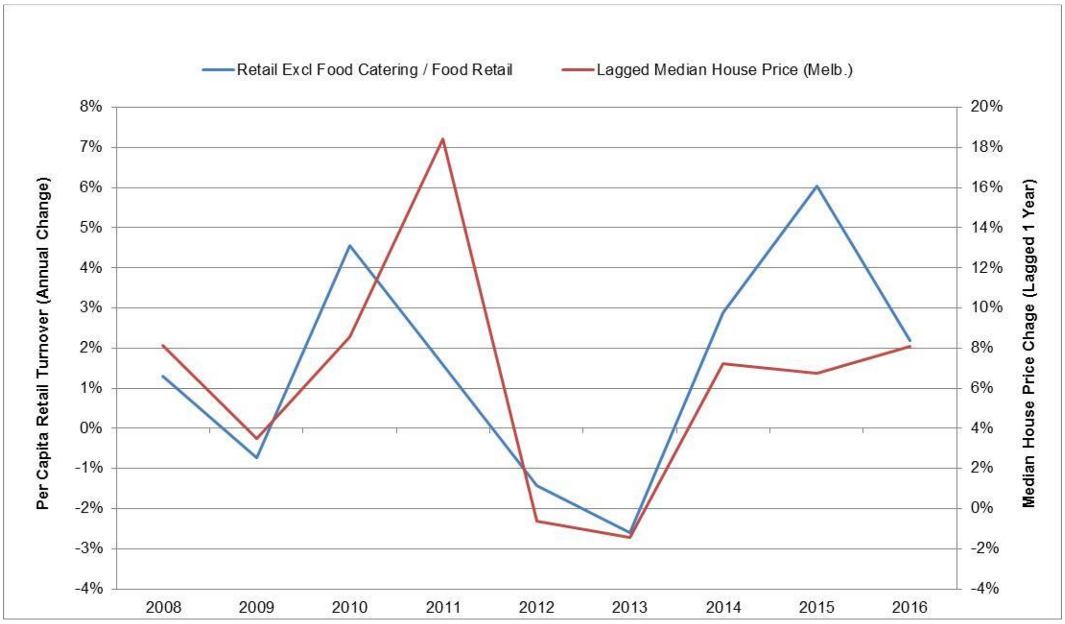
Source: ANZ-Roy Morgan

Figure 31: Victoria Per Capita Non-Food Retail Turnover 2001-2017



Source: ABS Cat No. 8501.0

Figure 32: Victoria Retail Turnover versus Lagged Median House Price Growth 2008-2016



Source: ABS Cat No. 8501.0, Department of Environment, Land, Water and Planning

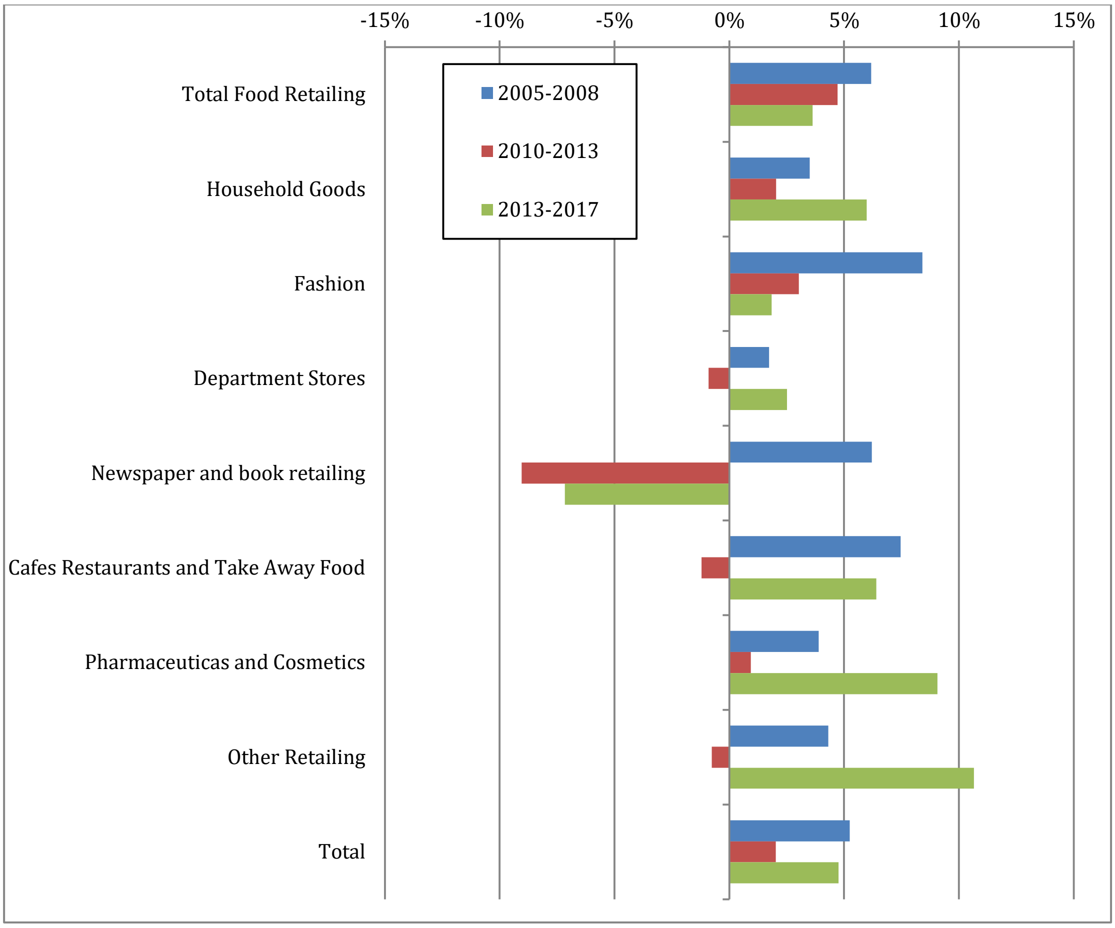
Given that food and groceries are staple goods, it is not surprising that turnover growth has remained relatively stable. There has however been a decline in the rate of growth in food retailing turnover, which may reflect a number of factors , including increasing competition for full line supermarkets from Aldi, resulting in a shift towards lower priced 'home brand' products.

It is within the non-food retail sector where there has been the most noticeable shift in growth rates over the past decade. Growth in fashion retailing has declined from around 8.5% per annum prior to the GFC to an average of only 1.8% per annum over the past four years (refer Figure 33). This reflects a number of factors including the popularity of online shopping as well as increased competition from international retailers establishing stores within Australia.

The digital revolution has however had the most significant impact within the 'newspaper and book retailing' sector where turnover has been declining sharply. This has had a notable impact within shopping precincts through the closure of bookstores.

Cafes, restaurants and takeaway food businesses experienced a significant slowing in growth over the period 2010-2013, consistent with declining consumer confidence over this period. There has however been a notable recovery in this sector with a return to previous growth rates of around 6-7% per annum.

Figure 33: Victoria - Average Annual Turnover Growth by Broad Activity

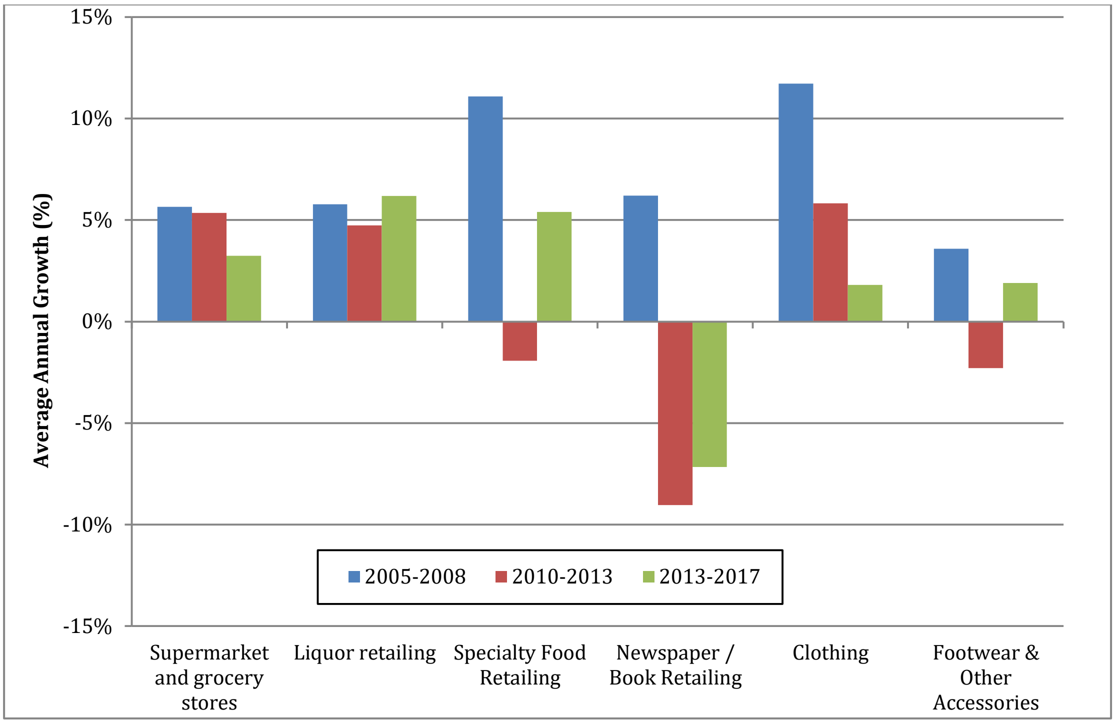


Source: ABS 8501.0

A more detailed analysis of turnover growth indicates that within the food retailing sector, specialty food retailing experienced a significant slowing in growth from over 10% per annum during 2005-2008 to -2% per annum over 2010-2013. This has occurred despite supermarket and grocery store turnover remaining relatively stable, and reflects a weakening in consumer confidence due to the GFC, and shoppers reducing their consumption of meat and other more expensive food items. Annual sales growth has since recovered to average more than 5% per annum over the past four years.

Within the fashion sector, the turnover of clothing retailers has steadily declined, due to the impact of online retailing. Similarly, 'footwear and other accessories' turnover growth has remained relatively low at around 2% per annum despite an increase in consumer confidence.

Figure 34: Victoria - Average Annual Turnover Growth by Detailed Activity



Source: ABS 8501.0

6.3 Online Retailing

Online retailing represents perhaps the most significant retail innovation since the supermarket concept was introduced early last century. Its impact upon traditional retailing is however more significant due to the pace at which it is occurring with suggestions that one year in online retailing equates to five years of traditional retailing.

It is therefore not surprising that there are a number of surveys undertaken both locally and internationally to identify the extent of online shopping. These include the following.

- Australian Bureau of Statistics (ABS): Retail Trade

  As part of its regular retail trade publication the ABS monitors online sales made by local businesses classified as being within the retail sector. It does not include non-employing businesses or businesses located overseas selling to Australian households.

- National Australia Bank: Online Retail Sales Index.

  This survey monitors online purchases by Australian households from both domestic and international suppliers with a time series of results extending back to 2010.

- Sensis e-Business Report 2016

  This annual report monitors trends in online purchasing by Australian households, including the incidence of online purchasing by age group and the types of items purchased.

- Swinburne University (ARC Centre of Excellence for Creative Industries and Innovation). Online Retail in Australia 2007-2013

  This study represents the most comprehensive analysis of online shopping by Australian residents based upon annual surveys extending back to 2007.

The National Australia Bank estimates that online shopping currently totals $23.4 billion, being equivalent to 7.6% of spending at 'bricks and mortar' retailers[2]. It identifies fashion, homewares and groceries as accounting for the largest shares of online shopping, which together represent over half of all online retail sales (refer Figure 35).

Figure 35: Online Retailing Annual Growth and Share by Category (September 2017)

	Annual Growth	**Share of Total Online Spending**
Fashion	1.6%	15.3%
Daily Deals	9.9%	2.4%
Department Stores	10.2%	8.2%
Homewares	-5.8%	20.0%
Media	19.5%	17.5%
Personal	1.5%	9.4%
Groceries	6.4%	16.7%
Toys	23.0%	3.6%
Food	9.8%	6.9%
Total	6.0%	100

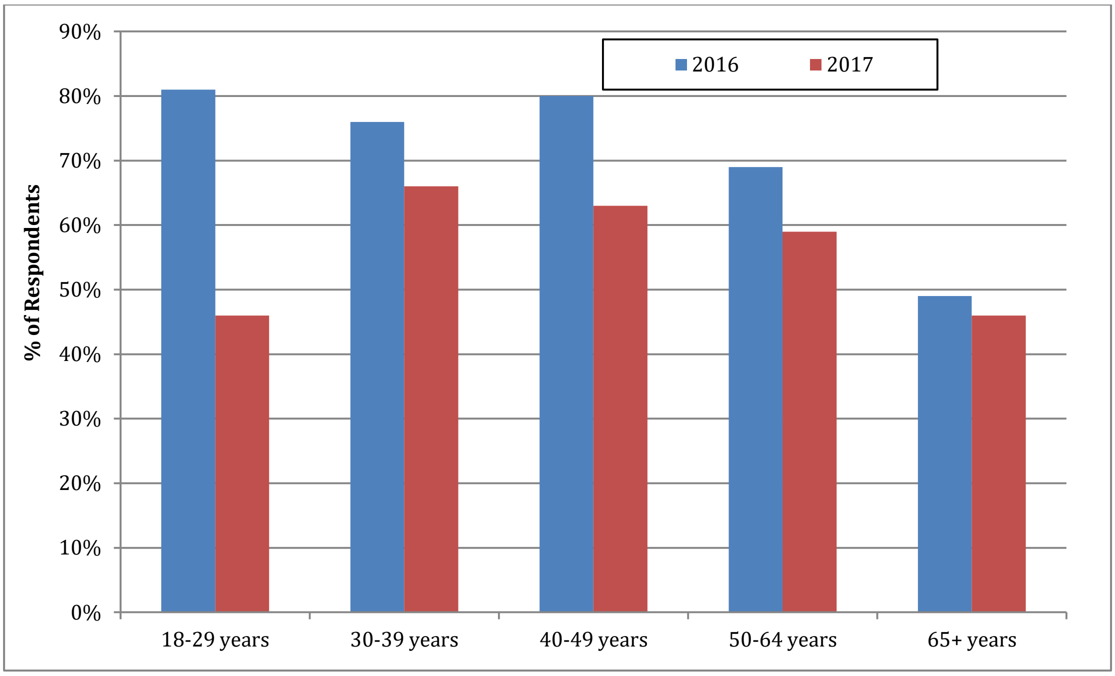
Source: National Australia Bank Online Retail Sales Index

[2] NAB Online Retail Sales Index (September 2017)

Sensis monitors the frequency with which households go online to purchase goods and services. In 2017 it estimates that 56% of Australian adults made online purchases within the last 12 months, compared to 71% in 2016. Sensis attributes this decline to lower consumer sentiment, mortgage stress, and rising energy prices, in addition to rising concerns around hacking.

This decline in online purchases has occurred across all age groups, but most pronounced amongst 18-29 year olds (refer Figure 36).

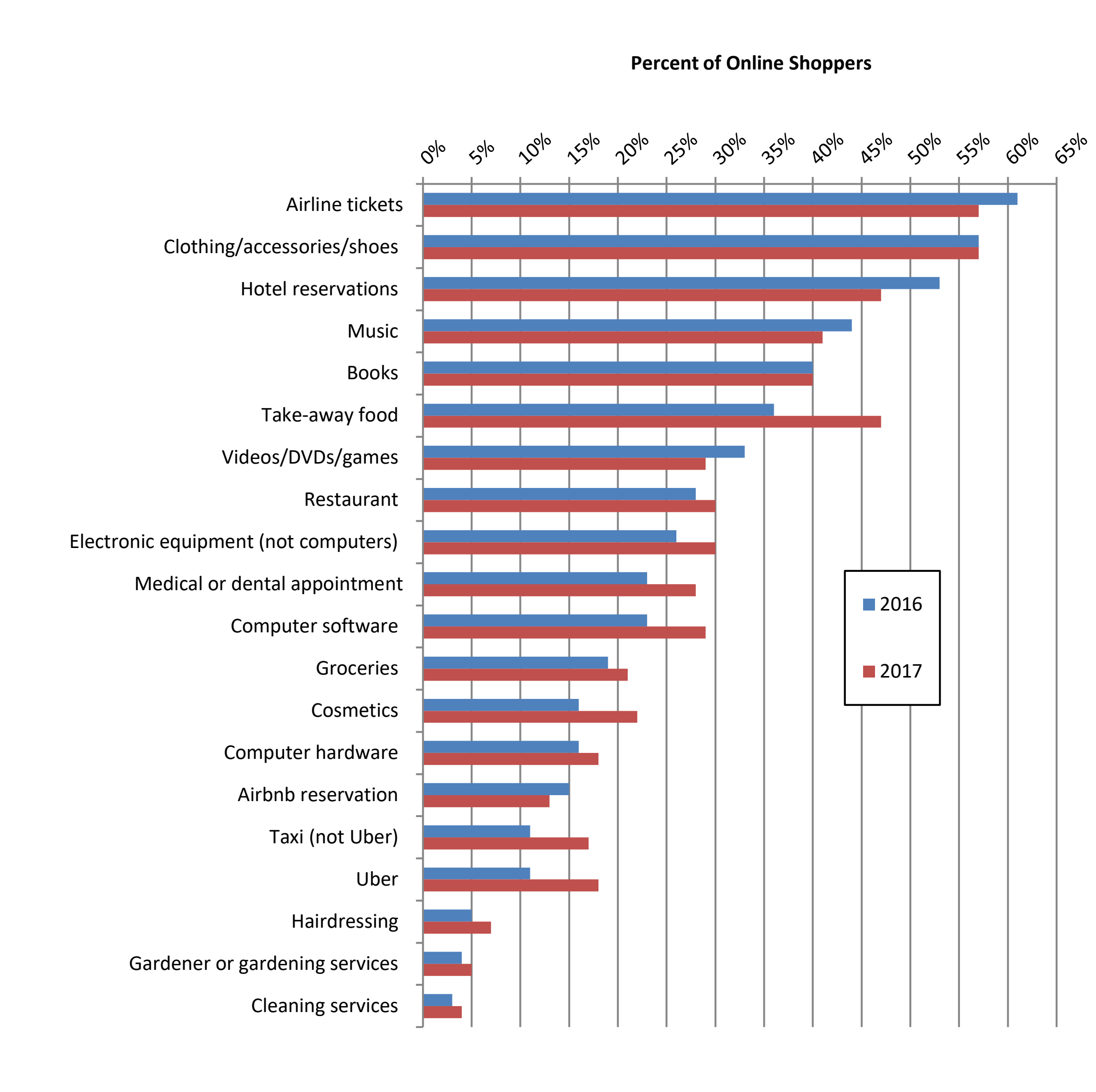
Figure 36: Percent of Australians Purchasing Online by Age Group 2016



Source: Sensis e-Business Report 2016

Fashion items are one of the most popular purchases made by online shoppers, with 57% of online shoppers purchasing such items in 2017(refer Figure 37). This is followed by music (41%), books (40%), electronics (30%), cosmetics (22%), groceries (21%), and computer hardware (18%).

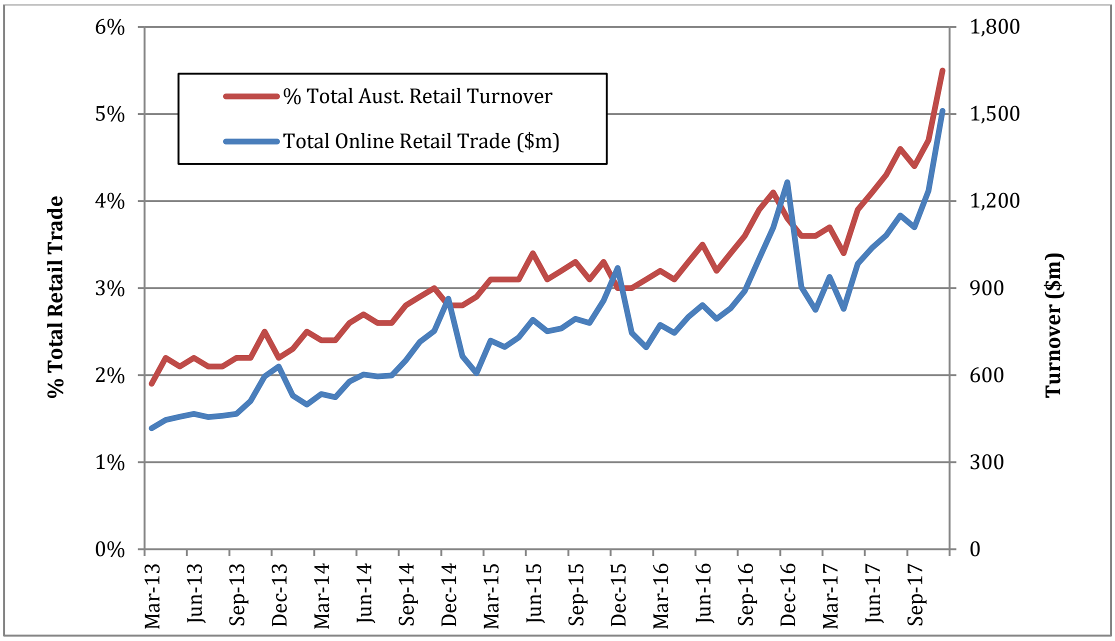
Figure 37: Percent of Online Shoppers Purchasing by Category



Source: Sensis e-Business Report

Based upon a survey of domestic online retailers, the ABS estimates that online retail sales totalled approximately $12.9 billion during 2017, compared to $10.2 billion over 2016, representing an increase of 26% per annum. The ABS estimates that domestic online retailers currently account for around 5.5% of total retail trade compared to 3.8% a year earlier (refer Figure 38).

Figure 38: Domestic Online Retailers Turnover (Monthly)



Source: ABS 8501.0

6.4 Contemporary Retail Formats

The retail sector is constantly evolving to meet the needs of consumers, retailers and property owners. As a result, new retail formats are continually emerging to simultaneously satisfy the needs of each of these groups. These formats can create new opportunities for retail centres that may otherwise become redundant, or alternatively support the development of new centres that may impact upon existing centres.

Examples of new retail formats from the past 20 years include:

- Bulky goods / homemaker centres to provide affordable floorspace for retailers.
- Factory outlet centres e.g. DFO.
- Café / restaurant precincts in otherwise redundant suburban retail strips.

Some more recent examples of new retail formats include:

- Pop-up shops offering temporary spaces for new and established retailers looking to test the market or sell short-run product lines.
- Small format department stores: (David Jones Malvern Central).
- Large format fresh food stores (Thomas Dux, LaManna-Essendon Airport).
- Gourmet / ethnic food outlets (Oasis Bakery Murrumbeena)
- Multi-channel concept retailing combining physical and online retailing.

The concept of pop-up shops has expanded considerably over recent years in response to increased vacancies but also a reduced willingness by businesses to commit to longer term leases given current retail market conditions. Pop-up shops may however also represent a means through which businesses are able to:

- Focus demand for products into a short period of time, thereby making more efficient use of floor space and hence reduce operating costs. Such a concept is not new and is similar to that used by Aldi supermarkets for non-food items that are only available for a given week.

- Promote products through social media to generate demand, which is then catered for via a pop-up shop, and therefore may represent a form of multi-channel retailing.
- Service a number of different geographic markets by rotating their business through a various pop-up shops, both within and across capital cities.
- Test the market for products in various locations and tailor their product mix more effectively to each local market.

Given the significant restructuring that has occurred within the retail sector as a result of online retailing and the attitudes and expectations of consumers, it is likely that flexible retail formats such as pop-up shops may become a more common within retail strips and shopping centres in the future.

The growth of pop-up shops as an alternative retail format has also been supported by the emergence of businesses providing services to property owners and businesses such as the listing of available properties through to firms providing short-term building insurance.

Part B: Surveys

7. Household Shopping Behaviour Survey

Telephone surveys of Glen Eira residents were undertaken to identify their current shopping behaviour. A representative survey of 402 residents was conducted during February 2017 and this section provides an analysis of the key findings of this survey.

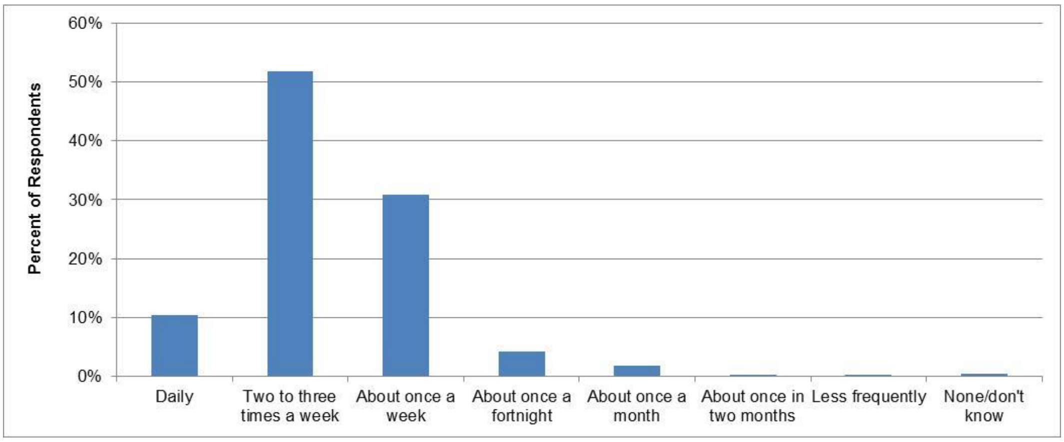
7.1 Fresh Food and Grocery Shopping

7.1.1 Frequency

As would be expected, shopping for fresh food and groceries is a weekly activity for Glen Eira residents with 93% shopping at least once per week. 52% of survey respondents indicated that they shop 2-3 times per week and a further 10% on a daily basis (refer Figure 39).

Fresh food and grocery shopping is therefore a key activity which not only connects residents with their chosen shopping location, but also provides exposure to potential customers for other retailers. Through regularly shopping at a centre, residents are aware of other businesses which may result in a dedicated shopping trip for items other than fresh food and groceries.

Figure 39: Fresh Food and Grocery Shopping Frequency



7.1.2 Choice of Centre

Overall, 73% of survey respondents nominated centres within Glen Eira as being their main location for fresh food and grocery shopping (refer Figure 40). Nearby centres such as The Links (Oakleigh South), Moorabbin Activity Centre, Brighton, Carlisle Street Balaclava, Glenferrie Road Malvern, and Chadstone and Southland shopping centres were nominated by a further 18% of respondents. As result, 90% of Glen Eira residents shop at centres within or immediately adjacent to, Glen Eira. This pattern is also reflected in the reasons for shopping at these centres, with the location of centres relative to where respondents live being a key factor.

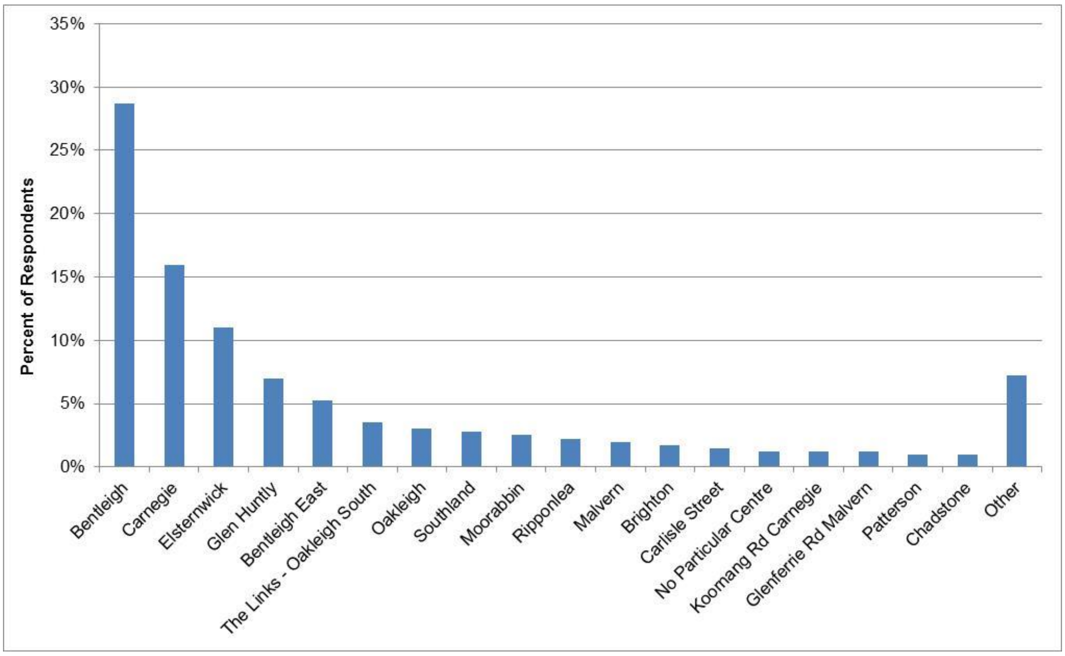
The Bentleigh Activity Centre was nominated by 29% of respondents as being their main centre for fresh food and grocery shopping, although this reflects its central location within Glen Eira, and therefore most accessible for survey respondents. The Carnegie Activity Centre, including Carnegie Central, was nominated by 16% of respondents. However, given its location on the northern boundary of Glen Eira, it may be assumed to be equally as popular as Bentleigh for food and grocery shopping. Elsternwick is the main centre for much fewer respondents (11%), although this may reflect its location on the western boundary of the municipality.

After taking these locational differences into account, it would be reasonable to assume that Bentleigh and Carnegie are the two most popular locations for fresh food and grocery shopping, followed by Elsternwick. This is most likely a reflection of the range of food and grocery shopping options within each centre with:

- Bentleigh offering Coles, Woolworths and Aldi supermarkets as well is a strong mix of fresh food retailers;
- Carnegie offering a large, new format, Woolworths supermarket and an Aldi within Carnegie Central; as well as a second Woolworths and a variety of fresh food retailers within the Koornang Road strip; and
- Elsternwick offering a relatively small, older format, Coles supermarket and fewer fresh produce retailers than either Bentleigh or Carnegie.

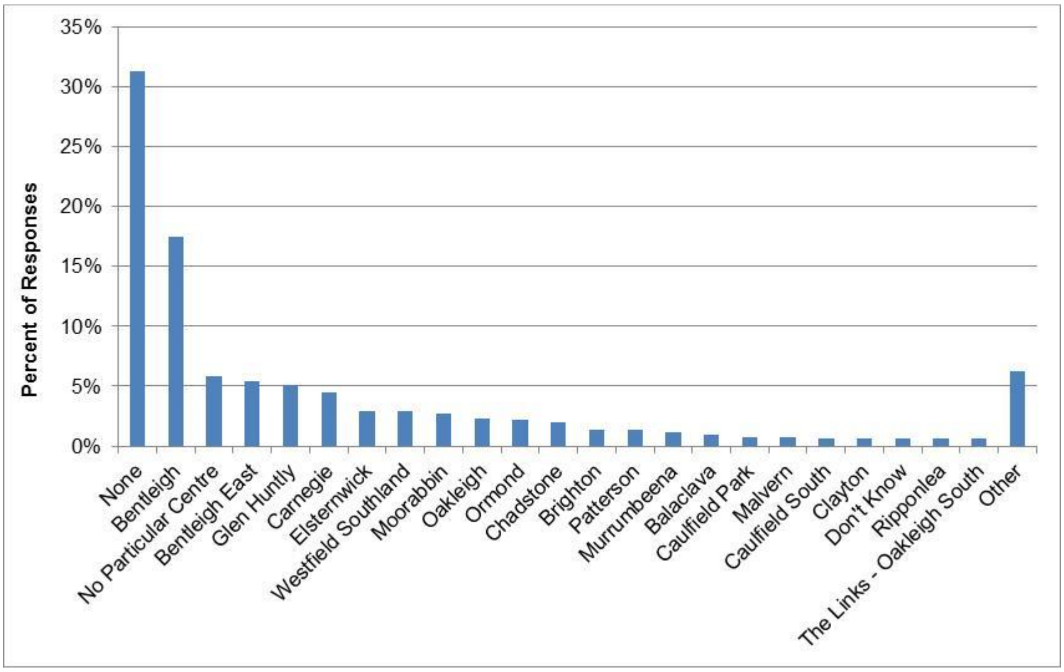
The fourth most popular centre for fresh food and grocery shopping was the Glen Huntly Activity Centre, which offers a refurbished Woolworths supermarket. There is however a very limited range of food specialties which is likely to limit the popularity of the centre, despite its relatively central location within Glen Eira. Overall, only 7% of survey respondents nominated this centre as their main location for fresh food and grocery shopping.

Figure 40: Main Shopping Area for Fresh Food and Groceries



For those respondents indicating that they also used other shopping locations, Bentleigh accounted for 18% of responses. Overall, centres within Glen Eira and 'no other centre' accounted for 72% of total responses (refer Figure 41).

Figure 41: Other Shopping Areas Used for Fresh Food and Groceries (% of Responses)



Combining together respondents' 'main' and 'other locations' for fresh food and grocery shopping, indicates that centres within Glen Eira account for around 73% of total food and grocery shopping trips undertaken by residents. Nearby centres, just outside of the municipal boundary, account for a further 17%.

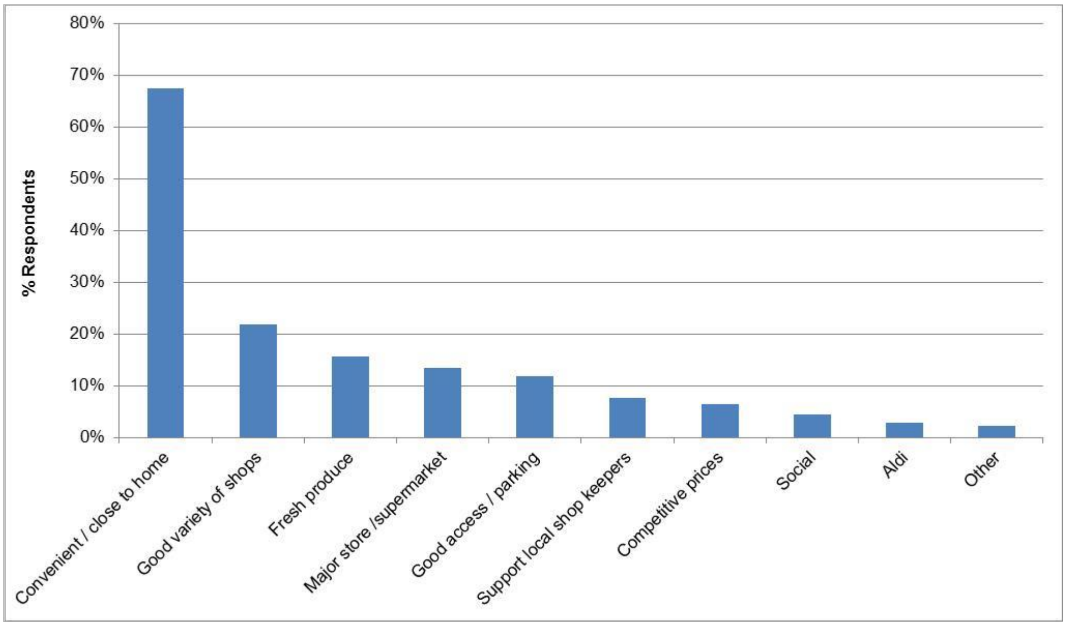
The implication of these survey results is that Glen Eira residents' choice of centre for fresh food and grocery shopping is primarily determined by proximity to where they live.

7.1.3 Reasons for Choosing Centre

Overwhelmingly, convenience and proximity to home influences where residents choose to undertake fresh food and grocery shopping, with 67% of respondents nominating such factors (refer Figure 42). This is followed by the variety of shops offered by centres which was nominated by 22% of respondents. The tendency for residents to shop locally is consistent with over 85% of respondents also indicating that they were either satisfied or very satisfied with their local food shopping options. As a result, the majority of shoppers appeared to see little need to travel outside of their local area to meet their food shopping needs.

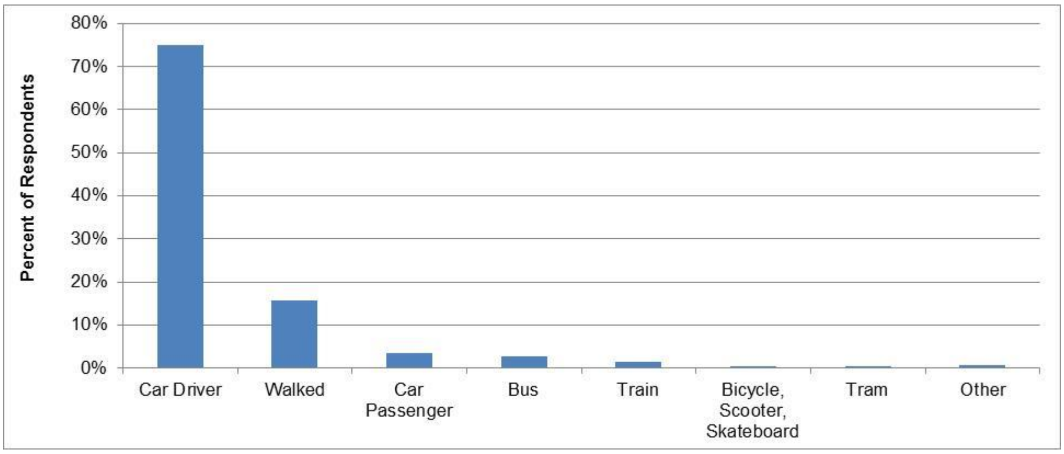
Interestingly, major stores and supermarkets were not a significant factor influencing respondent's choice of centre. This however may reflect the similarities of full line supermarkets within Glen Eira, with only Carnegie Central offering a notably larger full-line supermarket.

Figure 42: Reasons for Choosing Main Shopping Area for Fresh Food and Groceries



The majority of respondents access their main centre for fresh food and grocery shopping by motor vehicle, either as a driver (75%) or as a passenger (4%). 16% of respondents however walked to their main centre (refer Figure 43).

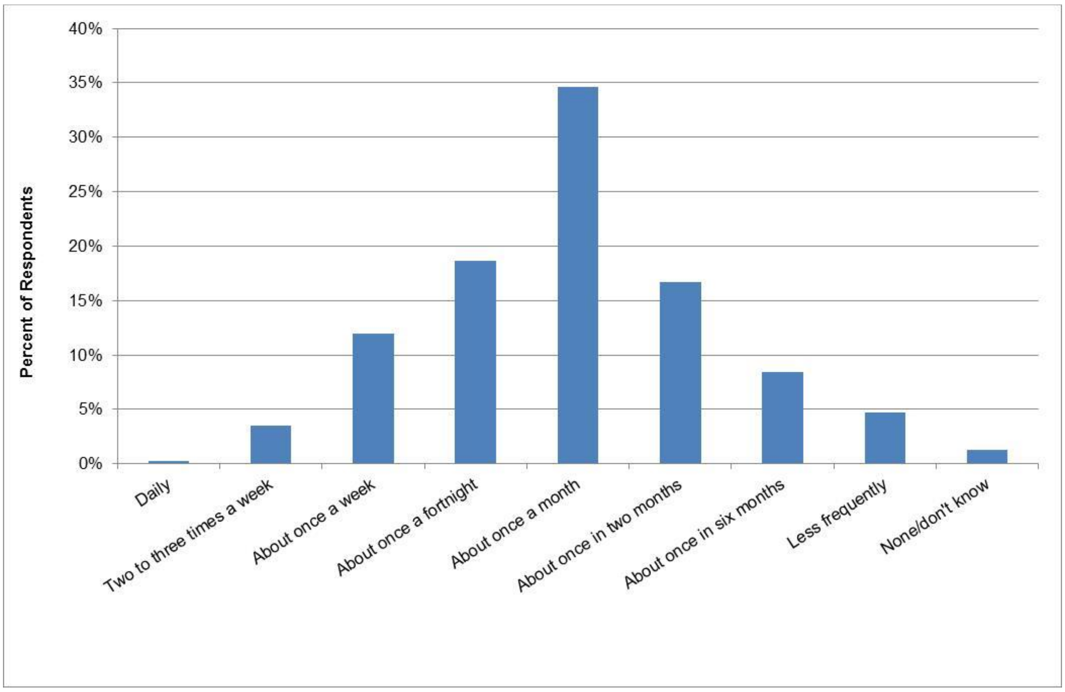
Figure 43: Main Shopping Area for Fresh Food and Groceries – Main Travel Mode



7.2 Non-Food Shopping

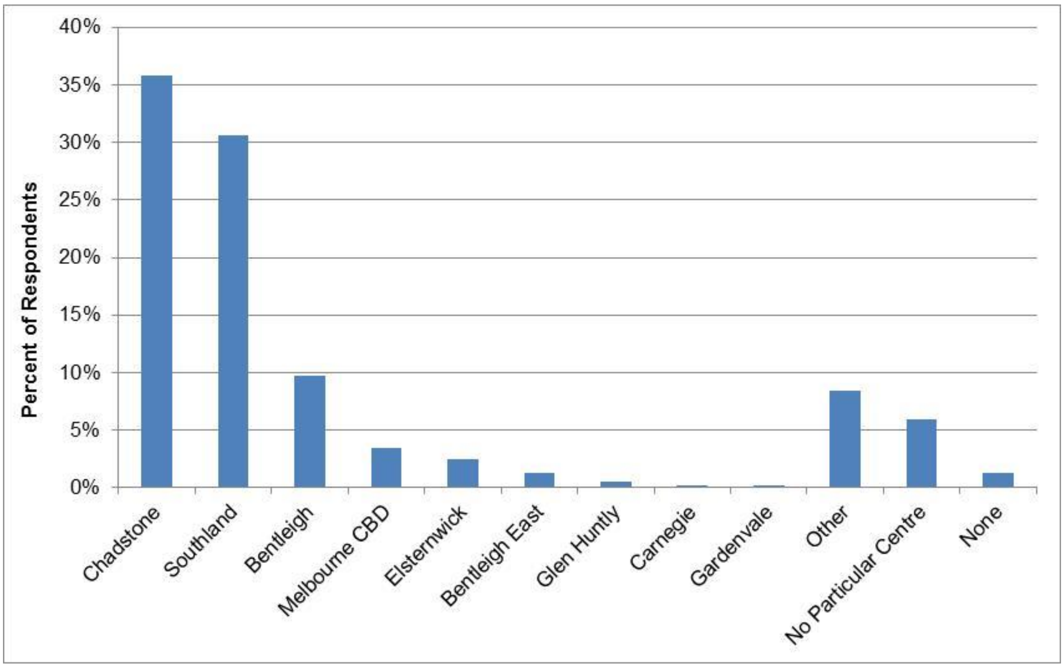
Given the less essential nature of non-food shopping, these trips are undertaken less regularly than fresh food and grocery shopping. Only 16% of respondents indicated that they shop for non-food items such as clothing, gifts, homewares or services at least once a week, with once per month nominated by the most respondents (35%) (refer Figure 44).

Figure 44: Frequency of Discretionary Shopping (clothing, gifts, homewares or services)



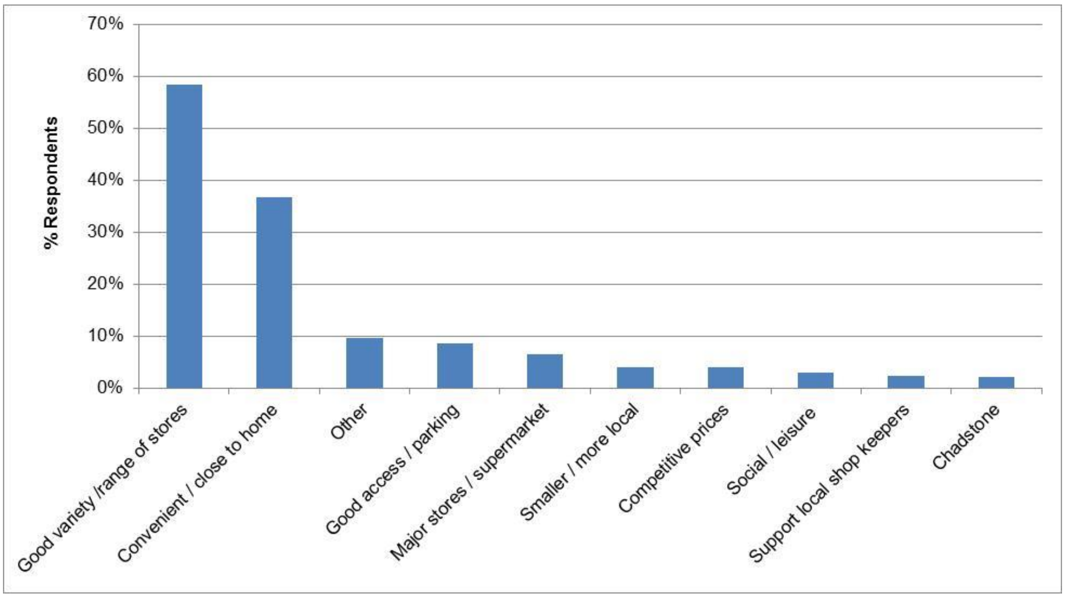
Chadstone and Southland shopping centres are the most popular 'main' shopping locations for fashion gifts and homewares, together accounting for around 65% of respondents (refer Figure 45). Bentleigh was nominated by 10% of survey respondents while Elsternwick was only nominated by 3%. Given the significant number of fashion stores within Elsternwick, this low percentage may however reflect its location on the boundary of Glen Eira. Nevertheless, Elsternwick faces very strong competition from the two regional shopping centres.

Figure 45: Main Shopping Area for Fashion, Gifts and Homewares



Given the importance of comparison shopping when purchasing non-food items, it is not surprising that 58% of respondents indicated that being able to access a range of stores was a reason for choosing where they shopped (refer Figure 46). Other than this, convenience and proximity to home were key factors.

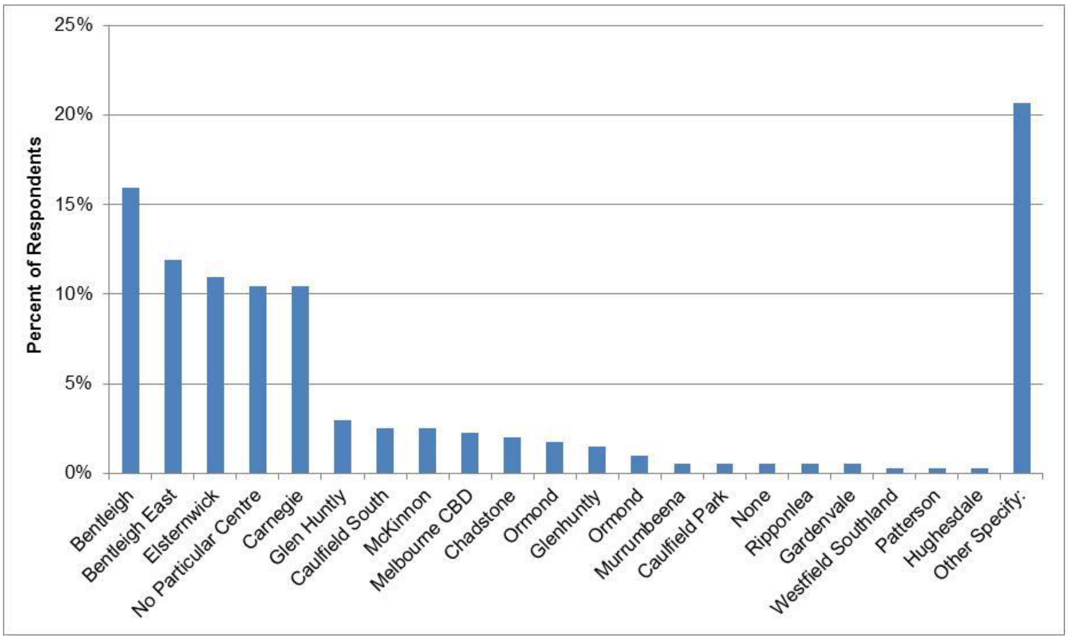
Figure 46: Reasons for Choosing Main Shopping Area for Fashion, Gifts and Homewares



7.3 Services

The main locations used by Glen Eira residents for personal and business services are the three urban villages together with Bentleigh East, which together accounted for 50% of the centres nominated by respondents (refer Figure 47).

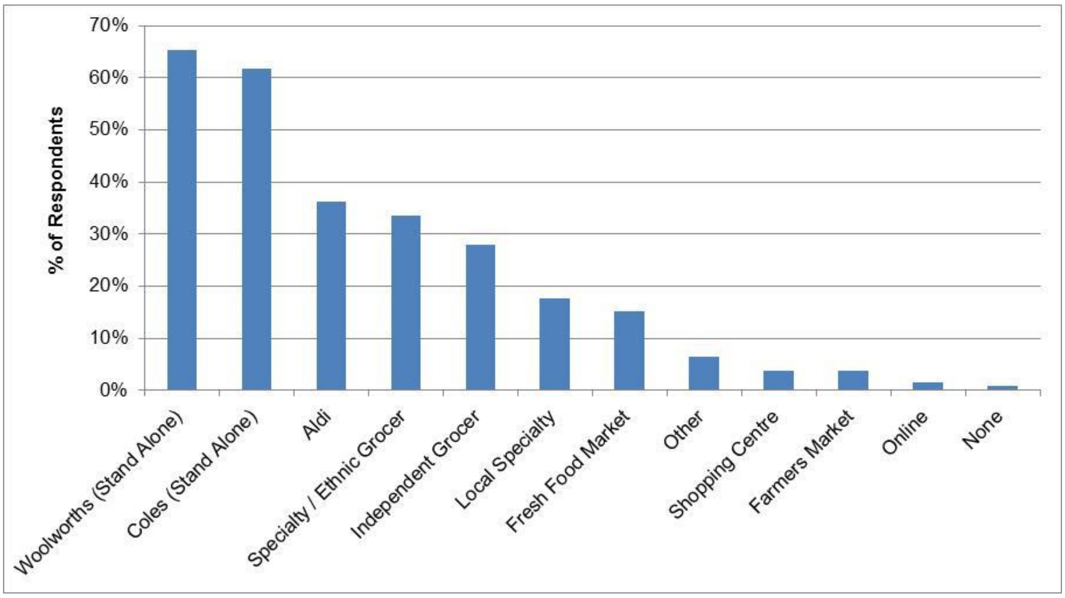
Figure 47: Main Location for Services (Personal, Business, Medical etc.)



7.4 Food Retailing Formats

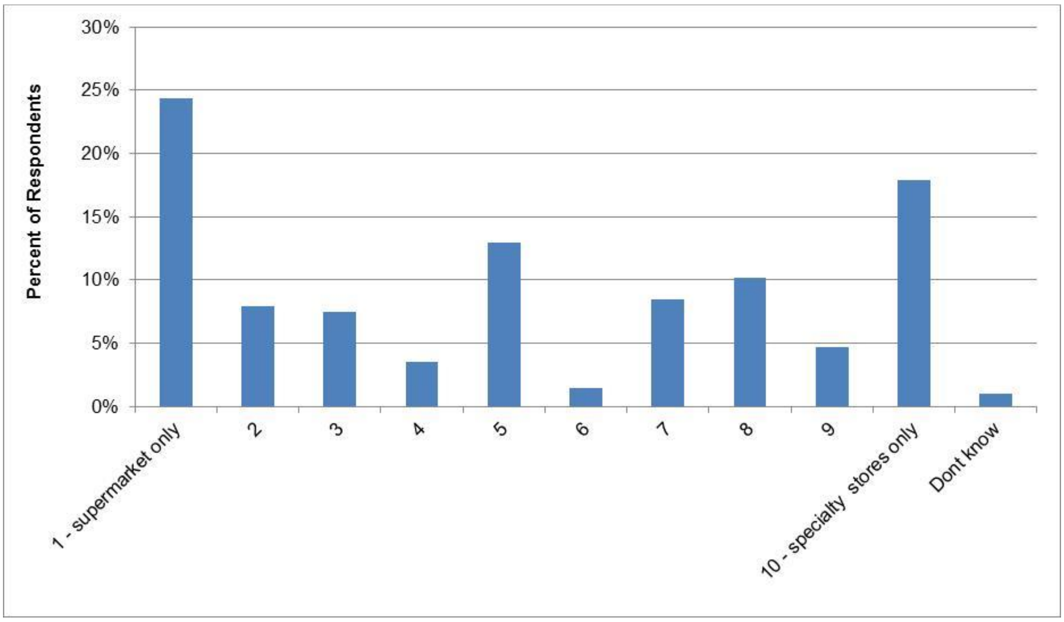
Glen Eira residents have access to a range of retail formats for food and grocery shopping, both within the municipality and in nearby centres. Full line supermarkets are the most commonly used format with over 60% of residents indicating that they shopped at each of Woolworths or Coles (refer Figure 48). Aldi supermarkets were used by 36% of survey respondents, followed by specialty/ethnic grocers (34%), independent grocers (28%) and local specialty stores which were used by 18% of respondents. 15% of respondents shopped at a fresh food market while 3.7% of visited farmers markets.

Figure 48: Food Retailing Formats Currently Used



Residents' preferred retail format for purchasing fresh produce was fairly evenly split between supermarkets and specialty stores (refer Figure 49). While 24% of respondents indicated that their preference was to only buy fresh produce at a supermarket, 18% referred to only shop at a specialty fresh food store. A further 13% were indifferent, while the remaining 45% of respondents had a mix of preferences.

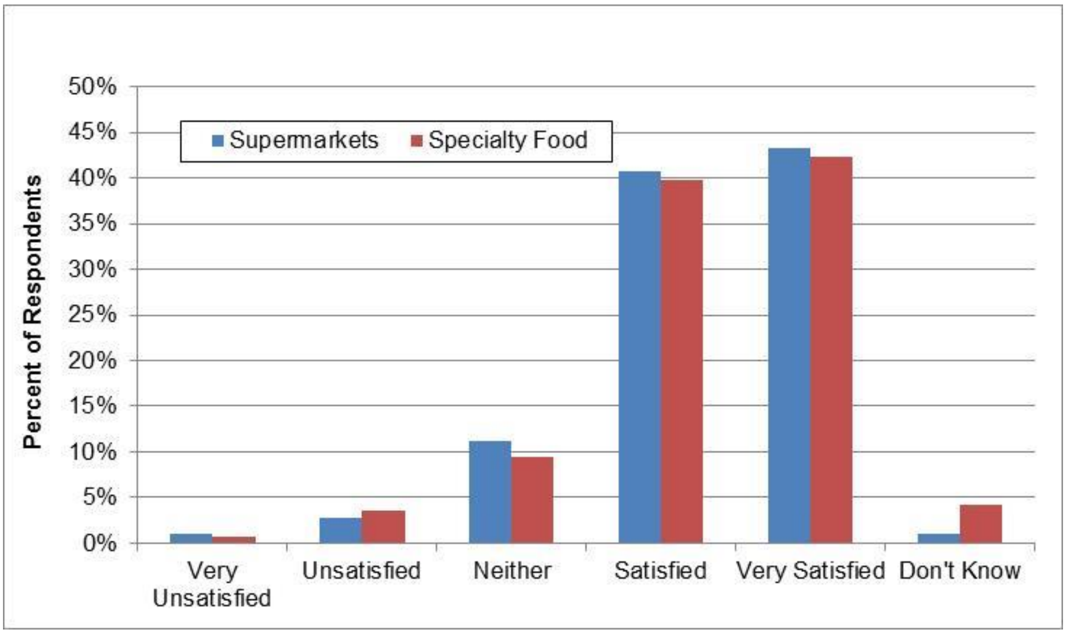
Figure 49: Where Respondents Prefer to Buy Fresh Produce



7.5 Satisfaction

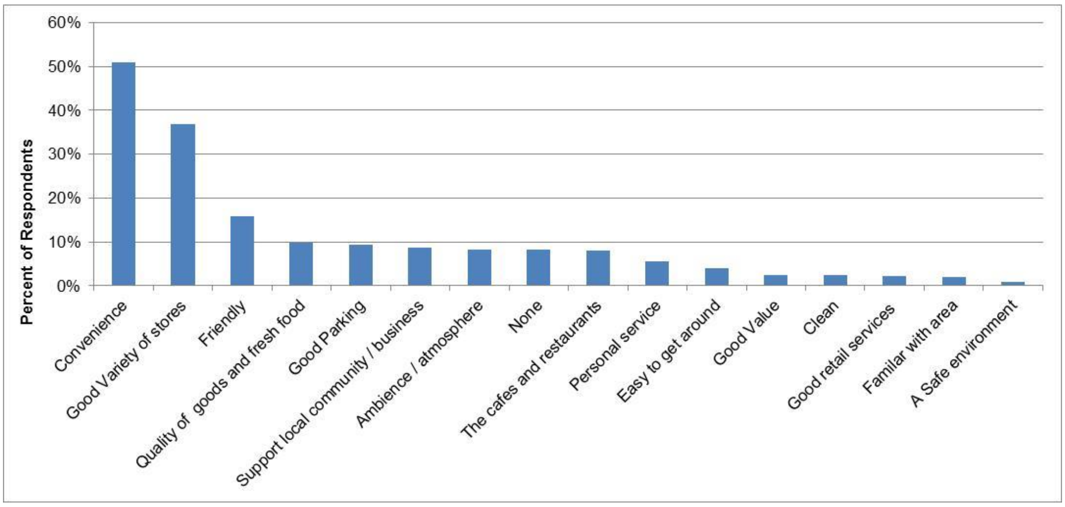
A high proportion of respondents (85%) indicated that they were either satisfied or very satisfied with the current weekly food shopping options in their local area (refer Figure 50). Similarly, 82% of respondents indicated that they were either satisfied or very satisfied with their local specialty food offer.

Figure 50: Satisfaction with Current Weekly Shopping Options



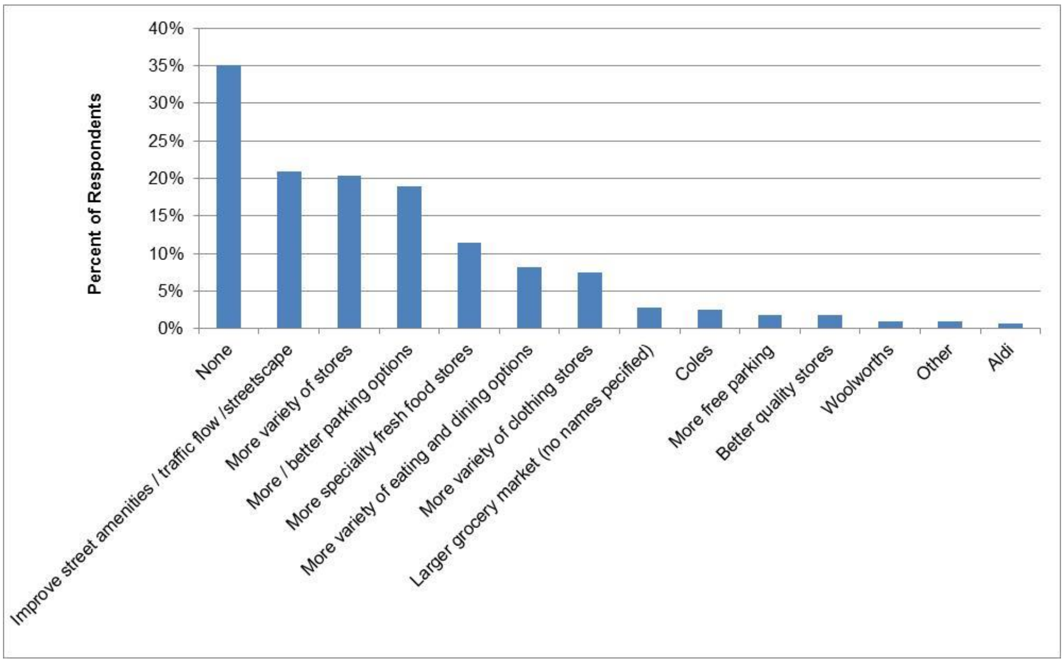
When asked what they love about their local shopping strip, the majority of respondents (51%) nominated convenience, followed by the variety of stores available (37%) (refer Figure 51).

Figure 51: What Respondents Love About Their Local Shopping Strip



While 35% of respondents did not offer suggestions for improving their shopping strip, the most common suggestions were improvements to the amenity, traffic flow and streetscape (21% of respondents), a greater variety of stores (20%) and improved parking (19%) (refer Figure 52). Interestingly, while 11% of respondents suggested more specialty fresh food stores, only 3% suggested a larger grocery store and a further 3.5% specifically suggested either a Coles or Woolworths supermarket.

Figure 52: Suggested Improvements



7.6 Online Shopping

The online shopping behaviour of Glen Eira residents is broadly consistent with that of the wider population, as indicated by the results of the Sensis survey of online shopping (refer Section 6.3). Only 7% of surveyed residents had shopped online for food and groceries within the past six months, compared to 34% that had shopped online for clothing (refer Figure 53).

While 64% of respondents indicated that they have not shopped online for either food and groceries or clothing in the last six months, 73% had purchased some other good or service online over this period. Within this group, the most popular items were books and music which were purchased by 27% of respondents, followed by an electrical goods (22%) and homewares (16%) (refer Figure 54).

Figure 53: Respondents Purchasing Goods Online Over Previous Six Months

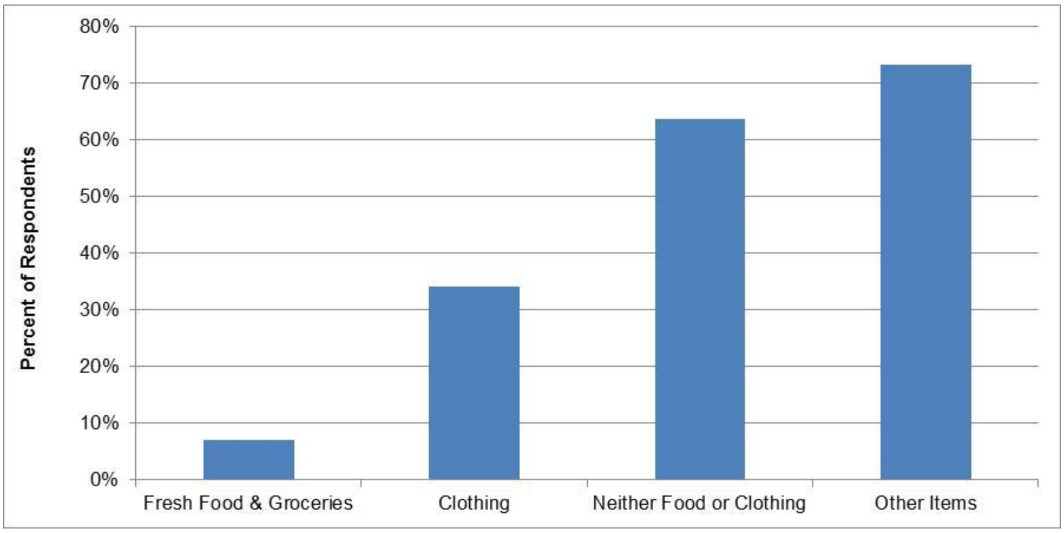
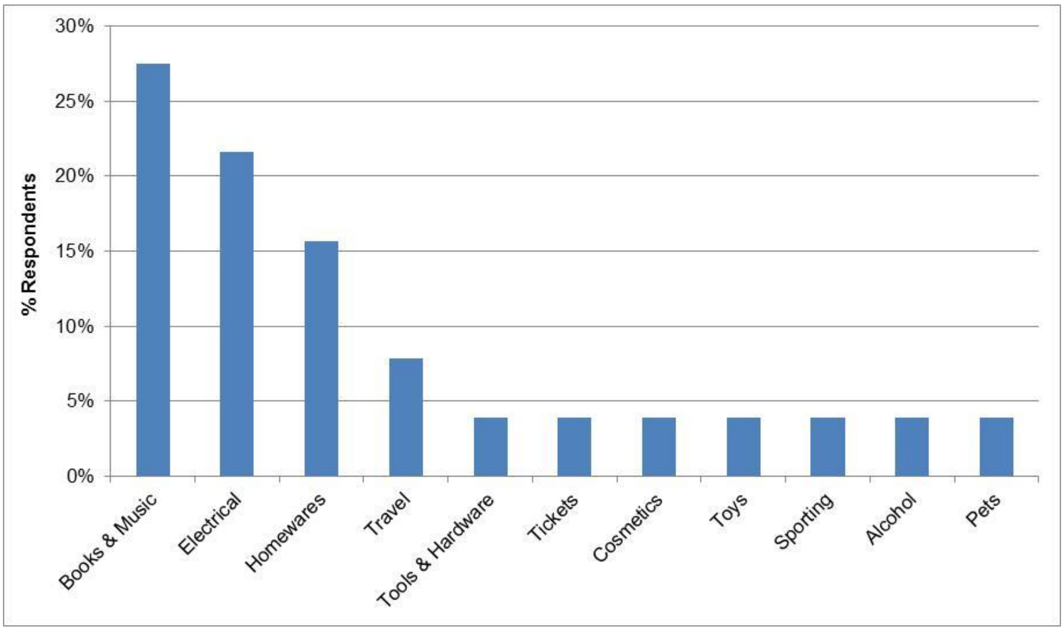


Figure 54: Other Items Purchased Online*



*Percent of respondents that purchased 'other goods and services' online in the last 6 months

7.7 Dining Out

Cafes and restaurants are a key element of Glen Eira's activity centres, and one which has experienced strong growth over the past decade. The proportion of respondents that had eaten out in their local area over the previous six month period ranged from 67% for breakfast/morning tea up to 83% for dinner.

Based upon respondents' indicated frequency of eating out in their local area, it is calculated that on average in a year they would eat out:

- 22 times for breakfast/morning tea;
- 26 times for lunch; and
- 27 times for dinner.

Figure 55: Eating Out for Breakfast / Morning Tea – Frequency in Local Area

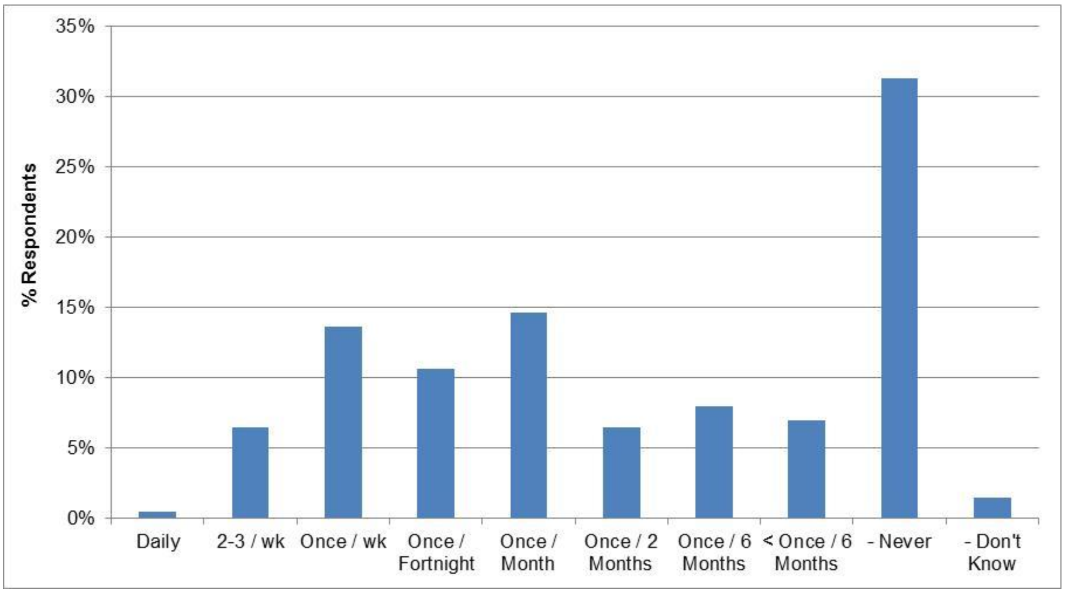


Figure 56: Eating Out for Lunch - Frequency in Local Area

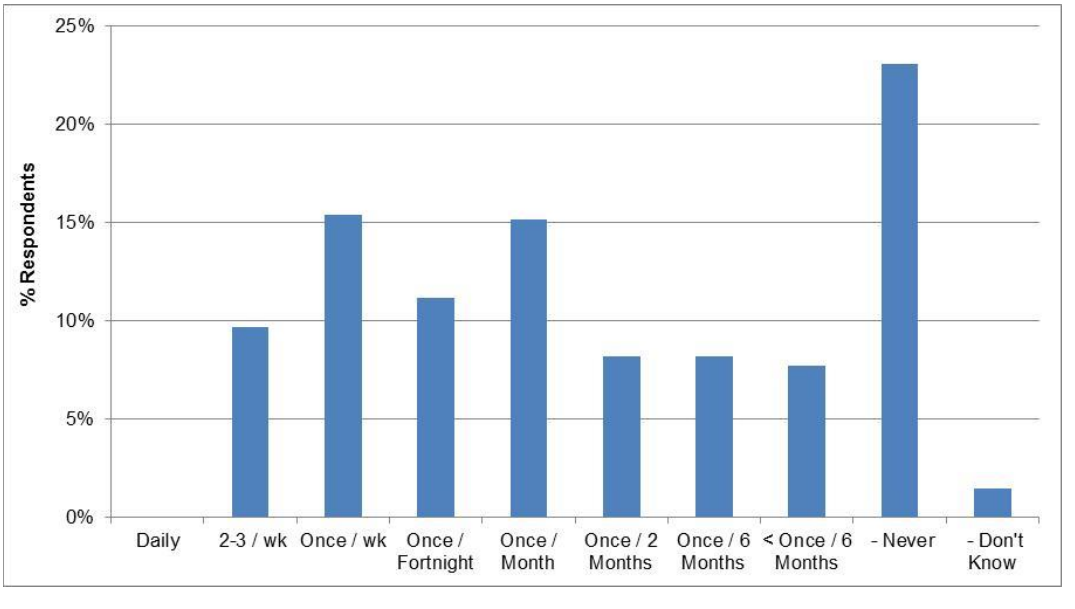
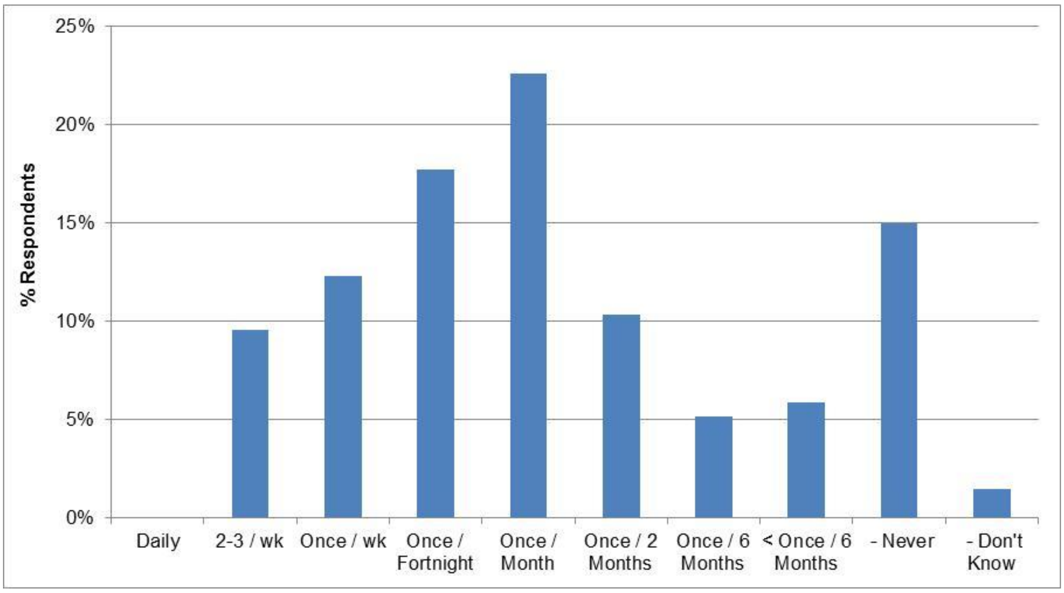
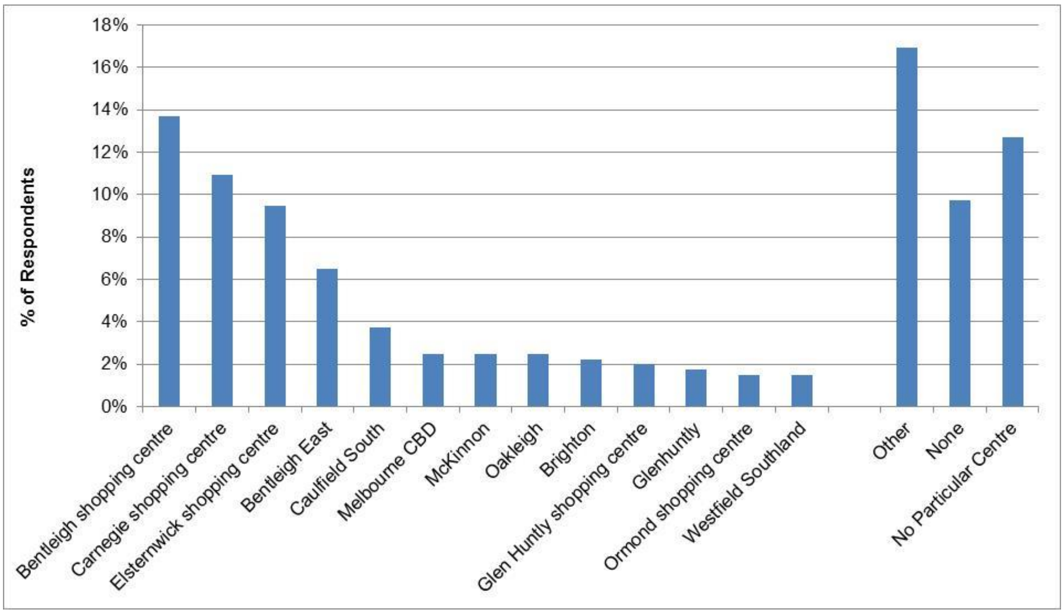


Figure 57: Eating Out for Dinner - Frequency in Local Area



When asked where they dine out most often for either breakfast, lunch or dinner, 23% of survey respondents indicated either 'none' or 'no particular centre'. 54% nominated centres within Glen Eira with the three urban villages being the most popular (refer Figure 58).

Figure 58: Eating Out Locations Most Used



8. Business Mix / Floorspace Survey

Glen Eira's activity centres have been surveyed to determine their current mix of businesses, and the floorspace they occupy, in order to understand the role and function of each centre. Identifying the mix of retail activities also provides an insight into their exposure of centres to the industry trends identified in Section 6, and the potential impact upon the future performance.

8.1 Methodology

For the purpose of this survey, the Phoenix Precinct has classified as a neighbourhood centre given that its total retail floorspace and retail mix is consistent with that of other neighbourhood centres.

The survey was limited to ground floor uses given the inherent difficulties associated with accurately identifying activities located on upper levels.

Activities have been classified according to the Australian and New Zealand Standard Industrial Classification (ANZSIC), and floor area measurements for individual properties were provided by the City of Glen Eira.

8.2 Vacancy Rates

While it is tempting to assess the performance of activity centres based upon vacancy rates, such a measure is sometimes misleading. For example, properties may be vacant because:

- they are undergoing a refit;
- there is a delay between a business vacating, and a new business occupying, a property; or
- properties are not advertised for lease by the landowner for a variety of reasons.

Given the relatively small number of properties within most activity centres, a temporary increase in the number of vacant properties may also result in what appears to be a high vacancy rate. For example, surveys were undertaken in January and February being a traditionally slow time of the year for retailers and therefore an opportune time to relocate.

Vacancy rates may also provide little insight into the overall performance of a centre. For example, a low vacancy rate may be due to a centre underperforming as a retail location, and instead being occupied by non-retail uses such as offices. Conversely, a high vacancy rate may be due to vacancies that are concentrated outside of a centre's retail core, and therefore provides little indication of the performance of retailers.

For these reasons, vacancy rates should be interpreted with caution, and only relied upon where the total number of properties in a centre is sufficiently large. Vacancy rates across each of the three tiers of activity centres have been calculated to be:

- Urban Villages 4.2%
- Neighbourhood activity centres 6%; and
- Local activity centres 9%.

Amongst the urban villages, Elsternwick has the highest vacancy rate at 7% while Bentleigh and Carnegie are much lower at 3.1% and 2.1% respectively (refer Figure 59). The majority of neighbourhood activity centres have vacancy rates around 6 to7% with Caulfield South (4.4%) and the Phoenix Precinct (2.8%) being notably lower. Alma Village has a vacancy rate of 9.5% but this is based upon a total of only 21 properties within the centre.

Figure 59: Vacancy Rates

Centre	Total No. Properties	Vacancy Rate
Urban Villages		
Bentleigh	292	3.1%
Carnegie	193	2.1%
Elsternwick	257	7.0%
Neighbourhood Activity Centres		
Alma Village	21	9.5%
Bentleigh East	121	5.8%
Caulfield Park	86	7.0%
Caulfield South	158	4.4%
Glen Huntly	94	6.4%
Hughesdale	57	7.0%
McKinnon	100	6.0%
Moorabbin	30	6.7%
Murrumbeena	60	6.7%
Ormond	107	6.5%
Phoenix Precinct	36	2.8%

8.3 Business Mix

Glen Eira has a total of 2,178 businesses located in ground floor premises within its activity centres. 34% of these businesses are located within the three urban villages, with a further 40% within the 10 neighbourhood activity centres and the Phoenix Precinct. There is a total of 1,040 retailing and hospitality businesses, representing 48% of all businesses across Glen Eira's activity centres.

Although food retailing accounts for only 7.7% of businesses, this sector is strategically important due to households shopping for food and groceries on a weekly basis. Many businesses within the non-food retailing and hospitality sectors are visited regularly and therefore also play a key role in determining the performance of centres.

The most notable difference in the business mix of the three types of centres is the proportion accounted for by offices and 'other' uses. This reflects the relative affordability of retail floorspace, with local centres having 28% of properties occupied by these uses, compared to 18.2% within neighbourhood activity centres, and only 10.5% within urban villages. This is also consistent with differences in vacancy rates across these three types of centres, with higher vacancy rates translating into lower rents which attract office and other non-retail uses

The proportion of businesses within the personal services, health care and business services sectors is reasonably consistent across centre types with the urban villages having 27.5% or businesses in this group, neighbourhood activity centres 30.2%, and local activity centres 25.2%. This reflects the service nature of these businesses, as opposed to office uses, and therefore a need to be accessible by local residents and other clients.

The performance of activity centres as retail locations, through the dynamics of the retail property market, is a key determinant of the business mix within centres. The weaker the retail performance of centres, the more affordable is retail space for non-retail/service uses, resulting in non-active frontages and a discontinuity of retail activity.

The role and function of activity centres is therefore largely determined by the performance of the retail traders. For this reason, it is important to understand the role and function of each activity centre as a retail location.

Figure 60: Glen Eira Business Mix – No. Businesses by Centre Type

Activity	Local	Neighbourhood	Urban Villages	Total
Food Retailing	36	56	75	167
Non-Food Retailing	78	160	178	416
Hospitality	100	181	176	457
Personal Services	73	136	90	299
Health Care	41	73	62	176
Business Services	29	54	52	135
Office Uses	62	57	28	147
Other	96	101	50	247
Vacant	51	52	31	134
Total	**566**	**870**	**742**	**2,178**

Figure 61: Glen Eira Business Mix – Percent of Businesses by Centre Type

Activity	Local	Neighbourhood	Urban Village	Total
Food Retailing	6.4%	6.4%	10.1%	7.7%
Non-Food Retailing	13.8%	18.4%	24.0%	19.1%
Hospitality	17.7%	20.8%	23.7%	21.0%
Personal Services	12.9%	15.6%	12.1%	13.7%
Health Care	7.2%	8.4%	8.4%	8.1%
Business Services	5.1%	6.2%	7.0%	6.2%
Office Uses	11.0%	6.6%	3.8%	6.7%
Other	17.0%	11.6%	6.7%	11.3%
Vacant	9.0%	6.0%	4.2%	6.2%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

8.4 Food Retailing

Food retailing represents an essential, and therefore the most stable, segment of retailing. While this sector accounts for 54,566 m^2 (27%) of Glen Eira's total retail and hospitality floorspace supply of 201,868 m^2, it is represented by only 167 businesses (16%) from a total of 1,040 retail and hospitality businesses within the municipality (refer Figure 62). This reflects the dominance of the major supermarket chains with 10 full line supermarkets within Glen Eira, (including a larger format Supa IGA in Bentleigh East), as well as two Aldi supermarkets. Together, these supermarkets have a total floor area of 23,852 m^2, representing 44% of total food retailing floorspace.

The majority (56%) of food retailing floorspace is located within the three urban villages, followed by neighbourhood centres with 31% and local centres with 13%. As floorspace provides a reasonable indication of turnover, and therefore the use of centres by households, this distribution highlights the relative importance of centres outside the three urban villages in providing convenient access to food retailers for non-weekly food shopping.

Figure 62: Glen Eira Business / Floorspace Mix

Category	Local	Neighbourhood	Urban Village	Total
Businesses (No.)				
Food Retailing	36	56	75	167
Non-Food Retailing	78	160	178	416
Hospitality	100	181	176	457
Total	214	397	429	1,040
Floor Area (m^2)				
Food Retailing	7,262	16,856	30,448	54,566
Non-Food Retailing	14,052	31,698	37,258	83,009
Hospitality	15,030	24,515	24,749	64,294
Total	36,344	73,070	92,455	201,868

Non-food retailing represents 40%of total retail and hospitality floorspace within the urban villages, 30% in neighbourhood activity centres and 39% in local activity centres. Hence, this sector still plays an important role in sustaining retail activity within all centre types, despite facing strong competition from regional shopping centres and other destination retail precincts.

Non-food retailing covers a wide variety of activities, ranging from convenience retailers such as pharmacies, newsagents and florists through to destination style retailers which include fashion and other specialty retailers. Non-food retail floorspace is distributed across the three tiers of centres in as follows:

- Urban villages 37,258 m^2 (45%)
- Neighbourhood centres 31,698 m^2 (38%)
- Local centres 14,052 m^2 (17%)

Major non-food retailing activities within Glen Eira's activity centres are fashion retailing, which accounts for 21% of non-food retail floorspace, and pharmacies which represent a further 8.4%. Interestingly, fashion retailing represents 14% of floorspace within local centres, which is comparable to that of neighbourhood centres (15%), and a little less than within the urban villages (21%). This highlights the attraction of affordable floorspace as well as the capacity for individual fashion retailers to be a destinations in their own right.

Hospitality activities, such as cafes and restaurants, have accounted for an increasing amount of floorspace within Glen Eira's activity centres over the past decade. Together with takeaway food outlets, they now account for 64,294 m^2 or 32% of total floorspace within activity centres. Local centres have the highest proportion of floorspace occupied by hospitality activities with 41%, followed by neighbourhood centres (34%) and urban villages (27%).

Although hospitality activities represent a form of discretionary spending, and therefore susceptible to changing economic conditions, they have played an important role in ensuring the vibrancy and amenity of centres. Strong growth within this sector has also enabled floorspace vacated by other uses to continue to be occupied. In addition, they have played an essential role in supporting the vitality of local centres, through attracting customers from both the immediate residential area and in some cases a much wider area. There is however a need to ensure that these uses do not 'crowd out' retail activities that are essential for servicing local retail needs.

The following tables provide a detailed analysis of the number of businesses and occupied floorspace across the various retail sub-categories.

Figure 63: Number of Retail and Hospitality Businesses by Centre Classification

Category	Local	Neighbour - hood	Urban Village	Total
1174 Bakery Product Manufacturing (Non-factory based)	10	14	14	38
4110 Supermarket and Grocery Stores	8	20	19	47
4121 Fresh Meat, Fish and Poultry Retailing	5	4	11	20
4122 Fruit and Vegetable Retailing	4	4	10	18
4123 Liquor Retailing	8	9	8	25
4129 Other Specialised Food Retailing	1	5	13	19
Total Food Retailing	36	56	75	167
4211 Furniture Retailing	2	4	3	9
4212 Floor Coverings Retailing	4			4
4213 Housewares Retailing	1	3	2	6
4214 Manchester and Other Textile Goods Retailing		3	6	9
4221 Electrical, Electronic and Gas Appliance Retailing	1	5	9	15
4222 Computer and Computer Peripheral Retailing	2	6	4	12
4229 Other Electrical and Electronic Goods Retailing	1	1	1	3
4231 Hardware and Building Supplies Retailing	2	7	1	10
4231 Hardware, Building and Garden Supplies Retailing	7	9	4	20
4232 Garden Supplies Retailing	1	1		2
4241 Sport and Camping Equipment Retailing	6	6	2	14
4243 Toy and Game Retailing	1	3	5	9
4244 Newspaper and Book Retailing	8	13	9	30
4251 Clothing Retailing	10	15	35	60
4252 Footwear Retailing	1	4	10	15
4253 Watch and Jewellery Retailing		5	7	12
4260 Department Stores			1	1
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	6	13	16	35
4272 Stationery Goods Retailing	3	5	2	10
4273 Antique and Used Goods Retailing			1	1
4274 Flower Retailing	2	11	2	15
4279 Other Store-Based Retailing n.e.c.	19	46	58	123
4310 Non-Store Retailing	1			1
Total Non-Food Retailing	78	160	178	416

Category	Local	Neighbour - hood	Urban Village	Total
Total Retailing	114	216	253	583
4511 Cafes and Restaurants	55	129	151	335
4512 Takeaway Food Services	45	52	25	122
Total Hospitality	100	181	176	457
Total Retail and Hospitality	214	397	429	1,040

Figure 64: Retail and Hospitality Floor Area (m²) by Centre Classification

Category	Local	Neighbour - hood	Urban Village	Total
1174 Bakery Product Manufacturing (Non-factory based)	1,447	2,226	2,441	6,115
4110 Supermarket and Grocery Stores	2,218	11,141	19,013	32,371
4121 Fresh Meat, Fish and Poultry Retailing	678	623	1,435	2,737
4122 Fruit and Vegetable Retailing	591	507	2,883	3,982
4123 Liquor Retailing	2,227	1,371	2,390	5,988
4129 Other Specialised Food Retailing	100	988	2,286	3,374
Total Food Retailing	7,262	16,856	30,448	54,566
4211 Furniture Retailing	465	928	925	2,318
4212 Floor Coverings Retailing	1,172			1,172
4213 Housewares Retailing	138	375	188	701
4214 Manchester and Other Textile Goods Retailing		613	3,753	4,365
4221 Electrical, Electronic and Gas Appliance Retailing	151	2,002	1,630	3,783
4222 Computer and Computer Peripheral Retailing	218	599	508	1,324
4229 Other Electrical and Electronic Goods Retailing	206	544	433	1,183
4231 Hardware and Building Supplies Retailing	494	2,476	202	3,172
4231 Hardware, Building and Garden Supplies Retailing	1,061	1,386	601	3,049
4232 Garden Supplies Retailing	111	56		166
4241 Sport and Camping Equipment Retailing	1,254	1,258	510	3,022
4243 Toy and Game Retailing	100	609	834	1,543
4244 Newspaper and Book Retailing	1,378	1,611	1,715	4,703
4251 Clothing Retailing	2,746	3,240	5,181	11,166
4252 Footwear Retailing	235	2,682	1,524	4,441
4253 Watch and Jewellery Retailing		394	750	1,144
4260 Department Stores			1,468	1,468
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	662	3,280	4,293	8,234
4272 Stationery Goods Retailing	598	605	1,263	2,466

Category	Local	Neighbour - hood	Urban Village	Total
4273 Antique and Used Goods Retailing			43	43
4274 Flower Retailing	432	1,199	347	1,977
4279 Other Store-Based Retailing n.e.c.	2,555	7,845	11,092	21,492
4310 Non-Store Retailing	76			76
Total Non-Food Retailing	14,052	31,698	37,258	83,009
Total Retail	21,314	48,554	67,706	137,575
4511 Cafes and Restaurants	9,199	17,572	21,325	48,096
4512 Takeaway Food Services	5,830	6,944	3,424	16,198
Total Hospitality	15,030	24,515	24,749	64,294
Total Retail and Hospitality	36,344	73,070	92,455	201,868

9. Trade Area Surveys

In the absence of in-centre surveys of shoppers, an indication of the trade area for centres has been obtained through surveying vehicles within each centre. Vehicle number plate details were recorded, and registration postcode obtained from Vicroads at an aggregated postcode level. While this approach has a number of advantages in terms of affordability, it does not provide details of activities being undertaken by visitors within centres. Similarly, it does not record visitors that have arrived at this centre by public transport or walking.

Some of these limitations may however be addressed through referring to the results of the telephone survey which identify shopping behaviour for Glen Eira residents, with visitors from outside the immediate area likely to have a similar pattern of behaviour. For example the degree to which local residents walk to their main food and grocery shopping location, or the distance to which they travel to cafes and restaurants, may be used to modify the extent of trade areas for different activities within centres.

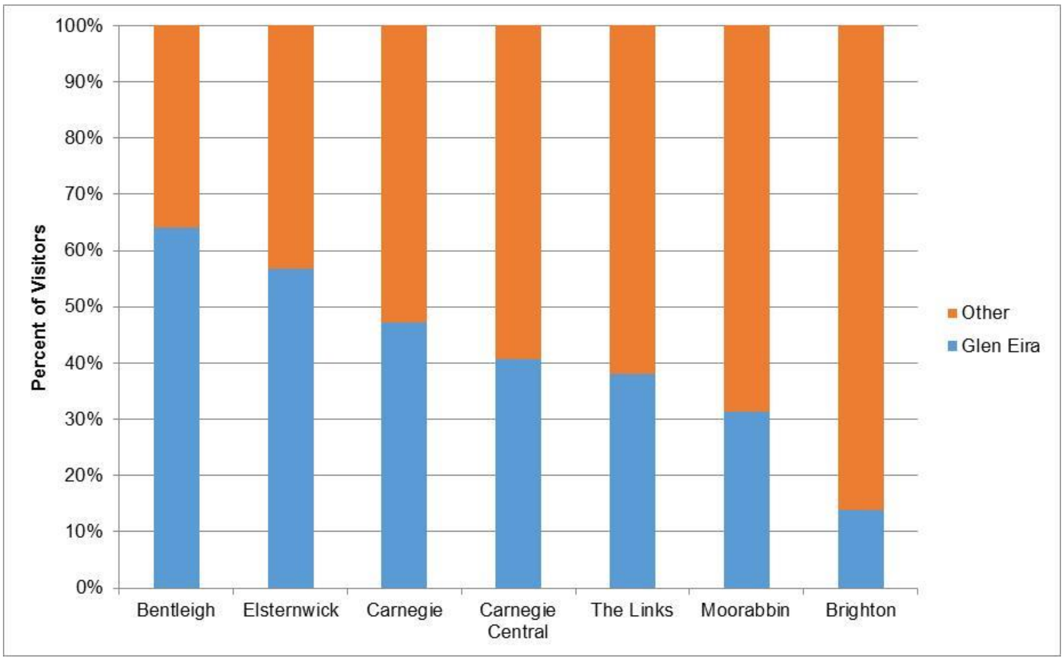
Surveys were undertaken for Glen Eira's three urban villages, as well as centres just outside the municipality which offer full-line supermarkets being The Links shopping centre (Oakleigh South), Moorabbin Activity Centre and Bay Street Brighton. Glen Eira's three urban villages provide a diverse mix of activities beyond just food and grocery retailing and therefore these surveys do not specifically identify a trade area for food and grocery shopping. Conversely, as the surveys within nearby centres (Bay Street Brighton, Moorabbin Activity Centre and The Links shopping centre) were undertaken in supermarket car parks, they provide a more accurate indication of the trade area for food and grocery shopping.

The location of centres within Glen Eira will also influence the extent to which visitors originate from within the municipality. For example, the Bentleigh Activity Centre had the highest proportion of visitors from within Glen Eira (64%) (refer Figure 65), reflecting its central location within the municipality. Conversely, Carnegie Central has the lowest proportion (47%) due to its location on the municipal boundary adjacent to Dandenong Road.

The availability of food and grocery shopping facilities adjacent to Glen Eira's municipal boundary will also influence the split between these two groups. For example, Carnegie Central attracts 60% of its visitors from outside Glen Eira, reflecting the limited availability of supermarkets to the north of Dandenong Road.

Surveys of vehicles in the car park of the Coles supermarket in Bay Street Brighton indicated that 46% of visitors that drove to the supermarket were from within the City of Bayside, which largely represents the area between the Nepean Highway and Port Phillip Bay. Glen Eira residents accounted for 14% of visitors, while residents of Port Phillip and Kingston each accounted for 9% of visitors.

Figure 65: Residential Location of Visitors by Centre



While individual centres are analysed in Part D of this report, the following figures show the results for each.

Figure 66: Bentleigh Trade Area

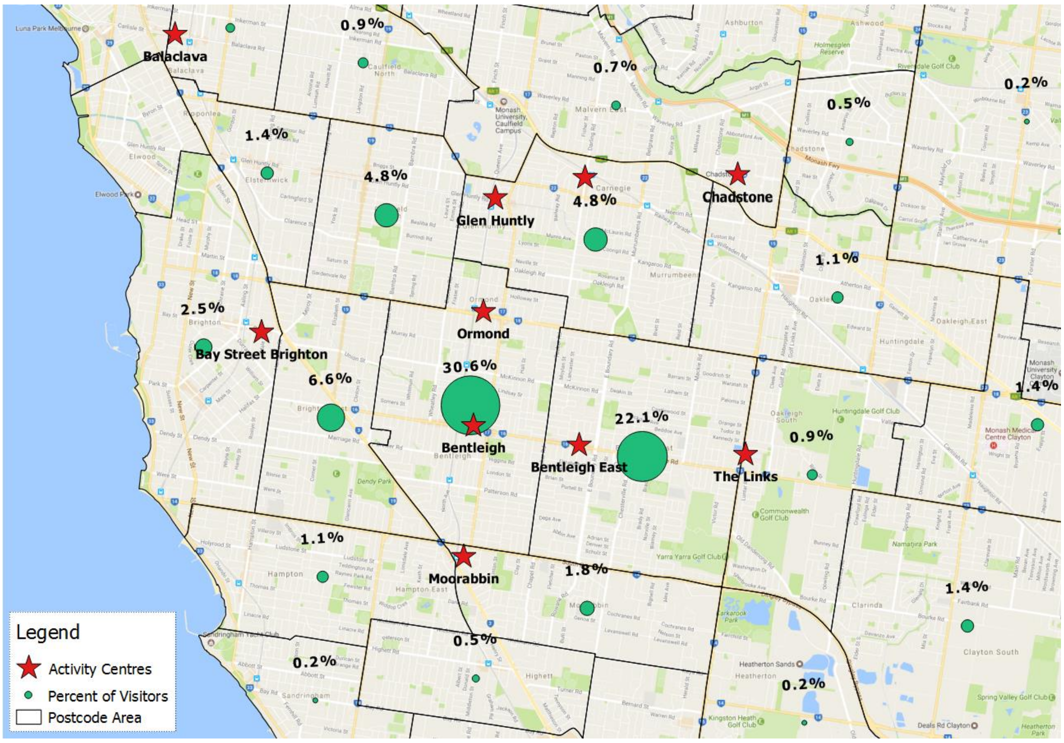


Figure 67: Elsternwick Trade Area

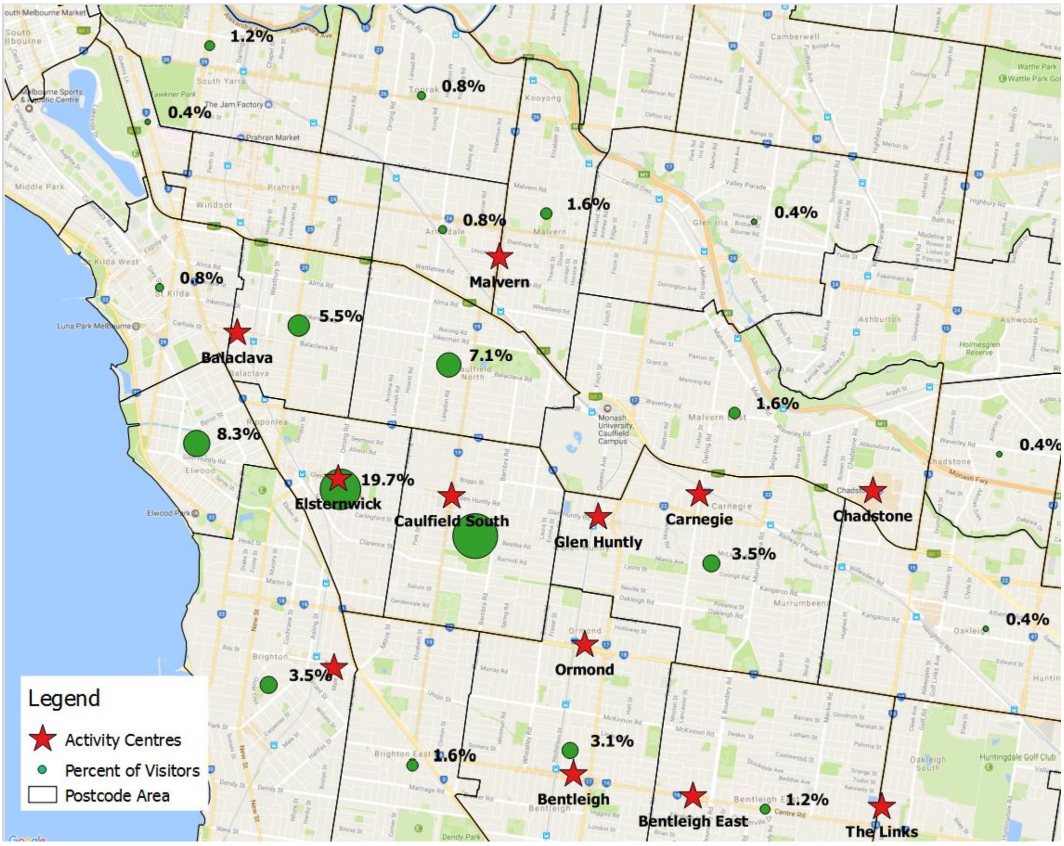


Figure 68: Carnegie Trade Area

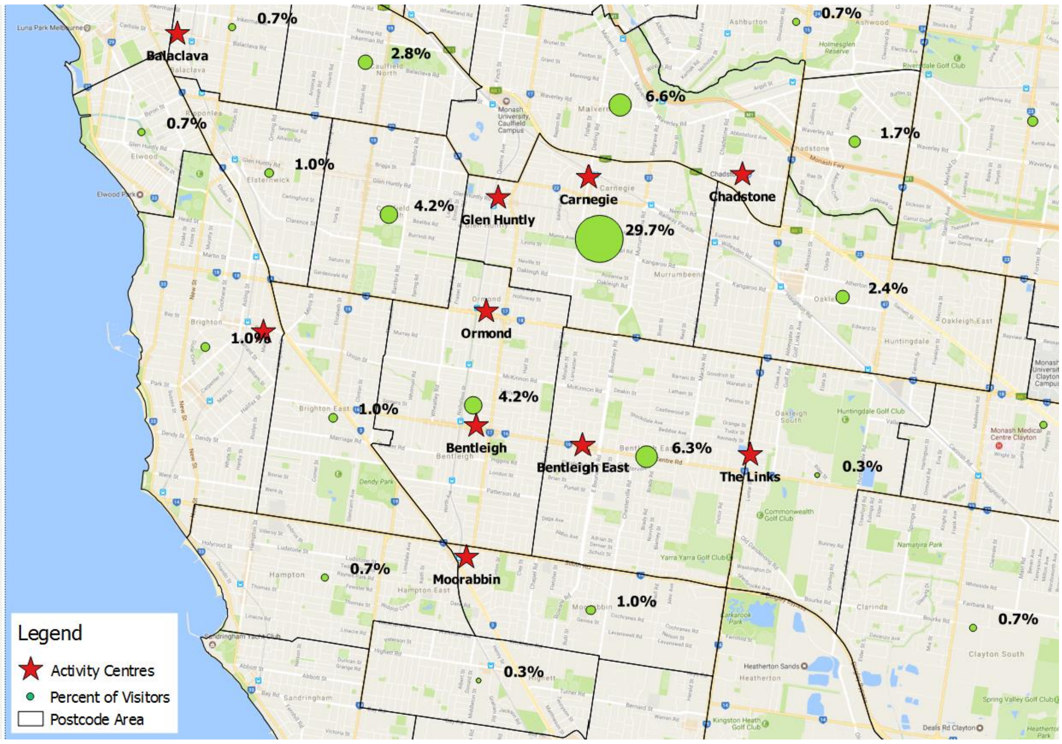


Figure 69: Carnegie Central Trade Area

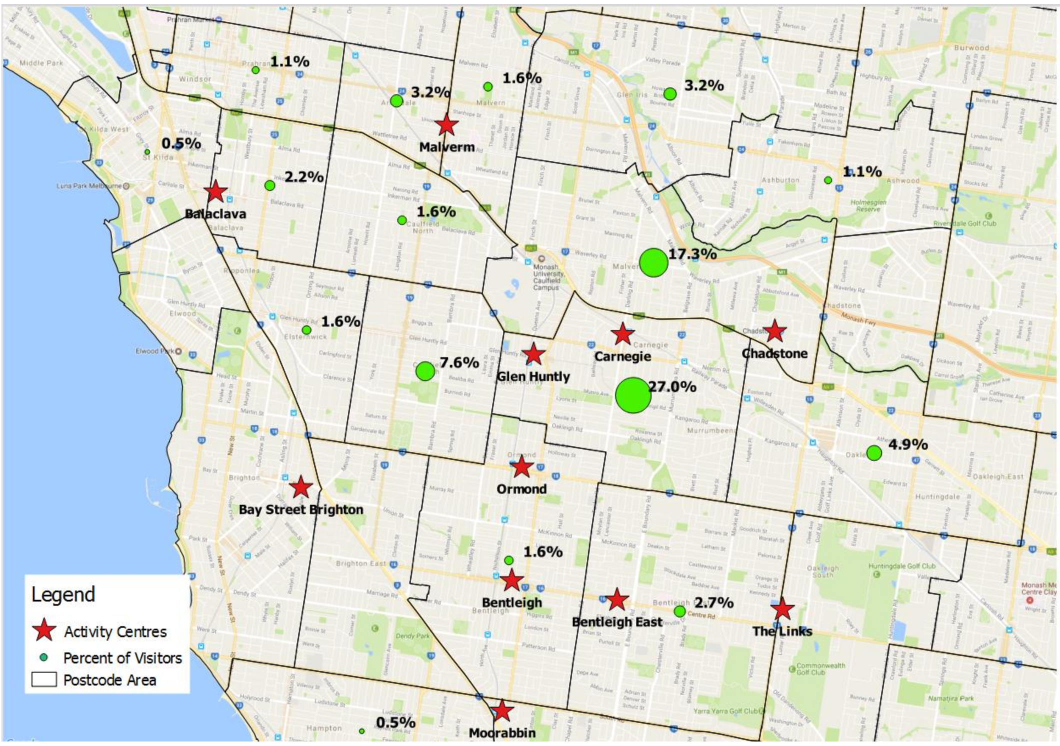


Figure 70: Moorabbin Trade Area

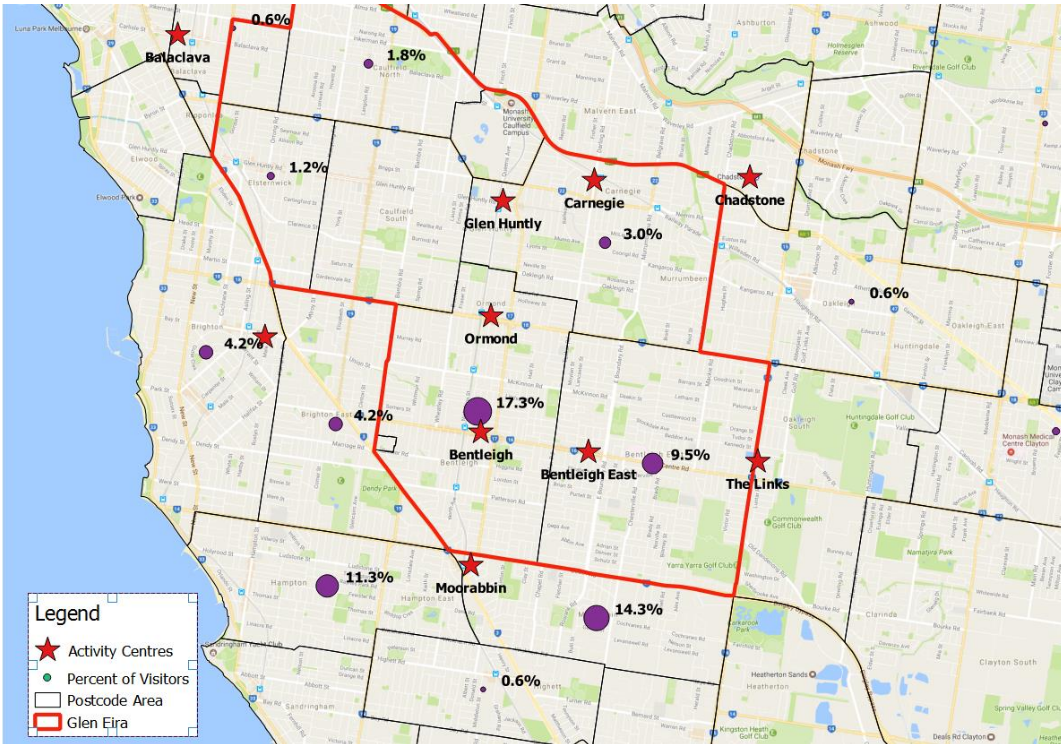


Figure 71: The Links (Oakleigh South) Trade Area

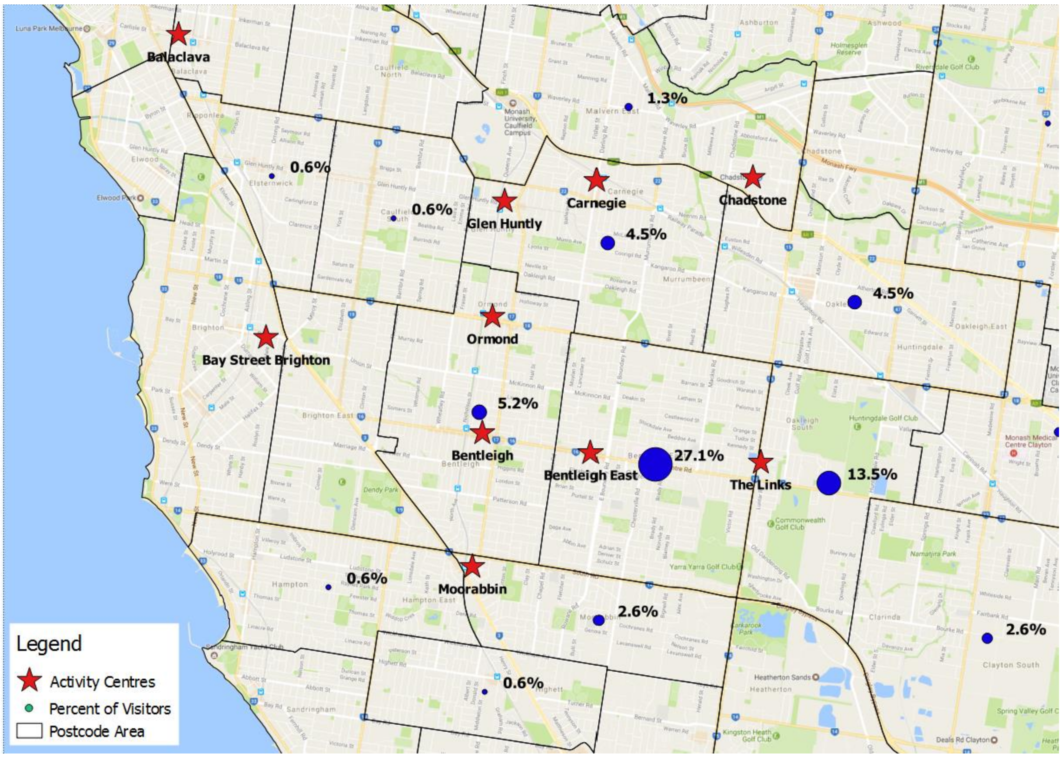
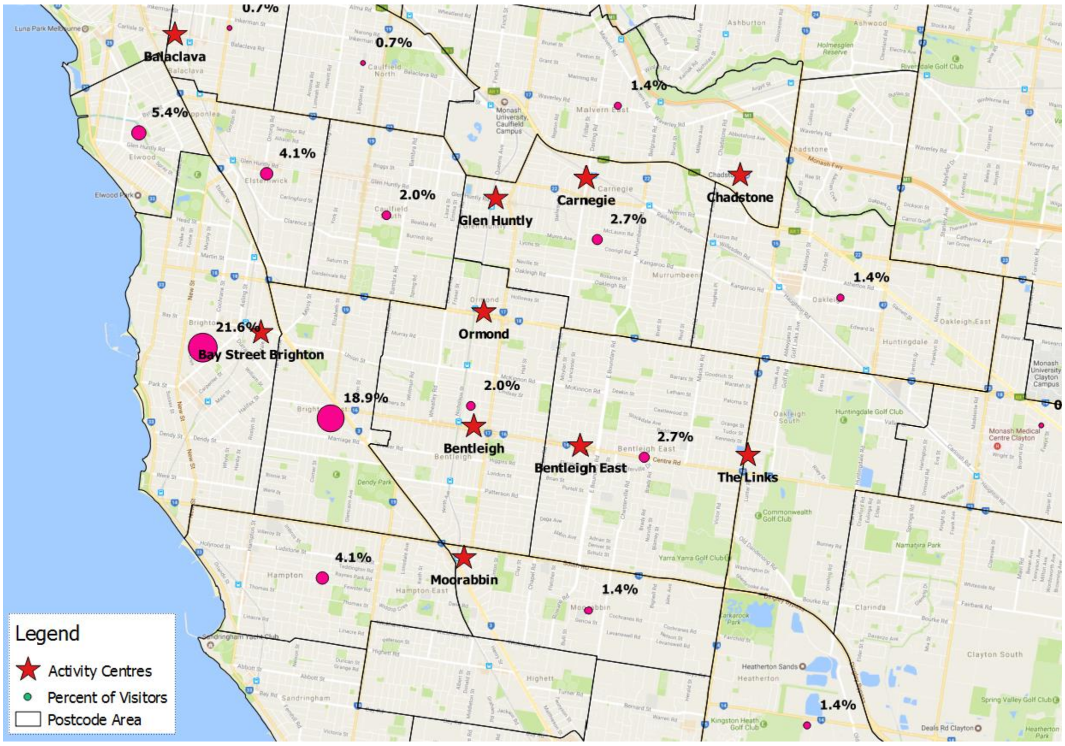


Figure 72: Bay Street Brighton Trade Area



Part C: Supportable Retail Floorspace Assessment

10. Supportable Food Retailing Floorspace Assessment

The future provision of retail floorspace within Glen Eira will play a key role in satisfying the retail needs of local residents, as well as ensuring the vibrancy and ongoing economic viability of centres. An under-provision of retail floorspace may result in reduced opportunities for new retailers and other service businesses to establish within centres, resulting in shoppers choosing to use centres outside of the municipality. Alternatively, too much floorspace may result in excessive vacancies and/or shop fronts being occupied by non-retail activities such as offices. Understanding the amount of retail floorspace that may be supported is also important for assessing the impact of future proposed retail developments upon existing activity centres.

10.1 Methodology

The methodology adopted for assessing the amount of additional retail floorspace that may be supported within Glen Eira over the next 20 years reflects a number of key observations including:

- Development pressure for new retail floorspace being in the form of full-line supermarkets similar to that recently proposed for Ormond Station, Caulfield and East Village.
- The impact of online retailing, and ongoing competition from both Chadstone and Southland shopping centres, limiting the amount of new floorspace that may be supported by non-food retailers.
- Incremental growth in smaller retail premises continuing to occur as part of new residential apartment projects on the periphery of existing activity centres.

Given these observations, the primary focus of this assessment is upon the level of additional floorspace required for new supermarkets, and food and grocery retailing generally.

Traditional retail analysis to determine the level of supportable retail floorspace relies upon assumptions being made with respect to the extent of a centre's catchment, the share of available household expenditure that may be captured, and the assumed retail turnover density (turnover per square metre) for retailers. The calculated level of supportable floorspace is very sensitive to these assumptions, which may require additional analysis to be undertaken when assessing specific development proposals.

10.2 The 20 Minute City

A key policy within Plan Melbourne is the concept of a '20 minute neighbourhood', whereby households are able to meet most of their everyday needs within a 20 minute walk, cycle or public transport trip of home. Based upon a pedestrian walking speed of 4.5 km/h, this would equate to a distance of 1.5 km.

Figure 73 shows the location of full line supermarkets across South East Melbourne, together with a 1.5 kilometre buffer. This indicates that the majority of Glen Eira's residential areas are currently within 1.5 km of a full line supermarket, thereby enabling residents to easily access weekly food and grocery shopping, as well as many of the other goods and services within Glen Eira's urban villages. The only area of Glen Eira where there is a significant number of households who cannot access a full line supermarket within 1.5 km is the area focused around Duncan McKinnon Reserve at the corner of North and East Boundary roads. This includes the East Village precinct where a new town centre is proposed.

Figure 73: Full-Line Supermarket Buffer (1.5 Km)

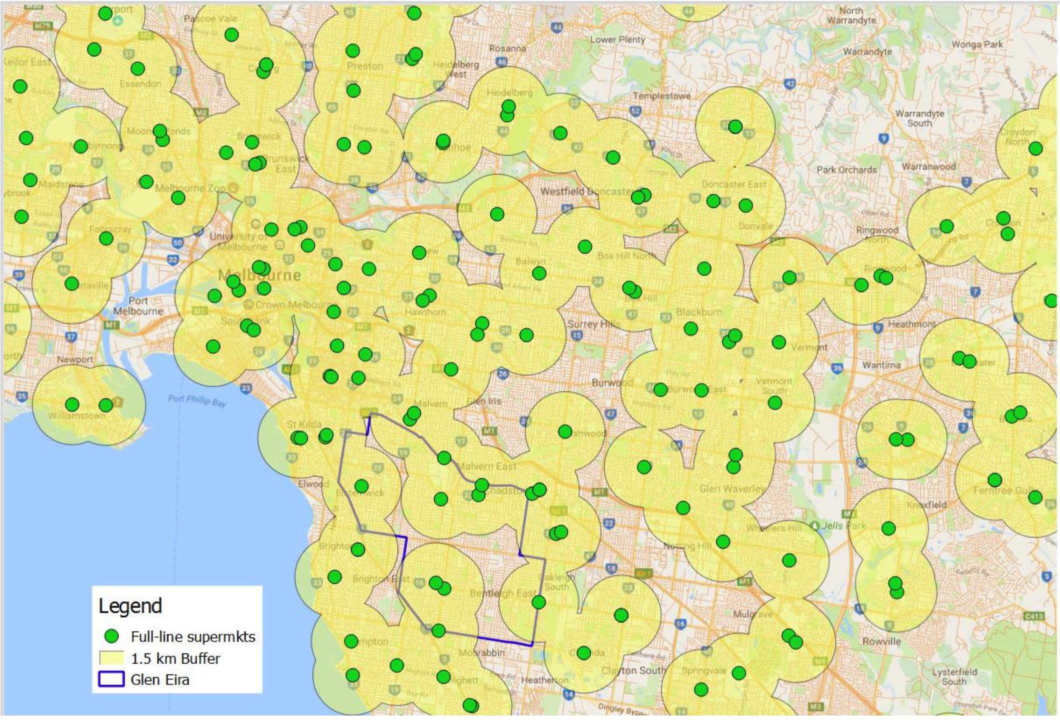
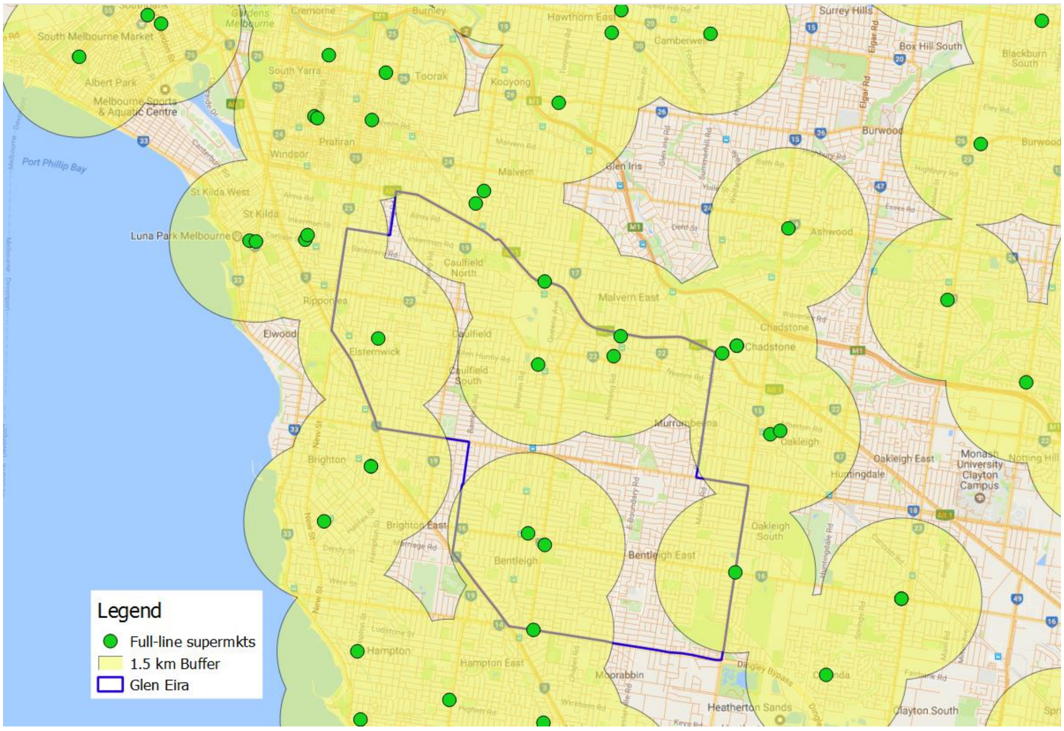


Figure 74: Full-Line Supermarket Buffer (1.5 Km)



10.3 Existing Food Retailing Floorspace Performance

While industry publications provide measures of floorspace performance for privately managed shopping centres, no data is available for retailers within traditional retail strips such as those within Glen Eira. A key source of such information is businesses that are currently advertised for sale, which provide details of weekly turnover and in some cases floor area. While turnover levels vary considerably depending upon location and the level of competition, reasonable assumptions may be made about the performance of Glen Eira's food retailers relative to a typical business.

Based upon this available information, retail turnover densities (turnover per square metre) have been estimated for Glen Eira's food retailers within each of the ABS food retail categories (refer Figure 75). Turnover densities for supermarkets have been estimated based upon their size, category mix, level of observed activity and industry benchmarks.

Figure 75: Food Retailing - Estimated Retail Turnover Densities 2017

	Local	Neighbour - hood	Urban Village
1174 Bakery Product Manufacturing (Non-factory based)	$3,700	$3,700	$3,700
4110 Supermarket and Grocery Stores			
Supermarkets (Full-line)	$15,000	$15,000	$20,000
Aldi	$12,000	$12,000	$12,000
Grocers	$5,000	$5,000	$5,000
4121 Fresh Meat, Fish and Poultry Retailing	$9,600	$9,600	$9,600
4122 Fruit and Vegetable Retailing	$6,200	$6,200	$6,200
4123 Liquor Retailing	$5,700	$5,700	$5,700
4129 Other Specialised Food Retailing	$6,000	$6,000	$6,000

Combining measured floorareas from the land use survey, with these estimated retail turnover densities, provides an estimate of the current total annual turnover for Glen Eira retailers within each of the food retailing categories (refer Figure 76).

It is estimated that Glen Eira's activity centres currently generate total food retail sales of $585 million. Full line supermarkets are estimated to account for $379 million (65%), with Aldi supermarkets representing a further $38 million (6.5%). It should however be noted that the Bentleigh East Supa IGA supermarket has been classified as a full-line supermarket given its overall size and observed performance.

Based upon the existing activity centre designations, the three urban villages (Elsternwick, Carnegie and Bentleigh) are estimated to account for 67% of total food retailing within Glen Eira, followed by neighbourhood centres with 26% and local centres representing 7%.

Figure 76: Food Retailing – Estimated Turnover per Annum ($ Million) 2017

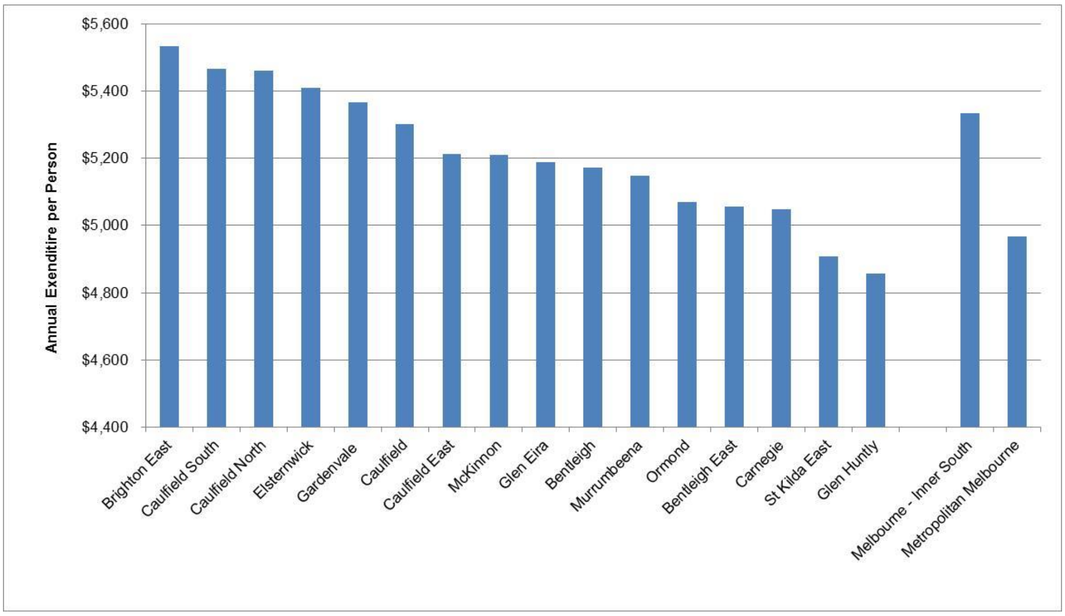
	Local	Neighbour-hood	Urban Village	Total
4110 Supermarket and Grocery Stores				
Supermarkets (Full-line)	$0.0	$104.4	$274.9	$379.3
Aldi	$0.0	$0.0	$37.8	$37.8
Grocers	$11.1	$19.3	$9.6	$40.0
1174 Bakeries	$5.4	$8.2	$9.0	$22.6
4121 Fresh Meat, Fish and Poultry Retailing	$6.5	$6.0	$13.8	$26.3
4122 Fruit and Vegetable Retailing	$3.7	$3.1	$17.9	$24.7
4123 Liquor Retailing	$12.7	$7.8	$13.6	$34.1
4129 Other Specialised Food Retailing	$0.6	$5.9	$13.7	$20.2
Total Food Retailing	$39.9	$154.8	$390.3	$585.0

10.4 Household Expenditure

Estimated household expenditure on fresh food and groceries, as well as other retail categories, has been sourced from Market Data Systems (Marketinfo), being the recognised provider of such data to retail industry analysts. Using micro simulation techniques, Market Data Systems estimate household expenditure based upon the ABS Household Expenditure Survey and various socio economic and demographic variables.

The estimated level of per capita expenditure on fresh food and groceries in 2014 generally ranged between $4,800 and $5,100 per annum, with only Brighton East ($5,534) and St Kilda East ($4,907) lying outside of this range (refer Figure 77). By comparison, estimated per capita expenditure within the broader Melbourne-Inner South region is $5,333 per annum, and within metropolitan Melbourne it is estimated to be $4,967 per annum.

Figure 77: Food Retailing – Estimated Annual Expenditure per person ($2014)



Source: Marketinfo 2014, MDS Market Data Systems

Currently available expenditure data from Market Data Systems relates to 2014, but has been inflated to take account of increases in prices for food items over the period to 2016.

The total level of expenditure on food and groceries by Glen Eira residents is estimated to be $780 million in 2016 ($2016). This is expected to increase to $947 million by 2036 ($2016) based upon projected population growth (refer Figure 78).

Figure 78: Glen Eira Residents – Total Food and Grocery Expenditure ($2016 million)

Category	Per Capita Spend ($2014)	Per Capita Spend ($2016)	2016 ($m)	2021 ($m)	2026 ($m)	2031 ($m)	2036 ($m)
Fresh Food	$2,337	$2,391	351.4	374.7	393.8	410.4	426.5
Food Groceries	$1,532	$1,567	230.4	245.6	258.2	269.1	279.6
Non-Food Groceries	$632	$646	95.0	101.3	106.5	111.0	115.3
Liquor	$689	$704	103.5	110.4	116.0	120.9	125.6
Total Food, Groceries & Liquor	$5,189	$5,309	780.4	832.0	874.6	911.3	947.0

Source: Marketinfo 2014, Id Consultants

10.5 Distribution of Local Households' Expenditure

Household expenditure on food and grocery items will be distributed across a variety of retail formats, including those typically located outside of activity centres or which are not primarily engaged in food, groceries and liquor retailing. Examples of these formats, and the items they may sell, include:

- service stations - milk, soft drinks
- takeaway stores - soft drinks, chips
- pharmacies - grocery items, cosmetics
- discount department stores - limited grocery range
- hotels - packaged liquor
- online retailers - groceries, fresh food, liquor.

As result, not all household expenditure on food and groceries will be directed to food, grocery and liquor retailers. For the purpose of this assessment, it has been assumed that 15% of total food grocery and liquor expenditure is directed to these other businesses. It is notable that the results of the telephone survey indicated that residents on average shop online for fresh food and groceries 1.5 times per year, which may alone potentially represent 3% of total expenditure.

Similarly, a portion of residents' spending on food, groceries and liquor will occur at centres outside of Glen Eira. Telephone surveys indicated that 73% of centres used by residents for fresh food and grocery shopping are within Glen Eira. It is reasonable to assume that this translates into an equivalent value of sales.

10.6 Non- Glen Eira Shoppers

Glen Eira's activity centres will attract visitors from outside of the municipality to undertake fresh food and grocery shopping. Based upon the results of the car park surveys, and giving consideration to the factors attracting visitors from outside of Glen Eira, it is estimated that these visitors account for approximately 20% of food, grocery and liquor expenditure at Glen Eira's activity centres.

10.7 Projected Food, Liquor and Grocery Expenditure

The level of food, liquor and grocery expenditure within Glen Eira's activity centres has been projected based upon forecast population growth and assumptions relating to the distribution of household spending across centres (refer Figure 79). Key projections include:

- Expenditure by Glen Eira residents on food, groceries and liquor increasing from $780 million to $947 million over the period 2016-2036.
- Total food, liquor and grocery expenditure at Glen Eira's activity centres increasing from $605 million to $734 million over the same period

Figure 79: Projected Food, Liquor and Grocery Expenditure ($2016)

	2016	2021	2026	2031	2036
1. Glen Eira Residents: FG&L Expenditure ($m)	780.4	832.0	874.6	911.3	947.0
2. Share Spent at Non-Food Retailers (%)	15%	15%	15%	15%	15%
3. Expenditure at Food & Grocery Retailers ($m) (1x2)	663.3	707.2	743.4	774.6	805.0
4. Glen Eira - Share of Main Food & Grocery Expenditure	73%	73%	73%	73%	73%
5. Local Spend to Glen Eira Centres ($m) (3x4)	$483.6	$515.7	$542.0	$564.8	$586.9
6. Spending from Beyond Glen Eira (% Total)	20.0%	20.0%	20.0%	20.0%	20.0%
7. Spending from Beyond Glen Eira ($m)	$120.9	$128.9	$135.5	$141.2	$146.7
8. Total Food Retailing Expenditure at Glen Eira Centres ($m)	$604.6	$644.6	$677.5	$706.0	$733.7
5 Year Change ($m)		$40.0	$33.0	$28.5	$27.6
Cumulative Change ($m)		$40.0	$73.0	$101.5	$129.1
9. Current Glen Eira Turnover ($m) (est.)	$585.0	$585.0	$585.0	$585.0	$585.0
10. Variance Spend - Turnover ($m)	$19.5	$59.5	$92.5	$121.0	$148.6
11. Ratio Spend / Turnover	103%	110%	116%	121%	125%

blair warman economics bwec

The existing distribution of food, grocery and liquor retailing activity across centres and retail formats within Glen Eira largely satisfies the needs of local residents for convenient access to both supermarkets and independent specialty food retailers. This has resulted in over 80% of telephone survey respondents being either satisfied or very satisfied with the existing weekly food shopping options in their local area.

Accordingly, it is considered appropriate for future retail activity to be broadly distributed between supermarkets and specially food retailers in line with that which currently exists. There should however be the flexibility for existing supermarkets to be expanded where it is shown that the existing supermarket is not adequately meeting the current needs of local residents. Any supermarket expansion should however not impact unreasonably upon existing specially food retailers, to the point that competition between supermarkets and specialty retailers is reduced.

Based upon the projected turnover growth for food retailing within Glen Eira, it is estimated that an additional 8,887 m^2 of food retailing floorspace may be supported over the period 2016-2026. This includes approximately 5,445 m^2 of supermarket floorspace, which may be in the form of full line supermarkets, Aldi supermarkets, and independent grocers of various sizes. This floorspace should not be solely in the form of a full-line supermarket, in order to provide greater diversity and choice for Glen Eira residents.

Over the period 2016-2036, a total of around 15,721 m^2 of food retailing floorspace may be supported across Glen Eira, with supermarkets accounting for approximately 9,632 m^2.

Figure 80: Food, Liquor and Grocery Retailing – Projected Turnover Growth / Supportable Floorspace

	Projected Turnover Growth			**Additional Supportable Floorspace**	
	2016-2026 ($m 2016)	**2016-2036 ($m 2016)**	**Turnover per m^2**	**2016-2026 m^2**	**2016-2036 m^2**
4110 Supermarket and Grocery Stores	57.0	100.9	-	5,446	9,632
Supermarkets (Full-line)	47.3	83.7	$12,500	3,786	6,696
Aldi	4.7	8.3	$10,000	471	834
Grocers	5.0	8.8	$4,200	1,189	2,102
1174 Bakeries	3.3	5.8	$3,100	1,057	1,870
4121 Fresh Meat, Fish and Poultry Retailing	3.1	5.4	$8,000	385	681
4122 Fruit and Vegetable Retailing	3.1	5.4	$5,150	598	1,058
4123 Liquor Retailing	4.3	7.5	$4,750	897	1,586
4129 Other Specialised Food Retailing	2.5	4.5	$5,000	505	893
Total Food Retailing	73.0	129.1	$8,213	8,887	15,721

This projection of future supportable food retailing floorspace should provide flexibility for the existing urban villages to expand in order to maintain their competitiveness within the activity centre hierarchy.

The proposed expansion of the Coles supermarket in Elsternwick is an example of a supermarket that is trading extremely strongly within a limited floor area. The expansion of this supermarket would improve access to supermarket facilities to a level consistent with other centres within Glen Eira, which may also reduce the extent of escape expenditure to competing supermarkets such as the newer Coles supermarket in Bay Street Brighton. Any future Woolworths' supermarket upon the ABC site in Selwyn Street would impact primarily upon the existing Coles supermarket, but also enable the centre to better compete with other centres.

There should also be the opportunity for innovative food retailers to establish within Glen Eira where it is shown that they will expand the diversity of food retailing opportunities available to residents, and potentially attract visitors from outside the municipality.

11. Supportable Non-Food Retailing Floorspace Assessment

Non-food retailing accounts for 396 businesses and 83,000 m^2, or 40% of total retail floorspace within Glen Eira's activity centres. This floorspace accommodates a diverse range of activities from fashion retailing through to building supplies, each with varying levels and sources of competition which range from regional shopping centres such as Chadstone and Southland, through to bulky goods and online retailers.

Fashion retailing represents the largest segment of non-food retailing within Glen Eira, accounting for around 20% of both businesses and total floorspace. This is followed by 'recreational' retailing, which includes newsagents, book stores, sporting goods and toys, which accounts for 13% of retailers and 11% non-food retailing floorspace. At an industry level, both of these segments have experience slow growth over recent years, largely as a result of online retailing and the 'digital revolution'.

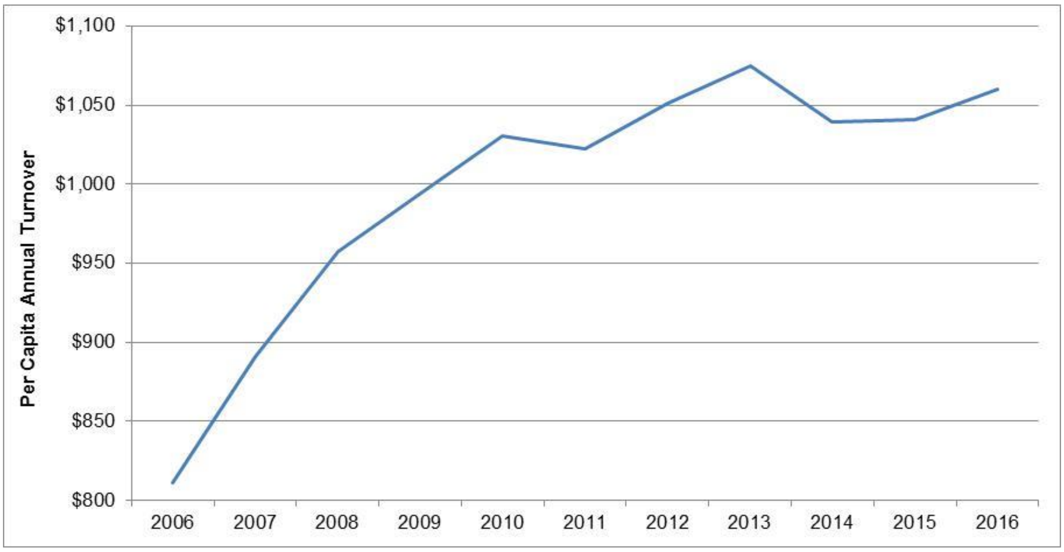
Figure 81: Glen Eira Non-Food Retailers by Broad Category

	Local	Neighbourhood	Urban Village	Total
Businesses (no.)				
Fashion	11	24	52	87
Homewares Furniture	7	10	11	28
Hardware, Building / Garden Supplies	3	8	1	12
Electrical (computers, mobile phones)	4	12	14	30
Pharmaceutical, Cosmetics & Toiletaries	6	13	16	35
Recreational (newsagents, books, sporting, toys etc.)	15	22	16	53
Other	25	62	64	151
Total	71	151	174	396
	Local	**Neighbourhood**	**Urban Village**	**Total**
Floorarea (m^2)				
Fashion	2,982	6,316	7,455	16,752
Homewares Furniture	1,775	1,915	4,866	8,556
Hardware, Building / Garden Supplies	605	2,532	202	3,338
Electrical (computers, mobile phones)	575	3,144	2,570	6,290
Pharmaceutical, Cosmetics & Toiletries	662	3,280	4,293	8,234
Recreational (newsagents, books, sporting, toys etc.)	2,732	3,477	3,059	9,268
Other	3,661	9,648	14,213	27,522
Total	12,991	30,312	36,657	79,960

This shift in household's shopping behaviour towards online retailers is highlighted in the following graphs which show the stagnation in per capita turnover for clothing and footwear retailers in Victoria over the past four years (refer Figure 82). Similarly, 'recreational goods' retailers have experienced a sharp decline in per capita sales over the past decade (refer Figure 83).

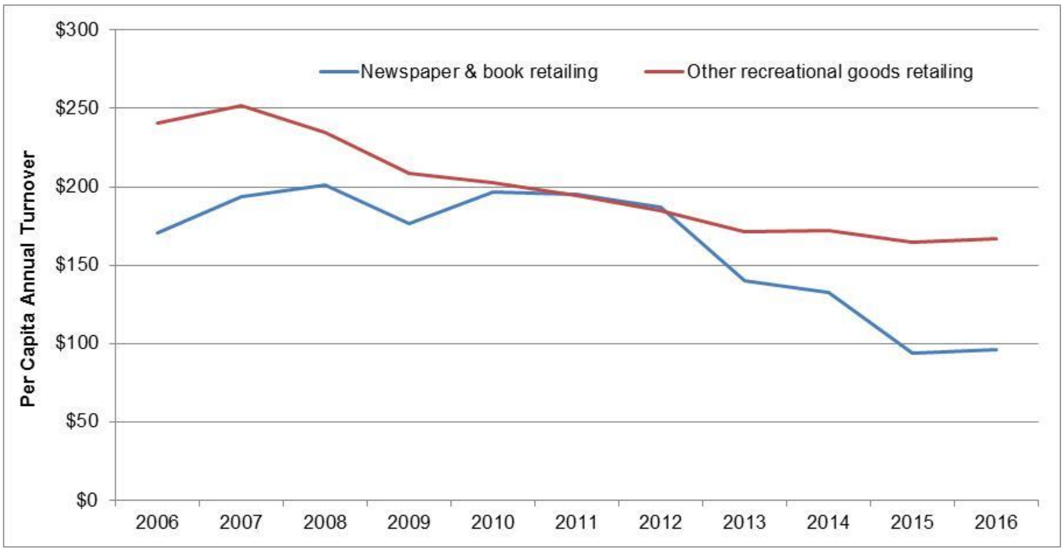
Hence, around one-third of non-food retailers within Glen Eira are likely to experience stagnant, and potentially negative, growth in per capita sales. While population growth within Glen Eira may provide the opportunity for some growth, this is likely to be offset by a continued strong competition.

Figure 82: Victoria – Clothing and Footwear Annual per Capita Retail Turnover



Source: ABS Cat No. 8501.0

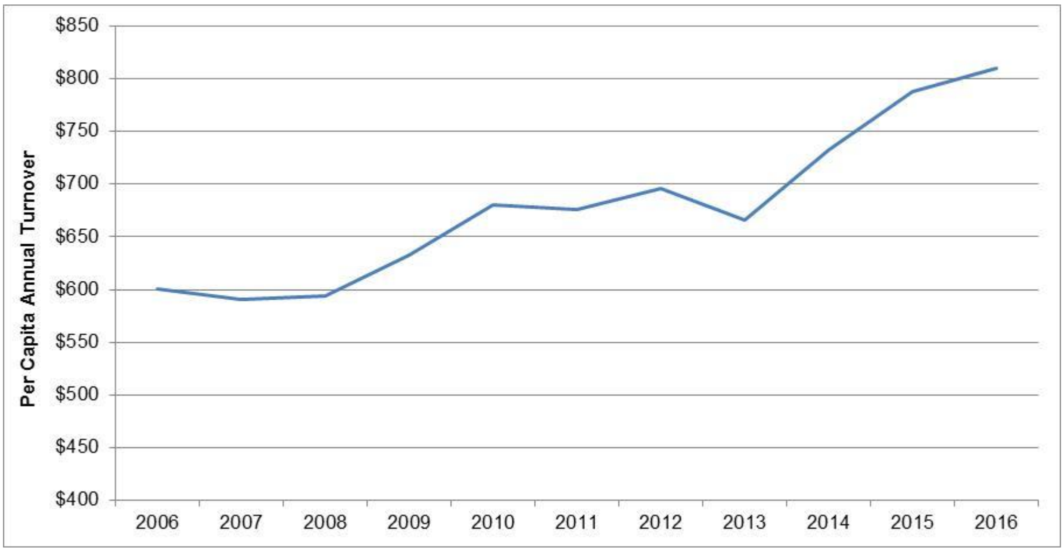
Figure 83: Victoria – Recreational Goods per Capita Retail Turnover



Source: ABS Cat No. 8501.0

'Pharmaceutical, cosmetic and toiletry goods' retailing accounts for approximately 10% of non-food businesses and floorspace within Glen Eira. This segment has experienced relatively consistent growth in per capita turnover over the past decade, albeit stagnating around the GFC (refer Figure 84). It would be reasonable to assume that this growth will continue, particularly given growing demand for health related services provided by pharmacists.

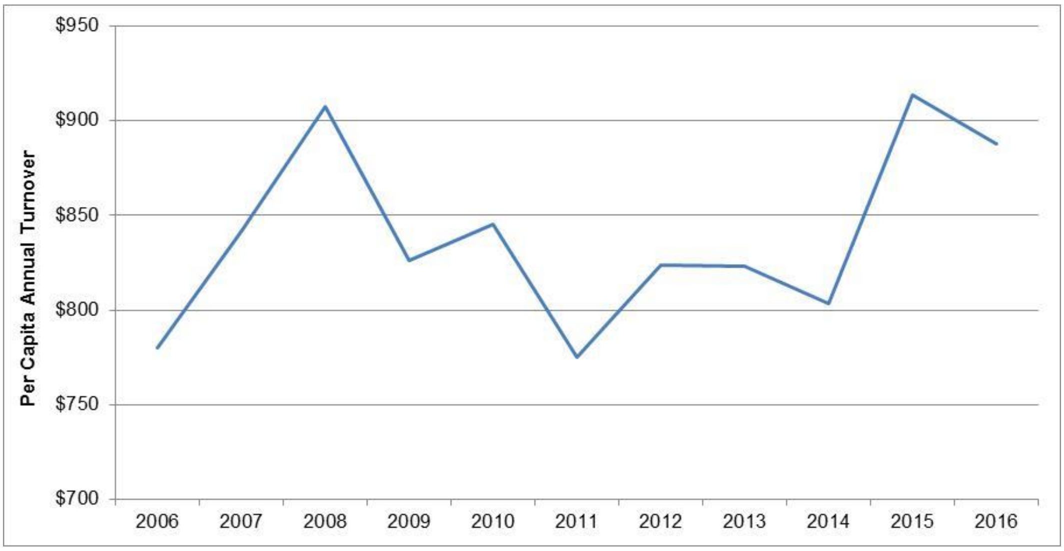
Figure 84: Victoria – Pharmaceutical, Cosmetic and Toiletry Goods Retailing - Per Capita Retail Turnover



Source: ABS Cat No. 8501.0

Electrical goods retailing has also experienced a stagnation in per capita turnover at a state level (refer Figure 85). This is likely to reflect the mature nature of this market with the majority of consumers now owning a computer and mobile phone. In addition, around 20% of online shoppers have purchased computer hardware or software online within the last 12 months[3].

Figure 85: Victoria – Electrical Goods Retailing - Per Capita Retail Turnover



Source: ABS Cat No. 8501.0

[3] Sensis e-Business Report 2016

Glen Eira's activity centres also include a number of businesses selling 'bulky goods' type products such as Homewares, Furniture, Hardware, Building / Garden Supplies. While these are primarily selling into niche markets, they may still experience competition from larger bulky goods retailers such as those located along the Nepean Highway in Moorabbin and Mentone. The likelihood of these activities generating demand for future floorspace is likely to be limited by their floor space requirements and the limited availability of larger sites.

The remaining non-food retail activities within Glen Eira's activity centres may be classified as 'other' store-based retailing' which covers a wide range of activities including bicycle retailing, cigarette sales, second hand retailers and opportunity shops, homewares and gifts, picture framing and variety stores. Many of these are not expected to experience strong competition from either Chadstone or Southland, or online retailers. As result, they are likely to remain the domain of strip retail centres and therefore experience some growth in the future.

This group of miscellaneous retail activities accounts for around one-third of non-food businesses and floorspace, and would be expected to grow at a rate consistent with population growth across the municipality.

11.1 Non-Food Floorspace Demand

Demand for non-food retailing floorspace is not expected to increase significantly within Glen Eira. Any growth in demand from those sectors likely to show potential for growth (pharmaceutical, cosmetics and toiletries retailing, and other 'store-based retailing') is expected to be offset by continued weakness within other areas of non-food retailing.

11.2 Hospitality Floorspace Demand

Hospitality related activities (cafes, restaurants and takeaway food) have played a key role in supporting the vibrancy and amenity of Glen Eira's activity centres. This would be expected to continue as the population of the municipality increases, and key cafe and restaurant precincts continue to attract visitors from outside Glen Eira.

At a sector level, per capita turnover of cafes restaurants and takeaway businesses has shown relatively consistent growth over the past decade (refer Figure 86). As a discretionary form of spending, eating out is influenced by consumer confidence levels, as evidenced by the impact of the GFC upon per capita turnover levels. Over the past three years however, there has been a consistent upward trend in per capita expenditure.

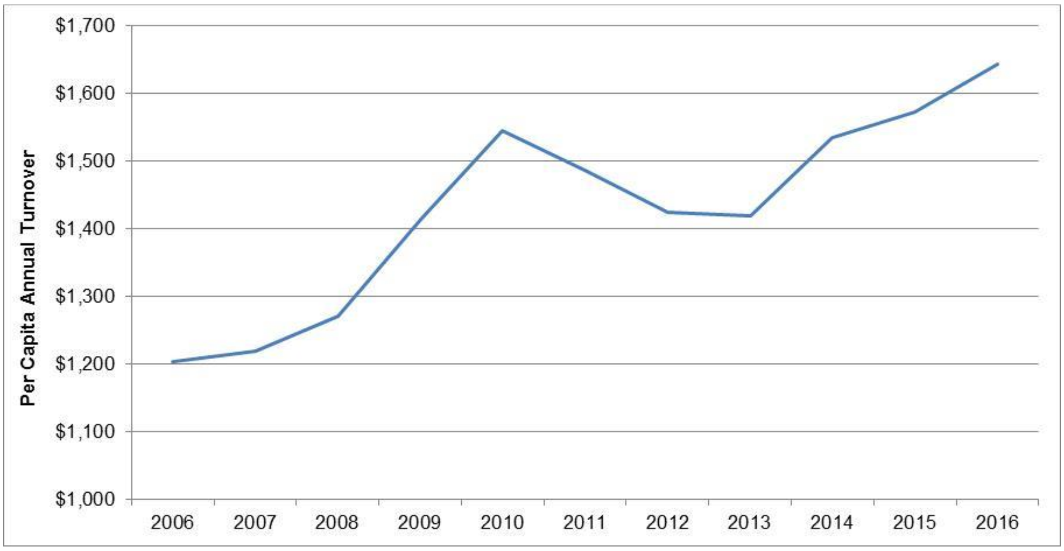
Cafes, restaurants and takeaway activities account for 45% of businesses and 32% of floorspace within Glen Eira's activity centres. Hence this sector is a significant source of growing demand for floorspace.

As hospitality activities have few synergies with core retailing, there is the flexibility to locate anywhere within an activity centre. This includes on the ground floor of new apartment developments on the periphery of centres.

Based upon the average annual growth in per capita turnover for cafes restaurants and takeaway businesses over the past decade of 3.2% per annum; projected population growth within Glen Eira of 1% per annum; and an assumed inflation rate of 1.5% per annum; the turnover of hospitality businesses may be expected to increase at a real rate of around 2.7% per annum.

With hospitality businesses currently occupying 64,000 m^2 of floorspace within Glen Eira's activity centres, future demand may be expected to increase at an average rate of approximately 1,750 m^2 per annum.

Figure 86: Victoria – Cafes, Restaurants and Takeaway - Per Capita Retail Turnover



Source: ABS Cat No. 8501.0

Part D: Individual Centre Assessments

12. Bentleigh Urban Village

12.1 Location and Accessibility

The Bentleigh Activity Centre is centrally located within Glen Eira with rail services providing a north-south connection. The 703 bus service provides connections along Centre Road to Brighton to the west and Monash University to the east.

12.2 Role and Function

12.2.1 Food Retailing

Bentleigh offers a particularly strong mix of food retailing with all three major supermarkets (Coles, Woolworths, Aldi) together with a wide mix of specialty food retailers. Food and other convenience retailing is concentrated immediately east of the railway station and adjacent to the Coles supermarket. In addition to this, the Aldi supermarket together with the CK Food Store and Extra Fresh market also represents a weekly food shopping destination within the centre's western precinct.

The Woolworths supermarket located at the eastern periphery of the centre is a small, older format store of only 2,200 m^2, which is not as well connected to other food retailers within Centre Road as the Coles supermarket. In addition to the three major supermarket chains, there are also four small specialty grocers, although these only have a combined floorspace of 650 m^2.

Figure 87: Bentleigh – Food Retailing

Activity	No. Businesses	Floor Area (m^2)
1174 Bakery Product Manufacturing (Non-factory based)	4	741
4110 Supermarket and Grocery Stores	7	7,103
4121 Fresh Meat, Fish and Poultry Retailing	4	507
4122 Fruit and Vegetable Retailing	5	1,526
4123 Liquor Retailing	4	1,473
4129 Other Specialised Food Retailing	8	1,243
Total	32	12,593

12.2.2 Non-Food Retailing

The Bentleigh Activity Centre has 77 non-food retailers, slightly more than Elsternwick's 71 retailers and more than double that of Carnegie with 30 non-food retailers. With a total of 19 fashion retailers (clothing, footwear and jewellery), Bentleigh is secondary to Elsternwick (27) but has considerably more than Carnegie (6).

Figure 88: Urban Villages – Non-Food Retailing

Activity	Bentleigh	Carnegie	Elsternwick
4211 Furniture Retailing	3		
4213 Housewares Retailing		1	1
4214 Manchester and Other Textile Goods Retailing	2	2	2
4221 Electrical, Electronic and Gas Appliance Retailing	3	2	4
4222 Computer and Computer Peripheral Retailing	1	1	2
4229 Other Electrical and Electronic Goods Retailing			1
423 Hardware, Building and Garden Supplies Retailing	3	1	
4231 Hardware and Building Supplies Retailing		1	
4241 Sport and Camping Equipment Retailing	1		1
4243 Toy and Game Retailing	2		3
4244 Newspaper and Book Retailing	3	3	3
4251 Clothing Retailing	12	4	19
4252 Footwear Retailing	5	1	4
4253 Watch and Jewellery Retailing	2	1	4
4260 Department Stores	1		
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	6	4	6
4272 Stationery Goods Retailing			2
4273 Antique and Used Goods Retailing			1
4274 Flower Retailing			2
4279 Other Store-Based Retailing n.e.c.	33	9	16
Total Non-Food Retailing	77	30	71

Within the 'other store-based retailing category' are 'Op Shops' of which Bentleigh has the greatest number with eight stores, followed by Elsternwick with five stores, out of a total of 21 across Glen Eira's activity centres. While many people may still have a negative image of op shops, they are now an established part of mainstream retailing as shown by the following article from the Canberra Times in 2012.

Figure 89: Op Shops Back in Fashion

canberratimes.com.au
The Canberra Times

Print this article | Close this window

Op shops back in fashion

Michael Inman
Published: April 15, 2012 - 3:00AM

FANS call it opp'ing - the social trend breathing new life into second-hand stores around the country.

Made popular by environmentally and socially conscious youth, the practice involves fashion shopping at opportunity shops.

The craze has proven so popular that some charities have altered their stores to cater to the new customers.

The Salvation Army is reporting an 8 per cent increase in sales throughout its 110 stores across the ACT, NSW and Queensland.

The sales spike means the opportunity shop, once the domain of battlers, has had to go up-market to cater to a broader client base.

The popularity prompted a revamp of the Salvos' Fyshwick store, with the grand reopening attracting hoards of bargain hunters yesterday.

The restyled store boasts more space, a department store layout, more products and extra change rooms.

ACT area manager Tony O'Connell has worked for the Salvos for 18 years and watched the shift to customers from broader socioeconomic backgrounds.

The traditional battler clientele now shared the store with the middle class, teenagers and trendsetters.

"The amount of young people we get through, and not just for dress-ups, has increased because opp-shopping is cool," Mr O'Connell said.

"Young kids love buying daggy stuff because that's the look."

Emily Peddle, of Scullin, buys second-hand clothing for its social and environmental benefits. The 24-year-old's funky personal style is testament to her opp-shopping prowess.

"I don't see why you need to buy new things when there's all this stuff here waiting for a new home," Ms Peddle said.

"It's recycling, better for the environment, and it's cheaper. Plus your money is going somewhere to help people, rather than into the pockets of a big corporation."

Amid the changes, Salvos Stores eastern territory general manager Neville Barrett said the charity hasn't forgotten it's traditional customers.

"With rising energy and food prices impacting the community, particularly our senior citizens, this store will have an even wider range of bargain-priced items for sale, including essential new household items such as bathroom and cleaning products," Mr Barrett said.

"All profits from Salvos Stores goes towards running important Salvation Army programs, which assist the less fortunate.

"By shopping at and donating to Salvos Stores our customers and donors are also helping the environment by recycling."

This story was found at: ***http://www.canberratimes.com.au/act-news/op-shops-back-in-fashion-20120414-1x0r6.html***

Within the Bentleigh Activity Centre, fashion retailing accounts for 19 (25%) of the 77 non-food retailers within the centre, and 2,936 m^2 (19%) of non-food retail floorspace. In addition to this the Target department store represents a further 1,468 m^2. There is also a strong representation of pharmacies with six stores.

Figure 90: Bentleigh Non - Food Retailing

Activity	No. Businesses	Floor Area (m^2)
4211 Furniture Retailing	3	925
4214 Manchester and Other Textile Goods Retailing	2	203
4221 Electrical, Electronic and Gas Appliance Retailing	3	717
4222 Computer and Computer Peripheral Retailing	1	112
4231 Hardware, Building and Garden Supplies Retailing	3	442
4241 Sport and Camping Equipment Retailing	1	158
4243 Toy and Game Retailing	2	274
4244 Newspaper and Book Retailing	3	543
4251 Clothing Retailing	12	1,960
4252 Footwear Retailing	5	640
4253 Watch and Jewellery Retailing	2	337
4260 Department Stores	1	1,468
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	6	1,504
4279 Other Store-Based Retailing n.e.c.	33	6,258
Total	77	15,539

12.2.3 Hospitality

There is currently 42 cafes and restaurants and 14 takeaway food businesses within Bentleigh, occupying 7,238 m^2 or 20% of total retail and hospitality floorspace (35,370 m^2). This is a significantly greater number than there was in 2010 when there was only 23 cafes and restaurants and seven takeaway food businesses based upon Google Streetview images at that time.

Figure 91: Bentleigh Hospitality

Activity	No. Businesses	Floor Area (m^2)
4511 Cafes and Restaurants	42	5,359
4512 Takeaway Food Services	14	1,879
Total	56	7,238

12.2.4 Core Retail Precinct

Although the Bentleigh Activity Centre extends over a distance of approximately 1 km along Centre Road, the 250 metre section of the strip between the railway station and Godfrey Street represents the centre's core retail precinct. This precinct benefits from its location adjacent to the Coles supermarket immediately to the north, as well as access to Council car parks and the Bentleigh railway station, and offers a wide range of convenience, fashion and other retailing, business and personal services, and cafes and restaurants.

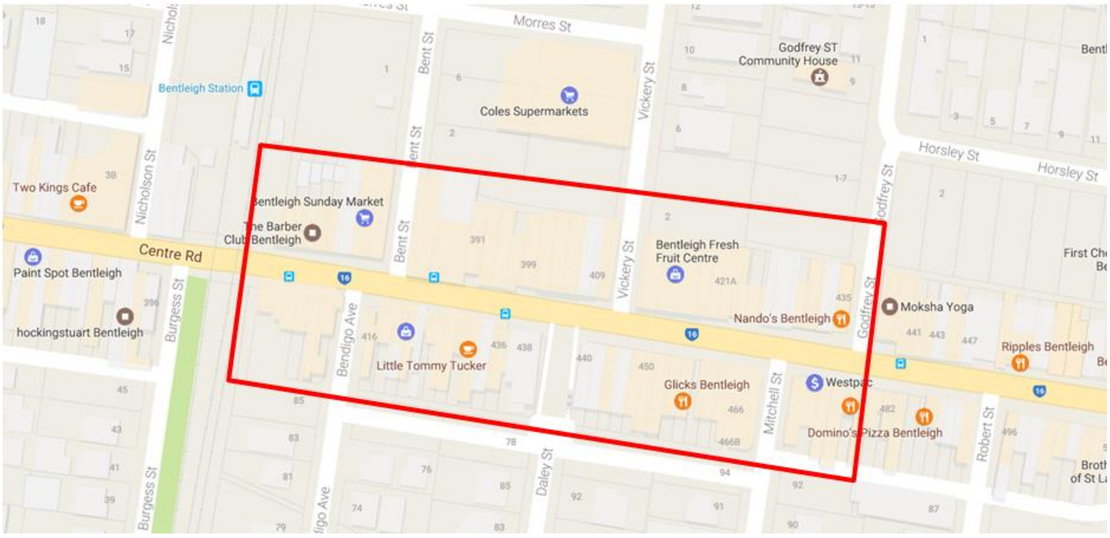


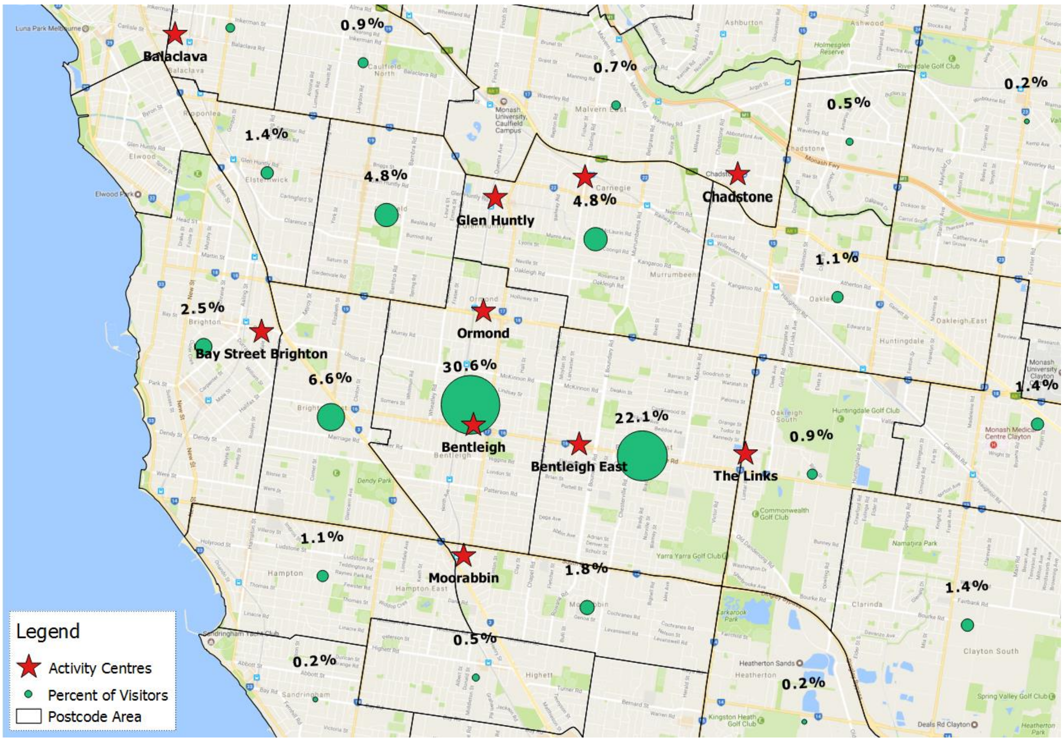
Figure 92: Bentleigh Core Retail Precinct

Activity	No. Businesses	Activity	No. Businesses
Bakery	3	Other Retailing	10
Butchers	2		
Fresh Seafood	1	Banks	5
Greengrocers	2	Real Estate Agents	1
Groceries	1	Mortgage Brokers	1
Pharmacy	3	Travel Agents	1
Newsagents	1	Business Services	8
Convenience Retailing	13		
		Cafes Bars & Restaurants	17
Fashion - Women	5	Takeaway food	2
Footwear	1	Food Catering	19
Jewellers	2		
Optometrists	3	Hair & Beauty	6
Fashion Retailing	11		
		Total Businesses	67
Homewares and Gifts	3		
Variety Store	2	Vacancies	4
Toy Store	1		
Retail - Other	1	Total Street Front Properties	71
Cigarettes	1		
Discount Department Store	1		
Mobile phones	1		

12.3 Trade Area

Based upon car park surveys within Bentleigh, 30% of visitors travelling by car to the centre reside in the 3204 postcode, which covers Bentleigh, McKinnon and Ormond. A further 22% of visitors live in the suburb of Bentleigh East. Therefore, just over half of car-based trips to the centre are made by Glen Eira residents living in the area to the south of North Road. A further 12% of visitors live within the suburbs of Caulfield South and East Brighton, with the majority of the remaining 36% of visitors living across Melbourne's southern region.

Figure 93: Bentleigh Trade Area



12.4 Surrounding Land Uses and Development Opportunities

There are a significant number of potential development opportunities within the Bentleigh Activity Centre. These include the Coles and Woolworths supermarket sites that may potentially support either an expansion or redevelopment of the existing supermarkets. In addition there are a number of strategically important sites that may offer the opportunity to stimulate development and activity across the centre. These sites are briefly discussed below.

- Coles supermarket site (3,386 m^2): 4-6 Bent Street

The existing Coles supermarket with a total floor area of 2,320 square is considerably less than that of a typical full line supermarket which is generally around 3,200 m^2. While there is the potential for the existing site to accommodate an expanded supermarket, this would result in the loss of car parks on the western side of the store. There may however be the opportunity for additional car spaces to be provided through the acquisition of the medical centre on the opposite side of Moores Street.

- Woolworths supermarket site (5,469 m^2): 524 Centre Road

While this site is strategically located on the corner of Centre and Jasper Roads, it is not well connected to the retail core to the west. Given the proposed development of a Woolworths supermarket of 4,100 m^2 at Ormond station, there is the possibility that this store may close in the future, particularly given that it is an older format store of only 2,669 m^2.

The potential for any retail development upon the site to stimulate activity elsewhere within Centre Road will be dependent upon improving linkages across Jasper Road. Alternatively, the site may offer the opportunity for other larger format retailers that may attract visitors from outside of Glen Eira.

Other key strategic sites include:

- Car wash site (approx. 1,125 m^2): corner Centre and Jasper Roads.
- 1 Nicholson Street (1,022 m^2): western corner of Centre Road.
- 9-17 Nicholson Street: three properties with a combined area of 1,854 m^2.
- Bentleigh Post Office site (752 m^2): corner Centre Road and Loranne Street

12.5 Social Infrastructure

The distinguishing social infrastructure features of the Bentleigh Activity Centre and its 400-metre catchment include the following:

- The Daly Street Mall / Centre Road Rotunda.
- Bentleigh Reserve, Hodgson Reserve, Victory Park and Halley Park being the major areas of open space in Bentleigh. The southern end of McKinnon Reserve and Allnutt Park are also located in Bentleigh, and Elster Creek Trail is on the boundary with McKinnon so is also easily accessible from Bentleigh. Bentleigh and Hodgson Reserve are also key active open spaces catering for a variety of outdoor sports such as cricket, Australian Rules football, soccer, tennis and lawn bowls.
- The Bentleigh Library and Godfrey Community House.
- Three privately operated long day child care centres, one sessional Kindergarten (GEKA Bentleigh Kindergarten), one Maternal and Child Health facility (Bentleigh MCH), one occasional child care service provided by Godfrey Community House and the Bentleigh McKinnon Youth Centre.
- Two schools: 1) Bentleigh West Primary School and 2) St Paul's Catholic Primary School.
- Valkstone (Uniting Age Well) Independent living units and the Bentleigh Senior Citizens Centre.
- Two Council venue-for-hire facilities: Bentleigh Recreation Reserve Social Room and the Bentleigh McKinnon Youth Centre.

13. Elsternwick Urban Village

13.1 Location and Accessibility

The Elsternwick activity centre benefits from a high level of accessibility via both private and public transport modes. Elsternwick station is located on the Sandringham line and may be accessed within 18 minutes from the CBD. The number 67 tram provides connections to Elsternwick station along Glenhuntly Road, as well as providing an alternative transport mode to the CBD via St Kilda Road.

The centre is also easily accessed via Nepean Highway/Brighton Road, although this arterial road also represents a major physical barrier that limits the centre's role in servicing residential areas to the west. Orrong Road also provides access, primarily from the north where retailing facilities are largely limited to the Alma Village neighbourhood activity centre. Similarly, Glenhuntly Road provides direct access for residents within Elwood to the west that don't have immediate access to a full line supermarket or other food retailing.

13.2 Role and Function

13.2.1 Food Retailing

The Elsternwick Activity Centre, as one of three Urban Villages within Glen Eira, primarily services the immediate suburbs of Elsternwick and Caulfield South while also attracting visitors from Elwood, St Kilda East and Caulfield North.

Food retailing within the centre is limited to a small, older format, Coles supermarket of 2,300 m^2 which has been proposed for redevelopment for a number of years as part of a mixed-use development upon the site. This supermarket is understood to be one of Coles strongest performing stores based upon per square metre sales, although this will partly be due to its relatively small size.

Specialty food retailing within Elsternwick comprises six bakeries, two butchers, two greengrocers and a delicatessen. With only two butchers and two greengrocers, Elsternwick's fresh produce offering is considerably less than Glen Eira's other urban villages with Bentleigh offering nine such retailers and Carnegie, eight. Despite being considerably smaller, nearby Ripponlea Village has five fresh produce retailers, catering for Elsternwick's large Jewish population which accounted for 16% of residents in 2011.

Typically, strong synergies exist between supermarkets, as the retail anchor of centres, and other food retailers. However, within Elsternwick such synergies do not appear to be as strong as in centres such as Bentleigh and Carnegie. This may reflect a number of factors including strong competition from fresh produce retailers in Ripponlea Village, fresh produce being purchased independently of a trip to the centre's Coles supermarket, or shopper's satisfaction with purchasing fresh produce at the Coles supermarket.

Figure 94: Elsternwick – Retail and Hospitality Businesses

Activity	No. Businesses	Floor Area (m^2)
1174 Bakery Product Manufacturing (Non-factory based)	6	1,229
4110 Supermarket and Grocery Stores	2	2,598
4121 Fresh Meat, Fish and Poultry Retailing	2	328
122 Fruit and Vegetable Retailing	2	477
4123 Liquor Retailing	3	700
4129 Other Specialised Food Retailing	3	624
Total Food Retailing	18	5,956
4213 Housewares Retailing	1	138
4214 Manchester and Other Textile Goods Retailing	2	234
4221 Electrical, Electronic and Gas Appliance Retailing	4	679
4222 Computer and Computer Peripheral Retailing	2	226
4229 Other Electrical and Electronic Goods Retailing	1	433
4241 Sport and Camping Equipment Retailing	1	352
4243 Toy and Game Retailing	3	560
4244 Newspaper and Book Retailing	3	424
4251 Clothing Retailing	19	2,878
4252 Footwear Retailing	4	703
4253 Watch and Jewellery Retailing	4	359
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	6	1,751
4272 Stationery Goods Retailing	2	1,263
4273 Antique and Used Goods Retailing	1	43
4274 Flower Retailing	2	347
4279 Other Store-Based Retailing n.e.c.	16	3,353
Total Non-Food Retailing	71	13,743
4511 Cafes and Restaurants	62	8,765
4512 Takeaway Food Services	3	535
Total Hospitality	65	9,300
Total Retail & Hospitality	154	28,998

13.2.2 Non-Food Retailing

Elsternwick has a strong concentration of fashion retailers with 28 businesses across clothing, footwear and jewellery retailing. Together, this represents around 30% of all fashion retailers within Glen Eira. This is complemented by a number of other specialty retailers including three toy shops and three homewares retailers. An Officeworks store, together with a range of business services including six major banks and a post office, are also key attractions for visitors.

Despite the growth in online retailing, there has been relatively little impact upon the number of fashion and homewares retailers with a similar number to that which existed in 2009[4]. The impact of the digital revolution is however reflected in the closure of Dymock's bookstore and Civic Video.

Elsternwick has therefore maintained its role as Glen Eira's principal location for fashion retailing, in terms of the number of retailers. This suggests that, to some extent, it may be catering for local and/or niche markets that enables it to some extent withstand competition from larger regional centres and online retailers. Nevertheless, while Elsternwick has not experienced the decline in fashion retailing activity experienced in centres such as Chapel Street (South Yarra) and Bridge Road (Richmond), trading conditions for these retailers are likely to be relatively weak, and may eventually result in a further decline in the number of fashion retailers in the centre.

13.2.3 Hospitality and Entertainment

The number of cafes and restaurants within Elsternwick has grown significantly from 35 businesses in 2009 to 62 businesses currently. This represents an increase of 27 businesses or 77%.

Cafes restaurants and takeaway food businesses now account for 41% of the 162 shop fronts in Elsternwick. This includes two larger cafes/restaurants (The Goat House and Bang Bang) adjacent to the Elsternwick Station Reserve, which has been recently redeveloped by Council and provides a central community space.

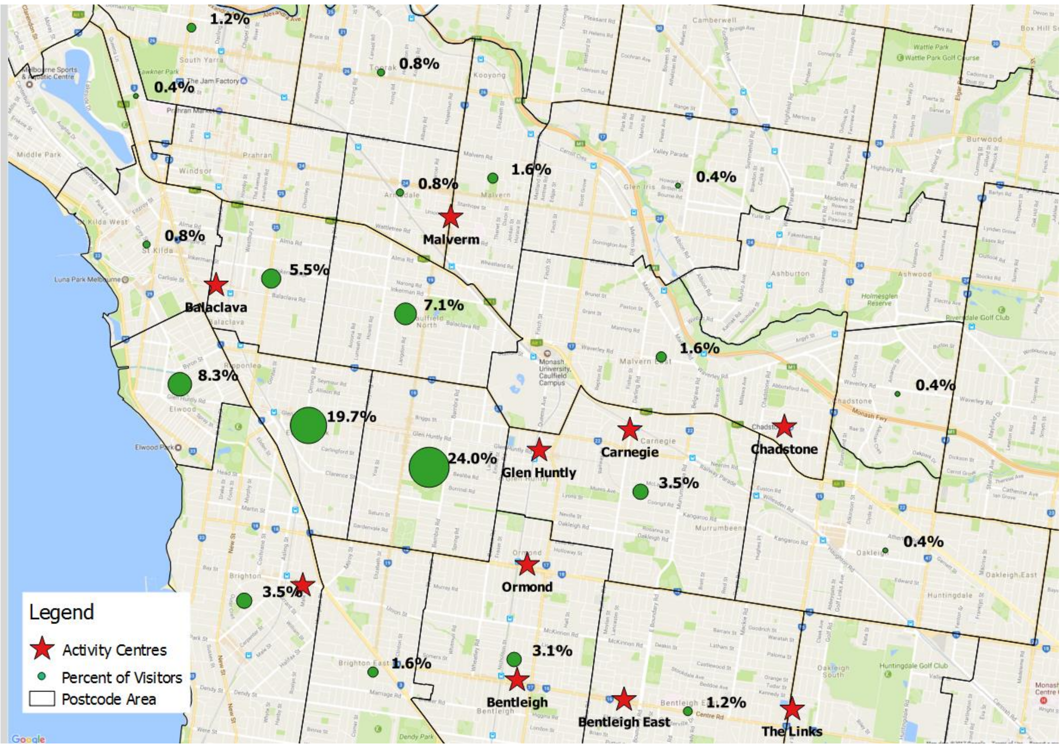
The Classic Cinema in Gordon Street contributes to a vibrant night time precinct while the Flying Saucer Club, a live music venue, is located within the RSL Club in St Georges Road, one block to the east.

13.3 Trade Area

An indication of the extent of Elsternwick's trade area may be obtained from car park surveys which indicate that 44% of visitors live within the 3162 or 3185 postcodes which are bounded by Nepean Highway, North Road, Booran Road and Glen Eira Road. Residents of Elwood, Caulfield and St Kilda East account for a further 21% of visitors. Therefore around 65% of car-based visits are by visitors from within around 2.5 km of the centre. This pattern is generally consistent with the location of full line supermarkets, which represent a key source of competition for Elsternwick with respect to weekly food and grocery shopping.

[4] Based upon Google Street view.

Figure 95: Indicative Trade Area – Visitors by Postcode



Source: Car Park Surveys

13.4 Surrounding Land Uses and Development Opportunities

There are number of key strategic activities and sites within or close to the Elsternwick Activity Centre that may influence future land uses.

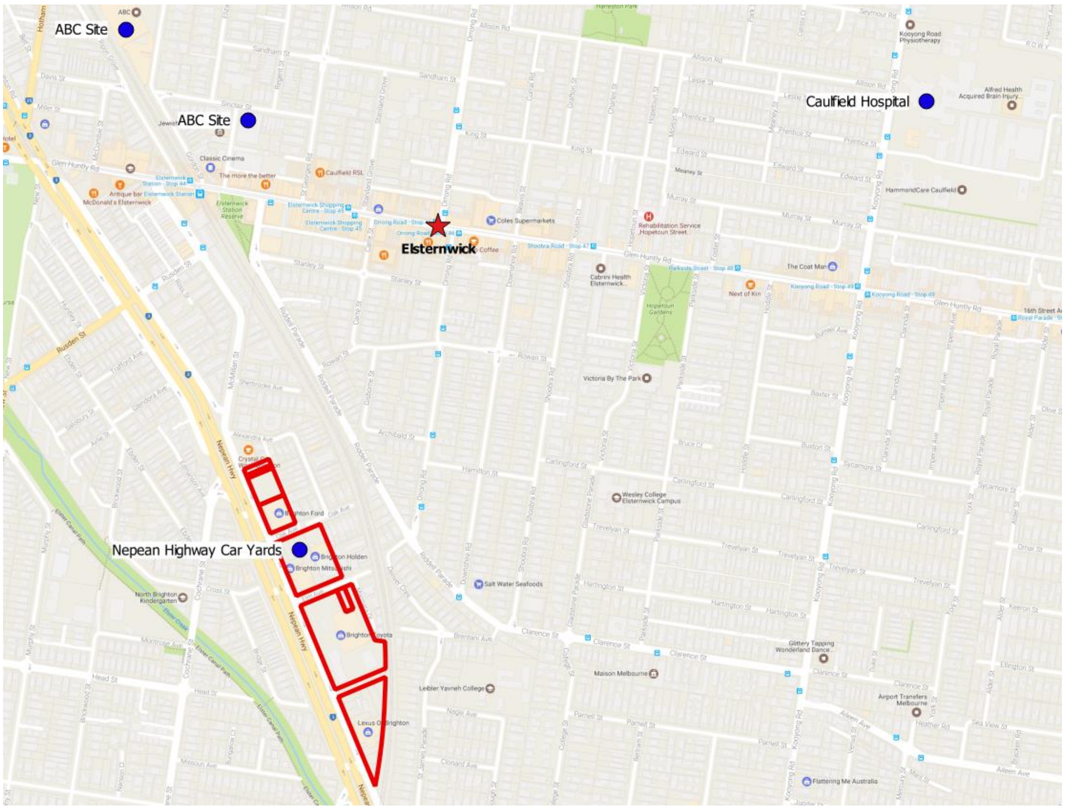
Caulfield Hospital, which is part of the Alfred Health Network, is located on an 11 ha site a short distance to the east of the centre in Kooyong Road, and specialises in community services, rehabilitation, aged care and mental health.

Key strategic development sites within the centre include:

- ABC studios in Gordon Street (approx. 1.2 ha) being a triangular site that will be vacated when the studios are relocated to Southbank.
- ABC production facilities site (6,155 m^2) in Selwyn Street, adjacent to Glenhuntly Road, which will also be vacated by the ABC, and has recently been purchased by Woolworths. This site is strategically important given the opportunity for a second supermarket to anchor the western end of Elsternwick's core retail precinct.

A number of car yards located along the Nepean Highway to the south of the centre also represent potential development opportunities. The combined area of these sites is approximately 4.5 ha with a frontage of approximately 700 metres to Nepean Highway. These sites offer the opportunity for a range of employment uses that may address the relative shortage of office jobs in Glen Eira.

Figure 96: Key Strategic Activities and Sites



13.5 Social Infrastructure

The distinguishing social infrastructure features of the Elsternwick Activity Centre and its 400-metre catchment include the following:

- Elsternwick Plaza, Hopetoun Gardens, Harleston Park, Ripponlea National Trust Estate & Gardens, Elsternwick Park and Riddell Park are the main public open spaces within the Elsternwick Activity Centre catchment.
- Elsternwick Park provides the main outdoor sporting functions in the area catering for sports such as golf, tennis, lawn bowls, Australian Rules football and cricket.
- The Elsternwick Library.
- One sessional Kindergarten facility (Orrong Road) and five privately operated long day child care facilities.
- Four non-government schools.
- Two acute hospital facilities.
- Two residential aged care facilities.

14. Carnegie Urban Village

14.1 Location and Accessibility

The Carnegie Activity Centre benefits from its proximity to Dandenong Road and the accessibility this provides for visitors living to the east and west of the centre. The removal of the level crossing may increase the benefits to the Koornang Road shopping strip. Public transport access to the centre is primarily via rail services, although bus route 626 also provides connections to the Chadstone Shopping Centre bus interchange, as well as to the west along Glen Eira Road.

14.2 Role and Function

The Carnegie Activity Centre comprises three main precincts being:

- Koornang Road shopping strip extending south of the railway line and which also includes a Woolworths supermarket to the rear;
- Carnegie Central shopping centre located on the corner of Koornang and Dandenong roads; and
- a bulky goods precinct along Dandenong Road.

14.2.1 Food Retailing

The Carnegie Activity Centre is well serviced by full-line supermarkets with a smaller, older format Woolworths supermarket at the rear of the Koornang Road shopping precinct, as well as a larger Woolworths and an Aldi supermarket within Carnegie Central.

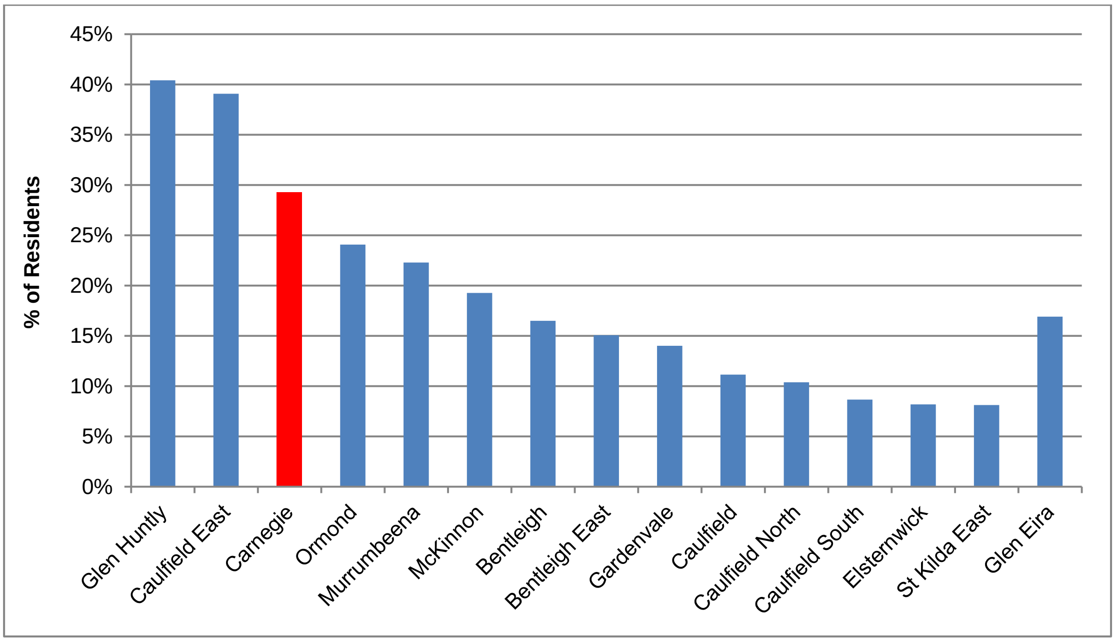
Fresh produce retailing is primarily located within the Koornang Road shopping strip where there are six retailers, compared to only two within Carnegie Central. This reflects the dominance of the Woolworths supermarket within the latter, which may also include pressure upon the centre's owners to limit the number of fresh produce retailers. By comparison, there are only four fresh produce retailers within Elsternwick, and a total of nine within Bentleigh.

Therefore, despite the strong competition from the two full-line supermarkets, there is a strong presence of fresh produce retailers within the centre. This may however also reflect the cultural profile of the local population with a significantly higher proportion of residents being of Asian ancestry than elsewhere within Glen Eira (refer Figure 98).

Figure 97: Carnegie – Food Retailing

Activity	Businesses (no.)	Floor Area (m^2)
1174 Bakery Product Manufacturing (Non-factory based)	4	471
4110 Supermarket and Grocery Stores	10	9,312
4121 Fresh Meat, Fish and Poultry Retailing	5	600
4122 Fruit and Vegetable Retailing	3	880
4123 Liquor Retailing	1	218
4129 Other Specialised Food Retailing	2	419
Total	25	11,900

Figure 98: Residents of Asian Ancestry* 2016



Source: ABS Census 2016
*south east, north east, southern and central Asia.

14.2.2 Non-Food Retailing

Apart from the Spotlight store within Carnegie Central, there is no significant non-food retailing within the Carnegie Activity Centre to attract visitors. While there are a number of bulky goods retailers located along Dandenong Road that would draw shoppers from across a wider catchment, there is not a strong physical connection to the Koornang Road strip. As a result, these two precincts function independently of each other.

Figure 99: Carnegie – Non-Food Retailing

Activity	Businesses (no.)	Floor Area (m^2)
4213 Housewares Retailing	1	50
4214 Manchester and Other Textile Goods Retailing	2	3,315
4221 Electrical, Electronic and Gas Appliance Retailing	2	234
4222 Computer and Computer Peripheral Retailing	1	170
423 Hardware, Building and Garden Supplies Retailing	1	159
4231 Hardware and Building Supplies Retailing	1	202
4244 Newspaper and Book Retailing	3	748
4251 Clothing Retailing	4	342
4252 Footwear Retailing	1	182
4253 Watch and Jewellery Retailing	1	55
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	4	1,038
4279 Other Store-Based Retailing n.e.c.	9	1,481
Total	30	7,976

14.2.3 Hospitality

The number of cafes and restaurants within the Carnegie Activity Centre has grown significantly from 18 to 47 over the period since 2010. This represents an increase of 160% compared to an increase of 77% in Elsternwick and 82% in Bentleigh over the same period. This stronger rate of growth is most likely due to the increased number of residents of Asian ancestry that either generate demand for these cafes and restaurants or are operating the businesses.

Figure 100: Carnegie – Hospitality

Activity	Businesses (no.)	Floor Area (m^2)
4511 Cafes and Restaurants	47	7,201
4512 Takeaway Food Services	8	1,010
Total	55	8,211

14.3 Trade Area

Car Park surveys were undertaken separately for the Koornang Road strip and Carnegie Central shopping centre. Residents of postcode 3163 (Carnegie, Glen Huntly and Murrumbeena) accounted for a similar proportion of car-based trips to each, 29% for Koornang Road and 27% for Carnegie Central.

There is a notable difference in the proportion of trips accounted for by residents living north of Dandenong Road in Malvern East. These residents accounted for 17% of visitors to Carnegie Central, but only 7% of those to the Koornang Road shopping strip. This may possibly reflect the opportunities for these residents to undertake strip shopping in Glenferrie Road Malvern or High Street Ashburton. Compared to the Elsternwick and Bentleigh activity centres, the distribution of visitors to the Koornang Road strip appears to be more dispersed. For example, over 10% of visitors lived south of South Road, which may be a reflection of its appeal to Asian shoppers living across the wider area.

Figure 101: Carnegie (Koornang Road) Trade Area

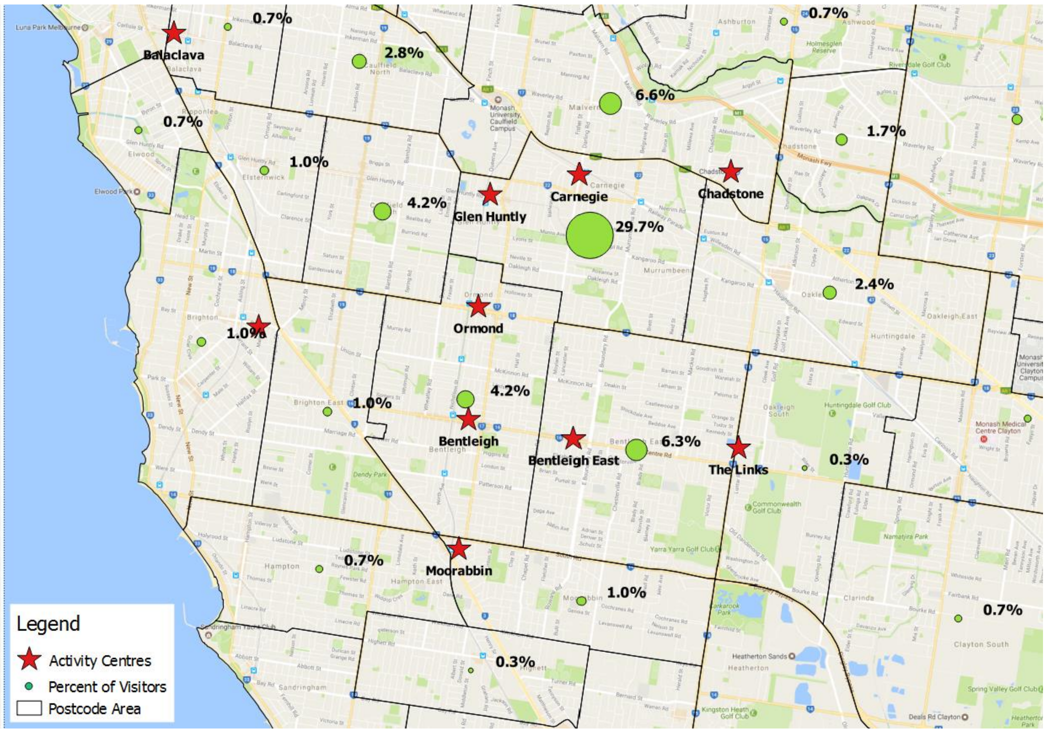
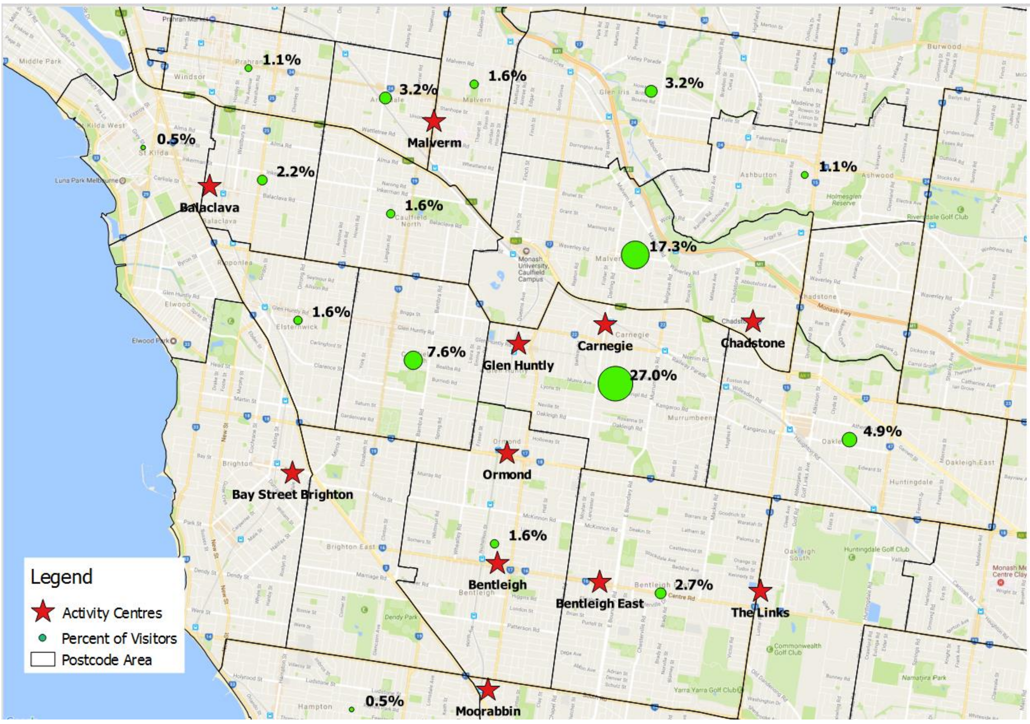


Figure 102: Carnegie Central Trade Area



14.4 Surrounding Land Uses and Development Opportunities

While there are no strategically significant development sites within the Carnegie Activity Centre, the removal of the existing level crossing may improve connectivity within the centre. This however may be limited by the absence of a continuous active frontage along Koornang Road, similar to that which exists around Elsternwick railway station and continues to divide the centre.

14.5 Social Infrastructure

The distinguishing social infrastructure features of the Carnegie Activity Centre and its 400-metre catchment include the following:

- Ardrie Park and Villiers Square are the main public open spaces with Ardrie also catering for tennis.
- The Carnegie Library and Community Centre.
- One sessional Kindergarten (Carnegie), one occasional child care centre (Carnegie) and two long day child care centres.
- The Carnegie Library and Community Centre, and Carnegie Children's Multipurpose Centre, are also available as Council venues-for-hire. Senior citizens groups operate from Boyd Room at Carnegie Library and Community Centre.
- One school – Carnegie Primary School.
- The Rosstown Community residential aged care facility and Belsize Avenue Carnegie Independent Living Units.
- One emergency service facility - Carnegie Ambulance Station.

15. Derby Road (Phoenix Precinct) Activity Centre

15.1 Location and Accessibility

The Derby Street Activity Centre is located adjacent to Caulfield Station and Monash University's Caulfield Campus. While Caulfield Station provides a means of accessing the centre, the railway line also represents a physical barrier, as does Caulfield Racecourse immediately to the south. Similarly, the centre is also located adjacent to Dandenong Road which provides convenient access for households to the east and west.

Other public transport options for accessing the centre include the number 3 tram along Balaclava and Waverley roads, and the number 900 bus services that provide a connection to Chadstone Shopping Centre.

15.2 Role and Function

There are two components to this centre being Caulfield Plaza and the Derby Street retail strip.

Caulfield Plaza

Caulfield Plaza consists of a Coles supermarket with a floor area of 3,110 m², together with a range of specialty food stores being a bakery, deli/café and Asian grocer. Non-food retailers within the centre are a pharmacy, mobile phone retailer and a homewares store. Non-retail activities include the Commonwealth Bank, hairdresser, together with two takeaway food businesses. Overall, Caulfield Plaza's retail mix is not as strong as would be expected given that it is anchored by a full line supermarket.

Derby Street Precinct

Activities within the Derby Street Precinct are predominantly cafes, restaurants and takeaway food businesses, with the only retailer being a 7-Eleven and a newsagent. There is however a number of non-active shop fronts that may potentially be actively used in the future.

Figure 103: Phoenix Precinct – Retailing and Catering

Activity	Businesses (no.)	Floor Area (m^2)
Food Retailing		
1174 Bakery Product Manufacturing (Non-factory based)	1	100
4110 Supermarket and Grocery Stores	3	3,510
4123 Liquor Retailing	1	100
	5	3,710
Non-Food Retailing		
4221 Electrical, Electronic and Gas Appliance Retailing	1	100
4244 Newspaper and Book Retailing	1	129
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	1	100
4272 Stationery Goods Retailing	1	100
4279 Other Store-Based Retailing n.e.c.	1	100
	5	529
Hospitality		
4511 Cafes and Restaurants	13	1,052
4512 Takeaway Food Services	3	299
	16	1,351
Total	26	5,590

15.3 Social Infrastructure

The distinguishing social infrastructure features of the Caulfield Junction Neighbourhood Centre and its 400-metre catchment include the following:

- Three key public open spaces: 1) East Caulfield which includes active open space (catering for sports such as soccer, Australian Rules football and cricket); 2 Caulfield Planation Reserve, and 3) Caulfield Racecourse Reserve.
- The East Caulfield Reserve Social Room is available as a Council venue-for-hire facility.
- One non-Council operated long day child care centre (Monash Caulfield Child Care), one independently operated Kindergarten facility (Bubbles Pre-school), and one privately operated occasional child care service (South Pacific Health Club).
- One major education facility: 1) the Caulfield campus of Monash University.
- The Malvern Community Arts Centre (City of Stonnington).
- One emergency facility: 1) MFB Station 24.

15.4 Surrounding Land Uses and Development Opportunities

Monash University is the dominant land use within the immediate area, together with the Caulfield Racecourse immediately to the south. In addition, the Caulfield Village precinct is located a short distance to the west, being the only significant development opportunity within the immediate area.

16. Caulfield South Activity Centre

16.1 Location and Accessibility

The Caulfield South Activity Centre is focused around the intersection of Glen Huntly and Hawthorn roads. As the centre is not located near any major arterial roads, accessibility by vehicles is somewhat limited and subject to delays due to trams, particularly along Glen Huntly Road.

While this centre is not accessible by rail, it is serviced by the number 64 tram route along Hawthorn Road and the number 67 route along Glen Huntly Road, both of which connect to the Melbourne CBD. The centre is not well serviced by cycle paths.

16.2 Role and Function

A key attraction of this centre has been the Penhalluriack's hardware store in Hawthorn Road, although there has recently been a proposal for the site to be redeveloped for a full line supermarket, subject to a rezoning. Reece Plumbing and the Godfreys (vacuum cleaners) factory outlet within the centre would also attract customers from across a wider area.

Food retailing is limited to a small Foodworks grocery store, 'The Shook' food store catering for the Jewish community, Yum Organics and two bakeries. Other convenience retailing within the centre is quite limited, but does include two pharmacies - one of which is a compounding pharmacy which may also draw customers from a wider area.

Cafes, restaurants, and takeaway food activities account for a significant number of businesses within the centre.

Figure 104: Caulfield South Activity Centre – Retailing and Catering

Activity	Businesses (no.)	Floor Area (m^2)
Food Retailing		
1174 Bakery Product Manufacturing (Non-factory based)	2	210
4110 Supermarket and Grocery Stores	4	1,049
4123 Liquor Retailing	1	202
	7	1,460
Non-Food Retailing		
4211 Furniture Retailing	1	100
4213 Housewares Retailing	1	116
4221 Electrical, Electronic and Gas Appliance Retailing	1	1,451
4231 Hardware and Building Supplies Retailing	5	2,259
4232 Garden Supplies Retailing	1	56
4244 Newspaper and Book Retailing	3	224
4253 Watch and Jewellery Retailing	1	96
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	4	829
4272 Stationery Goods Retailing	1	137
4274 Flower Retailing	2	230
4279 Other Store-Based Retailing n.e.c.	5	830
	25	6,327
Hospitality		
4511 Cafes and Restaurants	20	2,730
4512 Takeaway Food Services	11	1,422
	31	4,151
Total	63	11,939

16.3 Social Infrastructure

The distinguishing social infrastructure features of the Caulfield South Activity Centre and its 400-metre catchment include the following:

- Hopetoun Gardens and Princess Park are the main public open spaces within this catchment, with Princess Park also catering for a wide variety of sports including cricket, Australian Rules football, soccer, tennis and lawn bowls.
- One sessional Kindergarten (Caulfield Primary Early Childhood Centre), one privately operated long day child care centre.
- DC Bricker Social Room (Princes Park) is available as a Council venue-for-hire facility.
- One government school (Caulfield Primary School) and four non-government schools.
- Five residential aged care facilities and the Caulfield Senior Citizens Centre.
- One emergency service facility – Caulfield Ambulance Station.
- Four significant primary and acute health facilities.

16.4 Surrounding Land Uses and Development Opportunities

In addition to the Penhalluriack's Hardware site, there are a number of other key development sites within the centre, primarily along Hawthorn Road, south of Glen Huntly Road. These Include:

- Southern Indoor Bowls Club site (2,294 m^2)
- Woods Accident Repairs site (1,545 m^2)
- Godfreys site (1,779 m^2), located on the corner of Hawthorn Road and Olive Street
- 371-377 Hawthorn Road, comprising two sites between Larch and Olive streets. One of these sites has remained vacant for a considerable period of time, while the adjacent side has an older style industrial building. The combined area of the two sites is 2,755 m^2.
- Reece Plumbing site (1,740 m^2) on the corner of Glen Huntly Road and Masters Street.

These sites represent significant development opportunities, particularly given the potential for some sites to be amalgamated. This may allow an Aldi supermarket, or other larger format retailers to be introduced into the centre. Alternatively, mixed-use developments would provide the opportunity for contemporary retail space, similar to that developed within the local centre adjacent to Princes Park to the south.

17. Bentleigh East Activity Centre

17.1 Location and Accessibility

The Bentleigh East Activity Centre is located on Centre Road between Tucker Road and East Boundary Road. The retail core of the centre however is primarily within a 350 metre section between East Boundary Road and Malane Street.

Public transport to the centre is limited to the 703 bus service along Centre Road which connects to the Bentleigh railway station, and the 822 bus service along East Boundary Road, connecting to Murrumbeena station.

17.2 Role and Function

The East Bentleigh Activity Centre has a total of 115 businesses occupying a total of 17,837 m^2 of ground level floorspace. Retail activities account for 31 businesses, hospitality related activities a further 26 and business and personal services, 43 businesses.

17.2.1 Food Retailing

The Supa IGA supermarket adjacent to the shopping strip represents a key anchor for the centre, and is well connected to the adjacent specialty food retailers. This supermarket, with a floor area of 1,800 m^2, is effectively a full line supermarket for shoppers to undertake their weekly food and grocery shopping. The supermarket appears to be trading well and offers a contemporary fit out that includes a sushi chef. Specialty food retailers within the centre include three bakeries, two butchers and a greengrocer, together with a delicatessen and liquor store.

Figure 105: Bentleigh East Activity Centre – Food Retailing

Activity	Businesses (no.)	Floor Area (m^2)
1174 Bakery Product Manufacturing (Non-factory based)	3	365
4110 Supermarket and Grocery Stores	2	2,082
4121 Fresh Meat, Fish and Poultry Retailing	2	295
4122 Fruit and Vegetable Retailing	1	151
4123 Liquor Retailing	1	114
4129 Other Specialised Food Retailing	1	167
Total	10	3,173

This centre competes with the Bentleigh Activity Centre located 1.5 km to the west, and The Links shopping centre on Warrigal Road, 2 km to the east. Telephone surveys of residents within Bentleigh East indicated that the centre was the main location for fresh food and grocery shopping for 23% of respondents. This compared to 33% that mainly shopped at the Bentleigh Activity Centre, and 15% that shopped at The Links. This suggests that the combination of a smaller format, but still full line, supermarket combined with a range of specialty food retailers represents a competitive food retailing offer for shoppers.

17.2.2 Non-Food Retailing

The Bentleigh East Activity Centre has a limited range of non-food retailing and as a result does not offer the opportunity for the same level of comparison shopping available at larger centres such as the Bentleigh Activity Centre. Nevertheless, these businesses benefit from shoppers attracted by the relatively strong fresh food and grocery shopping opportunities which represent the core function of the centre.

Figure 106: Bentleigh East Activity Centre Non-Food Retailing

Activity	Businesses (no.)	Floor Area (m^2)
4222 Computer and Computer Peripheral Retailing	1	50
4231 Hardware and Building Supplies Retailing	2	67
4243 Toy and Game Retailing	1	312
4244 Newspaper and Book Retailing	1	115
4251 Clothing Retailing	3	602
4252 Footwear Retailing	1	171
4253 Watch and Jewellery Retailing	2	163
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	1	1,165
4272 Stationery Goods Retailing	1	148
4274 Flower Retailing	2	225
4279 Other Store-Based Retailing n.e.c.	5	492
Total	20	3,611

17.2.3 Hospitality

Hospitality related activities play a significant role within the centre, accounting for a greater number of businesses than non-food retailing.

Figure 107: Bentleigh East Activity Centre - Hospitality

Activity	Businesses (no.)	Floor Area (m^2)
4511 Cafes and Restaurants	16	1,957
4512 Takeaway Food Services	8	1,000
Total	24	2,957

17.3 Social Infrastructure

The distinguishing social infrastructure features of the Bentleigh East Neighbourhood Centre and its 400-metre catchment include the following:

- Four key public open spaces: 1) McKinnon Reserve which includes active open space (catering for Australian Rules football and cricket); 2) Bailey Reserve (which includes the Glen Eira Sports & Aquatic Centre and outdoor sporting fields catering for sports such as cricket, soccer, softball and skating); 3) Colin Street Park, and 4) Leckie Street Park.
- The McKinnon Reserve Social Room is available as a Council venue-for-hire facility.
- One privately operated long day child care centre (Buckets Early Learning Centre), and two occasional child care services (GESAC and the privately-operated Summit Health Club).
- The Moorabbin campus of the Monash Medical Centre, and the Bentleigh Bayside Community Health Service.

17.4 Surrounding Land Uses and Development Opportunities

Between Browns Road and Becket Avenue, there is a relatively recent apartment development and an adjacent service station site that may be potentially developed in the future. This would result in continuous retail activity along the southern side of Centre Road.

Remaining development opportunities within the centre are located further to the west, and include:

- Australia Post depot;
- United Service Station site

These sites are located adjacent to each other and have a combined area of approximately 7,000 m^2 and lie within the McKinnon Secondary College zone which is likely to create pressure for their residential development at some stage in the future.

Other nearby uses include the Virginia Park industrial estate, where a mixed-use development is proposed that includes a new town centre.

18. Ormond Activity Centre

18.1 Location and Accessibility

The Ormond Activity Centre is located on North Road, at the intersection with Jasper Road, and adjacent to the Ormond railway station.

North Road provides excellent access and exposure for businesses, resulting in a number of 'destination style' retailers, particularly on the southern side of North Road. Public transport access to the centre is via rail services, as well as bus route 630, which provides connections between Gardenvale railway station and Monash University.

The Ormond Activity Centre is well connected to bicycle paths that connect to both Glen Huntly and Bentleigh activity centres to the north and south, as well as the Rosstown rail trail which provides an east-west connection to the Elsternwick Activity Centre, EE Gunn Reserve, Packet Park and Duncan McKinnon Reserve.

18.2 Role and Function

The Ormond Activity Centre performs a number of roles including:

- servicing the daily shopping needs of local residents and passing traffic along North Road;
- providing a range of specialist 'destination style' retailing; and
- a range of business and personal services located in shop fronts.

Each of these activities are located in well-defined precincts within the centre

Of the 107 shopfront's within the centre, 35 are occupied by retail uses, 26 by cafes restaurants and takeaway businesses, 31 business and personal services, and a further eight shop fronts are occupied by office uses. When surveyed, seven properties were not occupied, although four of these were undergoing a refit and therefore not available for lease. Therefore the effective only three properties were available for lease

18.2.1 Food Retailing

The daily shopping needs of local residents and passing traffic are well met by a small IGA supermarket, two bakeries, a greengrocer, and a number of specialty food stores. While the existing IGA supermarket may not provide the opportunity for weekly supermarket shopping, it would allow convenient pop-up shopping to be undertaken without having to negotiate a large supermarket. Similarly, fresh food items that may be purchased a number of times per week, such as bread, fruit and vegetables are readily available within the centre.

Figure 108: Ormond Activity Centre – Food Retailing

Activity	Businesses (no.)	Floor Area (m²)
1174 Bakery Product Manufacturing (Non-factory based)	2	460
4110 Supermarket and Grocery Stores	2	1,082
4122 Fruit and Vegetable Retailing	1	210
4123 Liquor Retailing	1	73
4129 Other Specialised Food Retailing	1	365
Total	7	2,191

18.2.2 Non-Food Retailing

The Ormond Activity Centre performs two roles as a location for non-food shopping. Within the retail core of the centre, on the northern side of North Road between the railway station and Jasper Road, there are a number of convenience retailers such as a pharmacy, newsagent and florist. Together with the supermarket and other food retailers within this precinct, a Post Office and Bendigo Bank, households are able to access most of their daily requirements.

Destination style retailers provide a second role for the centre, and are primarily concentrated along the southern side of North Road, between Jasper Road and the railway station. Key retailers include Ozstrings and Ozwinds (musical instruments), PWS (school uniforms), Giant (bicycles) and Petstock (pet supplies). Additional destination style retailers located on the northern side of North Road are the Home of Lights (lighting store) and Melbourne Music Centre (musical instruments).

The centre therefore services a variety of markets, which has sustained its role as a retail centre. Nevertheless, there is reliance upon non-retail uses to ensure that shop fronts are occupied.

Figure 109: Ormond Activity Centre Non-Food Retailing

Activity	Businesses (no.)	Floor Area (m²)
4211 Furniture Retailing	1	232
4222 Computer and Computer Peripheral Retailing	1	130
4229 Other Electrical and Electronic Goods Retailing	1	544
4231 Hardware, Building and Garden Supplies Retailing	2	291
4241 Sport and Camping Equipment Retailing	2	441
4243 Toy and Game Retailing	1	120
4244 Newspaper and Book Retailing	3	456
4251 Clothing Retailing	3	803
4253 Watch and Jewellery Retailing	1	100

Activity	Businesses (no.)	Floor Area (m^2)
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	1	250
4274 Flower Retailing	1	127
4279 Other Store-Based Retailing n.e.c.	11	2,544
Total	28	6,037

18.2.3 Hospitality

Cafes and restaurants account for one quarter of all businesses within the Ormond Activity Centre.

Figure 110: Ormond Activity Centre - Hospitality

Activity	Businesses (no.)	Floor Area (m^2)
4511 Cafes and Restaurants	21	3,659
4512 Takeaway Food Services	5	925
Total	26	4,584

18.3 Social Infrastructure

The distinguishing social infrastructure features of the Ormond Neighbourhood Centre and its 400-metre catchment include the following:

- Three key public open spaces: 1) Cadby Avenue Reserve and the southern side of the Neighbourhood Centre; 2) Glen Orme Avenue Reserve to the south and, 3) Joyce Park to the east (which also has a lawn bowls facility). St Kevin's School located on the southern boundary of the centre also contains a tennis facility (3 courts).
- One privately operated long day child care centre to the north (Dalmour Avenue Early Learning & Kinder).
- Four education facilities: St Kevin's School (Catholic Primary School); Katandra School (Government Special School for primary school aged children) to the north; Kilvington Grammar School (Non-government K-Year 12 School) to the north, and the Ormond Primary School (Government Primary School) to the south-west.

18.4 Surrounding Land Uses and Development Opportunities

There are no notable development sites within the Ormond Activity Centre with the exception of the development site created as a result of the level crossing removal. A major mixed use development is proposed for the site, comprising a full line supermarket and specialty retailers.

19. Glen Huntly Activity Centre

19.1 Location and Accessibility

The Glen Huntly Activity Centre is accessible via rail, or the number 67 tram along Glenhuntly Road. Alternatively, the centre is easily accessed via Grange Road which connects to both Dandenong and North Roads. An off-road bike path also connects the centre to the Ormond activity centre to the south.

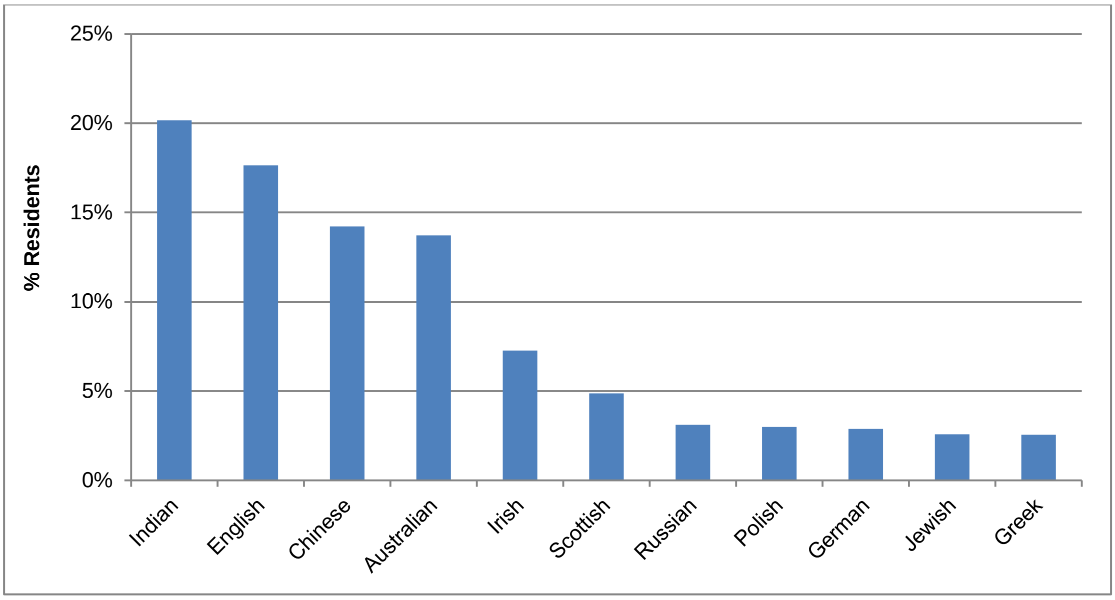
Within the centre, the railway crossing represents a significant barrier, with each side of the railway line functioning independently of each other. Caulfield Racecourse which occupies an area of approximately 70 ha, also impacts upon the centre through reducing the number of households within the immediate area.

19.2 Role and Function

19.2.1 Cultural Influences

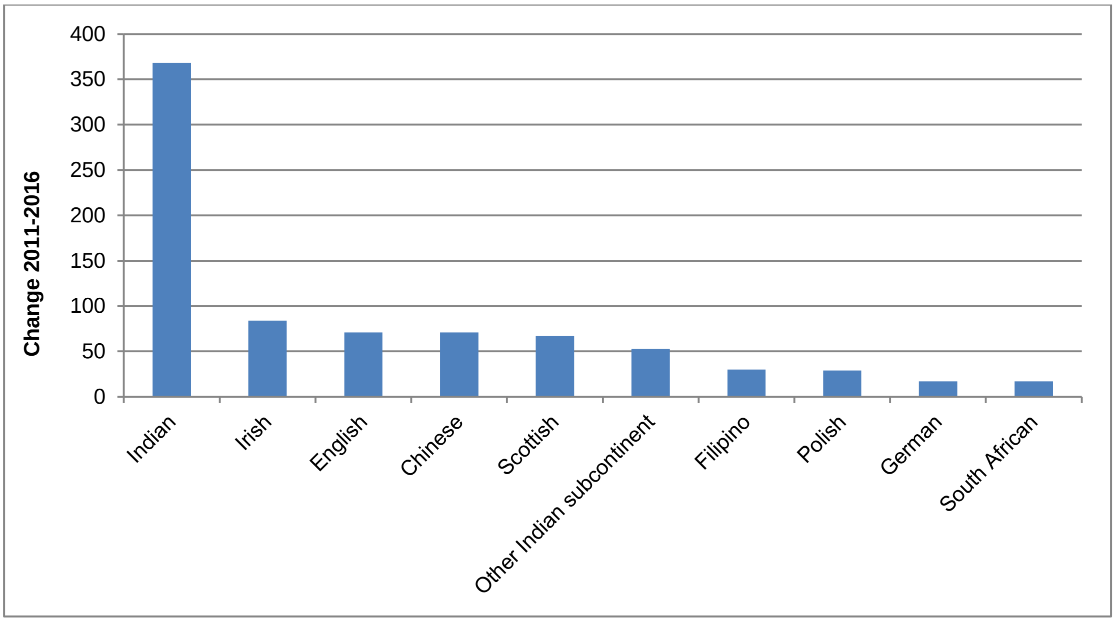
The immediate suburb of Glen Huntly experienced a notable shift in the cultural profile of its residents with a significant proportion residents now being of Chinese (14.2%) or Indian (20.2%) ancestry (refer Figure 111). The Indian community showed the strongest growth with an additional 368 residents over 2011-2016.

Figure 111: Glen Huntly Residents – Ancestry 2016 (% Residents)



Source: Id Consultants

Figure 112: Glen Huntly Residents – Change in Ancestry 2011-2016 (No. Persons)



Source: Id Consultants

19.2.2 Food Retailing

The Glen Huntly Activity Centre is anchored by a Woolworths supermarket, but otherwise offers only a limited range of food retailing. There is however a number of ethnic grocery stores that cater for the growing number of Asian and Indian residents within the surrounding area. Fresh food retailing is limited to a bakery, Halal butcher and a greengrocer.

Figure 113: Glen Huntly Activity Centre – Food Retailing

Activity	Businesses (no.)	Floor Area (m^2)
1174 Bakery Product Manufacturing (Non-factory based)	1	199
4110 Supermarket and Grocery Stores	4	2,598
4121 Fresh Meat, Fish and Poultry Retailing	1	178
4122 Fruit and Vegetable Retailing	1	89
4123 Liquor Retailing	1	308
Total	8	3,372

19.2.3 Non-Food Retailing

Although the centre does not offer a very strong mix of non-food retailing, there are a number of specialist and 'destination style' retailers including Gilmore's Comfort Shoes which offer specialised fitting footwear, the large Shu-Mart shoe store, Darn Cheap Fabrics and Glenhuntly Baby Carriages.

The overall image of the centre is negatively impacted upon by a number of poorly maintained stores, non-retail / inactive frontages and the presence of an adult bookshop within the centre.

Figure 114: Glen Huntly Activity Centre Non-Food Retailing

Activity	Businesses (no.)	Floor Area (m^2)
4211 Furniture Retailing	1	300
4213 Housewares Retailing	2	259
4214 Manchester and Other Textile Goods Retailing	1	522
4222 Computer and Computer Peripheral Retailing	2	212
423 Hardware, Building and Garden Supplies Retailing	1	162
4244 Newspaper and Book Retailing	1	136
4251 Clothing Retailing	2	288
4252 Footwear Retailing	2	2,411
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	1	162
4272 Stationery Goods Retailing	1	109
4279 Other Store-Based Retailing n.e.c.	7	1,584
Total	21	6,144

19.2.4 Hospitality

This centre offers a range of eateries, albeit not the same number as Glenhuntly's urban villages. Therefore while it would be expected to attract visitors from across Glen Eira, it does not represent a significant cafe and restaurant precinct.

Figure 115: Glen Huntly Activity Centre - Hospitality

Activity	Businesses (no.)	Floor Area (m^2)
4511 Cafes and Restaurants	18	2,113
4512 Takeaway Food Services	4	603
Total	22	2,716

19.3 Social Infrastructure

The distinguishing social infrastructure features of the Glen Huntly Activity Centre and its 400-metre catchment include the following:

- Booran Road Reserve, Garden Avenue Park, Glen Huntly Park and Lord Reserve are the main public open spaces within the Glen Huntly Activity Centre catchment.
- Both Glen Huntly Park and Lord Reserve provide the main outdoor sporting functions in the area catering for sports such as tennis, Australian Rules football, cricket and soccer.
- The Glen Huntly Park function room is available as a Council venue-for-hire facility.
- The Glen Huntly MCH and two privately operated long day child care facilities.
- Three schools, two of which are government and one non-government.
- One residential aged care facility.

19.4 Surrounding Land Uses and Development Opportunities

There are no notable development sites within the Glen Huntly Activity Centre, apart from the nursery site on the corner of Glen Huntly and Grange roads with a total area of approximately 1,000 m^2. This may potentially support residential development which also operates ground floor retailing such as a smaller format supermarket, or other destination style use.

The Sovereign apartments are currently being constructed on a previously vacant site at the eastern end of the centre.

20. Caulfield Park Activity Centre

20.1 Location and Accessibility

The Caulfield Park Activity Centre is primarily located along Hawthorn Road, south of Balaclava Road in Caulfield North. Located adjacent to Caulfield Park, the centre is approximately 1 km south of Stonnington's Glenferrie Road Activity Centre.

The centre may be easily accessed from Dandenong Road as well as by public transport via a number of tram routes along Balaclava and Hawthorn Roads, with connections to Malvern Station.

20.2 Role and Function

There are a total of 17 retailers within the centre together with 15 cafes and restaurants and three takeaway food outlets. Given the centre's proximity to the Glenferrie Road Activity Centre, it provides only a limited range of convenience retailing. This includes a single bakery and greengrocer, together with a newsagency, pharmacy, florist, liquor store and post office.

Figure 116: Caulfield Park Activity Centre – Retail and Hospitality Businesses

Activity	Businesses (no.)	Floor Area (m^2)
Food Retailing		
1174 Bakery Product Manufacturing (Non-factory based)	1	178
4122 Fruit and Vegetable Retailing	1	58
4123 Liquor Retailing	1	285
	3	520

Non-Food Retailing		
4214 Manchester and Other Textile Goods Retailing	1	50
4221 Electrical, Electronic and Gas Appliance Retailing	1	210
4222 Computer and Computer Peripheral Retailing	1	127
423 Hardware, Building and Garden Supplies Retailing	1	194
4244 Newspaper and Book Retailing	2	203
4251 Clothing Retailing	1	100
4253 Watch and Jewellery Retailing	1	35
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	1	224
4274 Flower Retailing	2	202
4279 Other Store-Based Retailing n.e.c.	3	438
	14	1,782
Hospitality		
4511 Cafes and Restaurants	12	1931
4512 Takeaway Food Services	3	287
	15	2,218
Total	32	4,520

In addition to retailers, local residents may access a number of hairdressing and beauty services, and health services which account for the majority of other ground floor activities within the centre.

There are a number of purpose built office buildings within the centre, primarily along Balaclava Road.

Figure 117: Caulfield Park Activity Centre – Other Ground Floor Businesses

Activity	Businesses (no.)
5101 Postal Services	1
6720 Real Estate Services	4
6921 Architectural Services	1
6931 Legal Services	1
6932 Accounting Services	2
7520 State Government Administration	1
7712 Investigation and Security Services	1
8511 General Practice Medical Services	2
8520 Pathology and Diagnostic Imaging Services	1
8533 Physiotherapy Services	1
8534 Chiropractic and Osteopathic Services	1
8539 Other Allied Health Services	4
8790 Other Social Assistance Services	1

Activity	Businesses (no.)
9111 Health and Fitness Centres and Gymnasia Operation	1
9511 Hairdressing and Beauty Services	11
9531 Laundry and Dry-Cleaning Services	2
9540 Religious Services	1
Total	36

20.3 Social Infrastructure

The distinguishing social infrastructure features of the Caulfield Park Neighbourhood Centre and its 400-metre catchment include the following:

- One key public open space: 1) Caulfield Park which includes both passive and active open space (catering for sports such as tennis, soccer, cricket, lacrosse, lawn bowls and croquet).
- The Caulfield Park Pavilion community room is available as a Council venue-for-hire facility.
- Two education facilities: 1) St Aloysius' School (a non-government, and 2) Caulfield Junior College;
- One residential aged care facility: 1) Sheridan Hall

20.4 Surrounding Land Uses and Development Opportunities

There are and no significant development sites within or adjacent to this centre.

21. McKinnon Activity Centre

The McKinnon Activity Centre comprises two precincts, each of which is zoned Commercial 1. For the purpose of this assessment these two precincts are considered together.

21.1 Location and Accessibility

The McKinnon Activity Centre is located midway between the Ormond and Bentleigh activity centres, and may be accessed via Jasper Road to the east or Thomas Street further to the west. Public transport services are train services to McKinnon station or the route 626 bus along McKinnon Road which provides connections to Gardenvale and Carnegie Stations.

21.2 Role and Function

21.2.1 Food Retailing

There is virtually no food retailing within this centre with only a small grocery store, bakery, delicatessen, liquor store and a cake shop.

Figure 118: McKinnon Activity Centre – Food Retailing

Activity	Businesses (no.)	Floor Area (m^2)
1174 Bakery Product Manufacturing (Non-factory based)	1	234
4110 Supermarket and Grocery Stores	1	55
4123 Liquor Retailing	1	88
4129 Other Specialised Food Retailing	2	236
Total	5	613

21.2.2 Non-Food Retailing

In addition to the small number of food retailers, there is a pharmacy and newsagent which together provide access to a limited range of daily shopping needs. The remaining non-food retailers represent an eclectic mix of activities.

Figure 119: McKinnon Activity Centre Non-Food Retailing

Activity	Businesses (no.)	Floor Area (m²)
4214 Manchester and Other Textile Goods Retailing	1	41
4221 Electrical, Electronic and Gas Appliance Retailing	1	121
4222 Computer and Computer Peripheral Retailing	1	100
423 Hardware, Building and Garden Supplies Retailing	2	242
4231 Hardware and Building Supplies Retailing	1	151
4244 Newspaper and Book Retailing	1	149
4251 Clothing Retailing	2	346
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	1	98
4274 Flower Retailing	1	127
4279 Other Store-Based Retailing n.e.c.	3	492
Total	14	1,864

21.2.3 Hospitality

Cafes and restaurants are again a significant contributor to the activity of this centre with a similar number of businesses and floorspace to that of non-food retailers.

Figure 120: McKinnon Activity Centre - Hospitality

Activity	Businesses (no.)	Floor Area (m²)
4511 Cafes and Restaurants	13	1,709
4512 Takeaway Food Services	2	296
Total	15	2,004

21.2.4 Business and Personal Services

There are a significant number of non-retail businesses located within the McKinnon Activity Centre, which is consistent with its role as a secondary retail location and the availability of affordable floor space. Such activities include legal and accounting services (4 businesses), health services (10), repair and maintenance services (6), and hairdressing and beauty services (10).

21.3 Social Infrastructure

The distinguishing social infrastructure features of the McKinnon Neighbourhood Centre and its 400-metre catchment include the following:

- Six key public open spaces: 1) Wattle Grove to the west; 2) McKinnon Memorial Gardens to the west; 3) Glen Orme Avenue Reserve to the north; 4) Joyce Park to the north-east; 5) Allnut Park to the south west, and 6) Hall Street Park to the east.
- McKinnon Kindergarten and MCH southern side of the western end of the centre.

- McKinnon Public Hall near the south-western end of the centre.
- Two education facilities: 1) Ormond Primary School (Government Primary School) to the north-west, and 2) McKinnon Secondary College to the east.
- Two residential aged care facilities: 1) Station Avenue (Independent Living Units) to the north, and 2) Claremont Terrace located within the eastern end of the centre.

21.4 Surrounding Land Uses and Development Opportunities

There are a number of potential development sites located within and adjacent to the centre being:

- 236 Jasper Road (Cnr. McKinnon Road) - vacant site (1,402 m^2).
- Ultra tune site (1,100 m^2 approx.)
- 88-100 McKinnon Road (approx. 3,500 m^2) being Industrial 3 zoned sites currently occupied by a number of automotive repairers.

There would be expected to be increasing pressure for these sites to be redeveloped for residential uses given their location within the McKinnon Secondary College zone. This will however be dependent upon whether they are owner occupied, in which case they may continue to support their existing uses.

22. Murrumbeena Activity Centre

22.1 Location and Accessibility

The Murrumbeena Activity Centre is located adjacent to Murrumbeena Railway Station, extending along Murrumbeena Road, and the section of Neerim Road immediately north of the railway station. While the centre is divided by the railway line, the level crossing is currently being removed. This may also reduce the level of traffic congestion that currently exists within the immediate area.

The centre is approximately 500 metres south of Dandenong Road, which provides convenient access by car. In addition to rail services, the number 822 bus service provides connections to Chadstone Shopping Centre and the Monash Medical Centre in Bentleigh East.

22.2 Role and Function

The role of this centre is somewhat constrained by its proximity to the Carnegie Urban Village, located approximately 1.3 km to the west along Neerim Road. As a result, it primarily acts as a centre for daily convenience shopping.

Figure 121: Murrumbeena Activity Centre – Retail and Hospitality Businesses

Activity	Businesses (no.)	Floor Area (m^2)
Food Retailing		
1174 Bakery Product Manufacturing (Non-factory based)	1	260
4110 Supermarket and Grocery Stores	3	665
4121 Fresh Meat, Fish and Poultry Retailing	1	150
4123 Liquor Retailing	1	102
4129 Other Specialised Food Retailing	1	220
	7	1,397
Non-Food Retailing		
4241 Sport and Camping Equipment Retailing	1	390
4244 Newspaper and Book Retailing	1	199
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	1	112
4274 Flower Retailing	1	128
4279 Other Store-Based Retailing n.e.c.	4	522
	8	1,351
Hospitality		
4511 Cafes and Restaurants	8	1267
4512 Takeaway Food Services	5	926
	13	2,193
Total	28	4,941

22.3 Social Infrastructure

The distinguishing social infrastructure features of the Murrumbeena Neighbourhood Centre and its 400-metre catchment include the following:

- Five key public open spaces: 1) Murrumbeena Bowls Club to the north; 2) Murrumbeena Tennis Club to the south east; 3) Riley Reserve; 4) Springthorpe Gardens, and 5) Boyd Park / Outer Circle linear Park, all located to the east.
- One long day child care centre to the south (Murrumbeena Children's Centre), one occasional child care centre (Murrumbeena House) and one MCH facility (Murrumbeena MCH).
- One education facility: Murrumbeena Primary School (Government Primary School) to the north east.
- Five aged care facilities: 1) St Michael's Aged Care facility to the east; 2) Spurway on the south-east boundary of the centre; Brimlea Aged Care to the south east; Rosstown Community to the west, and Finchley Court Supported Residential Service to the north.
- Murrumbeena Police Station located within the centre.

22.4 Surrounding Land Uses and Development Opportunities

There are a number of non-retail uses on the periphery of the centre on sites that are zoned either Mixed-Use or Industrial 3. These include:

- Tradelink site (1,210 m^2) on the corner of Neerim Road and Hobart Street.
- A number of smaller industrial zoned sites on Neerim Road, east of Emily Street.
- A single industrial zoned site (2,390 m^2) at 2-4 Emily Street.

Given the role of the Murrumbeena Activity Centre, the only alternative use for these sites would be for residential development.

23. Hughesdale Activity Centre

23.1 Location and Accessibility

This centre is located adjacent to the Hughesdale Railway Station along Poath Road, approximately 700 metres south of Chadstone Shopping Centre, and around 1.25 km north-west of the Oakleigh Activity Centre.

Public transport access is available in an east-west direction via rail services, and in a north-south direction along Poath Road with the number 767 bus providing a connection to the Chadstone bus interchange.

23.2 Role and Function

A wide range of food retailing options are available at the Oakleigh Activity Centre, including the Oakleigh Market. Similarly, Chadstone Shopping Centre offers considerable opportunities for non-food shopping. As a result, the Hughesdale Activity Centre's role is to primarily meet the day-to-day shopping needs of local residents, through offering a limited range of core food and non-food retailing.

There is however a number of destination style retailers such as Totb & Reiner (Milliners), MBT Shoes (specialist footwear) Gardenvale Collectables (sporting memorabilia), and Riding Way (bike shop).These businesses would be expected to attract customers from a wide area given the niche markets that they serve. As a result, they do not rely upon being located in larger centres to gain exposure to potential customers, and at the same time benefit from more affordable rents in the Hughesdale Activity Centre.

The number of cafes and restaurants in the centre is notably less than would be expected, although this may reflect strong competition from the Oakleigh Activity Centre where Eaton Mall has become a major attraction.

Other non-retail activities within the centre include a number of hairdressers and beauty services (6) and other personal services such as clothing alterations and a laundry. There is also a small number of offices within the centre.

Figure 122: Hughesdale Activity Centre – Retail and Hospitality Businesses

Activity	Businesses (no.)
Food Retailing	
1174 Bakery Product Manufacturing (Non-factory based)	1
4110 Supermarket and Grocery Stores	1
4123 Liquor Retailing	1
	3
Non-Food Retailing	
4241 Sport and Camping Equipment Retailing	1
4243 Toy and Game Retailing	1
4251 Clothing Retailing	1
4252 Footwear Retailing	1
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	1
4272 Stationery Goods Retailing	1
4274 Flower Retailing	1
4279 Other Store-Based Retailing n.e.c.	5
	12
Hospitality	
4511 Cafes and Restaurants	4
4512 Takeaway Food Services	7
	11
Total	26

23.3 Social Infrastructure

The distinguishing social infrastructure features of the Hughesdale Neighbourhood Centre and its 400-metre catchment include the following:

- Three key public open spaces: 1) Boyd Park / Outer Circle Railway Linear Park on the western boundary of the centre; 2) Galbally Reserve to the east; 3) Murrumbeena Park (an active open space catering for cricket, Australian Rules football and lawn bowls) to the south-west.
- Murrumbeena Pavilion (to the south-west) and Hughesdale Community Centre (to the south) are available as Council venue-for-hire facilities.

- Although there are no education facilities within the 400-metre catchment, Oakleigh Grammar (an independent K-12 school) is located just outside this catchment boundary to the east.
- Two residential aged care facilities: 1) Station Avenue (Independent Living Units) to the north, and 2) Claremont Terrace located within the eastern end of the centre.

23.4 Surrounding Land Uses and Development Opportunities

There are a number of notable development sites within the centre including those on the western side of Poath Road which is in Glen Eira being:

- 115-125 Poath Road: currently being developed for a five level apartment project of 40 dwellings.
- 67 Poath Road: Proposed six level Imperium apartment project, with construction expected to commence in the near future.
- Victorian Bridge Association site (approx. 1,500 m^2) at 131 Poath Road which represents a potential apartment development site.

The existing apartment projects will introduce new retail floorspace which may assist in attracting new businesses, raising amenity of the centre and potentially aiding in its revitalisation.

24. Moorabbin Activity Centre

24.1 Location and Accessibility

The Moorabbin Activity Centre extends across three municipalities (Glen Eira, Bayside and Kingston) due to its location at the intersection of Nepean Highway and South Road. The portion within Glen Eira, extends around the north-eastern corner of this intersection and along South Road.

24.2 Role and Function

Although the Moorabbin Activity Centre is anchored by a Woolworths supermarket, it offers very little other retailing immediately adjacent to this supermarket. There is however a significant retail precinct on the western side of Nepean highway, south of South Road within the City of Bayside. This precinct includes a number of outdoor retailers (Kathmandu, Macpac, Mountain Designs, Outsports, Vast Outdoors) together with a small number of convenience style retailers (newsagency, pharmacy, liquor store) and business services. This precinct benefits from not only its high exposure to Nepean Highway, but also the availability of convenient on-street parking.

While the portion of the Moorabbin Activity Centre within the City of Glen Eira does not include any food retailing, there are a number of 'destination style' non-food retailers that benefit from the exposure to either Nepean Highway or South Road. Due to the significant barrier created by South Road, these businesses have few synergies with the wider activity centre, and therefore this precinct largely functions as a local centre.

The Moorabbin Activity Centre is a significant office precinct, with a number of contemporary office developments are occupied by a range of businesses. This reflects a number of factors including the centre's accessibility by both private and public transport modes, access to an activity centre environment, and the demographic profile of households within the wider area.

Figure 123: Moorabbin Activity Centre (Glen Eira) – Retail and Hospitality Businesses

Activity	Businesses (no.)	Floor Area (m^2)
Non-Food Retailing		
4211 Furniture Retailing	1	296
4221 Electrical, Electronic and Gas Appliance Retailing	1	120
4222 Computer and Computer Peripheral Retailing	1	52
423 Hardware, Building and Garden Supplies Retailing	2	399
4241 Sport and Camping Equipment Retailing	2	327
4251 Clothing Retailing	3	1,002
4274 Flower Retailing	1	59
4279 Other Store-Based Retailing n.e.c.	2	211
	13	2,466
Hospitality		
4511 Cafes and Restaurants	2	189
4512 Takeaway Food Services	1	141
	3	330
Other Activities		
6931 Legal Services	2	441
6932 Accounting Services	2	329
8539 Other Allied Health Services	1	410
9412 Automotive Body, Paint and Interior Repair	1	269
9511 Hairdressing and Beauty Services	2	200
	8	1,649
Non-Active Frontage	1	115
Offices	3	431
Vacant	2	177
Total	30	5,166

24.3 Social Infrastructure

The distinguishing social infrastructure features of the Moorabbin Activity Centre and its 400-metre catchment include the following:

- No public open space within the Activity Centre or its 400 metre catchment on the City of Glen Eira side of the Centre.
- The nearest public open spaces on the Glen Eira side of the Centre are Brentwood Street Reserve to the east, Halley Park and North Avenue Park to the north, and Victory Park to the north-west.
- The nearest public open spaces on the Kingston side of the Centre include Moorabbin and Linton Street Reserves.
- The nearest public open spaces on the Bayside side of the Centre include Curly Rourke Reserve, Basterfield Park, Widdop Crescent Reserve and Wishart Reserve.
- The Kingston Arts & Cultural Precinct (City of Kingston side of the Centre).
- The Moorabbin Library (City of Kingston side of the Centre).
- The Avenues Education specialist school (City of Kingston side of the Centre).
- Moorabbin Police Station (City of Kingston side of the Centre).

24.4 Surrounding Land Uses and Development Opportunities

The Moorabbin Activity Centre immediately adjoins Commercial 2 zoned sites along Nepean Highway to the north of South Road. These sites offer the opportunity for additional office development, although this is not expected to significantly influence the mix of activities within that portion of the Moorabbin Activity Centre within Glen Eira.

25. Alma Village Activity Centre

25.1 Location and Accessibility

The Alma Village Activity Centre is located at the corner of Orrong and Alma roads in Caulfield North. This centre would primarily service households within the immediate area, and passing vehicles along Orrong Road. Public transport services include the number 5 and 64 trams along Dandenong Road to the Melbourne CBD, and bus route 220 along Orrong Road to the north and south.

25.2 Role and Function

Until recently, this centre also included a Foodworks supermarket at the northern end of the centre, where a mixed-use residential development is currently under construction. This will include a smaller format Woolworths supermarket which will provide a retail anchor for the centre.

Retailing within the centre is currently limited to a single bakery and a pharmacy with hospitality and business/personal services accounting for the majority of businesses. This may be largely due to the centre extending along Orrong Crescent which offers little exposure to passing traffic along Orrong or Alma roads.

Figure 124: McKinnon Activity Centre – Business Mix

Activity	Businesses (no.)	Floor Area (m^2)
Food Retailing		
1174 Bakery Product Manufacturing (Non-factory based)	1	121
Non-Food Retailing		
4271 Pharmaceutical, Cosmetic and Toiletry Goods Retailing	1	240
Hospitality		
4511 Cafes and Restaurants	3	315
4512 Takeaway Food Services	3	348
Business Services		
5101 Postal Services	1	244
6720 Real Estate Services	1	240
6932 Accounting Services	1	239
7000 Computer System Design and Related Services	1	237
8710 Child Care Services	1	212
Personal Services		
9111 Health and Fitness Centres and Gymnasia Operation	1	240
9491 Clothing and Footwear Repair	1	38
9511 Hairdressing and Beauty Services	2	116
9531 Laundry and Dry-Cleaning Services	1	80
Development Site	1	0
Vacant	2	135
Total	21	2,804

25.3 Social Infrastructure

Alma Village Neighbourhood Centre and its 400-metre catchment contains minimal social infrastructure except for:

- Te Arai Park, located within the City of Port Phillip (within which the Alma Road Community House is located).
- The Alma Road Community House (City of Port Phillip) which offers Neighbourhood House programs, occasional child care, meeting spaces for hire and a Maternal & Child Health service.

25.4 Surrounding Land Uses and Development Opportunities

While the proposed a supermarket would be expected to attract an increased number of shoppers to the centre, the existing mix of businesses and is not expected to change significantly. The potential for the centre to be expanded is also limited by the absence of any adjacent development sites.

Part E: Underutilized Land Review

26. Employment Context

Before assessing the opportunities for Glen Eira's existing employment land outside of the activity centres, it is useful to understand the employment needs of local residents, and the nature of existing local employment opportunities. This section provides an analysis of both of these aspects, while the following section profiles office developments that have generated employment opportunities in neighbouring municipalities, consistent with the needs of an increasingly higher skilled resident workforce (refer Figure 125).

26.1 Resident Employment Profile 2011

A key objective in planning for Glen Eira's activity centres is to provide local employment opportunities for residents. Consistent with their socio-economic profile, Glen Eira residents are predominantly employed in white collar occupations within the 'Professional, Scientific and Technical Services' (13.5% of residents), Health Care and Social Assistance (12.5%), Retail Trade (9.7%), and Education and Training (10.8%) sectors.

The 'Professional, Scientific and Technical Services' accounted for 23% 'Health Care and Social Assistance' 21%,and Education and Training 18% of the growth in employed residents over the period 2001-2011 (refer Figure 125). . Conversely, employment in the manufacturing sector contracted by 16% over the same period. This pattern of employment growth is consistent with that experienced across the broader economy with a shift towards the services sector, combined with a contraction in traditional manufacturing activity.

Figure 125: Glen Eira Residents – Industry of Employment 2006-2016

	2006	2011	2016	2006-2016	Average Annual Growth Rate (%)
Agriculture, forestry and fishing	101	102	161	60	4.8%
Mining	87	147	155	68	5.9%
Manufacturing	4,954	4,549	3,476	-1,478	-3.5%
Electricity, gas, water and waste services	377	573	674	297	6.0%
Construction	3,122	3,644	3,892	770	2.2%
Wholesale trade	3,535	3,425	2,543	-992	-3.2%
Retail trade	6,917	6,794	6,773	-144	-0.2%
Accommodation and food services	3,167	3,730	4,079	912	2.6%
Transport, postal and warehousing	1,725	1,885	2,003	278	1.5%
Information media and telecommunications	2,000	2,046	1,981	-19	-0.1%
Financial and insurance services	3,730	4,206	4,249	519	1.3%
Rental, hiring and real estate services	995	1,186	1,456	461	3.9%
Professional, scientific and technical services	7,318	8,838	9,425	2,107	2.6%

	2006	2011	2016	2006-2016	Average Annual Growth Rate (%)
Administrative and support services	2,146	2,402	2,525	379	1.6%
Public administration and safety	2,731	3,088	3,135	404	1.4%
Education and training	5,857	6,477	7,528	1,671	2.5%
Health care and social assistance	6,829	7,944	8,732	1,903	2.5%
Arts and recreation services	1,104	1,381	1,614	510	3.9%
Other services	2,060	2,153	2,287	227	1.1%
Inadequately described/Not stated	1,650	1,476	2,951	1,301	6.0%
Total	**60,404**	**66,040**	**69,634**	**9,230**	**1.4%**

Source: ABS Census

Figure 126 indicates the types of occupations held by Glen Eira's residents employed in the Professional, Scientific and Technical Services' sector, with almost all being typical office jobs. Similarly, the occupations of residents employed within the Financial and Insurance Services sector are also predominantly office based.

Figure 126: Glen Eira Residents – Professional, Scientific and Technical Services Employees by Occupation 2016

Occupation	Percent
Business and Systems Analysts, and Programmers	10.6%
Accountants, Auditors and Company Secretaries	10.1%
Legal Professionals	8.6%
Architects, Designers, Planners and Surveyors	7.4%
Sales, Marketing and Public Relations Professionals	5.1%
Information and Organisation Professionals	4.9%
ICT Managers	4.0%
Accounting Clerks and Bookkeepers	3.6%
Engineering Professionals	3.3%
Natural and Physical Science Professionals	2.7%
Business Administration Managers	2.7%
Advertising, Public Relations and Sales Managers	2.3%
ICT Network and Support Professionals	2.1%
Chief Executives, General Managers and Legislators	2.1%
Personal Assistants and Secretaries	2.0%
Miscellaneous Clerical and Administrative Workers	1.8%
Building and Engineering Technicians	1.6%
ICT and Telecommunications Technicians	1.6%
Office and Practice Managers	1.6%
General Clerks	1.4%
Construction, Distribution and Production Managers	1.3%
ICT Professionals, nfd	1.3%

Contract, Program and Project Administrators	1.2%
Miscellaneous Hospitality, Retail and Service Managers	1.2%
Arts Professionals	1.0%
Inadequately described	1.0%
Human Resource and Training Professionals	0.9%
Database and Systems Administrators, and ICT Security	0.8%
Media Professionals	0.8%
Clerical and Office Support Workers	0.8%
Insurance Agents and Sales Representatives	0.8%
Receptionists	0.7%
Other	9.1%
Total	100.0%

Source: ABS Census
nfd – not fully defined

Glen Eira residents working in the Health Care and Social Assistance sector are employed in a range of occupations ranging from health practitioners through to administrative staff. These will be either in hospital settings, purpose built medical centres or within an office setting.

Figure 127: Glen Eira Residents – Health Care and Social Assistances Employees by Occupation 2016

Occupation	Percent
Midwifery and Nursing Professionals	15.4%
Personal Carers and Assistants	10.3%
Medical Practitioners	10.3%
Health Therapy Professionals	8.5%
Social and Welfare Professionals	6.0%
Receptionists	5.8%
Health and Welfare Support Workers	5.4%
Child Carers	5.1%
Health Diagnostic and Promotion Professionals	3.7%
Office and Practice Managers	2.3%
Education, Health and Welfare Services Managers	2.1%
Natural and Physical Science Professionals	1.8%
General Clerks	1.5%
Agricultural, Medical and Science Technicians	1.5%
Accounting Clerks and Bookkeepers	1.3%
Chief Executives, General Managers and Legislators	1.1%
Other	17.9%
Total	**100.0%**

Source: ABS Census

26.2 Projected Resident Employment

Glen Eira's projected population growth will generate an increased number of work-related trips, both by private motor vehicles and public transport. The increased demand upon transport infrastructure will be determined by the workplace location of residents, which is influenced by the industries within which they will work.

Based upon projected population growth over the period to 2036, together with an assumed continuation of the growth rate in employment of Glen Eira residents by industry sector observed over the period 2006-2016, the number of residents employed within each industry sector has been projected. It should however be noted that these projections are indicative only as future employment growth will vary depending upon the stage in the economic cycle.

It is projected that over the period 2016-2036, the total number of employed Glen Eira residents will increase by an estimated 21% from 69,639 residents to 84,413. The 'Professional, Scientific and Technical Services' and 'Financial and Insurance Services' sectors are together expected to account for 23% of this growth, with the 'Health Care and Social Assistance' sector accounting for a further 19%, Education and Training 17%, and Accommodation and Food Services 9%.

Figure 128: Glen Eira Residents – Projected Employment by Industry Sector 2011-2036

Industry	**2011**	**2016**	**2021**	**2026**	**2031**	**2036**	**Change 2016-2036**
Agriculture, forestry and fishing	102	161	199	239	283	331	170
Mining	135	155	202	257	322	398	243
Manufacturing	4,500	3,476	2,850	2,274	1,783	1,384	-2,092
Electricity, gas, water and waste services	560	674	882	1,124	1,406	1,743	1,069
Construction	3,615	3,892	4,253	4,524	4,728	4,893	1,001
Wholesale trade	3,380	2,543	2,111	1,706	1,354	1,065	-1,478
Retail trade	6,759	6,773	6,560	6,184	5,727	5,253	-1,520
Accommodation and food services	3,661	4,079	4,531	4,899	5,204	5,474	1,395
Transport, postal and warehousing	1,878	2,003	2,112	2,169	2,187	2,185	182
Information media and telecommunications	2,007	1,981	1,930	1,830	1,704	1,572	-409
Financial and insurance services	4,159	4,249	4,439	4,513	4,509	4,460	211
Rental, hiring and real estate services	1,175	1,456	1,724	1,987	2,249	2,522	1,066
Professional, scientific and technical services	8,714	9,425	10,469	11,318	12,023	12,647	3,222
Administrative and support services	2,384	2,525	2,681	2,770	2,813	2,828	303
Public administration and safety	3,041	3,135	3,287	3,356	3,365	3,342	207
Education and training	6,443	7,528	8,353	9,022	9,574	10,060	2,532
Health care and social assistance	7,890	8,732	9,664	10,411	11,019	11,549	2,817
Arts and recreation services	1,349	1,614	1,910	2,200	2,490	2,791	1,177
Other services	2,158	2,287	2,358	2,367	2,335	2,280	-7
Inadequately described/Not stated	1,450	2,951	3,863	4,921	6,160	7,636	4,685
Total	65,360	69,639	74,378	78,070	81,234	84,413	14,774

Source: ABS Census, BWEC

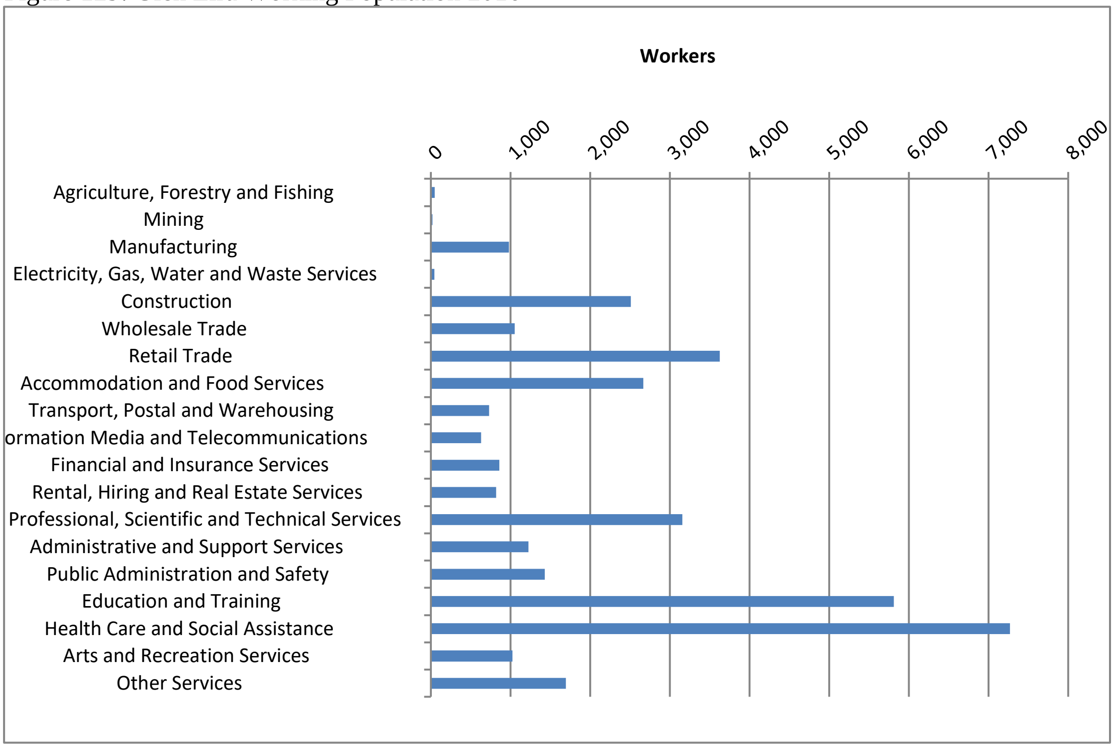
The increased number of Glen Eira residents working in the 'Professional, Scientific and Technical Services' and 'Financial and Insurance Services' sectors will generate increased trips to the Melbourne CBD, placing additional demands is upon road and rail infrastructure. Based upon the projected distribution of employed Glen Eira residents across industries, combined with the existing location of these jobs, it is estimated that the number of work-related trips to the City of Melbourne may increase by 33% over the period 2016-2036. This however assumes that recent employment trends are maintained.

While the Metro Tunnel will reduce congestion within the City Loop, and allow increased rail services to stations within Glen Eira, there will still be increased demand for tram services connecting to rail stations as well as car parking around stations.

26.3 Local Working Population Profile

Employment activity within Glen Eira is dominated by the Health Care and Social Assistance (19.5% of jobs) and Education and Training (15.6%) sectors, followed by Retail Trade (10%) which together account for 45% of jobs within the municipality. The 'Professional, Scientific and Technical Services' sector, being the largest employer of Glen Eira residents, accounts for 8.5% of local jobs (refer Figure 129).

Figure 129: Glen Eira Working Population 2016



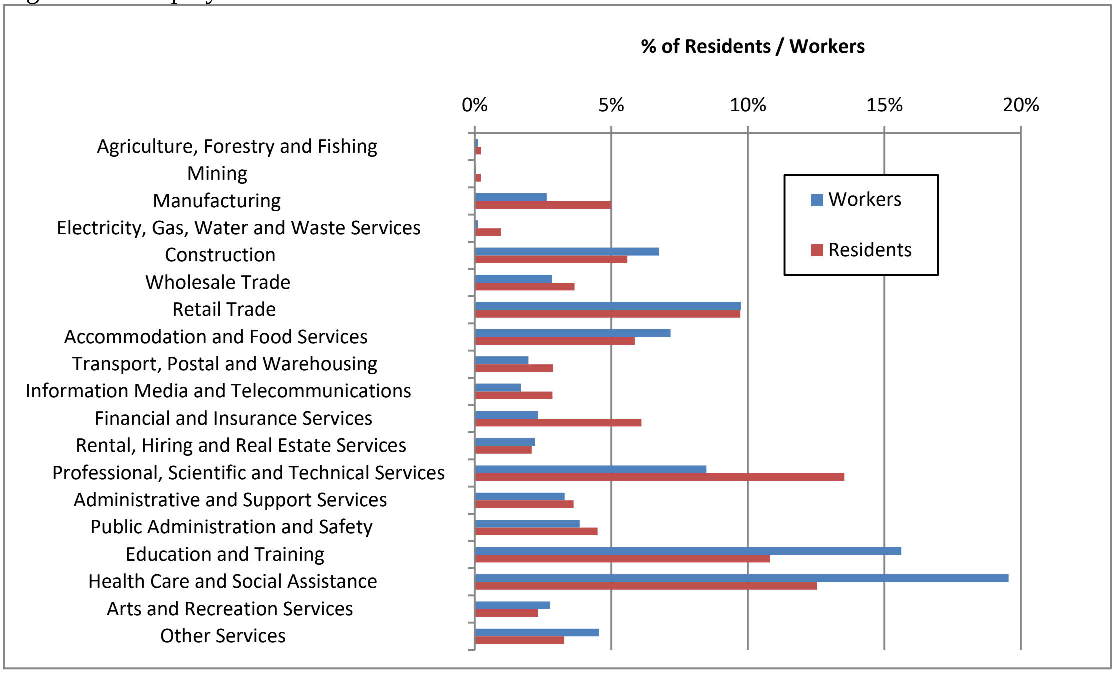
Source: ABS Census

There are some notable differences in industry mix of local employment compared to the industries within which local residents work. For example, the proportion of local jobs within the 'Education and Training' and 'Health Care and Social Assistance' sectors is significantly greater than the share of local residents working in these sectors (refer Figure 130).

Conversely, the proportion of local jobs within the 'Professional, Scientific and Technical Services' and 'Financial and Insurance Services' sectors is much lower than the share of local residents working in these areas. Similarly, the proportion of local jobs within the Manufacturing and Wholesale Trade sectors is also less than that of residents working in these industries.

Across the remaining sectors, the mix of local jobs is generally consistent with the sectors within which local residents work.

Figure 130: Employment Mix – Glen Eira Residents vs. Workers 2016

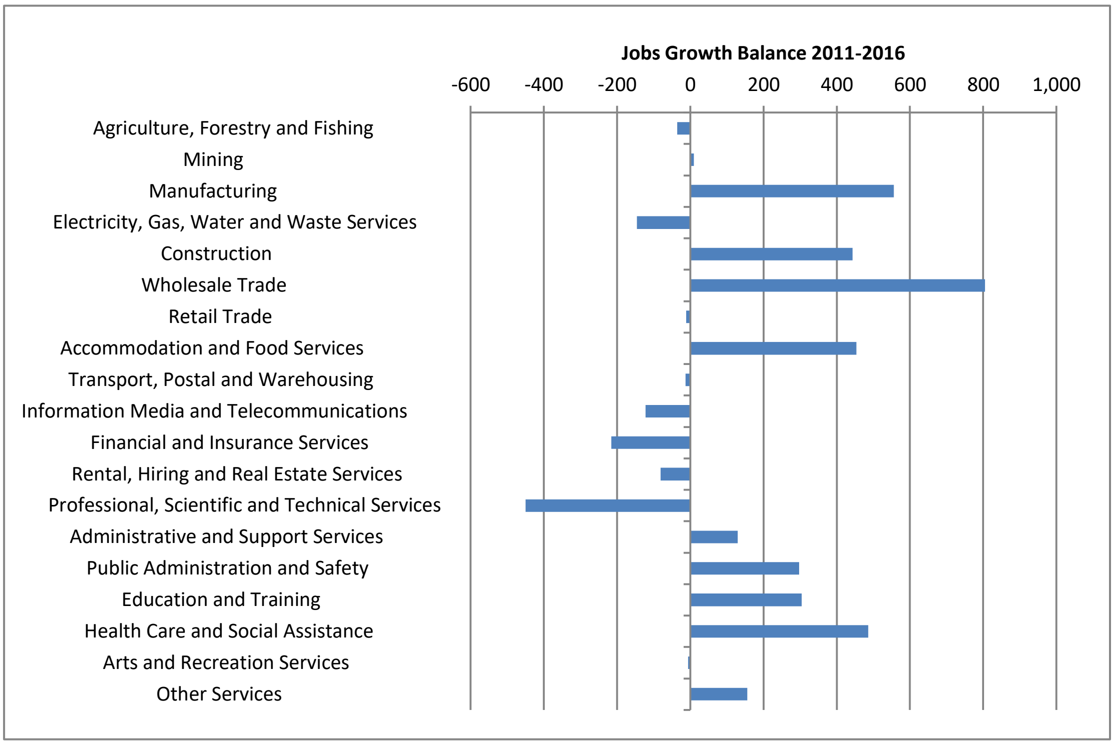


Source: ABS Census

Comparing the growth in local employment opportunities with the growth in the number of residents working in each sector over 2006-2011 (refer Figure 131) indicates that of the imbalance within the Professional, Scientific and Technical Services sector increased significantly. Over this period, the number of residents working in this sector increased by587, compared to an increase of only 137 local jobs, representing a deficit of 450 jobs. In proportional terms, this sector accounted for 16.4% of employment growth among residents, but only 2.3% of local employment growth. The next most significant deficit was within the Financial and Insurance Services sector where there was a jobs deficit of 216 over the five-year period.

Within the Education and Training, and Health Care and Social Assistance sectors, the rate of growth in local employment was significantly greater than the growth in the number of residents working in these sectors, resulting in a positive jobs balance over the five-year period. The positive jobs growth balance for manufacturing and wholesale trade was due to the number of residents working in these sectors declining by more than there was a contraction in the number of local jobs

Figure 131: Glen Eira - Jobs Growth Balance 2011-2016

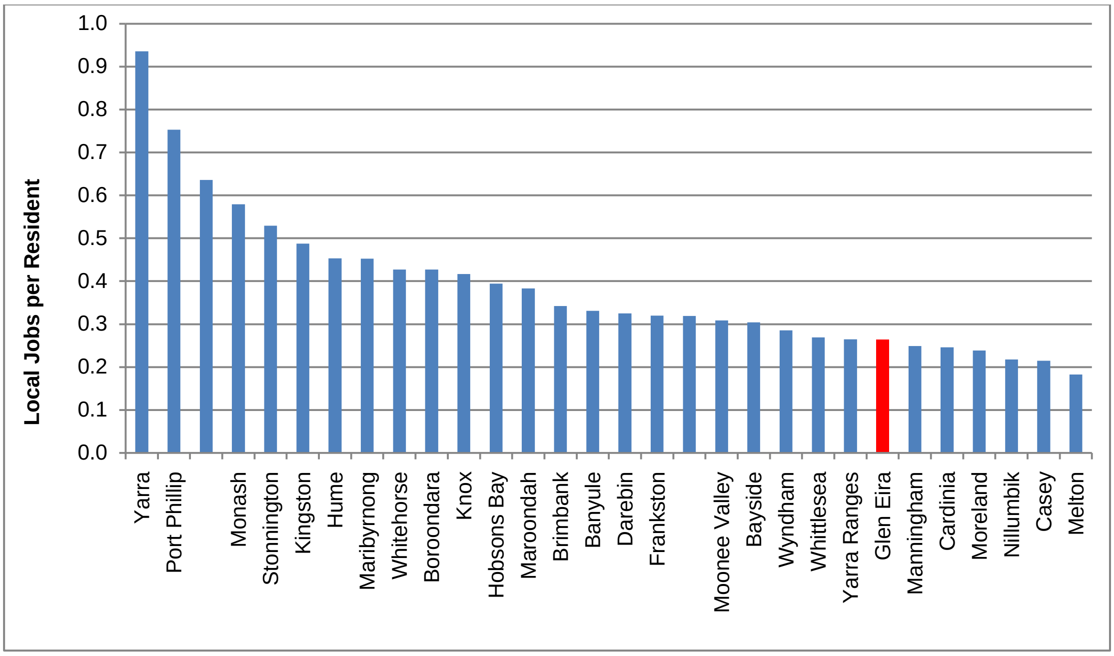


Source: ABS

26.4 Local Employment Provision

The provision of local employment opportunities within City of Glen Eira, relative to the number of residents, is very low when compared to other municipalities. Across Melbourne's 31 municipalities, Glen Eira is ranked 25th, with only 0.25 jobs per resident (refer Figure 132). This is comparable to many outer metropolitan municipalities such as Whittlesea, Yarra Ranges, Cardinia and Casey, and well behind similarly located municipalities such as Boroondara (0.43), Banyule (0.33), Moonee Valley (0.31). The latter group of municipalities are located a similar distance from the Melbourne CBD, and like Glen Eira have relatively little industrial land for employment.

Figure 132: Glen Eira - Local Jobs per Resident 2016 (Excluding City of Melbourne)

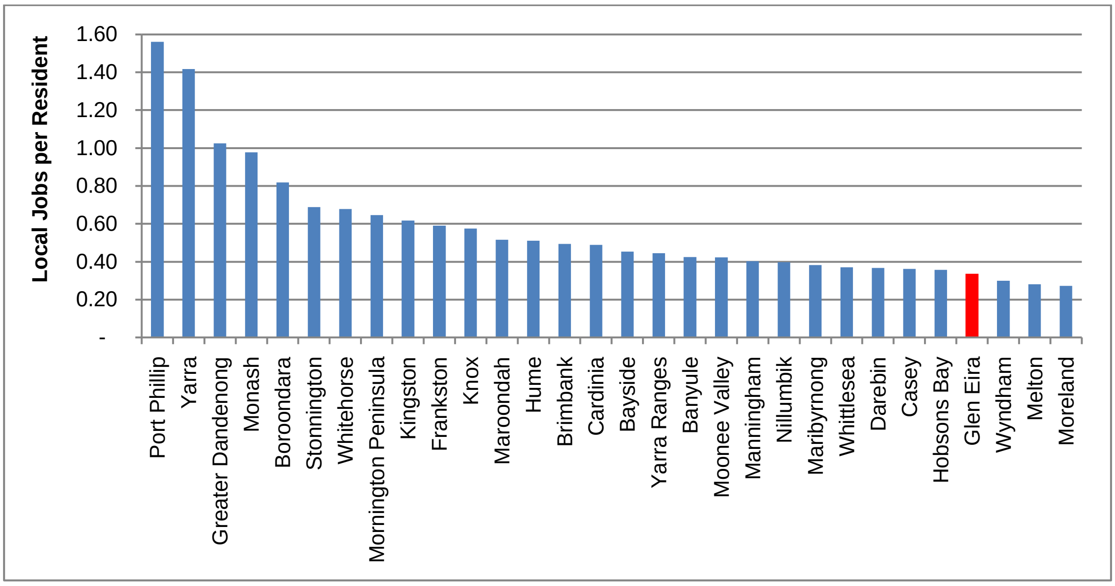


Source: ABS Census

Given that the 'Health Care and Social Assistance' and 'Professional, Scientific and Technical Services' sectors represent a large, and increasing, share of employment for Glen Eira's residents, these are of particular interest. Within the Health Care and Social Assistance sector, Glen Eira has 0.83 local jobs for every resident employed in that sector, giving it a ranking of 15 across the 31 municipalities.

With respect to the Professional, Scientific and Technical Services sector, there are 0.33 local jobs for each resident working in this sector, which ranks Glen Eira 28th across Melbourne's 31 municipalities (refer Figure 133). This provision rate of 0.33 local jobs per resident is less than many municipalities within Melbourne's outer region such as Nillumbik (0.40), Yarra Ranges (0.45) and Cardinia (0.49), as well as more comparable locations such as Boroondara (0.82), Stonnington (0.69), Bayside (0.45) and Banyule (0.42).

Figure 133: Glen Eira - Professional, Scientific and Technical Services Sector: Local Jobs per Resident 2016 (Excluding City of Melbourne)



Source: ABS Census

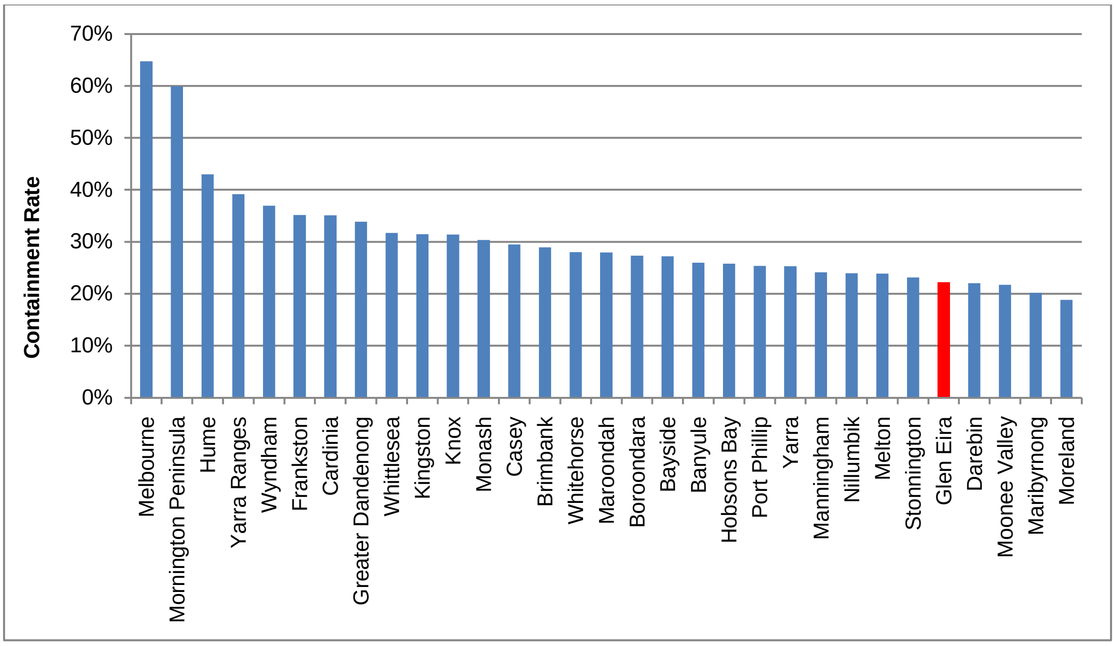
26.5 Employment Self-Containment and Self-Sufficiency

Employment self-containment refers to the percentage of employed residents who are actually employed within their local area. This provides a measure of residents' effective access to local employment opportunities, which may have a positive economic, social and environmental impact.

Glen Eira has a very low level of employment self-containment, with only 22.2% of its working residents employed within the municipality, being the fifth lowest across Melbourne's 31 municipalities (refer Figure 134). Only Darebin, Moonee Valley, Maribyrnong and Moreland have a lower proportion of residents working locally, all of which are immediately adjacent to the City of Melbourne which attracts workers.

The socio-economic profile of residents, combined with the distance from major employment nodes such as the Melbourne CBD, will influence the level of employment self-containment. However, Glen Eira is still well below that of comparable locations such as the Bayside, Boroondara, and Banyule which have containment rates in the range 26.0% - 27.3%.

Figure 134: Employment Self-Containment 2016*

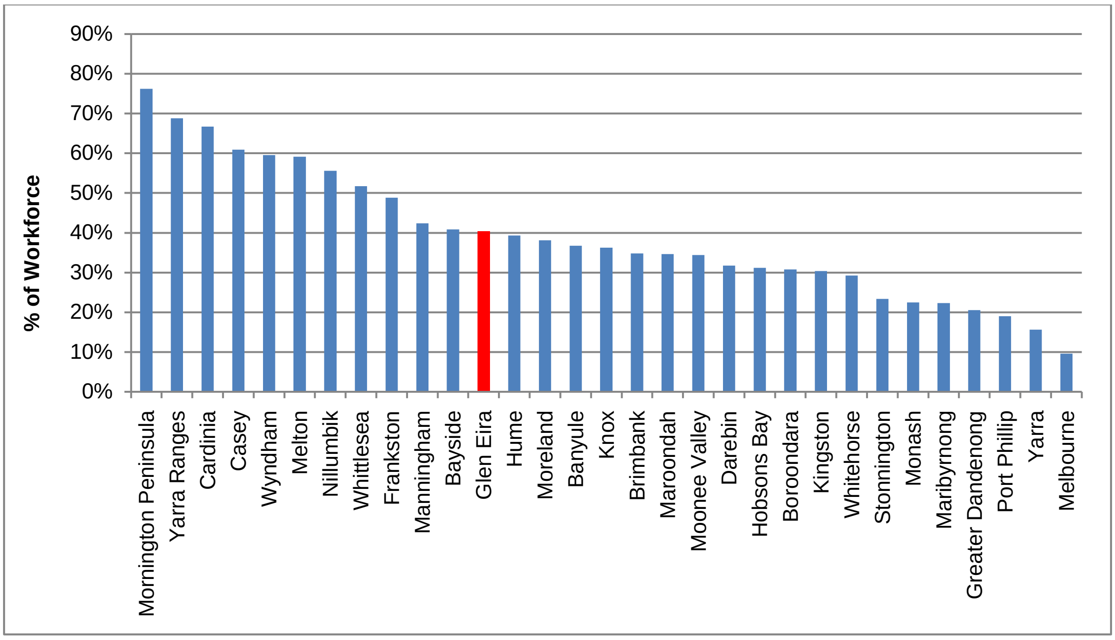


Source: ABS Census
* Percent of residents working within their resident LGA

Employment self-sufficiency measures the proportion of local jobs that are occupied by local residents. On this measure Glen Eira performs much better, being ranked 12th across Melbourne's 31 municipalities (refer Figure 135), with 40.3% of jobs within Glen Eira are held by local residents.

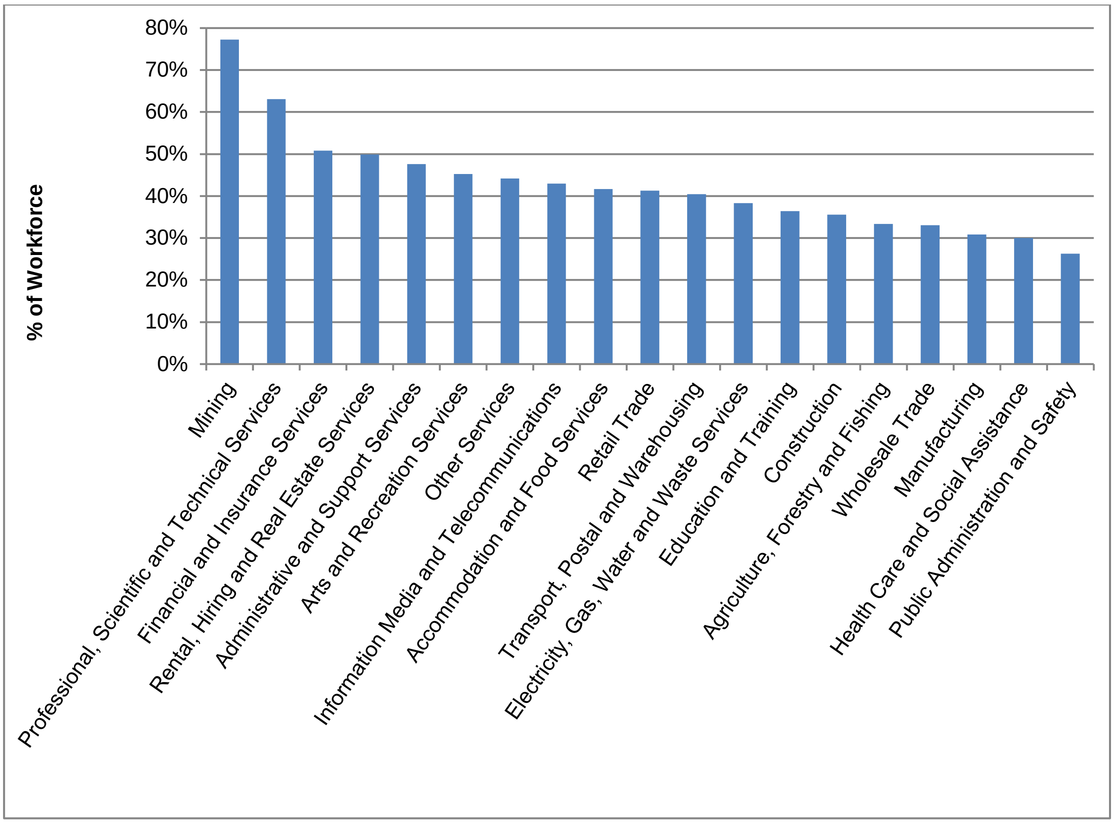
There is a significantly higher likelihood that jobs within the 'Professional, Scientific and Technical Services' sector will be occupied by local residents (refer Figure 136). Within this sector, 63% of local jobs are occupied by Glen Eira residents, compared to only 30% of jobs within the 'Health Care and Social Assistance' sector, and 36% of jobs within the Education sector. Therefore creating local 'office jobs' results in nearly twice as many residents working locally, than if these jobs were in the health or education sectors.

Figure 135: Employment Self-Sufficiency (share of Glen Eira jobs held by residents) 2016



Source: ABS Census

Figure 136: Glen Eira – Employment Self-Sufficiency by Industry (Share of jobs held by local residents) 2016



Source: ABS Census

Figure 137 indicates that the number of local jobs within each industry relative to the number of Glen Eira residents working in the same industry varies considerably. Ignoring smaller industries, this ratio varies from 0.21 for Financial and Insurance Services to 0.86 for Health Care and Social Assistance. For Professional, Scientific and Technical Services industry, which is the largest employer of Glen Eira residents, this ratio is only 0.35.

This analysis indicates that there is a shortage of local jobs within the Professional, Scientific and Technical Services sector, resulting in Glen Eira's residents having to travel to locations such as the Melbourne CBD to work. Promoting local employment opportunities within this sector, such as through the redevelopment of underutilised sites, would be expected to address this issue.

Figure 137: Glen Eira – Jobs Balance by Industry Sector 2016

Industry	Residents Employed in Industry	Local Jobs Available	Local Jobs Per Resident Working in Industry	Jobs Surplus (+) / Deficit (-)
Agriculture, Forestry and Fishing	161	52	0.32	-109
Mining	155	21	0.14	-134
Manufacturing	3,476	1,002	0.29	-2,474
Electricity, Gas, Water and Waste Services	674	45	0.07	-629
Construction	3,892	2,598	0.67	-1,294
Wholesale Trade	2,543	1,079	0.42	-1,464
Retail Trade	6,773	3,760	0.56	-3,013
Accommodation and Food Services	4,079	2,799	0.69	-1,280
Transport, Postal and Warehousing	2,003	760	0.38	-1,243
Information Media and Telecommunications	1,981	650	0.33	-1,331
Financial and Insurance Services	4,249	882	0.21	-3,367
Rental, Hiring and Real Estate Services	1,456	843	0.58	-613
Professional, Scientific and Technical Services	9,425	3,283	0.35	-6,142
Administrative and Support Services	2,525	1,264	0.50	-1,261
Public Administration and Safety	3,135	1,447	0.46	-1,688
Education and Training	7,528	6,196	0.82	-1,332
Health Care and Social Assistance	8,732	7,539	0.86	-1,193
Arts and Recreation Services	1,614	1,035	0.64	-579
Other Services	2,287	1,744	0.76	-543
Inadequately described/Not stated	2,951	1,620	0.55	-1,331
Total	69,634	38,610	0.55	-31,024

Source: ABS Census

27. Local Office Development Profiles

The previous section identified a shortage of local office employment opportunities for residents within Glen Eira. The capacity for office development within activity centres is largely limited by apartments representing a higher and better use from a development perspective.

This section profiles a number of contemporary office developments which have occurred within neighbouring municipalities. With the exception of two developments (3 Male Street Brighton, 1253 Nepean Highway Brighton) all these office developments have occurred on Commercial 2 zoned sites.

The mix of businesses that have established offices in these developments, offer a range of employment opportunities for higher skilled local residents.

27.1 3 Male Street Brighton

Rhumb Maritime - Ship Chartering

Austin Design Associates - Architects

The Finishing Touch – Removal Services

Wormington Accountants

Super 2000 – Accountants

Zous Lawyers

Oil Tanking Asia Pacific

Davies and Marks Lawyers

James Rigney Architects

Next Brand Strategy and Design – Marketing Consultants

Lipman James – Migration Agents

Bridsan Group – Horse Stud

Barry Smith and Associates

a2z Health Group (Physiotherapy) - Health Services

Fine Line Building Design - Building Designers

Southern Rheumatology – Health Services

Blueprint Developments – Property Developers

Quinn and Quinn - Lawyers

Melbourne Heart Care – Health Services

Bayside Financial Services

Shinsei Pulp and Paper Australia

Eurovillas - Real Estate Services

Allied Grain – Grain Traders

Intrepid Geophysics – Engineering Services

Pager Partners - Accountants

Sicuro – Financial Services

27.2 1253 Nepean Highway Cheltenham

Empower Healthcare - Physiotherapists
Ceechem – Industrial supplies
Estate Imagery - Photographers
The Bridge Employment – Recruitment agency
CPAP Direct – Medical supplies
Complete Speech Pathology – Health services
Richwise – Timber importer
Ates Insurance – Insurance brokers
Greenlight Mortgages – Mortgage brokers
SE Finance – Financial services
Winestone and Associates – Insurance brokers
The Thinking Chip – Engineering consultants
ACE Answering – Telephone answering service
Early Intevention Psychology – Health services
Recruitment Pool – Recruitment agency
Waverley Real Estate – Real estate agents
Huxxer Corporation IT Consultants
CFO Series – Business services

27.3 Hallmarc Business Park: 328 Reserve Road Cheltenham

TopYacht - Computer Software

Trident - IT Consultants

Aspire - Financial Services

Hydro Terra - Environmental Engineers

Innovag - Test equipment Suppliers

Xtreme Productivity - IT Consultants

NRS – Recruitment Services

Creative Product Design - Electronics/Product Designers

Webtron - Software Development

Sergeants - Conveyancing Services

Holland Thomas - Security Services

Norton and Co - Accountants

Bruce Young Engineers - Consultants

27.4 Tulip Green Business Centre

This development comprises 28 office suites, amenities to each level along with basement car park.

Accountancy Connect-Accountants

Bayside Glen Eira Kingston Local Learning and Employment Network – Employment Network

Initiative Sport – Event management

Share Wealth Systems – Financial Services

Optimal Data Services – IT Services

Elite Crossings – Engineering consultants

Broadbent Finance – Financial services

Integrated Bulk Systems – Engineering consultants

Loans Australia – Mortgage brokers

Atkins Maritime – Engineering consultants

Ezy2c - GPS Tracking

Brickcorp – Builders

VicSurvey – Land surveyors

EChoice & PSS – Mortgage Brokers

Ctrack - fleet management and vehicle tracking solutions

Future Sport & Entertainment – Sports Management

Novare Finance Group – Financial Services

Glendora Commercial Services - Accountants

Good Times Co – Building supplies

Brava Tango Bravo - Advertising

Dovetail Developments – Property development

RPI Financial Systems – Financial services

Limited-Space.com

ICommunique – Marketing services

Carcorp – Recruitment consultants

27.5 254 Bay Road Cheltenham

Dak-Wal Constructions - Builders

Stuart Broadly & Associates – Financial services

Cortex – Engineering consultants

Duromer – Industrial supplies

Wright Steel Sales – Industrial supplies

Yieh Phui Ent. Taiwan

Kids Business Communications – Marketing agency

G.C. Nixon & Associates – Engineering consultants

Edgerton - Builders

Ground Effect Aviation – Pilot training

Inspired Business Solutions – Business services

27.6 Bayside Business Park - 296 Bay Road Cheltenham

3G Energy Solutions – Energy consultants

ABH - Builders

The Clear Technology Group – IT services

My Wealth Advice/Mayfair Finance – Financial services

Workplace OT – Health services

Prime Thoroughbreds – Sports management

Time Well Spent – Virtual office solutions

Vogue Agencies – Industrial supplies

EPIK - Accountants

Clarinox Technologies – IT consultants

Truck Dealers Australia – Equipment sales

Papapetrou Rice - Architecture

Smart Line – Mortgage brokers

Usell Real Estate Real estate agents

Aeon Water Filters – Equipment supplies

Natloans – Mortgage brokers

Solutions Physio and Pilates – Health services

JLR Partners - Accountants

Duncraig Developments - Builders

Bay Road Counselling - Phychologists

F.D Beck - Insurance Brokers

Scott Chemicals – Industrial supplies

Cirrus Connect – Management consultants

E First Group – IT consultants

PBR Roofing Services - Construction

Great Pacific Property – Real estate services

Risk Solutions International – Financial services

Elite Executive Services – Staff relocation services

Kaliba Group – Engineering services

27.7 iSelect Corporate Head Office - 294 Bay Road Cheltenham

FDC

iSelect

iSelect is a web based organisation facilitating consumer choice of various type of insurance policies.

Continued expansion within iSelect and the desire to have all the business units under one roof, resulted in iSelect taking over an entire 3 floor office building in Bay Road, Cheltenham.

This fun and innovative 5,300sqm fitout included a few out of the ordinary finishes. A 550sqm cafe with commercial kitchen and extensive outdoor eating area was constructed, along with a games room complete with two-level slide exiting in a ball pit in the cafe. Levels 1 and 2 have 100 metre long running tracks around the core, and massage and sleep pods were installed to help staff relax.

New stairs were inserted between the floors, and front of house meeting areas include extensive joinery, data, electrical and audio visual capabilities. The increased staff numbers accommodated within the building required the provision of 510 workstations; additional bathroom facilities and kitchens on each floor and a new 4,500sqm car park.

Project Features

- Fitout over three levels, 510 workstations
- 550sqm cafe with commercial kitchen
- Games room with two level slide into a ball pit
- Interconnecting staircase
- Extensive joinery, data, electrical and AV capabilities
- 4,500sqm car park
- MBA Award Winner

Project Size

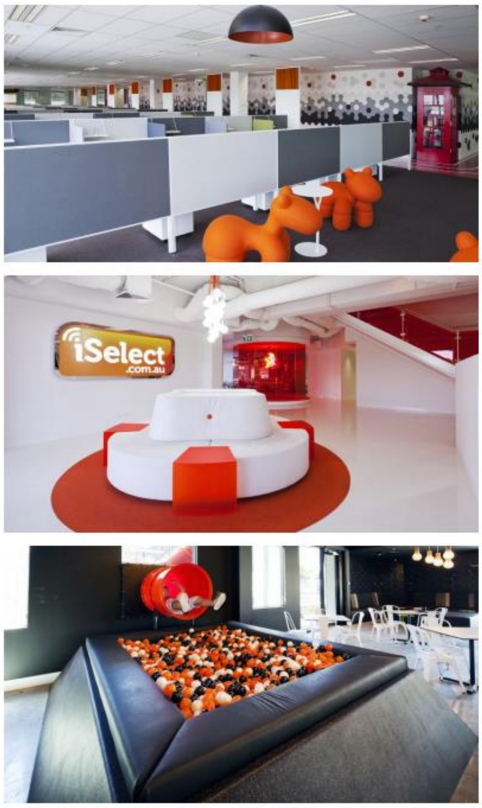
5300sqm

Program

13 weeks

Award list

2012 Special
Commendation
MBAV
Best Shop & Office Fitout



Source: fdcbuilding.com.au

iSelect Expands With New Customer Contact Centre

By Staff Writers | April 21st, 2016 | Categories: Australia, Industry News, Latest News | Tags: Call Centre, contact centre, growth, iSelect, jobs, melbourne | 0 Comments

Some good news for the local Melbourne contact centre industry with the market leader in online comparison services, iSelect Ltd, announcing the opening this week of its second Melbourne customer contact centre at 246 East Boundary Rd in East Bentleigh, employing 230 staff.

The new 4,000 square metre contact centre over two floors will house the customer contact centres for iSelect's fast growing energy, broadband and car insurance businesses. iSelect has signed an initial three year lease with the owner of the building, Make Property Group.

The group's customer contact centre for its largest business – health insurance – will remain at its Cheltenham headquarters at 294 Bay Road.

Chief Executive Officer of iSelect, Mr Scott Wilson said, "We are the largest employer in Melbourne's bayside region and continue to grow quickly as a group. We have doubled our staff to more than 700 people over the last three years, having added 100 permanent call centre jobs over the last year alone.

"Expanding to a second Melbourne location give us the capacity to further grow our business, while providing our staff with more spacious and comfortable surroundings to increase our productivity", he added.

The new East Bentleigh offices offer sales staff a relaxed working environment, with grass carpets, graffiti murals adorning the internal walls, along with a variety of recreation options including foosball, arcade games and giant chess boards.

Mr Wilson said "iSelect is often listed as one of the country's most exciting and pleasurable work environments. Our Cheltenham headquarters has an onsite café with our baristas serving staff a free coffee every day, on-site masseurs and even a slide for the enjoyment of our staff.

"We find providing this sort of work environment is critical to attracting and retaining talented sales staff that will help us grow our expert advice services and deliver on our growth plans", he added.

The new building is integral to iSelect re-focusing its business on customer service to deliver the most appropriate and cost-effective household and personal finance products to Australian customers.

The group is also investing in scalable technology platforms to enhance its cross-serve capability.

Source: contactcentrecentral.com

27.8 Parkview Estate: 13-15 Corporate Drive Heatherton

Home Timber and Hardware Group - Retail

Supersearch – Financial services

Toshiba

Infomedia – IT Solutions

Enterprise Law – Financial services

Technicalities – IT services

Ergopouch

The Factory Showroom

Carrier

Healthscope – Health services

North Park Group – Property development

Fibrevision Networks

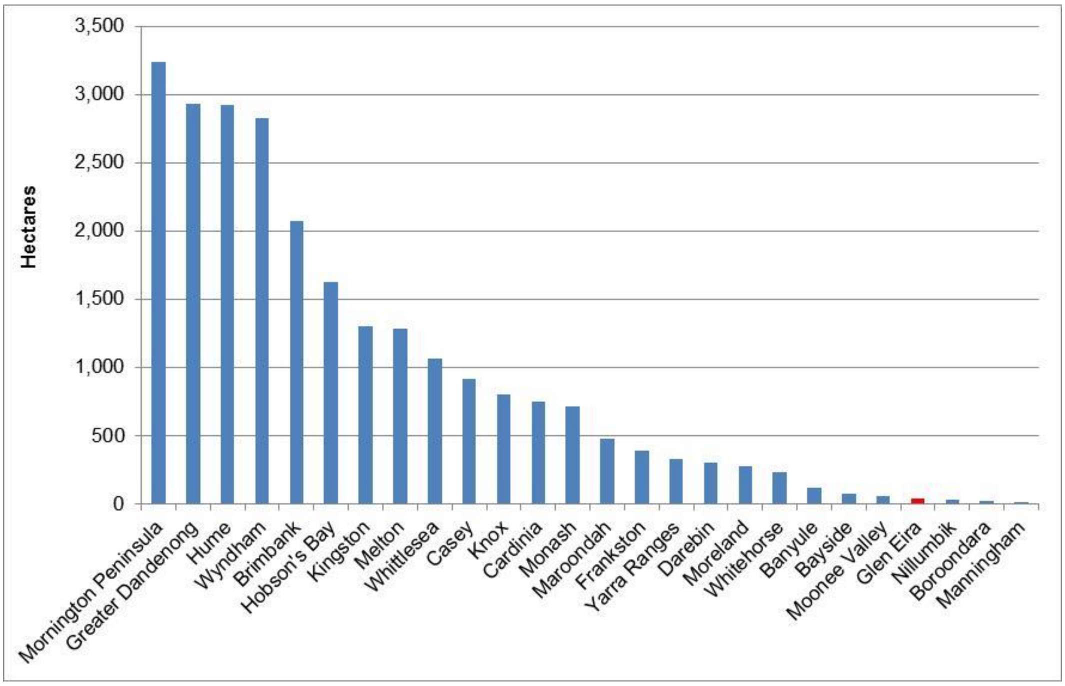
28. Strategic Site Assessments

Glen Eira has a number of 'Commercial 2' and Industrial zoned areas for which Council has sought a review of their current viability under their current zoning.

Within Glen Eira there is 44 ha of industrial land as defined by the state government's Urban Development Program (refer Figure 138). This compares to 75 ha within the neighbouring City of Bayside, and 13.5 ha within the City of Port Phillip where 215 ha of industrial land has been rezoned for the Fishermans Bend urban renewal area. While industrial land is most commonly used for traditional manufacturing and warehousing activities, it is also used by a range of businesses such as automotive servicing, property maintenance, building trades, and maintenance and repair related activities servicing local households and businesses.

Industrial land also plays a key role in supporting the development of commercial office space, as has been demonstrated by the success of the Bay Road Business and Employment Area within the City of Bayside. The role of this area as an employment precinct is supported under the Business Employment Area Policy of the Bayside Planning Scheme.

Figure 138: Metropolitan Melbourne Zoned Industrial Land 2016



Source: Urban Development Program

28.1 Purpose of Zones

The intended purpose of the Commercial 2, Industrial 1 and Industrial 3 zones, as defined in the Victorian Planning Provisions, is as follows.

Commercial 2

- To encourage commercial areas for offices, appropriate manufacturing and industries, bulky goods retailing, other retail uses, and associated business and commercial services'.

Industrial 1

- To provide for manufacturing industry, the storage and distribution of goods and associated uses in a manner which does not affect the safety and amenity of local communities.

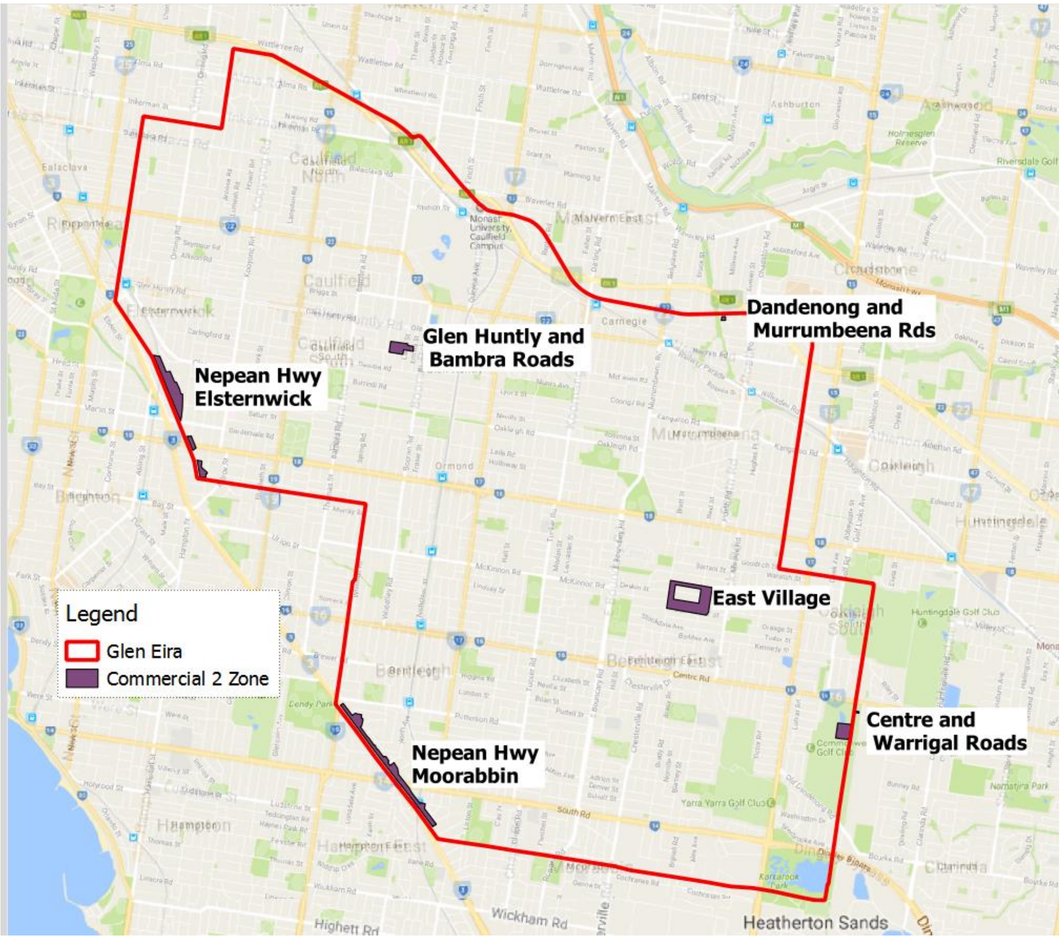
Industrial 3

- To provide for industries and associated uses in specific areas where special consideration of the nature and impacts of industrial uses is required or to avoid inter-industry conflict.
- To provide a buffer between the Industrial 1 Zone or Industrial 2 Zone and local communities, which allows for industries and associated uses compatible with the nearby community.
- To allow limited retail opportunities including convenience shops, small scale supermarkets and associated shops in appropriate locations.
- To ensure that uses do not affect the safety and amenity of adjacent, more sensitive land uses.

28.2 Commercial 2 Zoned Areas

Glen Eira has a number of Commercial 2 zoned precincts, including East Village which has been addressed separately in Section 29 of this report. The remaining precincts have been assessed in terms of their ongoing viability for supporting the range of land uses for which the Commercial 2 zone is intended.

Figure 139: Glen Eira - Commercial 2 Zoned Areas



28.2.1 Nepean Highway Elsternwick

To the north of the railway bridge crossing the Nepean Highway are a number of relatively large Commercial 2 sites, which together represent a high profile car showroom precinct. These sites have a combined frontage of approximately 600 m to Nepean Highway, and a total land area of around 5 hectares.

Further to the south, between Elster Avenue and North Road, are a number of smaller sites that are currently occupied by a petrol station, Rays Outdoors, car yards sites and automotive related services.

This precinct may be accessed by a range of public transport services being:

- rail services along the Sandringham line at both Elsternwick and Gardenvale stations,
- Number 67 tram service along both Brighton Road and Glen Huntly Road; and
- a number of bus services at both Elsternwick and Gardenvale stations being:
    - 625: Chadstone via Ormond, Oakleigh
    - 246 Clifton Hill via St Kilda
    - 606 Fishermans Bend
    - 630 Monash University via Ormond & Huntingdale
    - 605 City via Kooyong Road
    - 219 City via Hotham Street
    - 220 City via Orrong Road

Arterial road access to the precinct is via Nepean Highway and North Road.

This precinct also benefits from its proximity to the Elsternwick Urban Village and at Gardenvale Activity Centre.

28.2.2 Nepean Highway Moorabbin

This precinct is comparable to the Nepean Highway-Elsternwick precinct, offering a high level of exposure and accessibility via the Nepean Highway and South Road, which connects to Dandenong via the Dingley Bypass.

The precinct may be accessed via rail services along the Frankston line at nearby Moorabbin station, together with a number of bus services being:

- 811 Dandenong-Brighton via Springvale
- 823 North Brighton-Southland via Moorabbin
- 824 Keysborough via Clayton, Westall
- 825 Moorabbin-Southland via Black Rock and Mentone

The nearby Moorabbin Activity Centre offers access to a Woolworths supermarket, cafes and takeaway food outlets.

28.2.3 Centre and Warrigal Roads, Bentleigh East

Located on the north-western corner of Centre and Warrigal roads, this precinct has a total land area of approximately 2 ha, with a number of peripheral uses being:

- La Porchetta, Red Rooster and McDonald's family style restaurants;
- Bentleigh Service Centre (automotive repairs);
- Midas Service Centre (automotive repairs);
- two self-serve car washes; and
- a large Baby Bunting store (approximately 3,000 m^2)

The Links shopping centre is located immediately to the east over Warragul Road, and a collection of small retail premises is located on the south eastern corner of Centre and Warragul roads.

28.2.4 Dandenong and Murrumbeena Roads, Murrumbeena

This high exposure site has a total area of 1,728 m^2, with building improvements comprising:

- a two level office building with undercroft car parking which has been occupied by TWB Accountants for at least the past 10 years; and
- an adjacent showroom, occupied by Foster Hydronic Heating for at least the last 15 years.

28.2.5 Glen Huntly and Bambra Roads, Caulfield

This Commercial 2 zoned precinct extends along Glen Huntly Road, east of Bambra Road, for a distance of approximately 250 metres. The precinct comprises a diverse mix of land uses which include:

- a notable number of contemporary office buildings;
- traditional shop fronts occupied by showrooms and office uses;
- Melbourne Pathology clinic; and
- John Allison Monkhouse funeral home.

28.3 Assessment

All of the Commercial 2 zoned precincts identified above are well occupied and fulfilling the objectives of the zone. They are occupied by a variety of activities including car showrooms and associated automotive services, peripheral retail sales and destination bulky goods/showroom retailing and commercial office uses.

28.3.1 Nepean Highway Precincts (Elsternwick and Moorabbin)

The Nepean Highway in Elsternwick represents a significant cluster of car showrooms with Ford, Holden, Toyota, Lexus, and Jaguar and Land Rover represented. The Moorabbin precinct offers an even greater number of car dealers with a total of 19 car showrooms.

Despite some evidence of new, space efficient, showroom formats being explored by car retailers, there is still continued development of traditional showrooms similar to those within Elsternwick and Moorabbin. This includes the recently redeveloped Brighton Mazda showroom in Moorabbin, as well as within the Auto Centro car showroom precinct at Essendon Fields (Essendon Airport) where new Subaru and Kia showrooms have been developed in the last year.

Brighton Mazda (Moorabbin)

There may however be the potential for the Nepean Highway precincts to support more intensive employment activities in the future, which will provide local employment opportunities for Glen Eira's growing resident population. This may occur progressively over an extended period in the event that there is a change in the format of car showrooms in the future. However, given the continued development of car showrooms identified above, there would appear to be an ongoing role for existing car showrooms within the precincts

The Nepean Highway precincts are strategically well located to support a wide range of commercial activities including office related activities, consistent with those that already exist within comparable locations including the City of Bayside. A selection of office developments within the surrounding region have been profiled in Section 27, with businesses including accountants, lawyers, architects, engineering and IT consultants, financial service providers, health service providers and a variety of other business activities.

The proximity of the Nepean Highway precincts to activity centres, together with their accessibility by a range of public transport services and major arterial roads would be expected to result in strong demand for office space. These locations would appeal to a range of organisations, from small businesses through to larger corporates, with iSelect (located in Bay Road Cheltenham) being one example. Such organisations would directly address the identified shortage of office jobs within Glen Eira.

The availability of large development sites with minimal improvements and a Commercial 2 zoning provides the opportunity for office development to occur which are not viable within Glen Eira's activity centres where:

- Sites are not sufficiently large to allow at-grade car parking, and thereby require more expensive basement car parking.
- Sites do not offer a sufficient level of exposure for businesses seeking a higher profile location.
- Office uses must compete with apartments which offer a greater return for developers.

- Development sites are considerably higher valued given the opportunity for apartment development under a Commercial 1 zoning, thereby limiting opportunities for office development to occur.

The Nepean Highway precincts may accommodate both office and 'office warehouse' forms of development with the latter having a high office component whilst also offering a limited amount of space for non-office functions undertaken by high tech businesses. The Hallmarc Business Park (328 Reserve Road Cheltenham), profiled in Section 27, is one example of such a development. Health related activities may be accommodated within office developments, or alternatively purpose-built medical centres.

Alternatively, sites may be redeveloped for a range of showroom and bulky goods retail uses. While traditional bulky goods retailers such as furniture, homewares and floor coverings generate relatively few local jobs, more intensive large format retailers such as outdoors and sporting goods retailers, electrical goods (e.g. JB HiFi), automotive parts retailers, pet supplies (e.g. Pet Barn) and manchester retailers (e.g. Spotlight) generate notably higher levels of employment.

The exposure and accessibility offered by the Nepean Highway also provides the opportunity for these more intensive large format retail activities to locate within the Elsternwick and Moorabbin Commercial 2 zoned precincts. Development of new showrooms will however be incremental, but nevertheless still an important opportunity for these precincts. Given the lack of suitable development sites within Glen Eira's activity centres, combined with a limited number of competing retailers within these centres, these larger format retailers would not be expected to have an unreasonable impact upon existing centres.

The Nepean Highway Commercial 2 precincts are strategically well located to support a range of commercial activities that would provide much needed local employment opportunities for Glen Eira residents. This includes the existing showroom and bulky goods retailing activities, and over time may progressively be redeveloped for more intensive employment uses such as offices, medical facilities and more intensive showroom / bulky goods retailing.

The existing Commercial 2 zoning is considered appropriate to support ongoing commercial activity within the Commercial 2 precincts in Elsternwick and Moorabbin.

28.3.2 Centre and Warrigal Roads, Bentleigh East

This precinct is expected to continue to perform its role as a fast food/peripheral sales precinct given its high exposure and accessibility via both Warrigal and Centre roads, and location adjacent to The Links shopping centre.

While there is the potential for more intensive development upon the site, this is likely to be limited by competition from nearby industrial estates with respect to office warehouse development. Over the longer term, there may be the potential for a limited amount of office development within the precinct given its relatively high profile location.

28.3.3 Dandenong and Murrumbeena Roads, Murrumbeena

The high exposure offered by this precinct has supported the existing showroom and office uses for a considerable period of time, and this would be expected to continue to be the case in the future. There may however be the opportunity for additional office space to be supported through the redevelopment of the existing showroom in the future.

28.3.4 Glen Huntly and Bambra Roads, Caulfield

With this precinct being well occupied by a diverse mix of uses, there would be expected to be demand from businesses into the future. A small number of potential development sites exist within the precinct, which may be developed for office uses in the future. This will complement the existing 'purpose-built' offices to potentially establish a more recognisable office precinct.

28.4 Industrial Zoned Precincts

Despite the contraction in manufacturing activity, and the associated decline in demand for industrial land within Melbourne's inner and middle regions, smaller industrial precincts still play an important role in servicing the needs of other businesses and local households.

Older style industrial premises still represent functional accommodation for a range of uses including automotive servicing, a variety of trades such as cabinet making, and small-scale distribution and servicing. Despite Glen Eira's proximity to larger industrial areas within Moorabbin, such locations are often not convenient for households (e.g. car servicing), or businesses (e.g. tradespeople) for whom there is often a time cost associated with travelling to such areas.

Glen Eira has a limited number of small industrial precincts that continue to perform the functions identified above, and which have been reviewed below.

Figure 140: Glen Eira - Industrial Zoned Precincts

28.4.1 Dandenong and Grange Roads, Carnegie

While this precinct offers excellent exposure to Dandenong Road, the irregular shape of the precinct limits the range of uses which it may accommodate, particularly within the eastern portion. Nevertheless, all the existing businesses have operated in this location for a very long period of time.

It is expected that the existing industrial zoning will continue to support these and similar activities in the future. There is however limited opportunities for more intensive employment uses such as offices, and therefore the existing zoning is considered appropriate.

28.4.2 Neerim Road Murrumbeena

This precinct comprises a number of smaller industrial properties fronting Neerim Road, to the west of Murrumbeena Road, together with a larger warehouse of approximately 1,800 m^2 immediately to the North in Emily Street.

The properties fronting Neerim Road are occupied by predominantly automotive servicing activities together with a Radio Rentals furniture rental outlet and a Rexel Electrical store. All of these activities highlight the strong connection between smaller industrial precincts and local households and businesses, which would be expected to continue into the future for this precinct.

Although the warehouse in Emily Street appears to be still used for warehousing, it is unlikely to be supporting significant employment. If this property were to be no longer used for this purpose, there may be an opportunity to consider a rezoning of the site for residential uses. Given the site’s limited exposure and accessibility together with its proximity to residential uses, there may be limited opportunities the site to be redeveloped for industrial related activities or alternatively office uses.

At this stage the existing Industrial 3 zoning for the precinct should be maintained, with consideration given to rezoning the Emily Street warehouse site as required in the future.

28.4.3 McKinnon and Wheatley Roads, McKinnon

It is understood that this small industrial precinct is currently being considered by Council for rezoning to facilitate residential development. Accordingly, its viability as an industrial location has not been assessed.

28.4.4 North Road Murrumbeena

This precinct comprises an industrial park which was developed in the late 1980s, together with properties fronting North Road immediately to the east of Duncan McKinnon Reserve.

This industrial park is well occupied, with a wide range of businesses including Oasis Bakery, Vac City (vacuum cleaner sales), Charmford Gymnasium, Expose Dance Centre, Luisa Leather Boutique (head office/warehouse), Stefani Wine Estate (office), Trefolyte Labelling & Signage, and Roejen Engineering Services. As the industrial park is functioning well and meeting the purpose of the zone there is little need to consider any rezoning of the estate.

The properties fronting North Road, immediately east of Duncan McKinnon Reserve, are occupied by a number of showroom/peripheral sales uses, as well as a service station and an office suite development which was constructed around 2010. While North Road provides valuable exposure for retailers, there is little available off street car parking. Given the opportunity for office development within nearby East Village, additional office space within this location is unlikely to be well supported. The current industrial zoning is considered appropriate to support the existing role of this precinct

28.4.5 Ardena Court

The Ardena Court precinct is typical of a post-war industrial subdivision, similar to that which exists across Melbourne's inner and middle suburbs. All sites are fully developed with land areas in the range 750-1,800 m², with one larger property of 4,033 m² which is the only vacancy within the precinct.

Smaller properties of this size offer the flexibility to accommodate a wide range of activities including those currently within the precinct, which include:

- Automotive services (Autologic BMW, Carnegie Mufflers & Brakes)
- Rakumba Lighting - designers and manufacturers of decorative lighting (rakumba.com.au)
- CoinOPSolutions- Australia's largest seller and operator of crane machines (coinopsolutions.com)
- Solid Solutions – online silicon product distributor (solidsolutions.com.au)

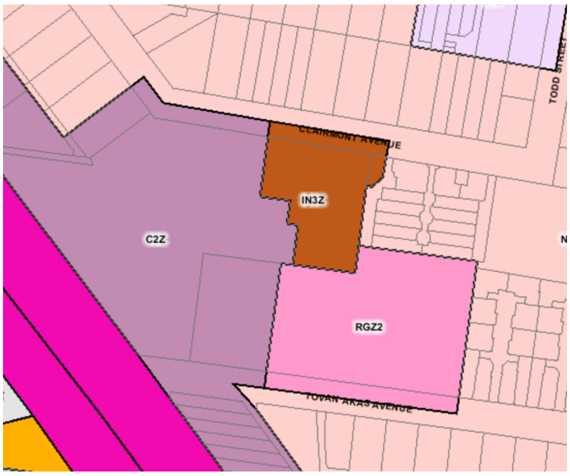
This precinct is expected to continue to perform its role as a light industrial precinct, providing ongoing opportunities for a new generation of businesses. The existing zoning is considered appropriate and should be retained.

28.4.6 Bowens Timber - 717 Warrigal Road Bentleigh East

Bowen's Timber and Hardware is a key supplier to the building industry with 11 outlets across metropolitan Melbourne. The Bentleigh East outlet was redeveloped and expanded in 2010, and reflects the extent of growing demand within the surrounding region. Continued residential development and renovation of existing properties would be expected to support the existing operations into the future. As result, there is no identified need to consider rezoning the site.

28.4.7 16-20 Clairmont Avenue

As shown in the following figure, this Industrial 3 zoned site is located adjacent to both the Commercial 2 precinct along Nepean Highway, and a Residential Growth zoned site fronting Tovan Akas Avenue. The site is currently used as Lonely Planet's Melbourne distribution centre, which relocated to the site in early 2016. With a total site area of 2,271 m², the existing building improvements comprise a 1,282 m² warehouse together with a 318 m² office, reception area and boardroom.



The recent relocation of Lonely Planet to this site demonstrates its ongoing viability for industrial uses, despite being accessed via a residential street. There may however be the opportunity to consolidate the site into the adjacent Commercial 2 precinct via a rezoning.

28.4.8 Brewer Road and Bendigo Avenue, Bentleigh

This industrial zoned site is approximately 400 metres south of the Bentleigh Activity Centre, adjacent to the railway line. While it is currently occupied by a cabinet making business, it does appear to be underutilised.

The site offers reasonable accessibility along Brewer Road to Nepean Highway, which may support its longer-term viability for industrial uses. However, the intensity of any activities upon the site may be limited by the quality of the existing building. Ideally, the site could be redeveloped for office warehouses, which would support an increased level of employment with a range of activities such as automotive servicing or trade services. However given the isolated nature of this site, and its location within a residential area, consideration may also be given to rezoning the site for residential uses.

29. East Village Development Opportunities

A 20 year Masterplan for the East Village Precinct has recently been released for community consultation by the landowners. This will be followed by more detailed analysis and planning by the developers including retailing and community infrastructure assessments.

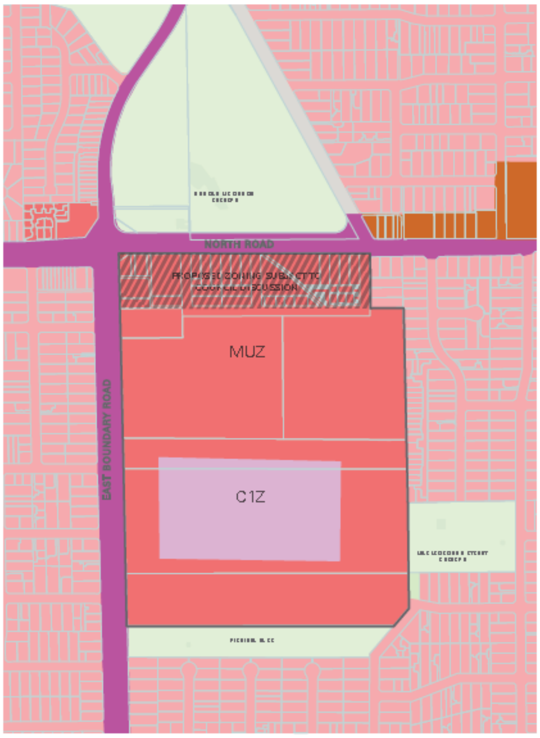
29.1 20 Year Masterplan

The Master Plan proposes:

- a dedicated employment and innovation precinct with 'a focus on new employment and service opportunities' as part of a Mixed Use zone,
- a Town Centre which will include retailing and services with 'opportunities for medium and high density residential and commercial activities above' within the existing Commercial 1 zone.

Figure 141: East Village - Draft Master Plan

Figure 142: East Village - Proposed Zoning



These proposed precincts are based upon the supporting document 'Masterplan Elements #3: Employment, Innovation Precinct and Retail'. This document highlights a number of key elements supporting the master plan including:

- a desire to 'balance business employment, retail and other mixed uses to ensure its status as an employment hub continues';
- 'an opportunity to attract tenants and employers to the precinct by expanding and supporting existing commercial office and service locations as well as replacing redundant buildings';
- the opportunity for 'an increase in employment in health and aged care, small professional offices and professional services, retail and education uses'.
- a proposal to include a 'dedicated employment and innovation precinct' to support ongoing employment, with planning overlays to limit residential development;
- consideration of retail floor space caps and maximum areas for individual shops to restrict the scale of any retail centre to that of a neighbourhood centre in order to minimise potential impacts upon existing centres.

29.2 Development Opportunities

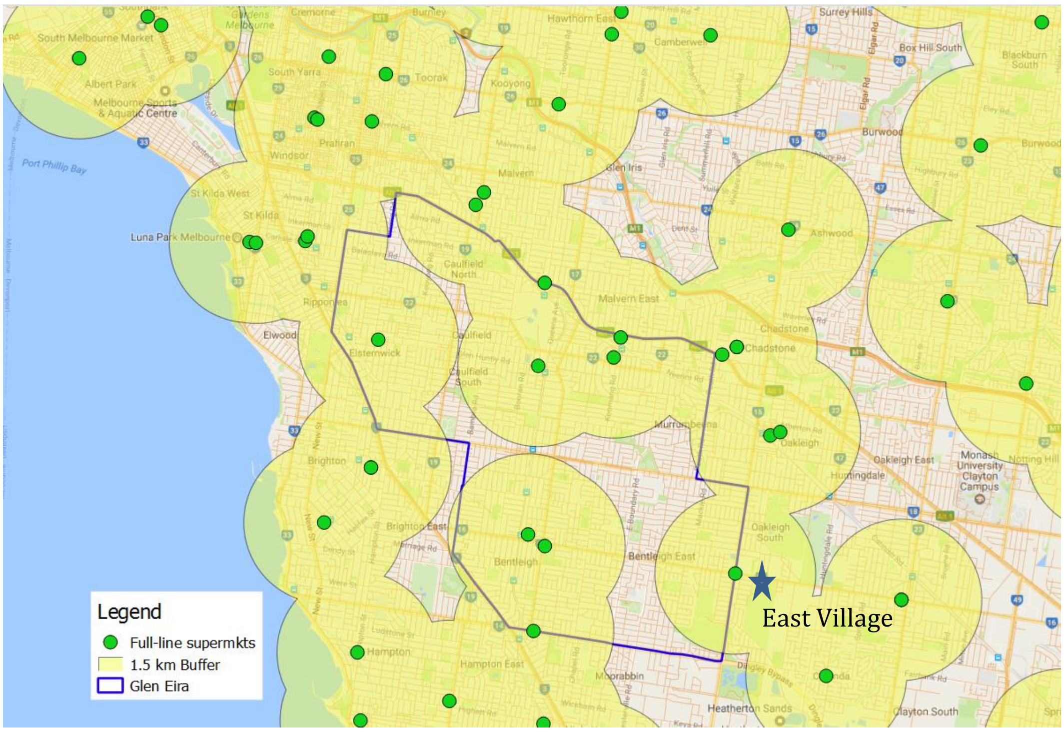
29.2.1 Retailing

An earlier abandoned planning scheme amendment (Amendment C126) proposed a maximum retail floor area of 12,000 m^2, comprising a full line supermarket of 6,000 m^2 together with a second discount style supermarket (e.g. Aldi) of 1,550 m^2, together with 2,150 m^2 of specialty retail and 1,000 m^2 of non-retail floorspace. While the current Draft Master Plan does not identify retail floor areas for the proposed town centre, it is assumed that this will be less than that proposed by the abandoned amendment.

The following figure, from earlier in this report, shows a 1.5 km buffer around full line supermarkets. It indicates that future residents within East Village, as well as existing residents within the surrounding local area, would need to travel further than the majority of Glen Eira residents to access a full line supermarket. While it may be argued that the Ritchies Supa IGA Supermarket in East Bentleigh is effectively a full line supermarket, despite not being a Coles or Woolworths, there would appear to be sufficient justification for a full-line supermarket at East Village.

East Village is strategically well located adjacent to the two major arterial roads, being East Boundary and North Roads, which may support destination style retailers including larger format retailers such as Officeworks, JB Hi-Fi, or outdoors / sports retailers. Such retailers are generally not represented within Glen Eira and therefore would have little impact upon existing centres. Similarly, new innovative forms of retailing that attract visitors from across a wider area would also contribute to the diversity of retailing within Glen Eira. The nearby Oasis Bakery on North Road is one example of this occurring within the local area.

Figure 143: Full-Line Supermarket Buffer (1.5 Km)



29.2.2 Offices

The Master Plan identifies the opportunity for commercial office activities within the 'innovation an employment precinct', although it does not identify the amount of floorspace that would be supportable. Analysis undertaken elsewhere in this report identified a shortage of office employment opportunities within Glen Eira, despite a significant amount of commercial office development within other comparable locations such as the City of Bayside.

When compared to the profiled office developments identified in Section 27, East Village represents a significant opportunity for commercial office development. The ability to attract major corporations has already been demonstrated, with iSelect recently locating upon the site. The attractiveness of East Village as an office location will be further enhanced by the amenity offered by a new Town Centre, together with East Village's market profile and the future availability of contemporary office floorspace.

29.2.3 Health Services

It is also anticipated that a range of health related activities may be supported, ranging from health service providers located with other businesses in office suite developments, through to purpose-built medical centres and potentially larger facilities such as a day hospital. Such opportunities will be strengthened by East Village's proximity to Moorabbin Hospital, approximately 1 km to the south on Centre Road.

Part F: Economic Development Initiatives

30. Economic Development Initiatives

30.1 Context

Economic Development is a core responsibility of Victorian local government with specific considerations listed in the Local Government Act. Activities that come under the umbrella of economic development include strategy and planning, business support, infrastructure, special rates and charges, environment and sustainability, digital economy, performance measurement and employment. The Inquiry into Local Economic Development Initiatives in Victoria 2013[5] provides a useful overview of activity.

It should be noted at the outset that the scale of retailing in Glen Eira and the time allocated to the economic development component of this project is limited. One of the challenges for Council will be to determine economic development priorities for retail strips. It is recommended that Council give consideration to undertake more detailed work in relation to specific initiatives and retail activity centres.

Retail activity centres play central roles in any municipality and consume significant economic development resources. In addition to providing goods and services to residents, workers and visitors they are a key indicator of prosperity and community wellbeing.

A survey of Council Community Plans reinforces the importance attached to retail. The recurring aspiration is to remain vibrant and resilient. Deterioration in retail trading conditions can become part of a downward spiral. The costs multiply for everyone involved and extend well beyond falling property values, including residential. The social costs can include lost connections, crime and deteriorating mental health.

Once a tipping point is reached the road to recovery, even if it is possible, can be expensive, divisive and protracted. The recent experience of Bridge Road Richmond, with a vacancy rate approaching 25%, is a prominent example.

At a national level the retail sector is being impacted by a multiplicity of factors including:

- Increasing competition;
- The growth of online retailing;
- Entry of international retailers;
- Digital disruption;
- Demographic change;
- Increasing costs;
- Environmental considerations; and
- Economics (limited wage growth, work force casualization, household debt and limited sales growth).

The move toward a digital economy requires particular mention. Seismic shifts, powered by digital disruption, are occurring across countries, regions, industries and individual businesses. Digital disruption is a profound force whose impact will be felt for years in all aspects of economy and society. Uber and Airbnb are examples of digital businesses turning their respective industries upside down. Delivery businesses such as Menu Log (menulog.com.au) are helping to drive growth in take away food sales.

[5] Parliament of Victoria, Economic Development and Infrastructure Committee: Enquiry into Local Economic Development Initiatives in Victoria, July 2013

Our economy, according to Seth Godin, is now the 'connection' economy. Bridget Loudon, CEO of Expert 3606, expresses the shift another way championing the rise of the 'on demand' economy. Value is created through connections. The value of Uber is greater than the independent cars it connects. In the digital economy connections create value. Connections and collaboration go hand in hand. Australia has a long way to go in this arena. According to the OECD: Australia currently ranks 123rd in the world. Retail collaboration is a powerful force for engagement and community cohesion.

Retailing in Glen Eira has a rich history that reflects the pattern of urban development in Melbourne. The network of retail strip centres is among the most diverse in Melbourne. Scale, character, diversity and access are particular hallmarks. Recent evolution of the retail landscape and the metropolitan position of Glen Eira has meant that it is subject to a high and increasing level of retail competition.

Chadstone is Australia's largest shopping centre and continues to undertake substantial investment to maintain and build its competitive position. The Melbourne CBD as a shopping, leisure and entertainment drawcard is located only 10 kilometres away and enjoys excellent public transport access including 3 train lines. The examples below, large and small, are a sample of the potential for expenditure leakage including:

- Southland;
- Various retail offers in Stonnington including Chapel Street, High Street and Glenferrie Road;
- Port Phillip – entertainment, dining and leisure;
- Eaton Mall Oakleigh – niche dining; and
- The vibrant Ripponlea strip providing fresh and speciality foods, cafes and dining options immediately adjacent to Glen Eira

There is a multiplicity of dimensions to consider in relation to the retail future of Glen Eira. It would also be reasonable to argue that Glen Eira is facing some of the greatest challenges in Melbourne due to its desirability as a location for residential development and the presence of significant sites capable of accommodating new development. An example is Caulfield Junction. The development of Caulfield Racecourse, continuing expansion of Monash University and Caulfield role as a public transport hub are three major pillars that will underpin continued investment.

Where a centre is undergoing level crossing removal works, such as Carnegie, the level of disruption is extreme and it is evident that trading will continue to be impacted at a greater level. In centres where level crossing removal works have been completed there is evidence that the centres are struggling to recover from the disruption. It is also noted that the new retail frontages that form part of the station redevelopments, for example Bentleigh and McKinnon, appear to have been completed but there is no indication the premises are for lease or any indication of when they may be occupied. As such these gaps in the retail strip are having a negative impact and represent a lost opportunity to capitalise on perhaps the most significant investment in the respective strips for many decades. A further consideration of the impact of level crossing removal is strips are not included. Glen Huntly was not included in the original works proposed and attracted protest from local traders.

Another form of disruption is the level of building activity associated with higher density development in and around many of Glen Eira's activity centres. Disruption can be protracted

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[6] Expert360.com

and apparent at different stages of development. This can include vacancies associated with land banking for site assembling, inactivity and short term leasing during the planning process. In many cases (see photos) the premises are left in a poor state of repair, rubbish accumulates in and around the property.

There is no doubt that this contributes to a negative feeling in a retail strip. A further source of disruption is during the construction process. Frontages are treated with hoarding different types of hoarding that are often unsightly. Construction workers place a significant demand on parking and traffic flow often displacing shoppers and employees. Traffic management associated with deliveries and works are a further source of disruption. This contrasts with what happens during construction and tenancy changes in centres managed by Westfield. An example would be where a hoarding with an appropriate image or message is erected to indicate works are taking place. A high standard of presentation is maintained at all stages.

Where disruptions to retail trade are protracted for whatever reasons the attractiveness and viability can be fundamentally damaged. In the current climate of high-density development owners/investors are increasingly likely to opt for the windfall gains that a multi-unit development can bring. There are a number of examples of infill development of a less than desirable standard including in McKinnon and Glen Huntly.

30.2 Consultation

Consultation has focused on active retail trader groups in the centres of Bentleigh, Carnegie and Elsternwick. This includes attending traders meetings, one to one consultation, telephone interviews, physical inspection with marketing coordinators and windscreen surveys. Brief inspections have also been undertaken a selection of activity centres listed in the table below. A summary of the key points from consultation is included in Attachment X.

A series of economic development initiatives are outlined below and summarised in the table below under the follow headings:

- Infrastructure and Amenity
- Business and Employment Development
- Culture and Community
- Policy and Planning
- Marketing Communication and Performance Measurement

The scope of the project has meant limited coverage of the suggested initiatives. The intention is to highlight economic development priorities. The focus reflects the consultation that has been undertaken and focus upon the urban villages of Bentleigh, Carnegie and Elsternwick. A number of the suggested actions particularly in marketing and communications are relevant to all centres.

30.3 Infrastructure and Amenity

30.3.1 Level Crossing Removal

The overriding and most immediate challenge is the ongoing State Government program of level crossing removals. The program includes 7 level crossing removals with an approximate budget of just under $1 billion. The majority of works are either in advanced planning stages, under construction or have recently been completed.

The works currently underway in Carnegie present a major place making opportunity and encompass:

- Public Transport
- Public open space
- Pedestrian connections and movement
- Physical and visual connections
- Urban design
- Parking and traffic movement

A similar opportunity applies in Murrumbeena with additional changes being contemplated to traffic movement.

30.3.2 Investment in Open Space and Community Facilities

Council has also been particular active investing in public open space and community facilities immediately adjacent to retail activity centres. Three prominent examples include:

- Library and forecourt in Carnegie;
- Elsternwick Plaza; and
- The $7m redevelopment of Booran Reserve.

Each of these examples is a major investment capable of improving patronage. The task is now to make sure they are activated.

30.4 Retail Strip Presentation and Maintenance

The presentation and state of maintenance of retail activity centres varies across the municipality. The issue was also highlighted in trader consultation and visits to the centres. Graffiti, maintenance, shop front presentation and cleanliness set the tone of the street. The examples below were noted:

Rubbish accumulating around plantings in median strips in some centres (North Road Ormond)

Bird droppings accumulating over time on the footpath (Centre Road East Bentleigh)

Graffiti on Shopfronts (Glen Huntly)

Inactive Retail shopfronts in various centres (obscured by various unsightly coverings) (Bentleigh and Glen Huntly)

Damaged and Poorly maintained Specimen Trees (Centre Road East Bentleigh)

Litter and Uncollected Mail in vacant shop doorways (East Bentleigh)

30.5 Business and Employment Development

30.5.1 Traders Groups

Council has an active relationship with the urban villages of Bentleigh, Carnegie and Elsternwick. Each centre has an active traders group that all have special rates in place to fund marketing activity. Most importantly each centre employs a part time marketing coordinator. Meetings and discussions with the respective groups indicate that there is a strong level of marketing activity taking place along with active engagement from individual businesses and other community stakeholders. The recent renewal of special rate schemes in Carnegie and Elsternwick is evidence of continued support for this type of activity.

Outside these centres the level of activity and engagement drops away. Glen Huntly is an example of a large neighbourhood centre that could benefit from consideration of a special rate or charge to support improved marketing of the centre. Traders have established an online presence and come together for particular issues, such as exclusion from the level crossing removal program.

There are an additional 12 centres covered in the Activity Centres Snapshot that have no active traders group. Preparing guidelines and facilitating establishment of new traders groups could assist with rejuvenation. Seeding grants may also be appropriate within the guidelines.

30.5.2 Employment Development

Local employment is a key driver of economic development and Employment and sustainability. According to ID Consulting the retail sector provides just under 12% of local employment and is the third largest provider following Health Care and Social Assistance and Education and Training.

The residential density of Glen Eira is relatively high by metropolitan standards and increasing however the corresponding number of local jobs is low. Opportunities to address this and create employment clusters need to be factored in to any consideration of underutilised sites.

A prominent example is the potential development sites on the Nepean Highway. Another opportunity is the possibility of facilitating or establishing co working spaces. Co working spaces, such as 'The Workery'[7] in Elsternwick perform a number of functions including:

- Increasing local employment;
- Activating retail activity centres;
- Building community connections;
- Increasing sustainability

We Work[8] is a prominent international example of how co-working spaces can function in practice. Fishburners[9] is a Sydney based example of a co-working space with a technology focus. Realm[10] is another variation where the City of Maroondah has combined a new library with community meeting facilities and co working spaces.

Co working should also be investigated as a means to rejuvenate some of the underperforming retail centres. This type of initiative is consistent with the aim of Clause 21.06 to promote a wider range of commercial activities in these centres.

Another form of activation that can help to rejuvenate retail centres is initiatives such as Creative Spaces[11] developed by the City of Melbourne and licenced to a number of local government authorities. The City of Darebin has developed an initiative to target inactive retail shop fronts through its Active Spaces Program[12]. The aim of the initiative is to encourage activation and more active use of space in various locations increasing economic activity.

30.6 Policy and Planning

Given the importance of retail activity centres in the municipality it is somewhat surprising to find little direct mention in the Glen Eira Community Plan. The Strategic Land Use Framework is more forthcoming and has a stated aim of encouraging the inter-connected nature of retailing in Glen Eira. Social, economic and environmental benefits are the key aspirations.

Council has recently undergone an organisational restructure and there is significant evidence of a new approach to the relationship with the retail community. An example is the major consultation that has been undertaken involving the completion of 2,100 surveys across Glen Eira's 17 activity centres. Most importantly the consultation is backed by action that includes the establishment of Neighbourhood Response Teams to focus on issues such as maintenance and cleaning in activity centres. The increased level of engagement was noted during the consultation process.

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[7] theworkery.com.au

[8] wework.com

[9] Fishburners.org

[10] Realm.vic.gov.au

[11] creativespaces.net.au

[12] darebinarts.com.au/creative-resources/active-spaces-in-Darebin

There is also scope to more actively coordinate citywide retailing. A multitude of factors were outlined in the context above the affect all retail businesses in Glen Eira. At present there appears to be no collaboration among traders outside the urban villages of Bentleigh, Carnegie and Elsternwick. Engagement is difficult where there is no active traders group. Development of a digital engagement strategy and quarterly forum, listed in the summary table under marketing and communications could assist in addressing these issues.

Statutory planning and traffic management (including parking) also have a role to play in the development facilitation process and construction site management. How facades are presented during the permit application process and during construction leave a lot to be desired. Similarly occupation of customer and staff car parking combined with traffic congestion can drive patronage away. Improving outcomes in these areas requires understanding of the economic impacts and a willingness to develop new solutions. Each is a demonstration of marketing in a new economy.

30.7 Marketing Communication and Performance Measurement

30.7.1 Digital Engagement Strategy

Marketing in the digital economy demands a new approach. As noted earlier, connections and collaboration drive value creation. Four principles outlined by Seth Godin for marketing in the new paradigm are:

- Coordination – organise the connections so they make sense;
- Trust – helps people travelling in the same direction
- Permission – remove the annoyance factor
- Exchange Ideas - the knowledge economy

One of the challenges facing Glen Eira is how to manage the multiplicity of demands that effective planning and management of retail strips requires. Council resources are finite and despite the resources available to Economic Development constraints are apparent.

A survey of local government economic development events reveals duplication and lack of imagination in some cases. Some Councils have embraced digital engagement however some lag well behind. Many small business operators simply do not have the time to engage face to face. For Council holding physical events, while important, can be time consuming and costly.

Recent surveys Sensis Social Media Report[13] indicates that small business use of social media is increasing.

Undertaking a digital engagement strategy that incorporates web, SEO, mobile, video, email and social media could provide a platform for engagement with retailers and the wider business community. An integrated strategy is a critical ingredient to ensuring message consistency and effective engagement.

[13] Sensis Social Media Report 2016: How Australian People and Businesses are Using Social Media

30.8 Performance Measurement

Performance measurement in retail strips presents a challenge in contrast to hard top centres where various marketing metrics are kept. Given the importance of retail to Glen Eira and the level of change being experienced regular monitoring is paramount. Regular surveys of business mix and vacancy levels are a first step in monitoring.

Figure 144: Summary of Economic Development Recommendations

Activity Centre	Infrastructure and Amenity	Business and Employment Development	Culture and Community	Policy and Planning	Marketing, Communication and Performance
Bentleigh	▪ Improved maintenance standards (particularly cleaning) ▪ Examine ways to improve vacant shop fronts ▪ Refresh the brand identity	▪ Investigate possibilities for co working spaces	▪ Encourage use of community open spaces	▪ Investigation options to maintain active street frontages during development and where vacancies persist ▪ Encourage short term activation	▪ Quarterly City wide retail forum ▪ Digital Engagement Strategy ▪ Guidelines for Special Rates and Charges ▪ Investigate options for Christmas Decorations ▪ Regular Vacancy Surveys ▪ Quarterly City wide retail forum

Elsternwick	▪ Improved maintenance standards in retail centres ▪ Refresh the brand identity	▪ Engage with ABC site developer to maximise benefits to strip	▪ Encourage use of community open spaces particularly the new Plaza	▪ Investigation options to maintain active street frontages during development and where vacancies persist ▪ Encourage short term activation	▪ ▪ Digital Engagement Strategy ▪ ▪ Guidelines for Special Rates and Charges ▪ ▪ Investigate options for Christmas Decorations ▪ ▪ Regular Vacancy Surveys ▪
Carnegie	▪ Actively engage with LXRA to maximise place making benefits of level crossing removal	▪ Investigate ways to ensure active retail businesses operate in the strip	▪ Continue to build links with emerging community sectors	▪ Investigation options to maintain active street frontages during development and where vacancies persist ▪ Encourage short term activation	
Alma Village		▪ Encourage inclusion of active retail frontages to the strip in redevelopment			
Caulfield South		▪ Encourage links between strip and proposed development (for example the Penhalluriack site)			

Bentleigh East		▪ Promote clusters and prominent attractions within centre – for example Indian supermarket and Op shops			
Glen Huntly	▪ Encourage links between Booran Reserve and retail strip	▪ Promote clusters within the centre for example Footwear ▪ Promote links with Booran reserve			
Hughesdale	▪ Actively engage with LXRA to maximise place making benefits of level crossing removal				
McKinnon		▪ Activate station retail frontage		▪ Encourage development that reflects the character of the strip	
Murrumbeena	▪ Actively engage with LXRA to maximise place making benefits of level crossing removal				

Ormond	▪ Improved maintenance standards in retail centres ▪ ▪ Refresh the brand identity				

30.9 Trader Consultation Notes

Carnegie

- Night-time economy is developing in centre particularly with Indian and Asian influences.
- Catchment area is growing.
- Carnegie is a food street.
- There is one example of a business closing at The Glen and planning to relocate to Carnegie due to the food and dining cluster
- Food tenants are capable of paying substantially higher rentals and this is leading to some operators, for example clothing and footwear, to exit the centre.
- Chadstone is a magnet for clothing and there is little point in trying to compete head to head. There can be differences when there is a high level of personal service
- There are distinct differences emerging between the day and night time economy
- Younger shoppers are more prevalent in the strip particularly with the growth of townhouse/unit developments
- Need for new Census information to reflect change in demographics since 2011
- Traders concerned about the process and payment of fees for use of the library forecourt. It acts as a disincentive to use.
- Some form of covering in the library forecourt would also improve usage
- Vacancy rates are relatively low in the strip estimated at less than 5%
- However there is a concerning trend for some Export oriented businesses to occupy retail shop fronts but not operate a retail business. It is estimated that there are approximately 6 of these type of businesses
- Footpath trading permits need to be streamlined
- Presentation of the strip needs to be improved.
- Traders and Council need to actively engage with the ongoing LXRA works to make sure that the associated works are planned with the strip in mind and executed to a high standard.
- The Rosstown hotel refurbishment has been a major positive for the centre and attracts a loyal clientele.
- Christmas decorations are an issue for the centre and we have had trouble getting this organised with Council in previous years
- There is very limited interaction with other strips in Glen Eira. There are no retail forums for the whole municipality. Carnegie is aware of this happening in Banyule and Stonnington.

Bentleigh

- Rental levels are too high in the centre and a number of businesses are biding their time before the exit the centre. An example is the jeweller's store that will close soon.
- Online shopping has had a continuing impact on the centre.
- From speaking with traders we estimate that turnover is down 25% in the past 12 months
- There is very little if any night time activity in the centre with cafes closing early. There is some evidence of this changing with the recent opening of an excellent wine bar.
- The lack of Christmas decorations is a negative for the strip.
- There has been inadequate consultation in relation to streetscape issues and where changes have been made traders feel they have little influence.
- The trees that have been planted are often poorly maintained, for example the tree outside Coffee Fix (504 Centre Road Bentleigh).
- Overseas investors are purchasing retail premises and either keeping the premises vacant or operating businesses that don't appear to be legitimate.
- Where developments are proposed or underway the shopfronts are presented poorly for an extended period not only do these properties represent gaps in the strip and inactivity but they set an undesirable image for the strip. We would like to see how we could work with Council to address this.
- There are no parking permits for traders or areas where staff can park.

Elsternwick

- The sale of the ABC site was reported extensively in the media on the day of the traders meeting including the president being interviewed on ABC radio. The general consensus was that the sale to Woolworths presents an opportunity to improve the west end of the centre.
- The redevelopment of the Coles site is still at the planning stages and it is anticipated that it is likely to include 6 or more levels of apartments.
- New businesses are continuing to open including a new niche grocery store
- Overall the vacancy rate in the centre remains low
- The provision of car parking associated with new developments continues to be an issue for the traders.
- Traders are pleased that the Elsternwick Plaza has been completed and is being used however they are not happy with the procedure and cost for them to use the facility.
- The strip is considered tired in terms of the branding and heritage paint scheme. It needs to be refreshed.
- The public toilets are not good and there is graffiti
- Footpaths need maintenance and better cleaning
- The street is 'ugly' including the seats and the planters
- The street is in transition becoming a food street that is popular with a 'hipster' crowd
- Jewish culture is diminished in the street
- Traders are concerned about the loss of diversity in business mix
- 95% of stores are owner occupied
- Where there are vacancies owners are often asking high rents and not flexible
- Medicare building has been vacant for an extended period
- There is a lack of consultation on changes to the street for example the installation of bike racks such as those outside Grill'd that meant lost car spaces
- The lack of Christmas decorations is an ongoing issue for the centres and the feeling is that Council has not been supportive

Part G: Conclusion

31. Conclusion

31.1 Context

Glen Eira's pattern of urban development reflects its initial growth along rail lines prior to mass car ownership, with traditional strip retailing focused around train stations and along tram routes. This distinguishes Glen Eira from locations where development occurred later, and is characterised by privately owned, car orientated, activity centres where the mix of businesses is carefully managed. By contrast, Glen Eira's strip centres offer opportunities for a much more eclectic mix of businesses, many of which may not be found in a privately managed centre.

In assessing the role and performance of Glen Eira's activity centres it is therefore important to look beyond traditional measures such as vacancy rates and the performance of individual businesses. A diverse mix of businesses, opportunities for start-up businesses, and the physical exposure offered to individual retailers by a strip retailing are equally important considerations.

It is this diversity of business opportunities and the organic nature of Glen Eira's activity centres that supports their capacity to evolve in response to the needs of residents and industry trends.

Urban development within Glen Eira has generally favoured residential development over employment uses to the extent that the municipality's longer-term sustainability may be impacted. Glen Eira has many of the characteristics of a dormitory location with relatively few residents working locally. This will be exacerbated by the growing number of residents employed in white collar occupations, for whom there is a lack of local employment opportunities. Encouraging office development upon Commercial 2 zoned sites will potentially reduce travel times and costs for residents, reduce parking congestion around railway stations and support nearby activity centres.

With Glen Eira already having one of Melbourne's highest population densities, behind only Port Phillip, Yarra and Stonnington, it is now appropriate to focus upon local employment growth to deliver sustainable economic, environmental and social outcomes.

31.2 Leveraging Cultural Diversity

Glen Eira has continued to attract a diverse mix of cultures with the Jewish, Southern Asian and Chinese Asian communities all experiencing strong population growth. While total population growth is expected to slow, there will be the opportunity for activity centres to leverage the Glen Eira's growing cultural diversity, as has already occurred in the Carnegie and Glen Huntly Activity Centres.

This provides a key economic development opportunity to not only service local residents but also attract visitors from beyond Glen Eira. With suburbs such as McKinnon, Ormond, and Murrumbeena forecast to experience an ageing of their populations, and potentially declining household expenditure, establishing niche areas of retailing will become increasingly important to maintaining the vibrancy of local centres.

31.3 Evolving Retail Environment

Glen Eira's activity centres have withstood the impact of structural change within the retail sector for well over a century with competition from a variety of new retail formats, initially from supermarkets, then regional shopping centres (Chadstone and Southland) and bulky goods retailing. The resilience of Glen Eira's activity centres reflects the inherent sustainability of strip retailing through offering, visual exposure to potential customers over reliance upon anchor retailers, public transport over a dependence upon private cars, and an open and competitive environment over a closed and uneven playing field for businesses.

While the impact of the Global Financial Crisis has largely passed with growth in retail sales at a state level returning to pre-GFC levels, Glen Eira's activity centres still face increasingly competition from regional shopping precincts and online retailing. This has impacted upon areas of discretionary retailing such as fashion were growth in retail sales over the past three years has generally stagnated, and newspaper and book retailing where sales have been declining at around 10% per annum. While this has been reflected firstly in the closure of book stores and video outlets, it is likely that other retailers will follow.

Glen Eira's activity centres have however been the beneficiary of the inner suburban gentrification, attracting a growing number of higher income households and increased residential development. Centres have evolved in response to these changes based upon their individual attributes and position within the activity centre hierarchy. The growth of Melbourne's cafe culture has played a key role in revitalising Glen Eira's activity centres, from the three urban villages through to small local centres. Although less vibrant, retail premises utilised as offices have played an important role in supporting the vitality of centres and facilitating local business development.

The challenge for Glen Eira's activity centres is maintaining their competitiveness and relevance to households through connecting with their local community. While many managed shopping centres have adopted elements of a main street environment in order to better engage with the community, this is already the foundation of Glen Eira's centres. Leveraging this competitive advantage however requires key issues relating to the amenity and accessibility of centres need to be constantly reviewed in order to provide an attractive 'lifestyle' environment to attract visitors. Similarly, Council may also support the competitiveness of centres through addressing traffic flow issues, and improving parking where possible.

Food retailing remains perhaps the most important strategic role for Glen Eira's activity centres, given that with over 60% of Glen Eira residents undertake food shopping at least 2-3 times per week, and a further 30% about once a week. It is this regularity of visits that connects residents to centres and provides exposure to potential customers for non-food businesses.

Overall Glen Eira's activity centres are already meeting the weekly shopping needs of many local residents with 73% of surveyed Glen Eira residents nominated centres within the municipality as being their main shopping location. Similarly, the majority (85%) of Glen Eira residents are either satisfied or very satisfied with their local food and grocery shopping options with the convenience of local centres and a good variety of stores being key factors. The challenge however is ensuring that the structure and business mix of centres continues to satisfy residents' needs.

While full-line supermarkets play an important role in meeting the weekly shopping needs of Glen Eira residents and attracting shoppers to centres, this often creates increased competition for traditional fresh food retailers. Supermarkets are keenly focused upon capturing market share of fresh produce sales as it represents their most profitable category line.

Therefore, there is a challenge for Council in balancing the role for larger supermarkets in centres with maintaining the diversity and competitiveness of fresh food retailing. With residents preference for fresh food shopping being evenly split between supermarkets and specialty food retailers, failing to do so may result in a reduced variety of food retailing and competitiveness of centres.

31.4 Future Retail Floorspace

Future demand for retail floorspace within Glen Eira will be primarily driven by the food retailing and hospitality sectors. This reflects the primary role, and competitiveness, of Glen Eira's activity centres in meeting households' convenience retailing needs. Non-food retailing is not expected to generate a significant requirement for additional floorspace due to the ongoing impact of online retailing and competition from larger competing centres.

Managing future retail floorspace needs to take account of not only future population growth but also the need to promote competition and diversity of retailing within centres. Council needs to play a lead role in directing the future expansion of supermarket floorspace in order to ensure that these outcomes are achieved.

Future population growth will generate a requirement for additional retail floorspace, which is expected to be distributed across the current mix of retail formats given resident's high level of satisfaction with the existing food retailing options. There is a projected requirement for 15,720 m^2 of food retailing floorspace over the period 2016-2036, with around 9,600 m^2 accounted for by a range of supermarket formats. Full-line supermarkets would be expected to account for 6,700 m^2 of this increased floorspace. Additional supermarket floorspace may however also be supported where existing supermarkets are identified as over-trading and where households would benefit from increased competition and choice. Hospitality related activities (cafes, restaurants and takeaway food businesses) are expected to support an additional 1,750 m^2 per annum over this period within Glen Eira.

31.5 Employment Land

A number of Glen Eira's industrial precincts offer the opportunity to support more intensive employment uses in the future, similar to that which has occurred in neighbouring municipalities. Given that Glen Eira's relatively low supply of industrial land, combined with a general absence of commercial office development within its activity centres, there is a notable shortage of local employment opportunities for residents, particularly those employed in office based occupations.

Glen Eira's industrial precincts are well serviced by public transport and activity centres. This will not only provide more convenient access to jobs for residents of Glen Eira and the surrounding region but also better utilise public transport infrastructure and support nearby activity centres. Smaller industrial precincts within Glen Eira will also offer continued opportunities for a range of businesses due to the continued functionality of existing buildings as well as the convenience offered by a middle suburban location for both businesses and customers.