

# **Maldon Economic Futures Project**

## **Assessment of Supermarket Development Options for Maldon**

Prepared for

Mount Alexander Shire

by

Essential Economics Pty Ltd

Planisphere

**FINAL REPORT APRIL 2008**



ESSENTIAL ECONOMICS



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## INTRODUCTION

### Background

Maldon is located 20km north west of Castlemaine in Mount Alexander Shire. Although Castlemaine is the main business and residential centre for the Shire, Maldon has an important support role, and is also a significant tourist destination for day-trippers and overnight visitors. Maldon's tourism role is underpinned by its heritage character which is fundamental to the town's identity and economy.

A Planning Panel recently considered Amendment C23 to the Mount Alexander Planning Scheme which proposed the relocation of the existing supermarket in the Maldon Town Centre to a new site in Vincents Road. The site is currently zoned Industrial 1 and is proposed to be rezoned to Business 1, with a schedule limiting gross leasable floor area to 1,000m<sup>2</sup>.

In its report, the planning panel requested that the following additional work be undertaken in order to better understand the retail-economic issues of relevance to the proposal:

- An examination of the benefits provided by an upgrade in supermarket facilities in the town;
- The degree to which escape spending would be reduced by the proposed development;
- The potential impact a relocation of the existing supermarket to the subject site would have on traders in the town centre;
- The potential for trading success of a supermarket on the subject site in Vincents Road; and
- The most appropriate zone for the subject site.

The Panel also identified the need for an urban design analysis to determine how the Vincents Road site may be best connected to the balance of the town centre.

### Objectives

This report has been prepared for Council in order to meet the objectives of the Maldon Economic Futures project, and specifically responds to the following issues:

- What is the potential for growth in commercially zoned land in Maldon?
- Can the growth in commercial land be accommodated in the existing town centre?
- If growth cannot be located in the town centre, what is an appropriate location for town centre expansion?
- How can any development outside the existing town centre be integrated through appropriate urban design treatment?

## Report Structure

The report has been prepared in two parts.

Part A of the report has been prepared by Essential Economics and relates specifically to the relevant retail-economic and strategic planning issues.

Part B of the report has been prepared by Planisphere and provides advice related to urban design principles and recommendations.

## Report Conclusions

It is our view that the preferred outcome for Maldon is the development of a new and modern supermarket within the existing town centre boundary. The development of the Vincents Road proposal is potentially a “second best” outcome for Maldon, which would improve the level of supermarket facilities in the town, but have implications for the future performance of the town centre.

The Tobin Street Car Park and the Motor Museum sites have been identified as sites within the existing town centre with the potential to accommodate a supermarket of between 800m<sup>2</sup> and 1,000m<sup>2</sup>.

It is therefore recommended that Council, DSE, the proponent and other relevant stakeholders are involved in a site assessment process which determines whether either or both sites are suitable for a supermarket development. If the sites are considered appropriate, it is recommended that Council and DSE work together to prepare an Expression of Interest (EOI) for the development of one (or both) of the sites.

The EOI would determine investor and market interest in the development of a supermarket on either the Tobin Street Car Park or Motor Museum site subject to the parameters determined in the site assessment process described above.

If at the end of the EOI process it is determined that neither of the identified town centre sites can be realistically developed for a supermarket of the size and type required for Maldon, then the Vincents Road site should be supported in order to secure an improved level of supermarket provision for the community.

# Part A

## Economic Assessment



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# 1 PROJECT DESCRIPTION AND CONTEXT

This section of the report provides a background description of Maldon, including the town's location and regional context. The proposed Vincents Road supermarket development is then described along with the relevant planning and strategic planning background.

## 1.1 Location and Regional Context

The township of Maldon is located in Mount Alexander Shire approximately 120 kilometres north west of the Melbourne CBD. The nearest major towns to Maldon include Castlemaine (20km), Maryborough (30km) and Bendigo (30km). A bus service links Maldon to Castlemaine where there is a V-Line train service to Melbourne.

Maldon was established as a gold mining town in the mid-nineteenth century, and has maintained much of its architectural and historical features from the gold-rush era. Maldon was listed as the first 'notable town' by the National Trust of Australia in 1965 for its unspoilt historic character. This heritage environment supports the important role tourism plays in the town today and is fundamental to Maldon's identity and economy.

Map 1.1 shows the location of Maldon, its regional context and major transport network connections.

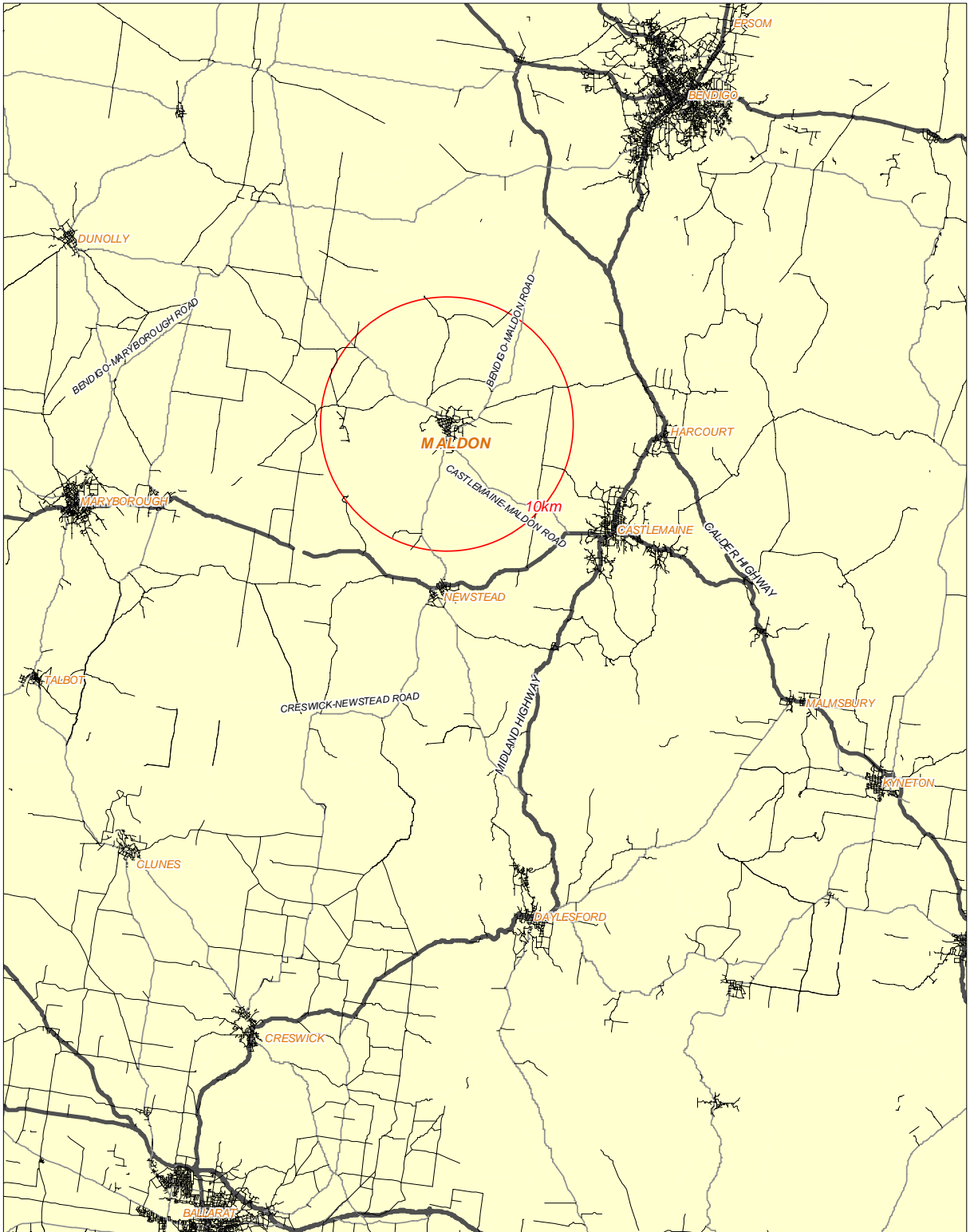
## 1.2 Proposed Vincents Road Project Description

A proposal exists for the relocation of the existing IGA supermarket in Maldon from its current location on Main Street, in the Maldon town centre, to a site on the south side of Vincents Road just east of the intersection with Phoenix Street.

The current owner of the IGA supermarket in Maldon has identified a number of constraints and issues with the existing site that means the continued operation of the store at its existing location is not feasible. These issues are discussed in more detail in Section 2 of this report but primarily relate to:

- Insufficient store size and limited capacity for expansion;
- Building design constraints which mean the store is unsuitable for modern retail requirements; and
- Parking and access difficulties.

As a result of these issues, the Vincents Road site has been identified as a location that would allow for the development of a new supermarket store of approximately 1,000m<sup>2</sup> and solve many of the operational constraints currently being experienced by the store in its existing location.



Map 1.1 Maldon Location

Source: CData with MapInfo  
Produced by: Essential Economics



### ***Vincents Road Site***

The Vincents Road site was formerly used for a rock crushing operation, although the land is currently vacant. The total site area is 2.47 hectares and much of this land is relatively flat and easily developable. At present there is an Industrial 1 Zoning for the site which does not allow for a retail use such as a supermarket.

Although the Vincents Road site is just 150 metres from the nearest shop in Main Street, the topography of the land between the proposed site and Main Street means that there is no obvious functional link between the traditional town centre and the proposed site. In this regard, the Vincents Road site can at best be described as an “edge-of-centre” location with respect to the Maldon town centre.

The location of the existing Maldon IGA store and the proposed Vincents Road site is shown in Map 1.2.

### ***Planning Process to Date***

The owner of the Maldon IGA store instigated Amendment C23 to the planning scheme which sought to rezone the Vincent Road site from Industrial 1 Zone to a Business 1 Zone, with a limit on gross leasable floor area of 1,000m<sup>2</sup>. The amendment would allow the relocation an expanded IGA store (1,000m<sup>2</sup>) to the Vincent Road site, with the 1,000m<sup>2</sup> floorspace limit intended to prevent other businesses in the Town Centre relocating to the Vincent Road site along with the supermarket.

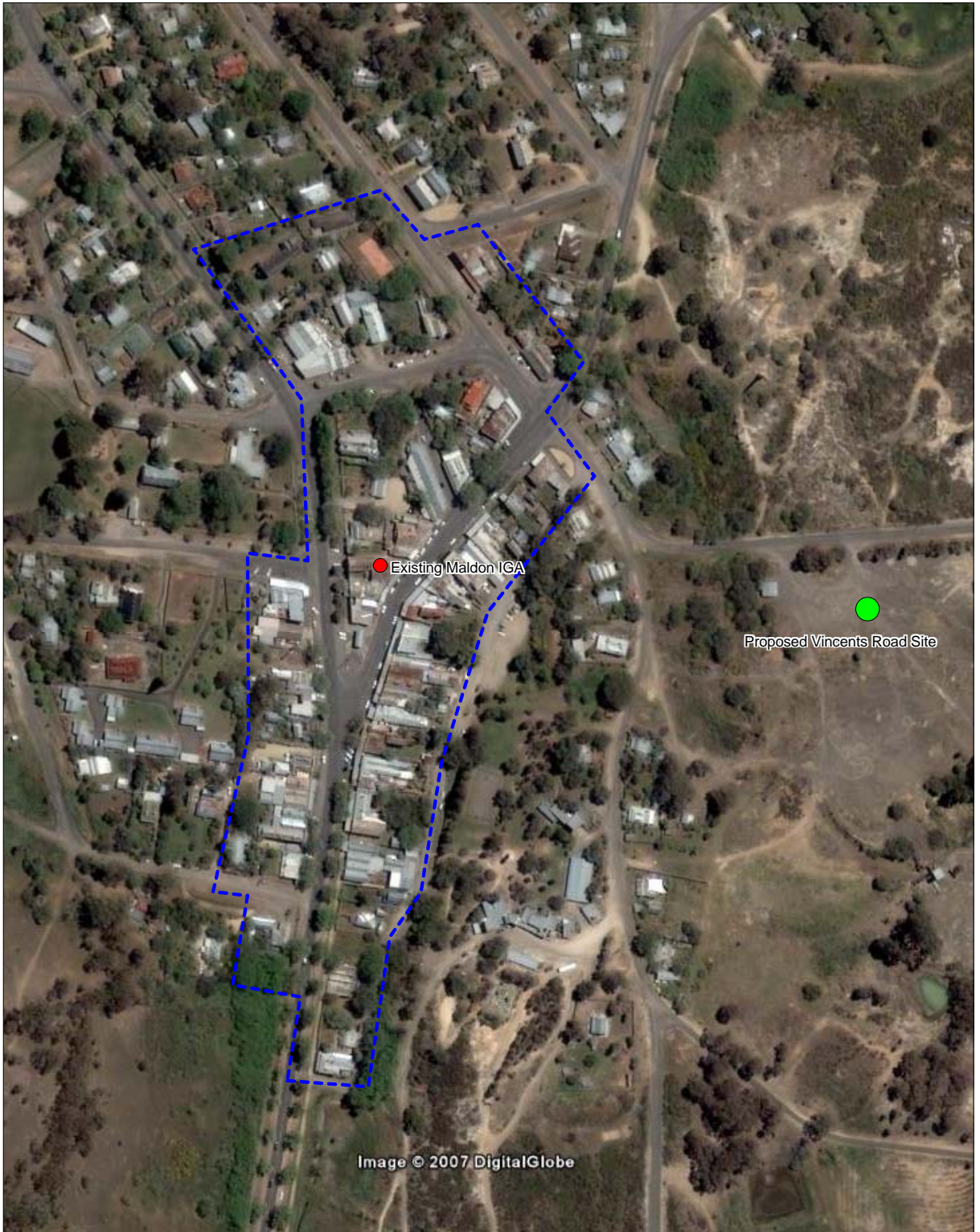
In preparing the amendment, the proponent argued that alternative sites within the town centre were neither available nor suitable for the type of development proposed. In particular, the potential to expand at the existing location (as proposed in the Maldon Urban Design Framework) and the potential to relocate to the CFA/Retirement Village site on High Street were considered not feasible.

The amendment was exhibited in early 2005, and a total of 14 submissions were received. A mediation meeting was held in order to resolve issues raised in the submissions, and two objecting submissions were subsequently withdrawn. Under the Planning and Environment Act 1987, Council decided to refer the amendment to an independent planning panel.

The Amendment C23 Panel recommendations were released in January 2006 and are summarised as follows:

- An independent economic assessment of the proposal should be undertaken in order to understand the implications of a relocated and enlarged supermarket, and the potential impact on the Maldon town centre;
- Given a lack of detail as to the implications of the rezoning in regard to local planning policy and uncertainty as to economic outcomes, additional information is required in order for the Panel to make an informed recommendation;
- Amendment C23 to the Mount Alexander Planning Scheme is recommended to be deferred to enable the required economic and urban design assessments to be carried out and upon completion, the panel can re-convene to consider the material prepared and make further and final recommendations.





Map 1.2 Current and Proposed Supermarket Locations

Source: Google Earth with MapInfo  
Produced by: Essential Economics

- Maldon Town Centre
- Existing Maldon IGA
- Proposed Vincents Road Site



Council noted the recommendations of the Planning Panel but adopted Amendment C23 at the Ordinary Meeting on the 11<sup>th</sup> April 2006 and the amendment was forwarded to the Minister for Planning for Approval.

The Minister for Planning advised that he was not prepared to approve Amendment C23. The Minister requested further economic and urban design research as recommended by the Panel. This report now forms part of that research.

### 1.3 Strategic Planning Context

The Mount Alexander Planning Scheme presents council policy as it relates to the use and development of land in the municipality. The key sections that are relevant to assessing the merits of the proposal include:

- State policies, presented in the State Planning Policy Framework, particularly in relation to Clause 14 (Settlement) and Clause 17 (Economic Development);
- the Municipal Strategic Statement (MSS), which provides the strategic rationale for the implementation of zones, schedules and other planning instruments; and
- Local Policies which provide recommendations and guidance on land uses and geographic areas are also an important component of the strategic planning context.

#### State Planning Policy Framework

Relevant provisions which relate to retail and activity centre policy include Clause 14.01, which relates to Settlement, and Clause 17, which relates to Economic Development.

Clause 14 relates in a general sense to settlement patterns across the State, and seeks “*to ensure a sufficient supply of land is available for residential, commercial, industrial, recreational, institutional and other public uses*” (SPPF, Clause 14.01-1). The provisions are intended “*to facilitate the orderly development of urban areas*”.

Clause 17.01 has a more specific objective to “*encourage the concentration of major retail, commercial, administrative, entertainment and cultural developments into activity centres (including strip shopping centres) which provide a variety of land uses and are highly accessible to the community*” (SPPF, Clause 17.01-1). Among other things, this provision emphasises the need to plan for centres which are readily accessible to the communities they serve and which encourage co-location and multiple-use. The objective is aimed at ensuring the sustainable delivery of business functions (including retail) in places that are easily accessible for the people they serve, and to maximise accessibility for multiple modes of transport.

Clause 17.02 encourages “*developments which meet the community’s needs for retail, entertainment, office and other commercial services and provide net community benefit in relation to accessibility, efficient infrastructure use and the aggregation and sustainability of commercial facilities*”. In particular, Clause 17.02 specifies that new freestanding commercial developments should be in existing or planned centres except where they serve new population, and provide improved accessibility (Clause 17.02-2).

### **MSS and Local Policies**

The Mount Alexander Municipal Strategic Statement presents a description of Council policy in relation to land use and development in the municipality, and provides the strategic context for the planning scheme's statutory controls.

Clause 22.02 of the Local Planning Policy Framework specifically relates to planning in Maldon and seeks to ensure that *"The commercial viability of the town centre is maintained and encouraged by accommodating a range of retail, commercial and public utility land uses"*.

The Clause also outlines strict heritage guidelines for Maldon in order to protect the character of the town and therefore notes that *"Development which is not in harmony with the existing character and appearance of the town is discouraged"*.

Heritage issues are also covered in Clause 22.20 Natural and Cultural Heritage which states that *"New development will be designed so it will not prejudice the character of a heritage building, site or area"*.

### **Other Strategies and Studies**

#### ***Mount Alexander Urban Living Strategy***

This study was prepared in 2004 and sought to identify where new urban growth and development in the Shire should be directed and how this growth should be managed.

In regard to Maldon, the study recognises the issues associated with retail in the town and the potential for the existing supermarket to relocate. The study considers that *"all opportunities for retail infill within the town centre must be exhausted before consideration of proposals for new retail stores outside of the historic town centre. Any proposals for new retail development outside of the existing town centre must be supported with a report that assesses the potential economic impact on the established town centre"* (Page 22).

#### ***Maldon Urban Design Framework***

In 2004, an Urban Design Framework was prepared for Maldon which examined a range of design and heritage issues in the town. A component of this work was related to the issue of the supermarket. The Urban Design Framework suggested the potential for the supermarket to expand through consolidation of adjacent sites including the public car park/toilet to the north.

## **1.4 Conclusion**

There is a proposal for the relocation of the existing IGA supermarket in Maldon from its current location in Main Street to a site in Vincents Road. The Vincents Road site is considered by the applicant to allow the development of a larger modern supermarket on a site which does not have the operational constraints present at the current location. The Amendment C23 to the Planning Scheme prepared in support of the proposal was put on hold by an independent panel subject to more detailed analysis of economic and urban design issues. These issues primarily relate to the implications associated with development of the supermarket in a location outside the existing Maldon Town Centre boundary.

## 2 MALDON TOWN CENTRE

### 2.1 Centre Role and Description

The Maldon Town Centre is the only activity centre in the town providing retail, commercial and administrative services. The centre extends from the intersection of Tobin Street and High Street in the south to the intersection of Edwards Street and Templeton Street in the north. The core retail area of the centre, in which most customer activity is generated, is the area immediately either side of the intersection of High Street and Main Street in the middle of the town. The existing Maldon IGA in Main Street is located in this core retail area.

#### *Floorspace Survey*

A floorspace survey of the Maldon town centre was undertaken by Essential Economics on the 30<sup>th</sup> May 2007. As a result of this survey a total of 52 occupied retail and commercial premises were identified in the town centre. Ten vacant premises were identified during the floorspace survey, although this included three recently constructed tenancies at the relatively quiet southern edge of the centre.

The survey also included estimates of total retail floorspace in the centre. These retail floorspace estimates are summarised by broad product group category in Table 2.1.

**Table 2.1 Maldon Town Centre Retail Floorspace by Product Group, May 2007**

Category	No. of Businesses	Retail Floorspace (m <sup>2</sup> )	% of Retail Floorspace
Food, Liquor and Groceries	4	710	18%
Food Catering	10	820	20%
<b>Total Food</b>	<b>14</b>	<b>1,530</b>	<b>38%</b>
Apparel	2	180	4%
Homewares	6	480	12%
Bulky Merchandise	3	530	13%
General Merchandise	15	1,130	28%
<b>Total Non-Food</b>	<b>26</b>	<b>2,320</b>	<b>57%</b>
Services	3	200	5%
<b>Occupied Retail</b>	<b>43</b>	<b>4,050</b>	<b>100%</b>
Vacant (Vacancy Rate)	10	830	(17%)
<b>Total Retail</b>	<b>53</b>	<b>4,880</b>	-
Commercial	9	-	-

Source: Essential Economics Floorspace Survey 30th May 2007

Total occupied retail floorspace in the centre is estimated at 4,050m<sup>2</sup> in May 2007, comprising 1,530m<sup>2</sup> of food based retail floorspace, 2,320m<sup>2</sup> of non-food retail floorspace and 200m<sup>2</sup> of service retail.

Vacant retail floorspace in the centre is estimated at 830m<sup>2</sup> which represents a vacancy rate of 17%. A vacancy rate of 17% is relatively high for a traditional street-based centre such as Maldon, with an acceptable vacancy rate for a successful activity centre typically considered to be in the range 4% to 8%.

Furthermore, a total of eight occupied tenancies, or 660m<sup>2</sup> of retail floorspace operate on a seasonal basis only and were closed at the time of the survey. Thus outside of the peak tourist season the vacancy rate in the centre is approximately 30%.

**Maldon Town Centre – Walking north towards High Street/Main Street Intersection**



*Essential Economics - May 30<sup>th</sup> 2007*

***Centre Function***

Despite its relatively small size, the Maldon Town Centre serves two important and very distinct roles.

**Resident Population**

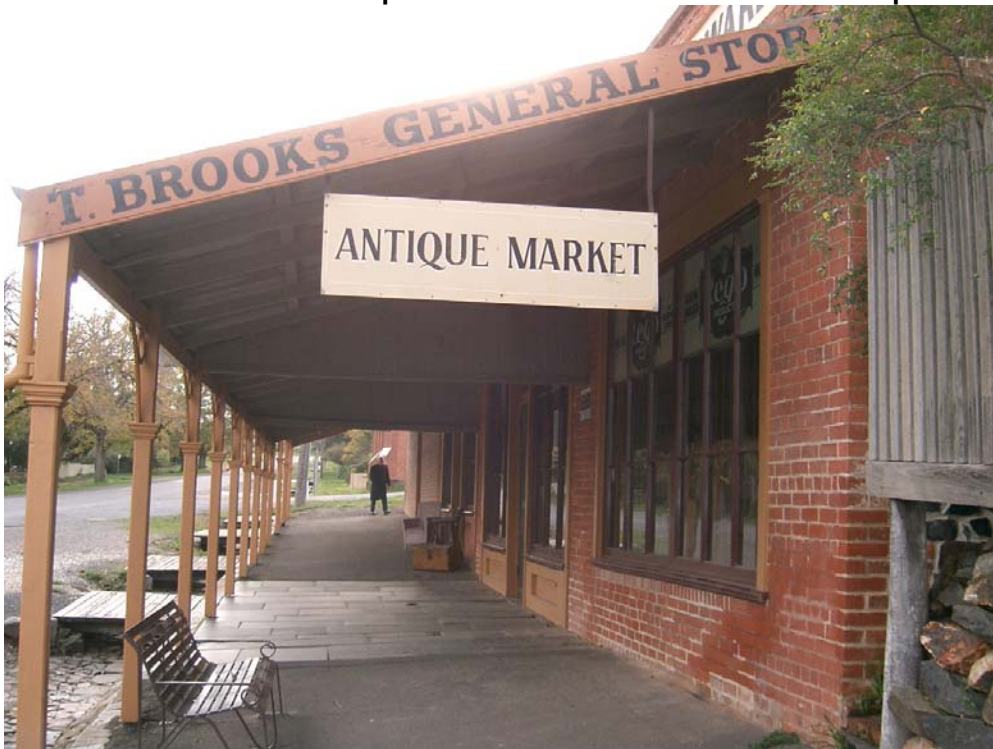
The Maldon Town Centre serves as the main service centre for the resident population in Maldon and immediate surrounding areas. In this respect there are a range of retail and non-retail traders who are primarily focussed on serving the basic needs of this population. Examples of such traders include:

- Maldon IGA,
- Bendigo Bank,
- Hairdresser (x2),
- Newsagent,
- Pharmacy, and
- Thriftylink Hardware.

However, the Maldon Town Centre provides this resident market with only a basic convenience oriented range of goods and services. A total of 11 stores were identified in the floorspace survey which are primarily focussed on serving residents, with a further 15 retail stores, including cafes and restaurants, which appear to cater to a mix of tourists and local residents.

Given the limited size and range of retail facilities oriented towards serving the local resident market, it is clear that a significant proportion of resident spending is directed to facilities located in nearby larger towns such as Bendigo and Castlemaine. These centres are able to offer a significantly larger and more diverse retail offer which is able to service the higher-order retail and commercial needs of Maldon residents which cannot be currently met in the town centre.

#### **Maldon Town Centre – Antique Store Corner of Edwards St and Templeton St**



Essential Economics - May 30<sup>th</sup> 2007

#### **Tourists and Other Visitors**

The Maldon Town Centre also has an important role to play in serving the significant tourist and other non-resident market that visits the town throughout the year. Traders identified in the floorspace survey which predominantly serve the visitor market include:

- Antique Shops (x8),
- Art Gallery,
- Arts and Crafts (x5), and
- Confectionary (x3).

On this basis, a total of 17 traders in the Maldon town centre are primarily focussed on serving the visitor trade. This represents approximately one-third of the total number of traders and retail floorspace located in the centre.

## 2.2 Existing Supermarket Issues

The Maldon IGA is located on the western side of Main Street, just north of the intersection with High Street. The store is located at the heart of the Maldon Town Centre and occupies a prominent position with a high degree of integration with the surrounding retail and commercial functions. According to the owner, the total store size is approximately 400m<sup>2</sup> which includes all storage areas in addition to shop space.

There are a number of issues associated with the existing store and location, which provide significant operational constraints to the IGA and are the catalyst for the proposed relocation of the store to the Vincents Road site. These issues have been identified during a site visit, from discussions with the current store owner and a literature review of previous reports on the Maldon supermarket issue.

The key limitations associated with the existing location can be summarised as follows:

### Design

- The building was constructed in the 1860s and is considered unsuitable for modern supermarket operations.
- The store incorporates two original tenancies which have been combined with internal works. This combination of two separate tenancies has resulted in an inefficient shop layout.
- The inefficient shop layout results in narrow aisles and awkward customer circulation through the store.
- The product display within the store is sub-standard due to the awkward design.
- There is a slope on the site from west to east which means that the storage area at the rear of the site has to be accessed via stairs. These stairs represent a considerable health and safety issue and also significantly reduces operational efficiency.
- There is a small mezzanine storage area at the rear, but this is inadequate in size and also generates health and safety concerns.
- The loading bay at the rear is limited in size and requires hand loading/unloading. This is a cost intensive requirement which again has a health and safety aspect.

### Parking

- There is no provision for off-street parking. All staff and customer parking is provided on the street.
- The on-street parking has deep kerbing which significantly reduces customer amenity.
- It is difficult to get groceries between the store and cars parked on-street due to deep kerbing and lack of parking space serving the store.

Site Constraints

- Despite issues such as those nominated above, the significant heritage constraints on the site mean that the ability to solve these issues at the existing location are limited.
- The existing site offers limited opportunities for expansion in order to meet demand and resolve the inefficient store layout.
- The expansion to the existing supermarket proposed in the Maldon Urban Design Framework is not considered feasible due to site and cost constraints.

At approximately 400m<sup>2</sup> in size, the Maldon IGA is considered to meet the minimum floorspace benchmark for a supermarket. Typically in retail-economic analysis, a store size of 400m<sup>2</sup> or less is typically termed a general store or mini-mart due to the lack of product range and facilities consistent with a supermarket shopping trip.

Although the Maldon IGA meets this minimum supermarket size benchmark, the store in reality operates at a significant cost and operational disadvantage relative to other small supermarkets of approximately 400m<sup>2</sup> which trade from modern premises and are not subject to the same constraints present at the Main Street location.

According to the owner, the Maldon IGA currently runs approximately 12,000 different product lines or SKUs. This figure is well below the typical provision for full-line supermarkets of approximately 3,000m<sup>2</sup> and above in larger towns such as Bendigo and Castlemaine which would stock 30,000 plus SKUs. Thus in terms of range, the existing Maldon IGA operates at a significant disadvantage to other larger supermarkets in the region and is primarily used for convenience or “top-up” shopping, with other larger supermarkets in nearby towns used for more comprehensive grocery shopping trips.

**Maldon Town Centre – Frontage of Existing Maldon IGA Store**



Essential Economics – 30<sup>th</sup> May 2007



## **Summary**

The existing Maldon IGA site is considered completely unsuitable for modern supermarket requirements. A site inspection and comparison of the store with contemporary supermarket shopping design leads us to conclude that the continued operation of a supermarket at the existing Main Street site is unsustainable.

The store in operational terms has a number of severe deficiencies which add to the cost base of the business and reduce the amenity of customers and the ability to capture trade from local residents. It is our view that the proposed store expansion proposed in the Maldon UDF is unworkable and would not resolve some of the important operational constraints identified with the existing store location.

## **2.3 Conclusion**

A floorspace survey of the Maldon Town Centre has found that there is a total of 4,050m<sup>2</sup> of occupied retail floorspace in the centre in May 2007. The vacancy rate in the centre is a relatively high 17% which is above normal acceptable levels. The town centre has a dual role, servicing both the resident population of Maldon and surrounds, as well as the tourist and visitor market. The existing Maldon IGA has a number of operational constraints which add significantly to business costs and reduce customer amenity. The continued operation of the Maldon IGA in its existing location is considered unsustainable.

## 3 TRADE AREA ANALYSIS

### 3.1 Trade Area Definition

This Chapter provides an assessment of the trade area catchment served by the Maldon Town Centre and which will also be served by a supermarket in Maldon. The analysis in this chapter includes consideration of:

- The trade area catchment served by the Maldon Town Centre;
- Existing and forecast population levels;
- Existing and forecast retail spending levels; and
- Forecasts of supermarket spending and floorspace requirements.

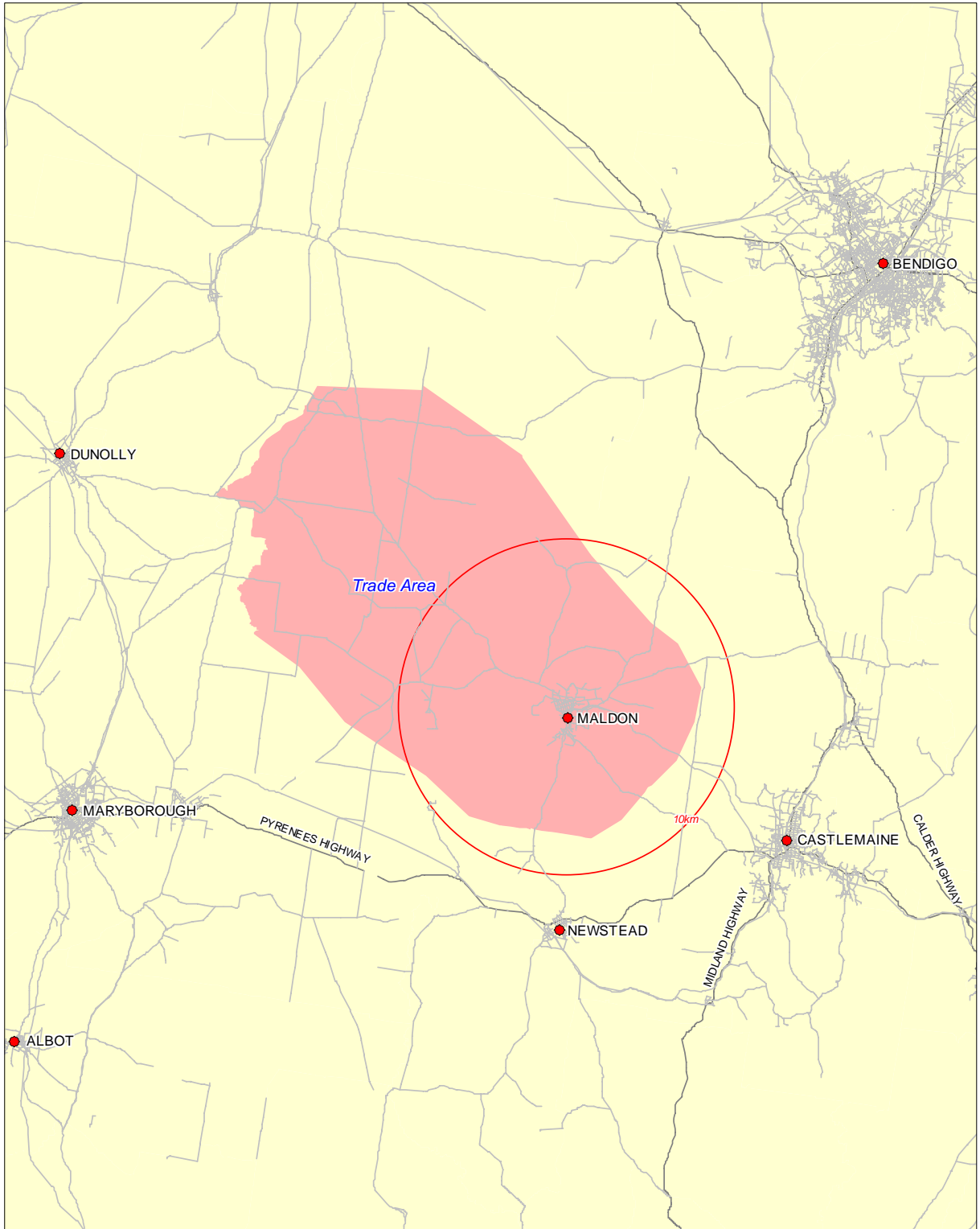
### 3.2 Trade Area Definition

The trade area for a retail activity centre is based on a range of factors, including:

- Size and composition of retail facilities in the subject centre,
- Relative proximity and composition of other retail centres,
- Road and other transport access to and from the centre,
- Physical barriers such as major roads, rivers and rail lines, and
- Residential development patterns.

The trade area for the Maldon Town Centre is shown in Map 3.1 and is defined to include Maldon as well as a surrounding rural hinterland for which Maldon is an important service centre.

Factors influencing the extent of the trade area include the proximity of major towns and cities to the east and south including Maryborough, Castlemaine and Bendigo which would all be regularly visited by residents of the Maldon trade area.



Map 3.1 Maldon Trade Area

Source: MapInfo  
Produced by: Essential Economics

Trade Area Selected Locations



### 3.3 Trade Area Population

Population estimates and forecasts for the trade area between 2001 and 2021 are shown in Table 3.1. These forecasts are based on the Department of Sustainability and Environment Victoria in Future (2004) projections and have been adjusted according to the latest ABS estimated resident population for 2007.

Maldon Town Centre serves a trade area catchment comprising a total estimated resident population of some 2,590 persons in 2007. This population includes residents living in Maldon and the surrounding rural area, as shown in Map 3.1.

Over the period 2007 to 2010, the resident population of the trade area is forecast to increase slightly to 2,610, representing overall growth of 20 persons. Over the longer term to 2021, the trade area population is forecast to reach 2,670 persons, representing an average annual growth rate of 0.3% per annum over the 2007 to 2021 period.

This relatively low population growth rate primarily reflects the few opportunities available for new residential development within Maldon.

**Table 3.1 Trade Area Population, 2001 to 2021**

	2001	2007	2010	2016	2021
<b>Population (no.)</b>					
Main Trade Area	2,550	2,590	2,610	2,640	2,670
<b>Average Annual Growth (%)</b>					
Main Trade Area		0.3%	0.3%	0.2%	0.2%
<b>Average Annual Growth (no.)</b>					
Main Trade Area		10	10	10	10

Source: Essential Economics, ABS Regional Population Statistics, DSE "Victoria in Future 2004"

Note: Totals subject to rounding

### 3.4 Trade Area Retail Spending

#### *Per Capita Spending*

Estimates of per capita retail spending are shown in Table 3.2, using the MarketInfo micro-simulation model which utilises the latest ABS Household Expenditure Survey (HES, 1998/99) and the ABS Census of Population and Housing 2001 as well as a range of other socio-economic indicators. The figures shown are in 2007 dollars and inclusive of GST.

**Table 3.2 Trade Area Retail Spending Per Capita, 2007 (\$2007)**

Trade Area	Food, Liquor and Groceries	Food Catering	Non Food	Services	Total Retail
<b>Per Capita Spending (\$2007)</b>					
Main Trade Area	4,120	1,100	4,180	300	<b>9,700</b>
Country Victoria Average	4,090	1,250	4,460	280	<b>10,080</b>
<b>Var'n from Country Vic Average (%)</b>					
Main Trade Area	+1%	-12%	-6%	+7%	<b>-4%</b>

Source: MarketInfo; Essential Economics

As shown in Table 3.2, per capita retail spending by trade area residents in 2007 is approximately 4% below the Country Victoria average. Spending on Food, Liquor and Groceries (FLG), the retail spending category of most relevance to supermarkets, is slightly above the benchmark average.

### **Total Retail Spending**

Forecasts of the total available retail spending of residents in the trade area for the period 2007 to 2021 are shown in Table 3.3 by retail category. Growth in trade area retail spending is forecast as a result of the modest population growth outlined in Table 3.1, as well as an allowance for real growth in per capita spending that reflects long-term growth trends in Victoria as measured in the ABS Australian National Accounts.

Total retail spending by trade area residents is estimated to increase from \$25.1 million in 2007 to \$30.4 million by 2021, representing a real average annual growth rate of 1.4% over this period.

Spending on FLG products by trade area residents is forecast to increase by \$1.6 million over the 2007 to 2021 period, with a significant share of this additional spending likely to be directed to supermarkets both in Maldon and nearby regional centres such as Castlemaine and Bendigo.

**Table 3.3 Trade Area Retail Spending, 2007 to 2021 (\$2007m)**

Retail Category	2007	2010	2016	2021	Growth p.a (%)
<b>Main Trade Area</b>					
FLG	\$10.7m	\$11.0m	\$11.7m	\$12.3m	1.0%
Food Catering	\$2.8m	\$3.0m	\$3.2m	\$3.4m	1.3%
Non-Food	\$10.8m	\$11.4m	\$12.6m	\$13.8m	1.7%
Services	\$0.8m	\$0.8m	\$0.9m	\$0.9m	1.5%
<b>Total Retail</b>	<b>\$25.1m</b>	<b>\$26.2m</b>	<b>\$28.4m</b>	<b>\$30.4m</b>	<b>1.4%</b>

Note: In 2007 dollars and including GST. Real per capita growth rate - FLG 0.75%, Food Catering 1.25%, Non Food 1.5%, Services 1.2%. Source: MarketInfo; Essential Economics

### **3.5 Supermarket Capacity Analysis**

An analysis of the capacity for supermarket development in Maldon has been prepared and is summarised in Table 3.4 below.

Food, Liquor and Grocery (FLG) spending is the retail spending category of relevance to supermarket operators. Within this category supermarkets compete for a share of spending with specialty stores, fresh food markets, convenience stores etc. We estimate that in the Maldon trade area supermarkets capture approximately 75% of available FLG spending, and this estimate is based on analysis of ABS data ("Retail Industry 1998-99" Cat.No.8624.0) and our own experience in undertaking supermarket assessments.

Based on an examination of the estimated turnover and trading patterns of the existing Maldon IGA, and having regard for the relative location, size and quality of supermarkets located outside the trade area, at present an estimated 30% of trade area supermarket FLG spending is directed to the Maldon IGA. That is, approximately 70% of supermarket spending by trade area residents currently "escapes" to supermarkets located outside the trade area in centres such as Castlemaine, Bendigo and Maryborough.

**Table 3.4 Supermarket Capacity Analysis, 2007 to 2016 (\$2007)**

Factor	\$M, Constant \$2007		
	2007	2010	2016
<b><u>FLG Spending (\$M)</u></b>			
Trade Area	10.7	11.0	11.7
<b><u>FLG Spending to Supermarkets (\$M)</u></b>			
Trade Area (@75% in 2007 & 75% in 2010 & 75% in 2016)	8.0	8.3	8.8
<b><u>Spending Retained by MTA Supermarkets (\$M)</u></b>			
Trade Area (@30% in 2007 & 55% in 2010 & 55% in 2016)	2.4	4.5	4.8
Plus Sales from Beyond Trade Area (@10%)	0.3	0.5	0.5
Total Supermarket FLG Turnover	2.7	5.0	5.4
Plus Non-FLG Sales (@6%)	0.2	0.3	0.3
<b>Total Trade Area Supermarket Turnover (\$M)</b>	<b>2.8</b>	<b>5.4</b>	<b>5.7</b>
Total Trade Area Supermarket Floorspace (m <sup>2</sup> ) <sup>1</sup>	400	1,000	1,000
<b>Total Trade Area Smkts Average Turnover Level (\$/m<sup>2</sup>)</b>	<b>7,100</b>	<b>5,400</b>	<b>5,700</b>

Source: Essential Economics, MarketInfo

With an allowance for sales from beyond the trade area of 10% of sales (based on discussions with the store owner and our own estimate), and with 6% of sales estimated to be in non-FLG product categories, Table 3.4 shows that the Maldon IGA achieves total sales estimated at \$2.8 million in 2007, which represents an acceptable overall trading level of \$7,100/m<sup>2</sup> based on floorspace of 400m<sup>2</sup>.

The introduction of an expanded and enhanced supermarket offer in Maldon is forecast in 2010. This assumes the development of a larger supermarket of 1,000m<sup>2</sup>, although for the purposes of this component of the analysis, no specific site is assumed.

As a result of this change, Table 3.4 shows the following:

- In 2010 the proportion of supermarket spending by trade area residents that is retained at the Maldon supermarket is forecast to increase from 30% in 2007 to approximately 55% in 2010. In making this estimate, 55% is considered the highest share of supermarket spending that is likely to be retained by a supermarket in Maldon given the proximity and accessibility of alternative major supermarkets in Castlemaine, Maryborough and Bendigo.
- The share of supermarket turnover derived from beyond the main trade area is assumed to remain constant at approximately 10%.

Based on the above assessment, turnover at the Maldon supermarket is forecast to increase to \$5.4 million in 2010, although average trading levels are likely to fall to \$5,400/m<sup>2</sup> from the current level of \$7,100/m<sup>2</sup> due to the larger store size. Beyond 2010, retail spending growth in the trade area means that by 2016, trading levels for a new Maldon supermarket of 1,000m<sup>2</sup> are forecast to have increased to \$5,700/m<sup>2</sup>.

### **Supermarket Floorspace Potential**

Based on the analysis in Table 3.4, it is apparent that there is potential for a larger supermarket to be operating in Maldon. At present approximately 70% of supermarket spending by trade area residents is directed to stores located outside of Maldon and there is the potential to reduce this level of "escape spending" through the provision of improved supermarket shopping facilities within the town.

However, the degree to which this escape spending can be reduced is limited by the proximity of major chain supermarkets at Maryborough, Castlemaine and Bendigo which will continue to be regularly used by residents of Maldon and surrounding areas.

Assuming that the proportion of supermarket spending captured by a new and larger supermarket store in Maldon increases to 55% from its present level of approximately 30%, Table 3.4 shows that turnover at the Maldon supermarket would be approximately \$5.4 million in 2010, up from approximately \$2.8 million currently. With a new supermarket of 1,000m<sup>2</sup>, as is currently proposed for the Vincents Road site, this would represent an average trading level of \$5,400/m<sup>2</sup>.

This trading level is relatively low for a supermarket store. In general, a trading level of \$7,000/m<sup>2</sup> and above is considered within the typical range for a successfully trading supermarket. It should be noted though, that in country areas such as Maldon where fixed costs such as rent are likely to be lower than metropolitan areas, a lower-than-typical trading level can still be commercially viable.

Nevertheless, a forecast trading level of just \$5,400/m<sup>2</sup> is considered very low and suggests that there is no specific requirement for a supermarket with floorspace of 1,000m<sup>2</sup> in Maldon. A new supermarket of 800m<sup>2</sup> (approximately double the size of the existing Maldon IGA) would have little appreciable difference to a 1,000m<sup>2</sup> store based on operation and amenity, and based on the forecast turnover in 2010 of \$5.4 million (see Table 3.4) would trade at \$6,700/m<sup>2</sup> in 2010 and \$7,100/m<sup>2</sup> in 2016. These trading levels are more consistent with typical supermarket trading levels.

On this basis, although the potential for a larger supermarket in Maldon is acknowledged, the 1,000m<sup>2</sup> supermarket proposed for the Vincents Road site is considered at the upper end of supermarket floorspace requirements for the town. A slightly smaller supermarket, of say 800m<sup>2</sup>, would deliver essentially the same economic and other benefits of a 1,000m<sup>2</sup> store at a trading level more consistent with typical supermarket benchmarks.

### **3.6 Conclusion**

The trade area for the Maldon Town Centre is defined to include Maldon as well as the surrounding rural hinterland for which the town is a key service centre. The trade area population is estimated at 2,590 persons in 2007, and this is forecast to increase to 2,670 persons by 2021. Retail spending by trade area residents is forecast to increase by 1.4% per annum over the period to 2021.

An assessment of supermarket capacity in Maldon shows that at present approximately 70% of supermarket spending escapes the trade area to other stores in towns such as Castlemaine, Maryborough and Bendigo. An improvement in supermarket facilities in Maldon has the potential to reduce this escape spending to approximately 45%, with further reductions beyond this level unlikely. On this basis, a supermarket of between 800m<sup>2</sup> and 1,000m<sup>2</sup> is considered appropriate for Maldon.

## 4 IMPORTANCE OF SUPERMARKET FACILITIES FOR MALDON

Having considered the limitations associated with the existing Maldon IGA site in Chapter 2, this chapter presents a discussion of the degree of importance of supermarket shopping to a centre such as Maldon.

### ***Role Serving Local Resident Market***

As identified in Section 2.1, the Maldon Town Centre serves a dual role as a service centre to local residents and for the important tourist/visitor market which visits the town throughout the year.

The existing supermarket in Maldon is of particular importance in terms of the town centre's role in serving the local resident market. Local residents are considered to account for approximately 90% of sales at the Maldon IGA, with tourists making up only a small component of total trade.

### ***Importance of Supermarket for Maldon Economy***

Supermarket shopping is a key component of most households retail requirements. In the Maldon trade area, an estimated 75% of all Food, Liquor and Grocery spending is directed to supermarket stores. Supermarket shopping represents a significant share of retail spending for residents and is undertaken regularly on a day-to-day and weekly basis.

The ability to meet at least some of this demand for supermarket shopping facilities locally in Maldon represents an important economic outcome in terms of the employment, income and spending that is retained within the community. At present the Maldon IGA employs approximately 25 people and directly generates retail turnover of approximately \$2.8 million.

The availability of a supermarket in Maldon also means that local residents are able to fulfil at least their basic grocery shopping needs within the town, without the additional cost, time and effort associated with travelling to more distant towns for what are often essentially basic convenience retail needs.

### ***Community Amenity***

Due to the high share of spending which is directed to supermarket facilities and the regular nature in which this shopping is undertaken by most households, supermarkets themselves are important community facilities which can contribute to a sense of place and promote social interaction.

The loss of supermarket shopping facilities in Maldon would therefore have social as well as economic impacts for the town and represent a significant loss of amenity to the Maldon community.



### ***Benefits for Other Traders***

Another factor is the way in which supermarket facilities tend to benefit surrounding traders through the additional exposure to customer traffic that these traders are able to generate from supermarket shoppers. For example, assuming an average basket size of \$20 per visit, the existing Maldon IGA generates a total of approximately 140,000 visits per annum. Many of these visits will be associated with a visit to other traders in the town centre, particularly in those categories associated most closely with supermarket shopping such as fresh food (butcher, baker etc) and other convenience items.

In this respect, the loss of a supermarket presence in Maldon is likely to have a negative flow-on effect to other traders in the centre due to lower levels of customer traffic in the centre, particularly from locals forced to visit other nearby centres in order to undertake their regular supermarket shopping. Given that existing vacancy levels in the town centre are considered at the high end of expectations, there is a high probability that vacancy rates in the town centre would rise further as a result of the loss of supermarket facilities in the town.

### ***Summary***

The existing Maldon IGA represents an extremely important economic and community asset for Maldon. Given the limitations associated with the existing site, finding an appropriate alternative site for the Maldon supermarket should be a priority for Council and other stakeholders.

**A worst case scenario for Maldon would be the loss of supermarket facilities in the town altogether. As a result, it is important that all stakeholders work together to ensure that an appropriate outcome for the required relocation and expansion of the Maldon supermarket is achieved.**

## 5 MALDON SUPERMARKET DEVELOPMENT OPTIONS

This section of the report considers the options for new supermarket development in Maldon.

### 5.1 Vincents Road Site

#### *Attributes of Vincents Road Site*

The proposed Vincents Road site has been identified by the existing operator of the Maldon IGA as a suitable alternative location for the supermarket given continued operation from the current location is not considered sustainable. In particular, the Vincents Road site is considered to have the following key attributes (see also Streetwise Rezoning Report, June 2004):

- The site size is more than sufficient to accommodate a supermarket of 1,000m<sup>2</sup> including dedicated at-grade parking and loading areas;
- The subject site is flat and easily developable;
- The subject site is just 150 metres from the existing town centre and within a walkable distance;
- The subject site does not compromise the heritage classification of Maldon township; and
- The site is centrally located and accessible to the wider Maldon township.

This assessment of the attributes of the Vincents Road site as a location for a supermarket is considered reasonable. The site can easily accommodate development of the type proposed and it is our opinion that a supermarket on the Vincents Road site would trade successfully.

In this respect the proposed Vincents Road site represents an opportunity for the relocation of the existing Maldon IGA which would overcome the operational constraints on the existing site and significantly improve the range and quality of supermarket facilities available to residents of Maldon and the trade area.

#### *Disadvantages of Vincent Road Site*

The attributes of the Vincents Road site described above need to be balanced against broader concerns relating to the site's suitability for supermarket development that have been identified previously during the rezoning process for the site. A summary of these key issues and concerns is provided below.

#### Out-of-Centre Location

The Vincents Road site has been considered an "out-of-centre" development by some stakeholders. Out-of-centre development is contrary to current Local and State Government activity centre policy which promotes the concentration of retail and other development within designated activity centres, including the Maldon Town Centre.

However, Clause 12.01-2 of the State Planning Policy Framework (SPPF) which relates to metropolitan development does allow for out-of-centre development which cannot be located in a nearby activity centre, and which demonstrates a net community benefit.

Having viewed the Vincents Road site, it is apparent that in functional terms the site can at best be considered an “edge-of-centre” location. The topography of the area between Main Street and the Vincents Road site would effectively limit pedestrian movement and there is no direct visibility between the proposed site and Main Street. However, given the relative proximity of Main Street and the Vincents Road site (approximately 150 metres at closest point), urban design treatments have the potential to promote at least a marginal degree of integration between the Vincents Road site and the existing town centre. Nonetheless, a supermarket development on the Vincents Road site will have a relatively low degree of integration with the existing Maldon town centre.

More detailed issues relating to urban design aspects of the Vincents Road site are described in the Part 2 of this report which has been prepared by a specialist urban design firm Planisphere.

### **Supermarket on Vincents Road Site will have Negative Impact on Traders in Existing Town Centre**

There are concerns that the relocation of the Maldon IGA to the Vincents Road site would have a negative impact on existing traders in the Maldon Town Centre. This concern primarily relates to the perceived out-of-centre location of the Vincents Road site and the reduced ability of people to visit both the proposed Vincents Road supermarket and shops in the town centre during the same shopping trip.

The low level of integration between the Maldon Town Centre and the Vincents Road site means that there is the potential for a loss of trade at some specialty shops within the existing town centre as a result of the relocation of the supermarket. In particular, those shops identified in Section 2.1 of this report as serving the resident market will no longer have the direct exposure to supermarket customers that the existing location within the town centre generates. On a relative basis, these shops will trade at a lower turnover level if the supermarket is relocated to Vincents Road compared with an alternative site within the town centre due to the reduced exposure to potential customers. This needs to be balanced against the additional turnover and employment that would be generated locally by a larger modern supermarket in the town.

This loss of direct exposure to customer traffic resulting from the relocation of the supermarket to Vincents Road also needs to be balanced against the implications for these stores if there is no supermarket in Maldon at all. If the existing Maldon IGA were to close due to the inability to find a suitable alternative site, the potential negative trading impacts on stores in the town centre could be significantly higher than those associated with the proposed supermarket development in Vincents Road. Given the existing high vacancy rate in the town centre, the complete loss of supermarket facilities in Maldon would be an extremely poor economic and community outcome and should be avoided if reasonably possible.

There is not likely to be a measurable impact on traders focussed on serving the tourist market in the Maldon Town Centre as a result of the relocation of the supermarket to the Vincents Road site. Moreover, there would be potential to accommodate another business in the existing IGA premises which is in the heart of the town centre precinct.

Therefore, the potential trading performance of specialty shops in the Maldon town centre serving the resident market can be summarised with the following three scenarios:

- Best Case - A suitable alternative supermarket site is found in the existing Maldon town centre which improves supermarket facilities and retains all customer traffic within the existing centre.
- Second Best Case - The Maldon supermarket relocates to Vincents Road which improves supermarket facilities in the town but transfers some customer traffic away from the existing town centre.
- Worst Case - Maldon loses its supermarket facilities.

**The Vincents Road Site has the Potential to Draw Specialty Shops out of the Town Centre**

The current proposal for the Vincents Road site only includes a supermarket of 1,000m<sup>2</sup> and does not allow for any adjoining specialty shops. On this basis the proposed supermarket will operate as a standalone development with no adjoining retail or commercial floorspace. This has been proposed in order to minimise any impacts on the existing Maldon town centre and ensure that no other shops relocate to the Vincents Road site. However, the Amendment C23 Panel Report identified the difficulty associated with providing a planning mechanism to ensure that any retail development on the Vincents Road site is limited to a supermarket.

In general, supermarkets are not standalone retail facilities. Supermarkets, as discussed in Chapter 4, tend to generate customer traffic which attract and benefit nearby specialty shops in the day-to-day retail categories such as newsagent, fresh food etc, which are often visited in association with a visit to the supermarket. This is often called the “anchor tenant” dynamic in which a major tenant such as a supermarket is the anchor tenant which creates the customer traffic upon which other nearby smaller retail shops rely. It is extremely unusual to see a standalone supermarket which does not trade alongside at least some specialty retail, and where this does occur it is usually considered counter to strategic planning policies which seek a mixture of activities in centres.

Therefore, even if the Vincents Road supermarket proceeds on a standalone basis, it is highly likely that over time there will be pressure to allow for adjacent retail and commercial development at the site. Such pressure may arise from existing traders in the Maldon town centre which for commercial reasons may seek to relocate to the Vincents Road site in order to be directly exposed to customer traffic generated by a larger and more modern supermarket.

Potential implications of allowing specialty shops to locate at Vincents Road include:

- Maldon town centre become decentralised with two distinct precincts at Vincents Road and the traditional town centre;
- The Vincents Road precinct is primarily focussed on serving the needs of the resident market,
- The existing Maldon town centre primarily serves the tourist/visitor service role;
- A higher propensity for retail vacancies in the traditional town centre due to the loss of tenants to the Vincents Road site;
- Re-located specialties at Vincents Road trading at more profitable trading levels due to exposure to the higher levels customer traffic generated by the adjacent supermarket.

Therefore, although at present the Vincents Road proposal only considers the potential for a supermarket to locate on the site, there may be important long term implications if opportunities for the relocation of specialty stores also occurs.

## **Summary**

Having reviewed the Vincents Road site, it is apparent that the site represents a genuine opportunity for the Maldon IGA to relocate and trade successfully from a larger and more modern premises. It is also recognised that although the site may be considered out-of-centre, there are opportunities through appropriate urban design treatments to provide a low degree of the integration with the nearby existing Maldon town centre. In the absence of any alternative sites for a supermarket in the Maldon Town Centre, the Vincents Road site represents the best opportunity to ensure the future of supermarket operations in Maldon are assured.

However, there are a number of significant issues associated with the Vincents Road proposal arising from its lack of integration with the existing Maldon Town Centre. This includes the potential for trading impacts on existing specialty shops in the town centre and the fragmentation of the retail sector in the town. In this respect, the Vincents Road site represents what is potentially a “second best” outcome for Maldon, with the “best case” outcome being an appropriate supermarket development within the existing town centre.

It is recognised that in the past a significant amount effort has been made in seeking an alternate site within the Maldon town centre, without success. However, it is considered important that all opportunities for achieving the Best Case scenario for Maldon of an appropriate supermarket development in the town centre have been exhausted before the Vincents Road option can be adopted.

## **5.2 Other Location Options**

In preparing this report, Essential Economics and Planisphere undertook a detailed field visit to Maldon which included a search for possible alternative sites for a supermarket in the Maldon Town Centre. In assessing potential sites the following criteria were applied:

- The site needs to be of sufficient size to accommodate a modern supermarket of between 800m<sup>2</sup> and 1,000m<sup>2</sup> in size;
- The site needs to be located within the Maldon Town Centre and have a strong degree of integration with the existing centre traders;
- The site needs to be relatively flat and easily developable;
- The site needs to allow supermarket development consistent with heritage considerations; and
- The site must be suitable for the operation of a successful supermarket business.

Other sites which had previously been considered for supermarket development - including the CFA site, retirement village site and redevelopment of existing site (Maldon UDF) - were all assessed and either found not be suitable or available for such development.

However, two potential sites were identified as meeting these criteria set out above and have been the subject of further consideration and investigation by Essential Economics and Planisphere.

## **Site 1      *Tobin Street Car Park***

The first site nominated as having the potential to accommodate supermarket development is the Tobin Street carpark. This site is shown in Map 5.1.

The Tobin Street Car Park site is located behind the Main Street shops and would allow the development of a supermarket on a site which has the potential to integrate with the existing Main Street shopping precinct through a direct pedestrian link.

Specific issues relevant to the site include:

- The site is relatively flat and easily developable;
- A direct and high quality pedestrian link through to Main Street is essential;
- The site consolidates the role of Main Street as the retail/commercial core of the Maldon town centre;
- There is some opportunity for on-site and adjacent parking along Tobin Street;
- It is likely Tobin Street will require an upgrade to handle additional traffic requirements including both private vehicles and delivery trucks; and
- There may be issues associated with site consolidation and use of crown land.

It is important to note that the location of supermarkets behind existing street oriented retail strips has been undertaken successfully in a number of centres across Australia including Daylesford, Bendigo and Leongatha.

A more detailed discussion relating to urban design aspects of the Tobin Street Car Park site is provided in Part 2 of this report.

## **Site 2      *Motor Museum Site***

Another possible location for a supermarket is the Maldon Motor Museum site on the corner of Francis Street and High Street. This site is a former service station and incorporates the museum as well as some adjacent office space. The site is shown in Map 5.1.

The Motor Museum site offers an opportunity for development of a new supermarket within the Maldon Town Centre on a high profile site opposite the Post Office and a short distance from Main Street.

Specific issues relevant to the site include:

- The site offers the potential to develop a new supermarket with a high degree of exposure and accessibility within the existing town centre boundary;
- The site is opposite the Post Office and a short distance from the existing supermarket;
- The pedestrian link to the existing retail core of the town centre is indirect, although relatively flat and easily walkable;

- There is the potential for on-street parking to service the supermarket in addition to any off-street parking;
- There may be some heritage requirements relating to building design;
- There is potential for land contamination issues due to the site's former use as a petrol station; and
- An appropriate alternative site may be required for existing tenants.

On balance, the Motor Museum site is considered to have strong site location characteristics for a successful supermarket operation. The site is high profile, accessible and is a genuine edge-of-centre location which integrates and shares infrastructure with the balance of the town centre.

A more detailed discussion relating to urban design aspects of the Motor Museum site is provided in Part 2 of this report.

### 5.3 Conclusion

It is our view that the preferred outcome for Maldon is the development of a new and modern supermarket within the existing town centre. As a result, a preliminary assessment of the potential for a new and larger supermarket to locate in the existing Maldon town centre has been undertaken by Essential Economic and Planisphere.

The Tobin Street Car Park and the Motor Museum sites have been determined as sites within the centre with the potential to accommodate such development.

It is therefore recommended that Council, DSE, the proponent and other relevant stakeholders are involved in a site assessment process which considers the following:

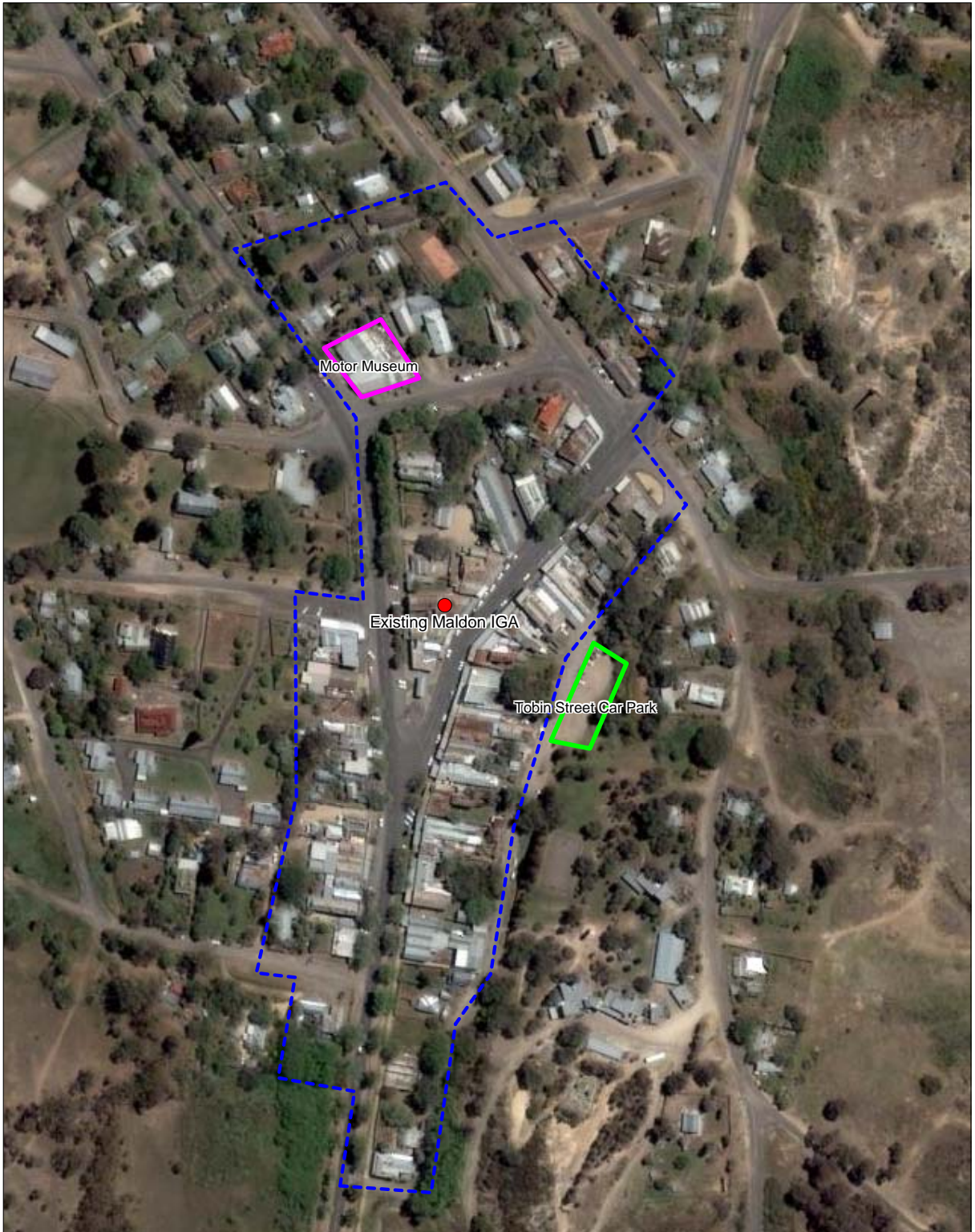
- The commercial and cost considerations associated with developing a supermarket on the two identified town centre sites;
- Ways in which the development of a supermarket on either site can be facilitated by Council and the State Government;
- Urban design principles and actions for the sites and their integration with surrounding land uses;
- The impact on existing users of the two potential sites; and
- The relative merits of either site as the preferred location for a supermarket in the Maldon town centre.

If at the end of this process, it is determined that either or both sites are considered suitable for a supermarket development, it is recommended that Council and DSE work together to prepare an Expression of Interest (EOI) for the development of one (or both) of the sites.

The EOI would determine investor and market interest in the development of a supermarket on either the Tobin Street Car Park or Motor Museum site subject to the parameters determined in the site assessment process described above.

If at the end of the EOI process it is determined that neither of the identified town centre sites can be realistically developed for a supermarket of the size and type required for Maldon, then the Vincents Road site should be supported in order to secure an improved level of supermarket provision for the community.





Map 5.1 Potential Maldon Town Centre Supermarket Locations

Source: Google Earth with MapInfo  
Produced by: Essential Economics

- Maldon Town Centre
- Existing Maldon IGA
- Site 1 - Tobin Street Car Park
- Site 2 - Motor Museum



## 6 SUMMARY AND CONCLUSION

### *Project Description and Context*

1. There is a proposal for the relocation of the existing IGA supermarket in Maldon from its current location in Main Street to a site in Vincents Road. The Vincents Road site is considered by the applicant to allow the development of a larger modern supermarket on a site which does not have the operational constraints present at the current location. The Amendment C23 to the Planning Scheme prepared in support of the proposal was put on hold by an independent panel subject to more detailed analysis of economic and urban design issues. These issues primarily relate to the implications associated with development of the supermarket in a location outside the existing Maldon Town Centre boundary.

### *Maldon Town Centre*

2. A floorspace survey of the Maldon Town Centre has found that there is a total of 4,050m<sup>2</sup> of occupied retail floorspace in the centre in May 2007. The vacancy rate in the centre is a relatively high 17% which is above normal acceptable levels. The town centre has a dual role, servicing both the resident population of Maldon and surrounds, as well as the tourist and visitor market. The existing Maldon IGA has a number of operational constraints which add significantly to business costs and reduce customer amenity. The continued operation of the Maldon IGA in its existing location is considered unsustainable.

### *Trade Area Analysis*

3. The trade area for the Maldon Town Centre is defined to include Maldon as well as the surrounding rural hinterland for which the town is a key service centre. The trade area population is estimated at 2,590 persons in 2007, and this is forecast to increase to 2,670 persons by 2021. Retail spending by trade area residents is forecast to increase by 1.4% per annum over the period to 2021.
4. An assessment of supermarket capacity in Maldon shows that at present approximately 70% of supermarket spending escapes the trade area to other stores in towns such as Castlemaine, Maryborough and Bendigo. An improvement in supermarket facilities in Maldon has the potential to reduce this escape spending to approximately 45%, with further reductions beyond this level unlikely. On this basis, a supermarket of between 800m<sup>2</sup> and 1,000m<sup>2</sup> is considered appropriate for Maldon.

### *Importance of Supermarket Facilities for Maldon*

5. The existing Maldon IGA represents an extremely important economic and community asset for Maldon. A worst case scenario for Maldon would be the loss of supermarket facilities in the town altogether. As a result, it is important that all stakeholders work together to ensure that an appropriate outcome for the required relocation and expansion of the Maldon supermarket is achieved.

### ***Maldon Supermarket Development Options***

6. Having reviewed the Vincents Road site, it is apparent that the site represents a genuine opportunity for the Maldon IGA to relocate and trade successfully from a larger and more modern premises. It is also recognised that although the site may be considered out-of-centre, there are opportunities through appropriate urban design treatments to provide a low degree of the integration with the nearby existing Maldon town centre.
7. However, there are a number of significant issues associated with the Vincents Road proposal arising from its lack of integration with the existing Maldon Town Centre including the potential for loss of trade at existing specialty shops and the fragmentation of the town's retail sector. In this respect, the Vincents Road site represents what is potentially a "second best" outcome for Maldon, with the "best case" outcome being an appropriate supermarket development within the existing town centre. It is considered important that all opportunities for achieving the Best Case scenario for Maldon of an appropriate supermarket development in the town centre have been exhausted before the Vincents Road option can be adopted.
8. A preliminary assessment of the potential for a new and larger supermarket to locate in the existing Maldon town centre has been undertaken by Essential Economic and Planisphere. The **Tobin Street Car Park** and the **Motor Museum** sites have been determined as sites within the centre with the potential to accommodate such development.
9. It is therefore recommended that Council, DSE, the proponent and other relevant stakeholders are involved in a site assessment process in which it is determined whether either or both alternate sites are considered suitable for a supermarket development. If the sites are considered suitable, it is recommended that Council and DSE work together to prepare an Expression of Interest (EOI) for the development of one (or both) of the sites.
10. The EOI would determine investor and market interest in the development of a supermarket on either the Tobin Street Car Park or Motor Museum site subject to the parameters determined in the site assessment process described above. If at the end of the EOI process it is determined that neither of the identified town centre sites can be realistically developed for a supermarket of the size and type required for Maldon, then the Vincents Road site should be supported in order to secure an improved level of supermarket provision for the community.

# Part B

## Urban Design Analysis





**plān|ī'sphēre** [ urban strategy planners ]

MALDON ECONOMIC FUTURES PROJECT

PART B

## Urban Design Analysis

Prepared for Mount Alexander Shire

## Part B – Urban Design Analysis

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## 1. Introduction

Planisphere and Essential Economics have been engaged by Mount Alexander Shire to undertake the Maldon Economic Futures Project.

This is Part B of the project report which relates to urban design aspects of the project brief. In Part A, Essential Economics have undertaken an economic analysis of issues relating to supermarket development options in Maldon.

The purpose of this urban design advice is to demonstrate how the site of the proposed supermarket at Vincents Road, Maldon can be connected to the Town Centre. Additional advice has also been provided on two potential alternative sites for the proposed supermarket in the existing Town Centre boundary.

The Vincents Road site is proposed to be rezoned from Industrial 1 to Business 1 for the purpose of developing a supermarket. A Planning Panel recommended that the decision to rezone the land be deferred until additional economic and urban design work was undertaken, which is the basis for this study. The Panel Report for Amendment C23 made the following recommendation for Council to undertake this additional work:

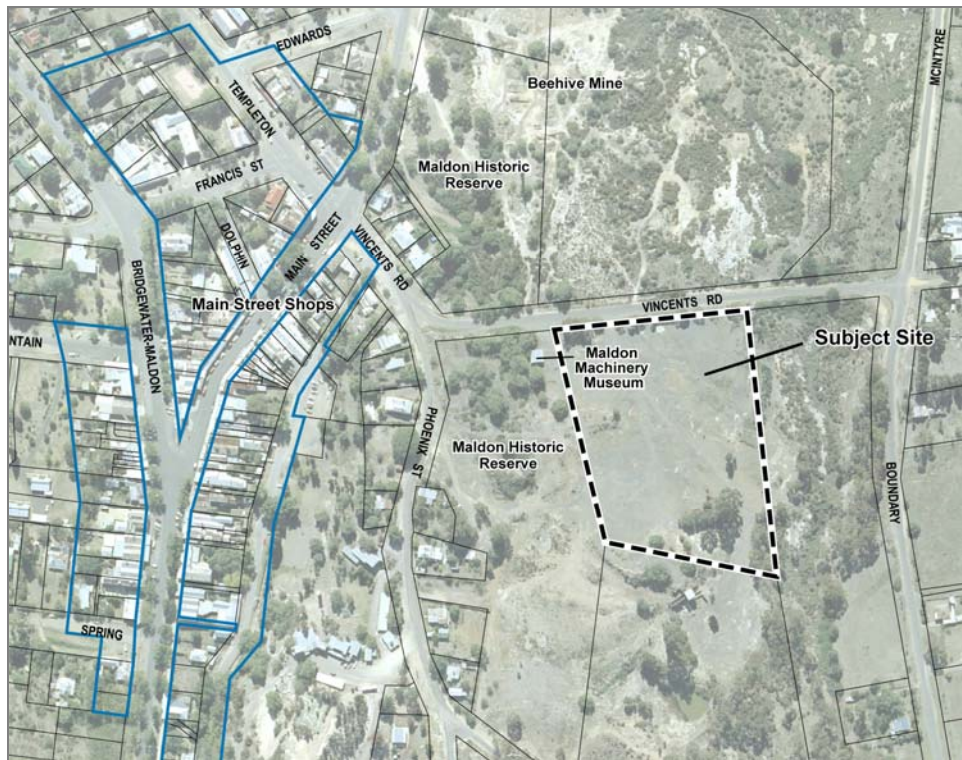
*'a submission is required to outline how the site will be 'connected' in urban design terms to the Town Centre and, if this cannot be achieved, why it is not necessary.'*

### 1.1 The Site

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The site is located on the south side of Vincents Road east of the main shopping area. It has an area of approximately 2.4 hectares and a frontage to Vincents Road of 145 metres. The proposed supermarket will occupy a small proportion of the property.

The site is situated within a former mining landscape which includes the Beehive Mine located to the north, and additional industrial land to the south. To the east and west of the site is Crown Land reserve, most of which is heavily vegetated. The Maldon Vintage Machinery Museum is located in crown land immediately west of the site.



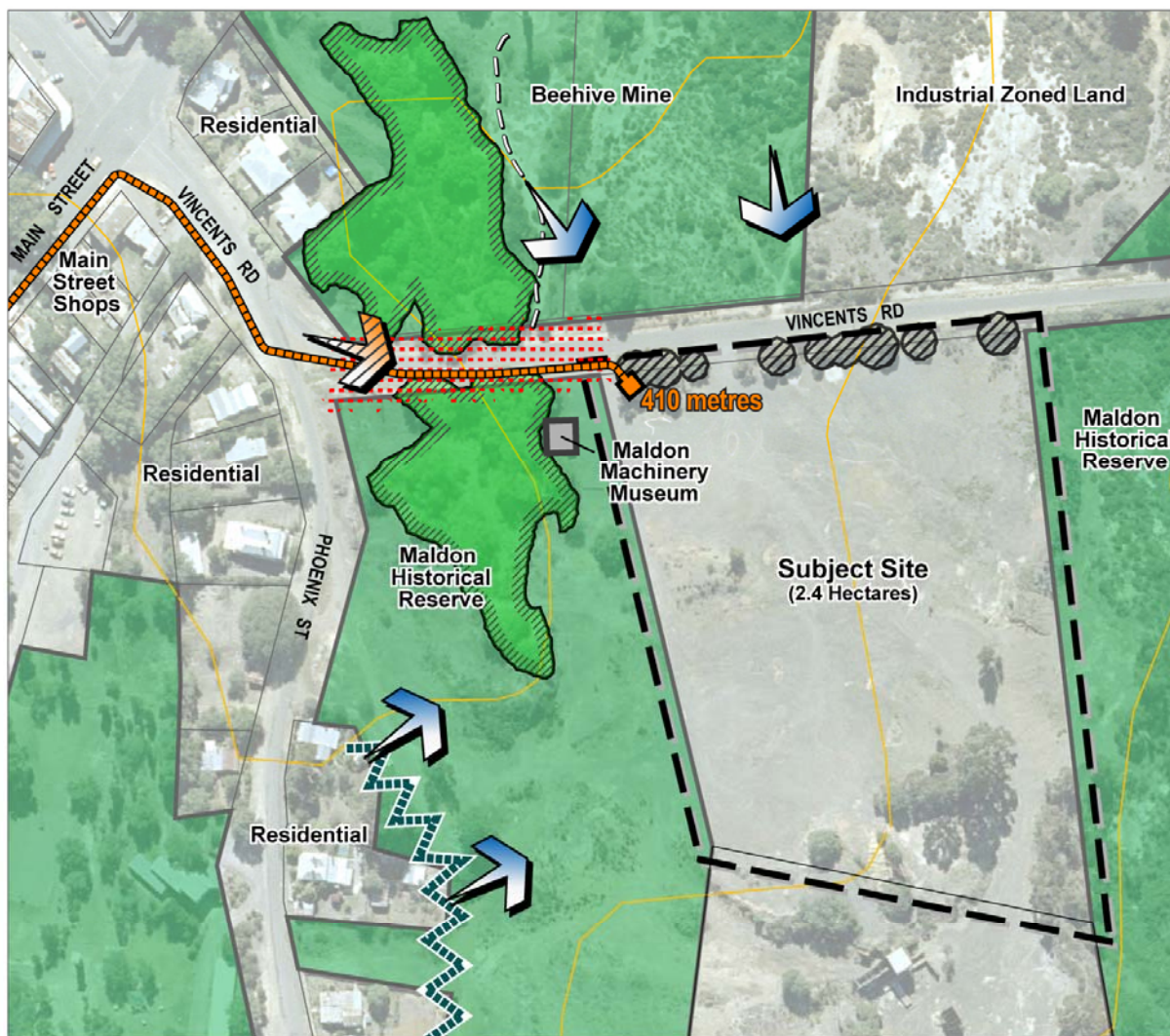
Locality Plan












## 2. Site Analysis

The following site analysis has focused on the proposed supermarket site in Vincents Road. A site inspection, analysis of GIS mapping data, and review of background material provide the inputs into this site analysis.

This section should be read in conjunction with the Site Analysis Plan below.





- |   |   |   |   |
|---|---|---|---|
|  | Existing Public Open Space  |  | Views to the site                                   |
|  | Views and access to public open space limited by dense vegetation             |  | Views to the site restricted by roadside vegetation |
|  | Steep slope along Vincents Road   |  | Sensitive viewing area from surrounding residential |
|  | Likely route from the town centre and approximate distance to the town centre |  | Important vegetation within the subject site        |
|  | Existing path from the Beehive Mine   |  | Contours (10m intervals)                            |
|   |   |  | Subject Site  |

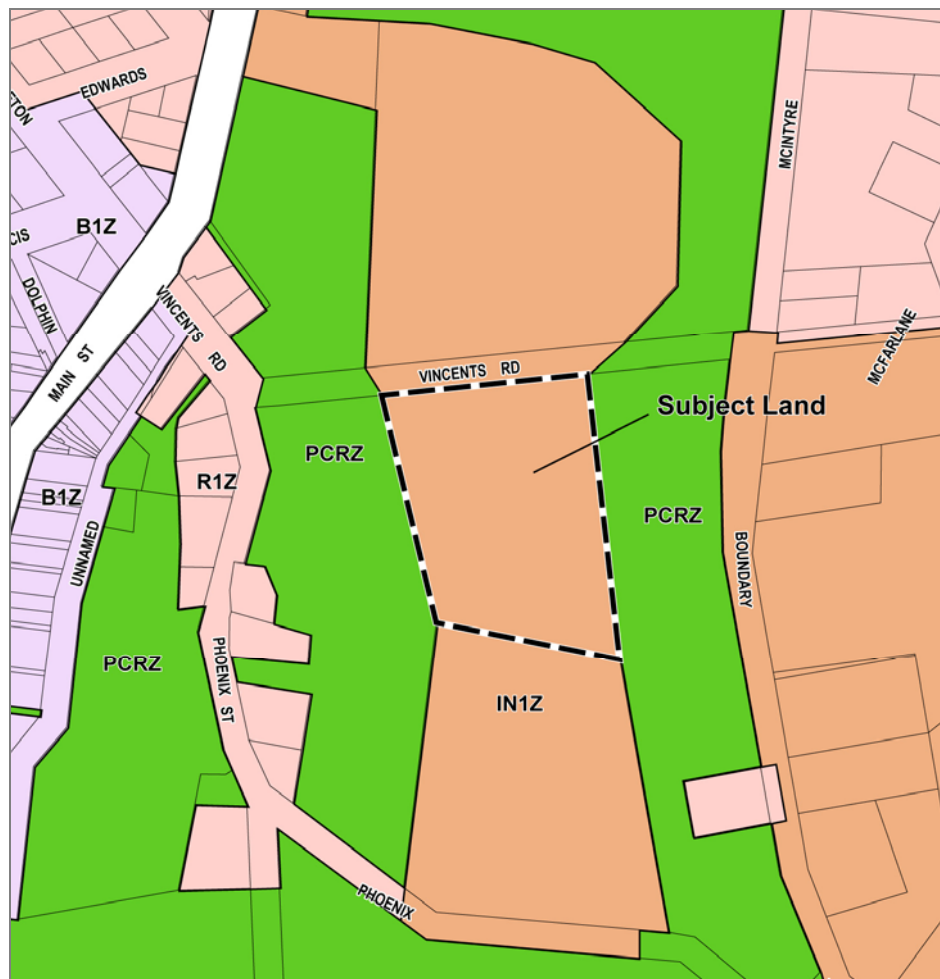
## Site Analysis Plan

## 2.1

### Land Uses

The site is currently vacant and is included within the Industrial 1 Zone (IN1Z). Land to the east and west of the site form part of the Maldon Historic Reserve and are included within the Public Conservation and Resource Zone (PCRZ). The Beehive Mine is located to the north and is partly included within the Industrial 1 Zone, and partly in the Public Conservation and Resource Zone.

A small number of dwellings within the Residential 1 Zone (R1Z) are located along the north south leg of Vincents Road, between the edge of the Main Street shopping strip and the site. The shops are included within the Business 1 Zone (B1Z).



Land Use Zone Plan

## 2.2 Pedestrian Accessibility

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The site is located approximately 410 metres from the centre of the Business 1 Zone, which equates to roughly a 5 minute walk. This is a substantial distance in the context of the township given that the entire Business Zoned area has a length of approximately 500 metres.

Access from the centre of town is provided along Main Street which slopes gently to the north and has wide asphalt footpaths (3.5m wide approx.), which are in good condition.

The north south leg of Vincents road is flat and has no formalised footpaths on either side of the road. There is a substantial gravel verge which is used for pedestrian traffic. The east west leg of Vincents Road slopes down to the site and again there are no footpaths on either side of the road. The gravel verge is narrower in this section and less even.

Pedestrian access from the Beehive Mine is provided along gravel paths which slope down to Vincents Road.



*Access along Main Street looking northeast*



*Access along the north south section of Vincents Road looking north west*



*Access along the east west section of Vincents Road looking west*

## 2.3 Vehicle Accessibility

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Primary vehicle access to the site is provided from Vincents Road. It has been assumed that the majority of vehicle movements to the site would occur from Main Street into Vincents Road.

Vincents road is sealed and provide single traffic lanes in both directions. The road verges are gravel with swale drains, and this contributes to the informal character of the streetscape.

## 2.4 Topography

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There is a slight fall across the site towards the waterway in the east. There is a significant rise in topography to the west of the site up to Phoenix Street and the north south leg of Vincents Road. The Beehive Mine site also rises towards the north west.

## 2.5 Vegetation

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The site is predominantly cleared. There is a row of large eucalypts located at the northern boundary of the site which could be retained in future development.

The reserve to the west of the site includes large Peppercorn trees with dense understorey and weeds. Indigenous vegetation is located along the creek corridor to the east of the site. Recent revegetation of the beehive mine reserve has included native grasses and shrubs.



*Large native trees at the northern boundary of the site*



*Native Grasses and Shrubs at the Beehive Mine*



*Peppercorn Trees in the Maldon Historic Reserve to the west of the site.*

## 2.6

## Views

Views to the site are limited because of vegetation and topography. The site is barely visible from the top of the north south section of Vincents Road because it is screened by Peppercorn trees and thick understorey vegetation. This is also the case for views to the site from the Maldon Historic Reserve on the south side of Vincents Road.

Views to the site from the Beehive Mine are available from the pedestrian paths down to Vincents Road. This view includes vegetation and the site in the foreground, and mountain ranges in the distance. This view is predominantly free of structures.

Sections of the site are likely to be visible from residential properties on the eastern side of Phoenix Street however the significant fall in topography would limit visibility.

There are views from the site across to the Beehive Mine and tower in the north, and views to vegetation in other directions.



*Views to the site from the top of the north south section of Vincents road are screened by vegetation*



*View to the site from the Beehive Mine*



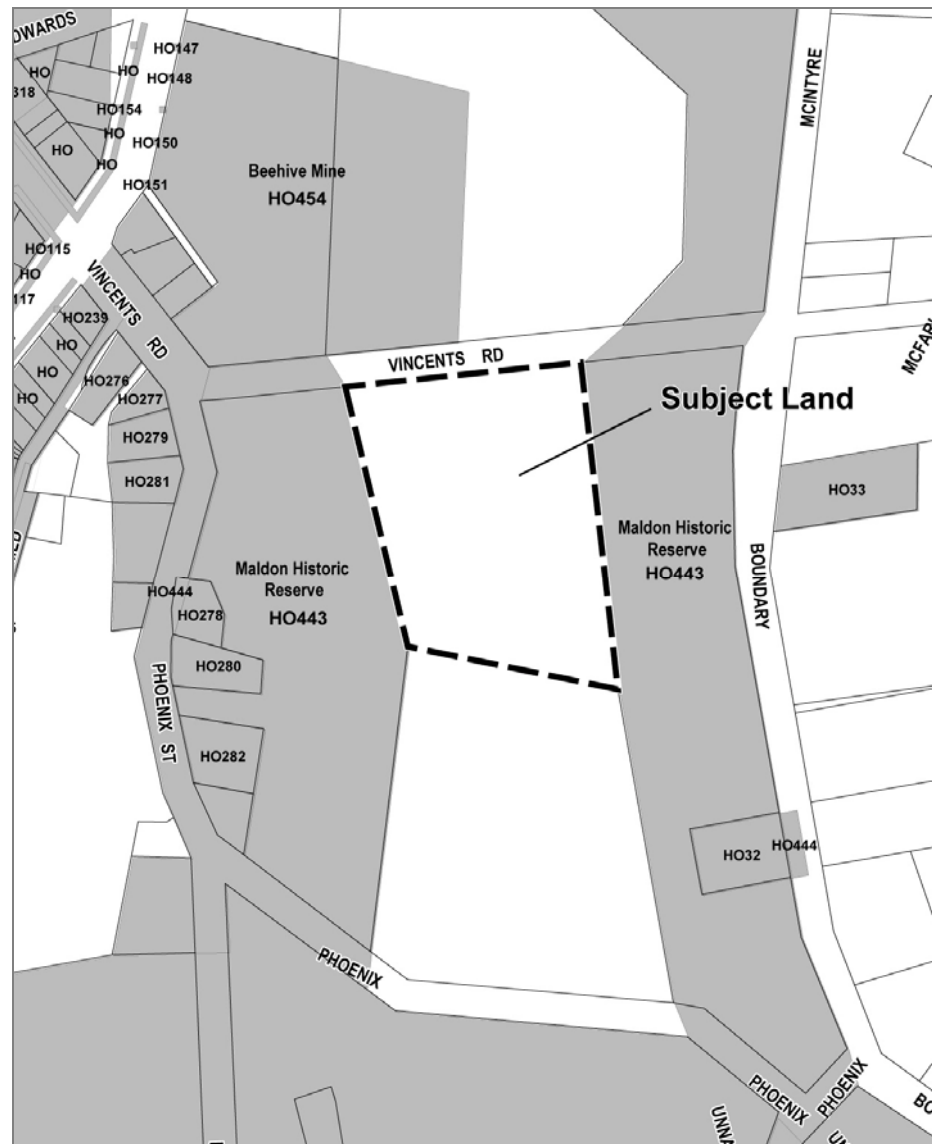
*View to the Beehive Mine from the site*

## 2.7

## Heritage

The site is located in a former gold mining landscape. The Beehive Mine to the north is of State Significance and included on the Victorian Heritage Register. The Chimney Stack is an important feature of the site that is visible from most points in the town including the proposed supermarket site.

The crown land to the east and west of the site is also of heritage significance and is included within the Maldon Historic Reserve Heritage Overlay (HO443). This reserve comprises approximately 2500 hectares of public land and forest surrounding the Maldon Township.



Heritage Overlay Plan

## **3. Issues and Opportunities**

### **3.1 Physical Connection to the Centre**

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#### **Issues**

- The supermarket site is located 410 metres from the centre of the Business Zone. This is likely to deter people from walking between the Main Street shops and the supermarket, unless given no other alternative.
- The steep slope of Vincents Road will be likely to deter pedestrian access to the site, particularly for people with limited mobility.
- The absence of footpaths along Vincents Road will limit pedestrian access to the site.
- Vincents Road has an informal appearance to the streetscape which is partly due to the gravel road verges and swale drains. This is an important element that is distinct from the formalised streetscape in Main Street.

#### **Opportunities**

- Opportunity to create footpaths between the Main Street retail strip and the supermarket site to improve pedestrian access.
- Opportunity to provide defined pedestrian access through the site to the supermarket entrance.
- Opportunity to provide a paving treatment that distinguishes the informal character of streetscape along of Road from the formalised streetscapes in the Main Street.

### **3.1 Visual Connection to the Centre**

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#### **Issues**

- The small area of residential along the north south section of Vincents Road and the Maldon Historic Reserve creates a break between the Main Street retail area and the proposed supermarket site.
- The site is currently not visible from the top of the hill at the intersection of Vincents Road and Phoenix Street because of the thick vegetation. The trees have low branches and thick foliage which limits visibility through the trees. It is important that this visual connection is created for passive surveillance and also to assist with navigation to the supermarket.

#### **Opportunities**

- There is an opportunity to provide a clear view to the site from the intersection of Vincents Road and Phoenix Street.

**Issues**

- The site is located out of the commercial area in a formal industrial landscape where there are few existing buildings. It is important that the design of the building relates to the types of buildings that would have once occupied this landscape. The design should not replicate the building forms found in the town centre, which are more urban in appearance.
- Achieving an appropriate building setback is important on this site. The following issues need to be considered:
  - Modern supermarkets often provide a substantial amount of car parking in front of the supermarket, which results in the building being set back significantly from the street frontage. This consequence of this is that frontages are dominated by open lot car parking and buildings have a poor relationship to the street.
  - A building extending to the street boundary may not be an appropriate response as this would be more suited to an urban area such as the town centre.
  - The building should be visible from the Vincents Road and Phoenix Street intersection.
  - Car parking should be provided in the front setback
- Vincents Road has an informal appearance the streetscape which consists of gravel road verges and swale drains. Providing formalised car parking with concrete upstanding concrete kerbs and channels would not be in keeping with the character of the streetscape.
- The roof of a future supermarket is likely to be visible from residential properties in Phoenix Street and also from the Beehive Mine site.

**Opportunities**

- Opportunity to design the supermarket buildings to reflect the industrial style of built form that would have once occupied this landscape.
- Opportunity to site the supermarket close to Vincents Road and provide limited car parking in front of the building. This will ensure the building has a presence on Vincents Road, is visible from the intersection of Phoenix Street and Vincents Road, and provide car parking within the front setback.
- Opportunity to retain large Eucalypts located along the northern boundary of the site.
- Opportunity to provide a car park that integrates with the existing streetscape. This could be achieved with native vegetation and informal drainage treatments. It is noted that exotic Peppercorn trees are a feature of the streetscapes however they are generally located in the sloping land while native vegetation is found in the flatter landscape. Providing native vegetation will also provide a connection to the revegetated Beehive Mine site.
- Opportunity to provide articulated roof form to minimise the visual impact of the supermarket from surrounding residential areas and the Beehive Mine.



### 3.3 The Maldon Historic Reserve

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#### Issues

- The reserve currently acts as a visual and physical barrier between the town and the Vincents Road site. This is primarily because the overgrown vegetation restricts views through the reserve from surrounding areas. The dense vegetation also limits pedestrian access into, and through the reserve.
- The reserve is included in the Heritage Overlay. Alterations to the landscape may have impacts on its heritage values.

#### Opportunities

- Opportunity to improve passive surveillance of the supermarket site from the adjoining Maldon Historical reserve. There is also potential to provide access through the reserve to the Machinery Museum and through to the supermarket. Improved visual and physical access would be beneficial for the proposed supermarket and the museum.
- Opportunity to improve the appearance and functionality of the reserve and make it a key attractor for pedestrians and draw people to the Vincents Road area.

## 4. Recommendations

The following recommendations have been provided to achieve the best possible integration of the Vincents Road site with the Maldon town centre. It is considered that the significant distance of the site from the town Centre will seriously inhibit the connections between the two areas. Walking from the town centre to the site is unlikely to occur because of the distance and topography, neither of which can be improved on this site.









### Analysis of Alternative Sites

Two possible alternative sites for the development of a supermarket in the existing Maldon Town Centre have been identified by Planisphere and Essential Economics. An urban design analysis for these sites has been provided as an Appendix while an examination of the two sites is also provided by Essential Economics in Section 5 of Part A of this report.

A review of background material indicates that these sites have not been investigated in previous studies. It is strongly recommended that these sites are investigated further, and if development is found to be feasible, they should be pursued in favour of the Vincents Road site.



- 1** Establish footpaths on both sides of Vincents Road
- 2** Direct pedestrian traffic to the western side of Phoenix Street
- 3** Establish sight line to the Vincents Road site
- 4** Provide suitable building setback and active frontages to Vincents Road and the Machinery Museum
- 5** Minimise the visual impact of the roof forms when viewed from surrounding areas
- 6** Provide heavily landscaped car park with informal drainage treatments
- 7** Retain large native trees
- 8** Improve the appearance and functionality of the Maldon Historic Reserve

-  Proposed footpaths
-  Existing paths
-  Improved passive surveillance
-  Active building frontages
-  Landscaped car park
-  Potential vehicle entry point
-  Vegetation to be retained
-  Limit visual impact from residential areas

## Recommendations Plan

## 4.1

### Physical Connection to the Centre

#### Discussion

Providing pedestrian paths between the Main Street Shops and the Vincent Road site is recommended as the primary means to achieve physical integration between the two areas. The paths need to be constructed with a suitable sealed material that allows for safe movement along the steep sections of Vincents Road.

Another important consideration is maintaining the informal appearance of the streetscape in Vincents Road. The recommendations below aim to build on the important elements of the Vincents Road streetscape and not replicate the treatments found in the commercial area.

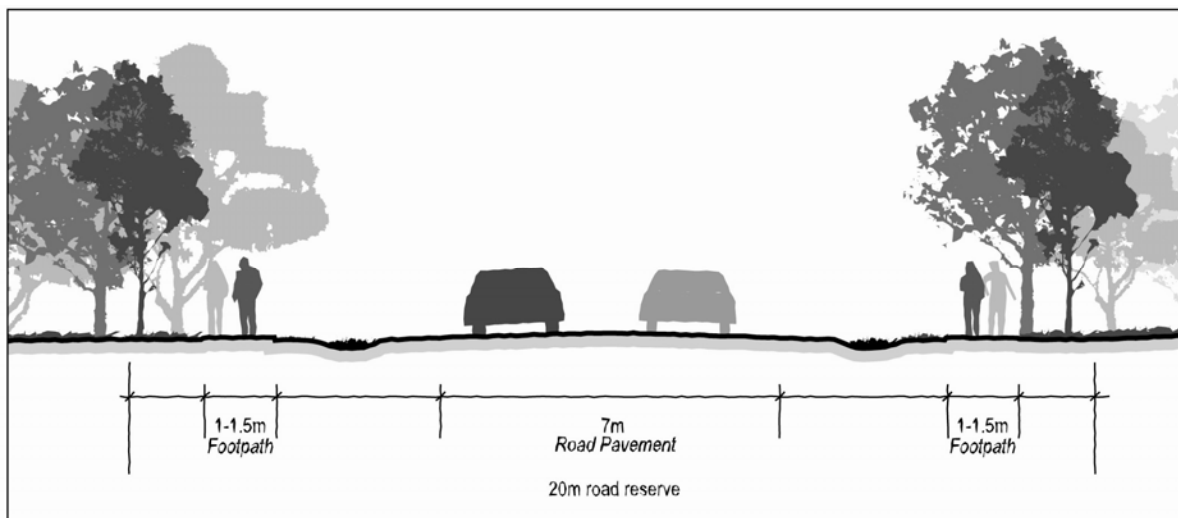
#### Objectives

To improve the physical connections between the Maldon town centre and the Vincents Road proposed supermarket site.

To maintain the informal appearance of the Vincents Road streetscape.

#### Recommendations

- Establish footpaths on either side of Vincents Road with minimal visual impact. The footpaths should:
  - Have a width of at least 1.5 - 2 metres to allow for the comfortable passing of pedestrian traffic
  - Be constructed with asphalt surface and simple timber edging.
- Pedestrian traffic should be directed to the western side of Phoenix Street and the southern side of Vincents Road. This would ensure that pedestrians walking from the town centre will be required to cross a trafficked road only once.
- Provide defined pedestrian access through the car park to the supermarket entrance. These access paths should connect to the Vincents Road footpath and be separated from vehicular traffic.
- Maintain the current road surface with gravel verges and provide grassed swale drains.



Indicative cross section of Vincents Road

## 4.2 Visual Connection to the Centre

### Discussion

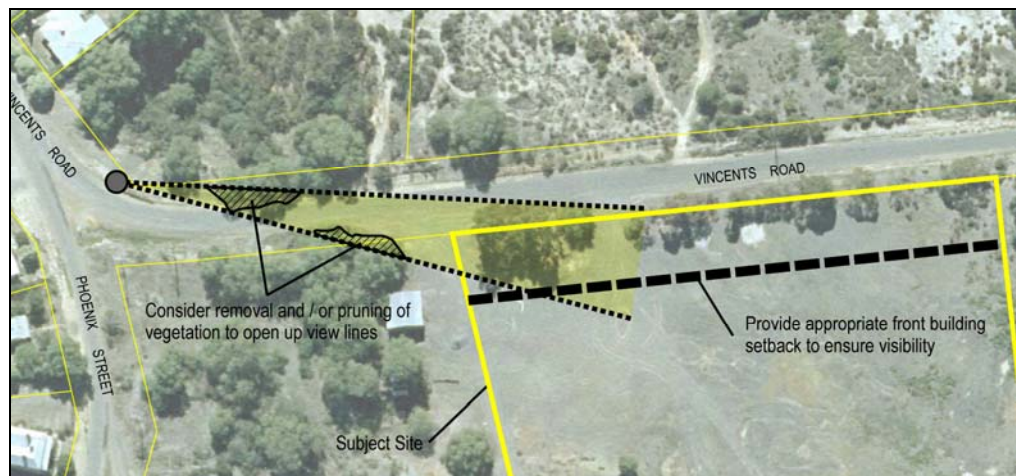
Creating sightlines between the surrounding areas and Vincents Road will improve passive surveillance and also assist with navigation to the supermarket. The following recommendations for improving the visual connection to the supermarket, may require alteration to vegetation in the road reserve, which is included as part of the Maldon Historic Reserve Heritage Overlay. From the background material reviewed, it is not clear whether this vegetation is of heritage value to the landscape. This would need to be investigated further.

### Objective

To strengthen visual links between the Maldon Street network, the Maldon Historic Reserve, and the Vincents Road proposed supermarket site.

### Recommendations

- Establish sightlines between the Vincents Road site and the intersection of Vincents Road and Phoenix Street. This could be achieved by:
  - Minimal removal and/or pruning of identified peppercorn trees and understorey that currently screen views to the site. These trees would most likely be located within the road reserve.
  - Providing an appropriate front setback to the building so that it is visible from the intersection.
- Development should be sited and designed to relate to the historic built form and landscape context in which it sits. Refer to the Building Design and Siting section for more detail.



## 4.3 The Siting and Design of the Supermarket

### Discussion

The site is located a former industrial mining landscape and it is important that the siting and design of the supermarket relates to this context. Building forms for industrial buildings are traditionally simple in form and materials, which is reflected in the recommendations below.

In terms of siting of the building, it is important to create a presence of built form along Vincents Road, which needs to be balanced with providing an appropriate amount of car parking in the most accessible location.

## Objectives

To ensure that the built form of the supermarket is designed and sited to complement the context of the landform, vegetation and historic character.

To minimise the visual impact of the building when viewed from surrounding residential properties and the Maldon Historic Reserve.

## Recommendations

- Provide a front building setback which is sufficient to allow for two rows of car parking within the setback. This would allow the building to be visible from the Vincents Road / Phoenix Street intersection and create a building presence to Vincents Road
- Provide active frontage to the supermarket with windows on at least two of the building frontages. The supermarket layout should be arranged so that there is visibility into the building from surrounding areas. Active frontages to Vincents Road and the Machinery Museum would be the preferred outcome.
- Future built form on the site should be of a design and scale that reflects the former industrial character of the area. The building should incorporate the following key elements:
  - Simple iron clad facades in muted tones. Corrugated iron would be a suitable outcome as seen in other industrial buildings in Maldon. Avoid the use of pre-cast concrete and brick in building facades.
  - Windows of a suitable size, proportion and spacing, so that they do not dominate the façade and integrate with the scale and form of the building. The windows should be partly screened by verandahs to limit their impact.
  - Utilise simple, timber door and window frames finished in natural or muted tones.
  - Articulated roof forms incorporating gables. A double gabled roof form would be an appropriate outcome because of the large size of the building. Roof forms should be articulated behind the building facades so that bulk of the roof is minimised when viewed from surrounding, elevated areas.
  - Verandahs that extend across the footpath and integrate with the building design. Verandahs should be used to minimise and limit the visual impact of glazing.
  - Signage which is of a size and height that is complementary to the built form and surrounding landscape, and does not detract from public view lines. The signage should be located close to the base of the gable and be externally illuminated.



- Retain large native trees at northern edge of the site and incorporate trees into shade for car parking.
- Provide heavily landscaped car parking areas with a planting theme consistent with the Beehive Mine revegetation areas utilising native trees, shrubs and grasses.
- Utilise informal drainage treatments in the car parking area and avoid the use of upstanding concrete kerbs. Large areas of unrelieved hard surfaces should also be avoided.
- Car parks should be well lit to provide safe access but have minimal impact on views from surrounding areas. Incorporate low level lighting and use landscaping to minimise light spillage.

#### 4.4 Maldon Historic Reserve

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Improvements to the Maldon Historic Reserve could strengthen the links between the town centre and Vincents Road and provide another attractor to draw people into the area.

The Reserve is protected by a Heritage Overlay so it is important that any alterations to this landscape are undertaken with minimal impact on heritage values. The following recommendations have been made without extensive background into the heritage significance of this landscape. Further investigation would be required.

##### Objective

To improve the appearance and functionality of the Maldon Historic Reserve in keeping with the landscape heritage values.

To improve passive surveillance of the Vincents Road site and the Machinery Museum from the Maldon Historic Reserve.

##### Recommendations

- Consider undertaking vegetation removal and/or pruning to provide clear views into the reserve and from the reserve to the Machinery Museum and Vincents Road site.
- Consider providing pedestrian access paths through the reserve down to the Machinery Museum and the Vincents Road site.
- Consider creating terraced open spaces in the sloped areas to provide useable areas that could be used for passive recreation.

## Appendix - Alternative Sites

### Site 1- Rear of Main Street Shops - Tobin Street

The site includes vacant land to the rear of the main street shops which is currently used for car parking however the car parking arrangements are not formalised. To the south is the Derby Hill Youth Camp, which is run by the Victorian Police. To the east is an adjoining residential area, and to the west is the rear of the Main Street shops.

The site is accessed by a laneway which has a pavement width of around 5.5 metres and a considerably wider reservation which varies between 9 metres and 18 metres. The laneway also provides service access to the rear of Main Street properties.

The topography falls gently to the east from Main Street. There is a sharp rise to adjoining residential areas at the eastern edge of the site.

#### Advantages

- The site has excellent proximity to the retail core of Maldon being only 110 metres from the approximate centre of the Business Zone.
- Site is large enough to accommodate supermarket of 1,000sqm however there may be need to excavate a small section of land in the north east corner of the site. This excavation may not be required if a smaller supermarket of 800sqm is constructed on the site (see also Part A Section 3.5)
- Potential walkway through to Main Street that could meet with the supermarket entrance. There is no building in this location and it appears that it was once designated as a walk through. Ownership and use rights will need to be investigated.
- This walkway would provide convenient access and also a visual connection to Main Street. It would encourage customers to walk to the supermarket because of its proximity to parking in Main Street.
- There is an existing walkthrough further south which provides access from Main Street.
- The site is hidden behind the shops and future buildings would be likely to have minimal or no impact on the heritage streetscape of Main Street.
- The site is not covered by a Heritage Overlay.
- A considerable amount of car parking can be provided on the site and in the laneway. Customers can also park on Main Street and walk through to the supermarket site. This is a significant increase in the amount of the car parking that is provided for the existing supermarket.
- Access to the rear of Main Street shops and parking along the western side of the laneway could be maintained.
- The majority of the site is likely to be in Council ownership and the southern portion of the area is possibly Crown Land.
- There will be an opportunity to encourage more active uses onto the laneway that could benefit from the activity generated by the supermarket.
- There may also be opportunities for active uses along the walkthrough from Main Street.



## **Disadvantages**

- The supermarket may not have enough visual prominence from Main Street which could detract from its customer base however it is potentially more visible to shoppers in the Town Centre than the Vincents Road site.
- The hill to the east could potentially have landscape heritage value and may not be able to be excavated.
- Would need to negotiate the purchase or use of the Crown Land to the south and east of the site. The amount of land would be minimal.
- Passive surveillance may be limited because of the lack of active uses in the area.
- The link from Main Street would require upgrading to improve amenity and safety for pedestrians. A high quality pedestrian link between Main Street and the Tobin Street site is crucial.
- Other public spaces around the supermarket entrance would also require upgrading to improve the pedestrian environment.
- There is a sharp corner at the southern entry to the laneway that would need to be altered to allow delivery vehicle access. There may be sufficient room within the laneway reserve to accommodate these alterations.



Site 1 – Analysis Plan

## **Site 2- Maldon Motor Museum**

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This site includes two parcels of land at the corner of Francis Street and Bridgewater-Maldon Road. The southern parcel has an area of 655sqm and the northern parcel has an area of 732sqm. Both properties are included within the Business 1 Zone

It is located approximately 250 metres from the centre of the Business 1 Zone and the most direct pedestrian route would be along Dolphin Street.

There is a laneway at the eastern boundary, which ceases at the northern edge of the site.

### **Advantages**

- The site is currently zoned Business 1 which supports the development of land for a supermarket.
- The land is large enough to accommodate a supermarket of up to 1,000sqm.
- The buildings do not appear to be of significant heritage value, particularly the building on the northern allotment which has been altered. There is a Heritage Overlay (HO134) that applies to the site however it appears to represent the residence at 48 High Street which is located north of the site.
- The site is located opposite the post office.

### **Disadvantages**

- The site appears to be in private ownership and the landowners may not have any intention of redeveloping the site for a supermarket.
- The site may not have enough visual prominence from the retail core which could detract from the customer base, however it is considered to be more prominent than the Vincents Road site.
- The site is located approximately 250 metres from the centre of the Business 1 Zone, which may discourage walking from the Main Street shops.
- Car parking would have to provide on street and there may not be enough spaces to meet the parking requirements.
- Footpaths around the site and to the site would need to be upgraded.



Site 2 – Analysis Plan