



# APPENDIX 2

## ONLINE QUESTIONNAIRE TEMPLATE

# Glenferrie Rd and High St Draft Structure Plan Survey

## **Privacy Statement**

*Information provided by you will only be used for the purposes for which it was collected. Personal information provided will not be disclosed to any outside organisation or third party. Individuals about whom "personal information" is provided in this Survey may apply to the City of Stonnington's Privacy Officer on telephone number 8290 1333 for access to or correction of the information. It is requested that surveys be completed by people aged 15 years and over only.*

## **To complete this survey, please:**

- Tick the box or circle adjacent to your selected response
- Return your completed survey in the reply paid envelope provided



	Strongly don't support	Don't support	Neutral	Support	Strongly support	Can't say	What are your reasons for the level of support?
Actively encourage employment, commercial activity and retention of small scale business and boutique shops through planning policy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Enhance and upgrade the appearance of laneways to rear of commercial properties where they provide through links and access to public car parks (including new development fronting laneways).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<b>Investigate potential</b> for temporary event spaces (markets, special events etc.) at key locations including: Kings Arcade/ Armadale Station, Coldblo Tram Depot and Station Street/ Malvern Station.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
<b>Investigate potential</b> public realm upgrades and improvements (e.g. new trees, seats etc.) at locations including: the Malvern Town Hall Civic Precinct, Armadale Station Precinct, Malvern Station Precinct, Malvern Central Precinct, Coldblo Tram Depot and Drysdale Street Carpark.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Q2: To what extent do you support the following key **pedestrian and cycling** aspects of the plan?

	Strongly don't support	Don't support	Neutral	Support	Strongly support	Can't say	What are your reasons for the level of support?
Improved and simplified signage to key places.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Improved pedestrian crossings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Creation of community gathering spaces at side street intersections.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Public realm guidelines for street furniture and bicycle parking facilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Working with VicRoads for on-road cycle lanes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Q3: What do you like **most** about the Draft Structure Plan?

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Q4: What do you like **least** about the Draft Structure Plan?

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Q5: What is your overall level of comfort with the Draft Structure Plan?

I love it - I am 100-80% comfortable with the draft plan, only minor tweaks, if any, are required. I am very happy

I like it - I am 80-60% comfortable with the draft plan. Some small changes required but I am mostly happy

I will live with it - I am 60-40% comfortable with the draft plan. Some significant changes are required but I can accept it as it is

I am uncomfortable with it - I am 40-20% comfortable with the draft plan. There are lots of changes required

I hate it - I am 20-0% comfortable with the draft plan. It needs an overhaul I can't see it working at all

Q6: Any other comments about the Draft Structure Plan?

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Q7: Please nominate the gender description that you most identify with?

- Female
- Male
- Other \_\_\_\_\_

Q8: What is your age range?

- <18
- 18-24
- 25-34
- 35-49
- 50-69
- 70+

Q9: What is your interest in and relationship to the Structure Plan area? (Please tick as many as apply).

- Local resident
- Business Owner/ Trader: (please specify business general location) \_\_\_\_\_
- Landholder
- Developer
- Employee
- Student
- Visitor from elsewhere in Stonnington/ Melbourne
- Other \_\_\_\_\_

Q10. Please state your post code.

Postcode \_\_\_\_\_

Q11. If you would like to receive updates regarding the Draft Structure Plan please provide your contact details below

Name \_\_\_\_\_

Email \_\_\_\_\_

**This completes the survey. Thank you for your time.**



ESSENTIAL ECONOMICS

# **Glenferrie Road – High Street Activity Centre Structure Plan**

**Economic Technical Report**

Prepared for

City of Stonnington

by

Essential Economics Pty Ltd

**September 2014**



## **Authorship**

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## **Disclaimer**

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# Contents

<b>Introduction</b> .....	<b>1</b>
<b>1 Context</b> .....	<b>3</b>
1.1 Glenferrie Road-High Street Activity Centre Description.....	3
1.2 Relevant Background Documents.....	3
1.3 Key Industry Trends .....	4
<b>2 Glenferrie Road-High Street Today</b> .....	<b>7</b>
2.1 Retail and Commercial Overview.....	7
2.2 Study Area .....	7
2.3 Precincts .....	8
2.4 Shopfront Tenancy Audit.....	9
2.5 Estimated Existing Retail Sales in Glenferrie Road-High Street .....	14
2.6 Commercial Office .....	15
2.7 Community Infrastructure and Services .....	15
2.8 Employment .....	16
2.9 Housing and Resident Population.....	16
2.10 Summary: Role and Function of Glenferrie Road-High Street .....	17
<b>3 Retail Assessment</b> .....	<b>19</b>
3.1 Trade Area Definition .....	19
3.2 Competition.....	19
3.3 Trade Area Population Forecasts.....	21
3.4 Socio-Economic Characteristics .....	21
3.5 Retail Spending Analysis .....	24
3.6 Retail Potential .....	25
<b>4 Commercial Office Assessment</b> .....	<b>27</b>
<b>5 Residential Assessment</b> .....	<b>28</b>
5.1 Dwelling Trends by Type.....	28
5.2 Forecast Dwelling Demand .....	28
<b>6 Issues and Opportunities</b> .....	<b>30</b>
6.1 Issues .....	30
6.2 Opportunities .....	32
<b>7 Action Plan</b> .....	<b>35</b>
7.1 Centre Heart .....	35
7.2 Retail Objectives .....	35
7.3 Other Objectives.....	35
<b>8 Critical Success Factors</b> .....	<b>37</b>

# INTRODUCTION

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## Background

The *Plan Melbourne* metropolitan strategy classifies Glenferrie Road-High Streets as an Activity Centre for the purposes of metropolitan planning. Activity Centres are defined as important locations for the future development of retail, commercial, community and residential infrastructure. Through the removal of retail floorspace and office caps, activity centres may grow unrestricted. A key direction of Plan Melbourne is the '20-minute neighbourhood'. Activity centres, such as Glenferrie Road-High Street, play an important role in enabling 20-minute neighbourhoods by providing access to a wide range of goods and services in centres that are planned and coordinated by local governments.

In this context, Structure Plans are to be developed at the municipal level for Activity Centres in metropolitan Melbourne in order to guide development in these centres over the next 20 years in a manner which is consistent with the principles of *Plan Melbourne*.

As part of this structure planning process, the Glenferrie Road-High Street Structure Plan is now being prepared for the City of Stonnington. As input to the Structure Plan, economic analysis is required in order to understand the role of the Activity Centre from a retail, commercial and residential perspective, and to identify opportunities for growth and change in these sectors in a way which is consistent with the objectives for metropolitan planning.

This economic analysis is therefore intended to guide and inform the Structure Planning process for the Glenferrie Road-High Street Activity Centre.

## Terms and Definitions

### Retail Activity

Retail activity is defined in this report as the *Retail Trade* industry division according to the industry classifications used by the Australian Bureau of Statistics (ABS) in the Australian and New Zealand Standard Industry Classification 2006 (ANZSIC2006), but modified to exclude:

- Motor vehicle and motor vehicle parts retailing
- Garden supplies retailing
- Marine equipment retailing
- Non-store retailing.

This definition is consistent with other approaches in undertaking retail-economic analysis in Australia.

### **Retail Categories**

Retail floorspace and retail expenditure is divided into three broad product categories and a number of sub-categories. These categories and sub-categories are defined as follows:

- **Food**, which includes all household spending on take-home food, groceries, liquor, cafes, restaurants and take-away food outlets. Take home food spending is usually directed to retail stores including supermarkets, fresh food stores, bakeries, butchers, etc.
- **Non-food retailing**, including spending on apparel, homewares, bulky items, and other leisure and general merchandise
- **Retail services**, which comprises household spending on services such as hair dressing, dry cleaning, video hire, and optometry.

# 1 CONTEXT

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This Chapter presents a general description of Glenferrie Road-High Street activity centre, a summary of background documents relevant to the centre, and commentary on key market trends of relevance.

## 1.1 Glenferrie Road-High Street Activity Centre Description

Glenferrie Road-High Street Activity Centre (Glenferrie Road-High Street) is a street-based activity centre, located approximately 7km south-east of the Melbourne CBD, in the City of Stonnington. The centre is 'transport rich' in terms of access to road, rail, tram and active forms of transport. Within the centre a high standard of pedestrian activity and amenity exists.

Glenferrie Road-High Street includes Glenferrie Road (from Dandenong Road to High Street, including Malvern Town Hall,) as well as High Street (from Malvern Public Gardens to the Armadale Rail Station bridge).

Glenferrie Road-High Street is characterised by a wide diversity of retail and commercial land uses across an extensive area. The distance from the intersection of Glenferrie Road and Dandenong Road, to Armadale train station via Glenferrie Road and High Street is almost 2km. Glenferrie Road and High Street are at a 90 degree angle and the intersection of both roads is the only functional link between each commercial strip.

The centre is almost entirely street-based, with the only enclosed components being the Malvern Central shopping centre and a number of arcades primarily linking to rear carparking. Despite its relatively large size a sense of vibrancy and activity is retained throughout virtually the all centre. The overall height and scale of buildings remains relatively modest relative to development occurring at nearby centres, including Chapel Street, Caulfield and Elsternwick.

The Cabrini Hospital is located a short distance east of the Glenferrie Road strip and has relatively strong influence on the centre. Other important land uses in the centre include the municipal and administrative functions (Malvern Town Hall, City of Stonnington offices, Malvern police station) that are located at the intersection of Glenferrie Road and High Street. These uses form an important 'anchor' to the intersection of the Glenferrie Road and High Street strips that serves to increase the degree of integration between the two.

## 1.2 Relevant Background Documents

### ***Plan Melbourne 2014***

The *Plan Melbourne* metropolitan planning strategy, released in October 2013, will guide Melbourne's housing, commercial and industrial development to 2050. With regard to activity centre planning, the Strategy no longer distinguishes between Principal Activity Centres (PACs) and Major Activity Centres (MACs). Therefore, Glenferrie Road-High Street centre is now classified simply as an 'Activity Centre'.

Through the removal of retail floorspace and office caps, activity centres may grow unrestricted. A key direction of Plan Melbourne is the '20-minute neighbourhood'. Activity centres, such as Glenferrie Road-High Street, play an important role in enabling 20-minute neighbourhoods by providing access to a wide range of goods and services in centres that are planned and coordinated by local governments.

### ***City of Stonnington Activity Areas Economic Analysis 2013***

The *City of Stonnington Activity Areas Economic Analysis 2013* was prepared by HillPDA and identifies the existing role and function of all activity areas within the municipality. In regard to the Glenferrie Road-High Street Activity Centre, the analysis outlines the key characteristics of the centre, together with its floorpace supply and key activity generators, as well as a broad trade area definition.

The analysis also includes forecast demand for retail floorpace within the City's existing activity areas. It found a current undersupply of 13,000m<sup>2</sup> of retail floorpace in Major Activity Centres and Neighbourhood Centres. The analysis also estimates that over the period to 2031, these centres will require an additional 40,000m<sup>2</sup> of retail floorpace, at an average rate of +2,000m<sup>2</sup> per annum. The study does not nominate specific centres to accommodate the additional retail floorpace.

### ***Building Prosperity: Economic Development Strategy 2012-2016***

The *Building Prosperity: Economic Development Strategy 2012-2016* for the City of Stonnington recognises that the City's precincts are a hub for retail and business activity and that the high profile precincts (including Glenferrie Road) are strongly linked to the identity, character, amenity and liveability of the city. A key strategy is "to maintain attractive vibrant precincts which are embraced by residents and visitors and where businesses thrive". As such, a key action of the Strategy is the development of a Structure Plan for Glenferrie Road, Malvern and High Street, Armadale. The Strategy also emphasises the importance of tourism to the City's economy with shopping, dining, entertainment, and arts and culture activities able to attract visitors and generate employment.

## **1.3 Key Industry Trends**

Several industry trends are particularly relevant to retail, commercial and residential land use outcomes for Glenferrie Road-High Street.

### ***Retail Trends***

Retailing is one of the most dynamic sectors of the Australian economy, with the industry continually evolving to reflect new formats, products and consumer preferences. Understanding and responding to changes in the retail sector are important components of activity centre planning.

A number of retail trends are underway that need to be considered in assessing the future retail development opportunities in Glenferrie Road-High Street. These trends relate to factors such as the structure and size of the retail industry, demographic and behavioural shifts, the emergence of new forms of retailing that respond to these changes, and technical innovations that will also influence future retail outcomes.

### **Industry Structure**

In terms of industry structure, the trends suggest an ongoing outlook in which smaller independent operators continue to lose market share to the retail 'giants' and major national chains (such as Coles, Woolworths and the major bulky goods and homemaker chains), as well as losing market share to franchises in the food and specialty retail sector. This situation effectively means that for many street-based centres, the presence of these major chains contributes to a centre's ability to attract visitation and spending.

For Glenferrie Road-High Street, this situation creates the challenge of maintaining and encouraging major anchor retailers and national brand operators seeking to locate in the centre in order to attract regular shoppers. It is also necessary to maintain the important point of difference relating to independent specialty retailing and other cultural characteristics that are widely recognised and valued features of Glenferrie Road-High Street, and where the centre as a whole has a significant advantage compared with other activity centres in greater Melbourne.

### **Internet Retailing**

Another factor relevant to Glenferrie Road-High Street is the growth of internet retailing and the implications this has for traditional shopfront retailing. At present, an estimated 4-6% of retail sales in Australia are sourced via the internet, with growth in internet sales of between 10% to 15% per annum over the past few years. This rapid growth has had a major influence on particular retail categories, including books, apparel, music and other home entertainment, all of which are well-suited to online selling. In contrast, product categories such as fresh food and cafe/restaurant dining have had little or no impact from internet-based competition.

### **Demographic and Behavioural Shifts**

One trend with particular relevance for Glenferrie Road-High Street is the growth of 'recreational retailing' or the popularity of shopping as a form of entertainment and social interaction. In Melbourne, centres such as Chapel Street, Chadstone, Bourke Street Mall, and Bay Street (among others) are now seen as leisure and entertainment destinations, as much as locations for retail and shopping. Glenferrie Road-High Street is well-placed to cement its reputation as one of Melbourne's pre-eminent leisure shopping destination.

### ***Office Trends***

Recent trends have seen office development occurring increasingly in several key markets, predominantly the CBD and City Fringe, as many suburban commercial tenants migrate to the CBD and surrounds. According to recent research by CBRE and Colliers International, this trend is likely to continue with significant tenant moves scheduled over the medium term.

At the suburban level the research also indicates that the suburban market is becoming increasingly two-tiered with development not occurring uniformly across suburban markets as once expected. The Inner-East office market (within which Glenferrie-Road-High Street is situated, albeit in a highly competitive environment) is one of the most resilient suburban markets, mainly due to:

- Proximity to the CBD,
- Available white-collar workforce,
- Strong transport links, and
- Proximity to amenities including retail, cultural and community facilities.

Additionally, ongoing trend of consolidating existing office sites in the inner east into residential development sites is contributing to falling office vacancy rates, as limited office development is coming on stream. Having said this, the highly competitive nature of the office market is likely to be even stronger in view of current economic uncertainty and the strong competition that is emerging to attract any potential large-scale tenants.

**Residential Trends**

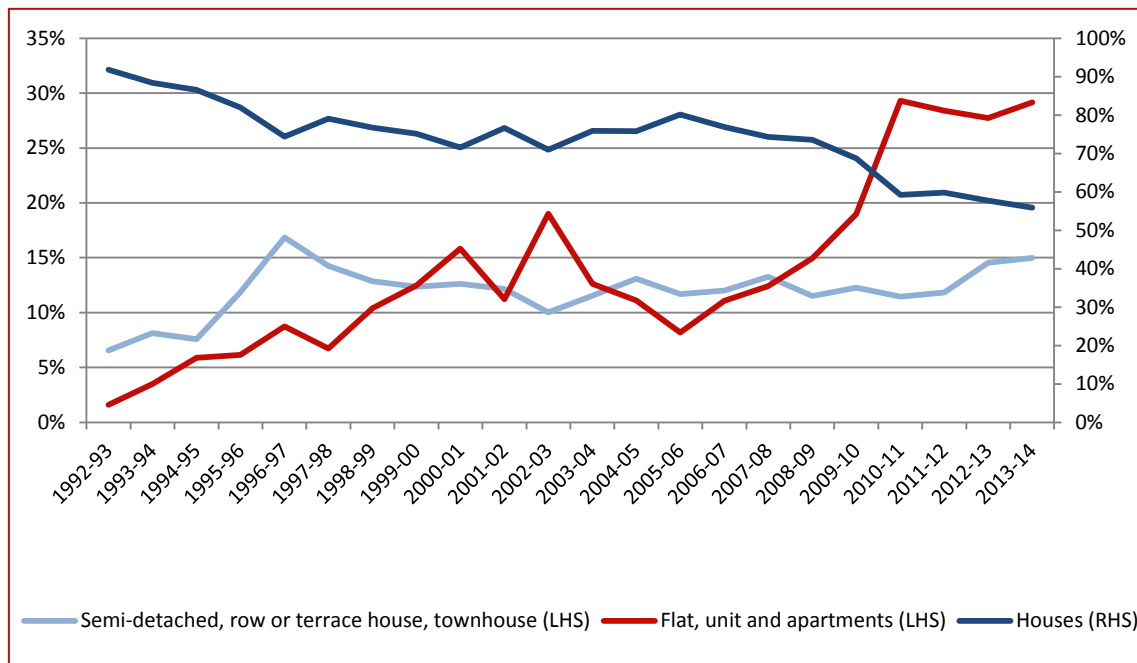
Nationally, the past 20 years or so has seen a significant shift the types of residential buildings being built. Overall, an increased demand for medium and higher-density housing is occurring in inner-middle ring metropolitan areas, as public attitudes are becoming more positive towards the benefits of urban living, including greater amenity as well as the affordability of higher-density living.

In Victoria, detached housing remains the predominant type of dwelling being built, however its share of total dwelling approvals has fallen consistently from 92% in 1992-93, to 56% in 2013-14, as shown in Figure 1.1. This is according to building approvals data sourced from ABS.

During the same period, medium to high-density residential building approvals has increased from just 8% of total dwelling approvals in 1992-93, to approximately 44% in 2013-14, including:

- **Flat, unit or apartment approvals** which have increased from 2% of total dwelling approvals in 1992-93, to approximately 29% in 2013-14.
- **Semi-Detached housing approvals** which increased from 7% of total dwelling approvals in 1992-93, to approximately 15% in 2013-14.

**Figure 1.1: Type of Structure as a Share of Residential Building Approvals, 1992-93 to 2013-14, Victoria**



Source: ABS, Building Approvals, Australia (Cat No: 8731.0)

The growing market acceptance of high-density residential development is most evident in Melbourne. Along with strong rates of population growth, and general planning policy support for increased residential densities, apartments have become an increasingly important part of the residential sector. This is discussed in greater detail in Sections 2 and 3 of this report.



## 2 GLENFERRIE ROAD–HIGH STREET TODAY

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This Chapter provides a general overview of the current role and operation of Glenferrie Road-High Street Activity Centre. It includes an summary of the results of a detailed shopfront tenancy audit, as well as a description of the commercial office, housing and other infrastructure situated within the centre.

### 2.1 Retail and Commercial Overview

Total retail floorspace provision in the Glenferrie Road-High Street Activity Centre is estimated at approximately 70,000m<sup>2</sup>, according the *City of Stonnington Activity Areas Economic Analysis 2013*.

In terms of total retail floorspace provision, Glenferrie Road-High Street is a relatively large centre compared with nearby centres such as Camberwell (58,000m<sup>2</sup>), Carnegie (28,500m<sup>2</sup>) and St Kilda (45,000m<sup>2</sup>). However, Glenferrie Road-High Street lacks the size of the nearby Chapel Street (150,000m<sup>2</sup>) and Chadstone (155,000m<sup>2</sup>) centres that have a scale of metropolitan importance.

The Malvern Central shopping centre accounts for 20% of the total retail floorspace in Glenferrie Road-High Street, and is the single most important generator of retail sales and visitation.

Commercial office floorspace in Glenferrie Road-High Street comprises approximately 30,000m<sup>2</sup> of floorspace, although the centre is not a significant office location in terms of the inner city office market.

The Glenferrie Road and High Street strips have very different business mixes. Glenferrie Road has a more traditional mix of businesses, with an emphasis on meeting the day-to-day needs of local residents and visitors. In contrast, the High Street strip includes a large provision of specialised bridal and fashion boutiques, antique stores and high-end fashion and beauty shops.

The vacancy rate for Glenferrie Road-High Street is estimated at approximately 6% of total commercial floorspace, according the *City of Stonnington Activity Areas Economic Analysis 2013*, which is at the upper end of reasonable expectations for a well-performing centre.

### 2.2 Study Area

The Glenferrie Road-High Street Activity Centre Structure Plan Study Area is illustrated in Figure 2.1 and includes:

- Glenferrie Road (from Dandenong Road to across High Street, including Malvern Town Hall),
- High Street (from Malvern Public Gardens to the Armadale Rail Station bridge), and
- Wattletree Road (from the rail bridge west of Malvern Central to Cabrini Hospital).

The study area includes the commercial core of the activity centre as well as the adjoining residential areas, and adjoins land in the City of Glen Eira to the south of Glenferrie Road. The study area contains the following areas of relevance:

- **Activity Centre Boundary** is focused on the commercial zones of the centre which are predominantly located along the main street shopping centre frontages of Glenferrie Road and High Street.

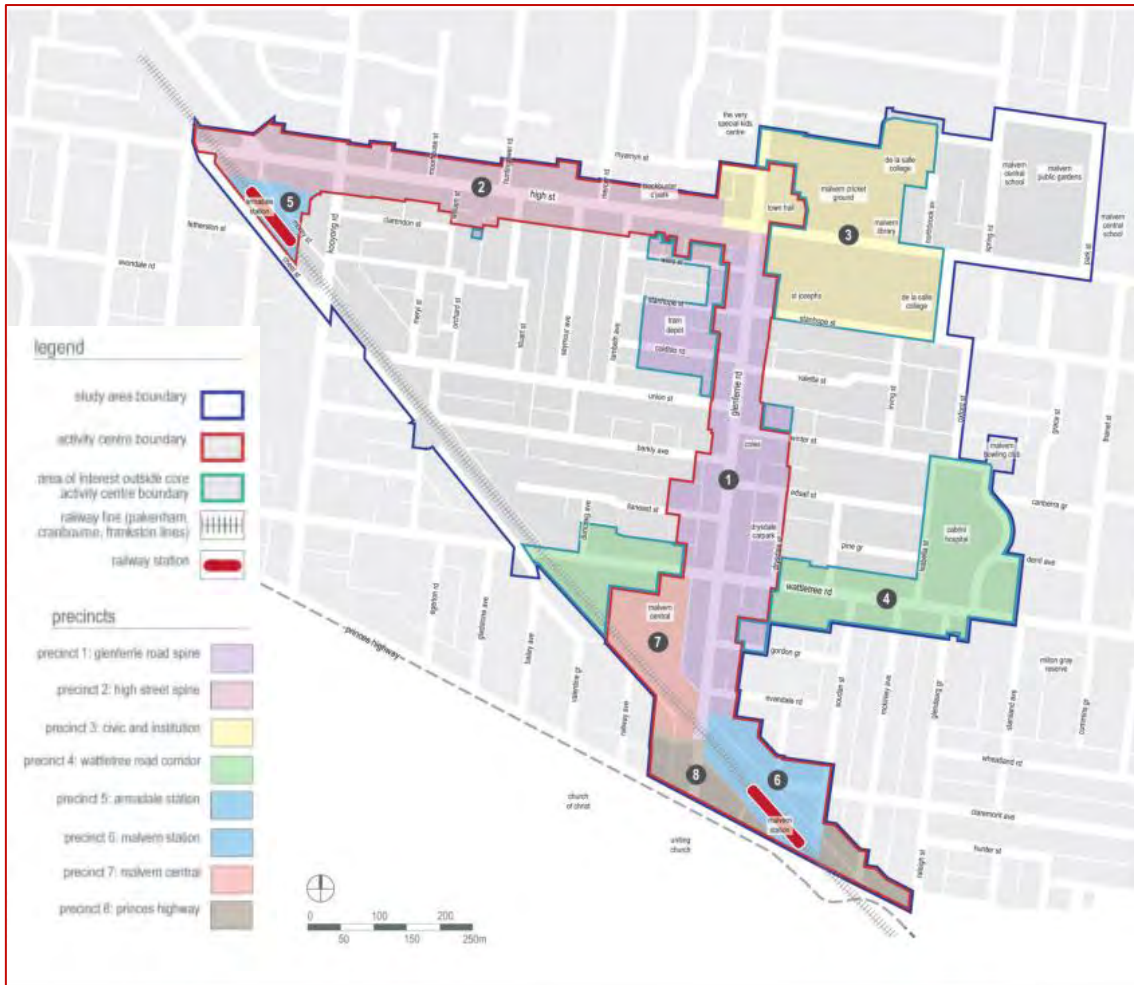
- **Peripheral Areas of Interest** outside of the core Activity Centre Boundary have been included to capture Council buildings, community uses, child care centres, schools etc, in addition to acknowledging the Cabrini Hospital and the 'commercial and medial related spine' located along Wattletree Road.

## 2.3 Precincts

In order to better understand how Glenferrie Road-High Street Activity Centre operates, the centre has been divided into eight precincts. These precincts are also shown in Figure 2.1, and include the following attributes:

- **Glenferrie Road** is the main suburban street shopping centre, with frontages along Glenferrie Road. Spanning approximately 900m, between High Street in the north and the Malvern Train Station bridge in the south, Glenferrie Road is characterised by high-intensity uses and high levels of pedestrian traffic. The Glenferrie Road precinct includes both the Malvern Tram Depot located behind Glenferrie Road to the west, as well as car parks which are located behind Glenferrie Road to the east.
- **High Street** is a destination strip shopping centre with frontages along High Street. High Street extends approximately 980m from the Glenferrie Road intersection in the east to Armadale Trail Station bridge in the west. High Street is characterised by slightly lower intensity uses, such as showrooms, fashion boutiques and furniture/antique businesses
- **Civic and Institution** is a community/civic precinct centred around Malvern Town Hall located on the corner of Glenferrie Road/High Streets and extending to the east to incorporate a number of schools and community based uses.
- **Wattletree Road Corridor** is a secondary 'commercial and medical related spine' located along Wattletree Road, extending from the railway line to the west to Cabrini Hospital to the east.
- **Armadale Station** is a public transport node centre around Armadale Station to the west of the study area, which incorporates a heritage node centre on the Kingsway Arcade heritage precinct.
- **Malvern Station** is a public transport node focused around Malvern Station to the south of the study area, which incorporates a small localised commercial precinct centred along Station Street and the intersection with Claremont Avenue
- **Malvern Central** is a sub-regional shopping centre and major retail node located on the south-eastern corner of Glenferrie Road and Wattletree Road. Set immediately behind properties fronting Glenferrie Road, pedestrian access to Malvern is via Wattletree Road
- **Princes Highway Precinct** is a commercial/service-industrial precinct situated on land between Pakenham-Cranbourne-Frankston railway corridor and the Princes Highway.

Figure 2.1: Study Area and Precinct Boundaries, Glenferrie Road-High Street



Source: Hansen Partnership

## 2.4 Shopfront Tenancy Audit

A detailed audit of retail and office tenancies in Glenferrie Road-High Street Activity Centre was undertaken by the consultants in June 2014. The audit presents business counts for retail and commercial shopfront tenancies and is presented at the precinct level. The shopfront tenancy audit builds upon previous floorspace estimates contained in the *City of Stonnington Activity Areas Economic Analysis 2013*, which were presented for the whole centre and did not include precinct level analysis. No significant changes have occurred to activities and floorspace provision since that time.

For the purposes of this report **Shopfront tenancies** are classified as having an open shopfront which is easily accessible to the general public. These tenancies can be located with street frontage, or within shopping centres and arcades. All retail tenancies are considered to be shopfront tenancies due to the need for retail traders to have a high degree of accessibility and exposure to potential customers.

A range of non-retail commercial uses such as banks, real estate agents, travel agents, insurance agents, medical consulting suites and the like will often locate in a shopfront tenancy. However, many of these

non-retail uses also have the option of locating in dedicated office space or other purpose-built tenancies not typically suited to a retail use.

Non-shopfront tenancies include those typically used for dedicated office space or for other non-retail activities such as light industry or other specialised uses. These commercial tenancies are not suited to a retail use and have been excluded from the tenancy audit, and are covered separately later in this Chapter.

In order to reflect a range of geographic influences on how particular areas of the centre function, and the different roles and markets served by areas the centre, the following areas have been adopted for the subsequent analysis:

- **High Street:** incorporates the entire High Street Strip and the Armadale Station Precinct, as well as the western fringe of the Civic Precinct around the Glenferrie Road Intersection,
- **Glenferrie Road:** incorporates the entire Glenferrie Road Strip,
- **Malvern Station / Dandenong Road:** incorporates both the Malvern Station and the Princes Highway Precinct, and
- **Malvern Central** shopping centre.

Note that the Wattletree Road Corridor has been excluded from the analysis as it does not contain retail or commercial tenancies of significance.

### ***Summary of Results***

A detailed breakdown of retail and non-retail commercial shopfront floorspace in Glenferrie Road- High Street is presented in Table 2.1 and shown graphically in Figure 2.2.

A total 617 shopfront tenancies were identified in Glenferrie-High Street Activity Centre, comprising 489 retail tenancies, 76 other commercial tenancies and 52 vacancies.

Overall **retail tenancies account for 79.3% of total shopfront tenants**, which is high for a street-based activity centre and highlights the role of Glenferrie Road-High Street as one of Melbourne's sought after retail destinations. Among the retail categories, non-food retailing has that largest representation, accounting for 40.8% of shopfront tenancies, while food retailers accounted for 23.5%. Retail services represent 14.9% of total shopfront tenancies.

**Commercial shopfront businesses (ie, non-retail) comprise only 12.3% of total shopfront tenancies**, which is well below the typical 30% usually found in street-based activity areas across Melbourne. The reason for this is that commercial office floorspace is readily available in the area (either above groundfloor retail or in dedicated office buildings). Businesses such as medical consulting rooms and professional services are able to secure specially designed tenancies that would not be suited to a retail use. This is a major asset, and highlights the broad range of commercial tenancy options available to businesses in Glenferrie Road-High Street.

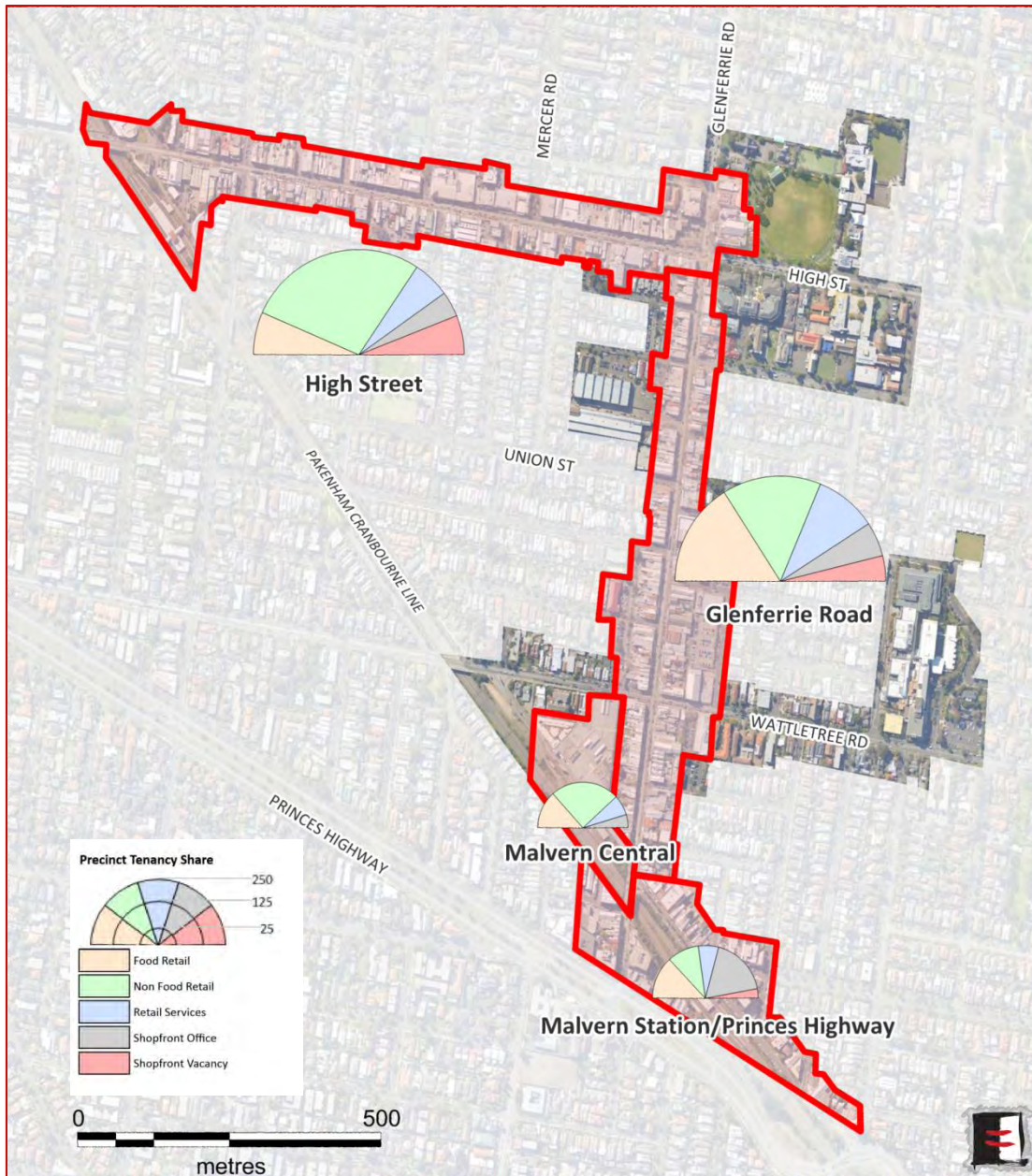
The total of 52 vacant shopfront tenancies accounts for 8.4% of total shopfront tenancies. A vacancy rate of 8.4% is in the order of 2 to 3 percentage points higher than the typical range of vacancies for a well-performing street-based centre of between 4% and 6%.

**Table 2.1 Shopfront Tenancies, Glenferrie Road- High Street, June 2014**

	High Street		Glenferrie Road		Malvern Central		Malvern Station/ Princess Highway		Total	
	Number	% of Shopfront	Number	% of Shopfront	Number	% of Shopfront	Number	% of Shopfront	Number	% of Shopfront
Food, Liquor and Groceries	6	2.5%	23	9.3%	8	14.5%	8	11.1%	45	7.3%
Food Catering	<u>26</u>	10.7%	<u>56</u>	22.8%	<u>7</u>	12.7%	<u>11</u>	15.3%	<u>100</u>	16.2%
<b>Total Food Retail</b>	<b>32</b>	<b>13.1%</b>	<b>79</b>	<b>32.1%</b>	<b>15</b>	<b>27.3%</b>	<b>19</b>	<b>26.4%</b>	<b>145</b>	<b>23.5%</b>
Apparel	82	33.6%	27	11.0%	17	30.9%	4	5.6%	130	21.1%
Homewares	23	9.4%	15	6.1%	5	9.1%	3	4.2%	46	7.5%
General Merchandise	12	4.9%	32	13.0%	5	9.1%	2	2.8%	51	8.3%
Bulky Merchandise	<u>19</u>	7.8%	<u>1</u>	0.4%	<u>0</u>	0.0%	<u>5</u>	6.9%	<u>25</u>	4.1%
<b>Total Non-Food Retail</b>	<b>136</b>	<b>55.7%</b>	<b>75</b>	<b>30.5%</b>	<b>27</b>	<b>49.1%</b>	<b>14</b>	<b>19.4%</b>	<b>252</b>	<b>40.8%</b>
Retail Services	<b>28</b>	<b>11.5%</b>	<b>47</b>	<b>19.1%</b>	<b>8</b>	<b>14.5%</b>	<b>9</b>	<b>12.5%</b>	<b>92</b>	<b>14.9%</b>
<b>Total Retail</b>	<b>196</b>	<b>80.3%</b>	<b>201</b>	<b>81.7%</b>	<b>50</b>	<b>90.9%</b>	<b>42</b>	<b>58.3%</b>	<b>489</b>	<b>79.3%</b>
Shopfront Office	19	7.8%	26	10.6%	5	9.1%	26	36.1%	76	12.3%
Shopfront Vacancy	29	11.9%	19	7.7%	0	0.0%	4	5.6%	52	8.4%
<b>Total Shopfront</b>	<b>244</b>	<b>100.0%</b>	<b>246</b>	<b>100.0%</b>	<b>55</b>	<b>100.0%</b>	<b>72</b>	<b>100.0%</b>	<b>617</b>	<b>100.0%</b>

Source: Essential Economics, June 2014

Figure 2.2 Shopfront Tenancy Audit, Glenferrie Road-High Street, June 2014



Produced by Essential Economics, with Hansen Partnership, MapInfo and Nearmap

### ***Distribution of Shopfront Tenancies in Glenferrie Road-High Street***

A review of the shopfront audit data at the precinct level identifies significant differences in the types of business present within Glenferrie Road-High Street. Key outcomes identified in the analysis by precinct include the following:

#### **High Street**

- Contains approximately 200 retail businesses which account for approximately 80% of total shopfront tenancies.
- The role of High Street as an established Melbourne shopping destination is re-enforced by the size of the non-food retail offer (136 retailers, or 56% of total shopfront floorspace). Non-food retail is dominated by high-end apparel (82 traders or 33% of total shopfront tenancies), of which around one-third, or 25 are bridal boutiques. In this respect, High Street is a significant fashion destination in its own right. The centre also contains traders from other non-food retail categories, including a number of niche retailers such as antique shops and traders selling homewares and furniture.
- Food retail accounts for a small, but emerging share of High Street shopfronts, and is dominated by cafes and restaurants (26 in total) which account for 11% of total shopfront tenancies. This emerging representation of cafes/restaurants highlights a recent trend in the overall retail mix of High Street.
- Non-retail commercial shopfront businesses account for only 8% total shopfront tenancies, which is very low for a strip-based centre. These types include medical suites and other personal and professional services such as designers, real estate agents, travel agents, gyms and other personal and professional services.
- The overall share of vacant shopfronts is relatively high in High Street, accounting for 12% of total shopfront tenancies. A concentration of vacant tenancies was identified in the north-eastern area of High Street, around Huntingtower Road and Mercer Road.
- Kings Arcade contains 13 retail tenancies, with the majority selling apparel and other retail services including hairdressing and beauty. Only 1 vacancy was identified.
- Civic Precinct contained 3-5 retailers.

#### **Glenferrie Road**

- Similar to High Street, Glenferrie Road contains a total of 246 shopfront tenancies, with retail tenancies accounting for approximately 82%, and non-retail commercial shopfront 11% of total shopfronts, which is similar to High Street.
- However, food retailing accounts 32% of shopfront tenancies, which is more representative of a traditional street-based centre serving local residents.
- The food catering presence in the Glenferrie centre is significant, accounting for 23% of shopfront tenancies, and including 43 cafes and restaurants and 13 takeaway food outlets. This food catering offer is aimed at residents, as well as workers in the centre and surrounding precincts. A cluster is identified around the tram depot.

- The share of Food, Liquor and Groceries retailers (9.3% of total shopfronts) is below what would normally be expected in a centre of this size and type, however a strong representation of fresh food retailers exists (approx. 14, including 6 bakers, 4 green grocers).
- The Coles supermarket (2,500m<sup>2</sup>) is a limited-range supermarket that is too small to contain the full range of food and grocery products available in larger supermarkets.
- A significant non-food retail offer comprising 31% of total shopfronts, with a large number of general merchandise retailers, as well as apparel, reflects the overall 'diversity of retail offer' on Glenferrie Road.
- Another strong presence in the centre is the number of retail services consisting of mostly beauty salons, hairdressers and other personal care retailers. Together, this category accounts for 19% of total shopfront tenancies on Glenferrie Road.
- An overall shopfront vacancy rate of 7.7% is at the upper limit a 'well-performing' centre.

#### **Malvern Central**

- Contains approximately 15,000m<sup>2</sup> of retail floorspace
- 50 tenancies, including a David Jones small format department store, a full-line Woolworths of 3,400m<sup>2</sup> and 48 speciality stores
- 49% non-food retail, dominated by apparel and an increasing presence of premium brands.
- Turnover in June 2013 estimated at \$96.8 million, with an average trading level of \$6,500/m<sup>2</sup> according to Shopping Centre News Little Guns 2012 – however, recent centre refit as well as a new tenancy mix (including the new David Jones) means that current turnover is likely to be in the order \$120m, or \$8,000/m<sup>2</sup> in 2014.

#### **Malvern Station/Princes Highway**

- Relatively small local retail offer (42 traders).
- 36% of shopfront are non-retail commercial shopfront business, including 6 architects, and a number of financial services and personal services.
- Low Vacancy Rate of 5.6%.

## **2.5 Estimated Existing Retail Sales in Glenferrie Road-High Street**

The existing Glenferrie Road-High Street Activity Centre has an estimated 70,000m<sup>2</sup> in retail floorspace and achieves an estimated \$400.6 million in retail sales. Of this total sales figure, Malvern Central accounts for an estimated \$120 million and the balance of the overall activity centre accounts for \$280.6 million. These estimates are shown in Table 2.2.

As shown later in this report, the Main Trade Area (MTA) served by the activity centre has available retail spending estimated at \$1,068.3 million in 2014. With the centre drawing an estimated 80% or \$320.5 million of its sales from the MTA, it is evident that the centre has a 30% market share of the MTA's available spending. The MTA's balance of 70% in available retail spend is directed to numerous other centres in the MTA and beyond, some of which are illustrated later in Figure 3.1.



**Table 2.2: Estimated Annual Retail Sales at Glenferrie Road-High Street Activity Centre, 2014**

Location	Retail Floorspace	Average Sales Density	Estimated Total Sales
Malvern Central	15,000m <sup>2</sup>	\$8,000/m <sup>2</sup>	\$120.0 million
Balance of Activity Centre	55,000m <sup>2</sup>	\$5,100/m <sup>2</sup>	\$280.6 million
<b>Total Activity Centre</b>	<b>70,000m<sup>2</sup></b>	<b>\$5,720/m<sup>2</sup>(*)</b>	<b>\$400.6 million</b>

Source: Essential Economics

Note: (\*) derived average

These retail sales estimates subsequently form part of the assessment of retail potential in the activity centre in Chapter 3.

## 2.6 Commercial Office

In terms of commercial office space, Glenferrie Road-High Street is part of the “Inner East” office market which is located in the high-income inner-eastern suburbs of Melbourne in close proximity to the Melbourne CBD. Major commercial centres in this market include Hawthorn (over 200,000m<sup>2</sup>), Camberwell (over 100,000m<sup>2</sup>) and Kew Junction (over 50,000m<sup>2</sup>).

According to the *City of Stonnington Activity Areas Economic Analysis 2013* Glenferrie Road-High Street contains an estimated 30,000m<sup>2</sup> of commercial office space, which is predominantly situated above shopfront tenancies, or as ground floor shopfronts.

In terms of dedicated office floorpace, the tenancy audit undertaken by Essential Economics identified a total of approximately 10,000m<sup>2</sup> of dedicated office floorspace. This dedicated office floorspace is primarily located around the intersection of Dandenong Road and Glenferrie Road, and includes:

- 2,700m<sup>2</sup> located at 2-6 Glenferrie Road (3 storey)
- 2,100m<sup>2</sup> at 1-11 Glenferrie Road owner occupied (3 storey)
- 3,400m<sup>2</sup> 615 Dandenong Road (3 storey)

In this context Glenferrie Road-High Street is not considered a major commercial office location, however, additional office development is located in proximity to the centre (particularly along High Street to the west) and therefore needs to be taken into consideration when assessing the overall demand for commercial office floorspace.

## 2.7 Community Infrastructure and Services

Glenferrie Road-High Street has an important role in providing the community with a broad range of infrastructure and services. This role includes:

- **Cabrini Hospital:** with 508 beds and a diverse range of medical and para-medical services located on-site, the Cabrini Hospital attracts significant numbers of staff, patients and visitors who would otherwise not visit the activity centre. Likewise, the Cabrini Hospital supports a large number of consulting rooms and medical services that are located within or on the fringe of the activity centre.

- **Social and Civic Infrastructure:** including Council Offices, City Hall, Malvern Police Station and Malvern Library which located around the north-eastern intersection of Glenferrie Road and High Street and employ a total of approximately 750 persons, according the 2011 Census data. Council are currently relocating staff from the Prahran Office to the old Transfield Building located at 311 Glenferrie Road.
- **Education:** including De La Salle College (1,200 Students and 150 Staff) and St Joseph's Primary (250 Students and 30 Staff) located within the study area.
- **Malvern Tram Depot:** located at 21 Coldblo Road, on the western periphery of Glenferrie Road, the Malvern Tram Depot is an important State asset and an integral part of the centre. Consultation with Yarra Trams confirms that the depot currently services 6 regular tram routes as well as employing approximately 200 staff.
- Other uses of relevance to the centre include the Firestation Print Studio, located on Wills Street, as well as a range of personal, professional and business services.

## 2.8 Employment

The economic role of Glenferrie Road-High Street can also be examined with reference to Journey-to-Work data derived from the Census. Accordingly, approximately 9,500 persons work within walking distance of the Glenferrie Road-High Street, and include:

- 4,400 Managers and Professionals (46% of workforce)
- 1,400 Clerical and Administrative employees (15% of workforce)
- 1,200 Sales staff (13% of workforce)
- 1,000 Community and Personal Service employees (11% of workforce)
- 800 Technicians and Trades workers (8% of workforce), and
- 700 Machinery Operators, Drivers and Labourers (7% of workforce).

These people at work in the area contribute to retail expenditures, especially in regard to convenience retail (eg takeaway food), but also in other areas of retail and services.

## 2.9 Housing and Resident Population

Analysis of ABS Census data shows recent changes in population and housing in the Glenferrie Road-High Street Activity Centre, the period 2006 to 2011. As shown in Table 2.2 below, in 2011 the Centre contains an estimated 165 dwellings accommodating approximately 270 residents, representing an increase of +55 dwellings (+50%) and +85 residents (+46%) over the period. Overall, the average household size in the Centre is 1.6 persons, which is in line with household sizes in activity centres across Melbourne.

- **High Street** comprises a slightly higher average household size of 1.8 persons per household. Over the period 2006 to 2011 the total number of dwellings in High Street increased from 40 to 45 (+13%), while the population increased from 60 residents to 80 (+33%). Currently, several small 'boutique' apartment developments are under-construction on the southern side of High Street, while a 5-storey development at 48 units at 948-960 High Street has recently been approved.

- **Glenferrie** also comprises an average household size of 1.6 persons per household. Over the period 2006 to 2011 the total number of dwellings in Glenferrie Road increased from 55 to 60 (+9%), while the population increased from 80 residents to 95(+19%).
- **Malvern Station/Princes Highway** comprises an average household size of 1.6 persons per household. Over the period 2006 to 2011 the total number of dwellings in this location increased by an estimated 45 dwellings to 60 in total, while the population increased by 50 residents to 95 in total. A 5-storey development consisting of 40 apartments at 65 Station Street was constructed in 2006 and therefore accounted for almost the entire increase in total dwellings in the area.

In comparison, the broader study area has an average household size of 2.0 persons per household which is indicative of the larger detached dwellings and family homes in the centre’s residential areas. Over the period 2006 to 2011 the number of dwellings in the broader study area increased from 1,340 to 1,400 representing an increase of 60 dwellings, or +4%. Over the same period, the resident population declined slightly from 2,770 to 2,760 persons.

**Table 2.2: Dwelling and Population Growth, 2006 to 2011, Glenferrie Road-High Street Activity Centre**

	2006		2011		Change	
	Dwellings	Population	Dwellings	Population	Dwellings	Population
High Street	40	60	45	80	+5 (+13%)	+20 (+33%)
Glenferrie Road	55	80	60	95	+5 (+9%)	+15 (+19%)
Malvern Station/Princess Highway	15	45	60	95	+45 (+300%)	+50 (+111%)
<b>Total GR-HS Activity Centre</b>	<b>110</b>	<b>185</b>	<b>165</b>	<b>270</b>	<b>+55 (+50%)</b>	<b>+85 (46%)</b>
<i>Study Area</i>	<i>1345</i>	<i>2770</i>	<i>1380</i>	<i>2760</i>	<i>+35 (+3%)</i>	<i>-10 (-1%)</i>

Source: ABS Census, 2006 and 2011, Essential Economics

While some higher density-residential is occurring on High Street and around the Malvern Station Precinct, the Centre has not experienced the same levels of residential development as other street-based activity centres. For example, the Chapel Street Activity Centre (which is similar in size to Glenferrie Road-High Street) contained an estimated 7,000 dwellings in 2011, increasing by +1,060 dwellings from 2006 levels, according to the *Chapel ReVision Economic Advice* prepared by SGS Economics and Planning.

Given the proximity of Glenferrie Road-High to central Melbourne and it’s desirable neighbourhood location, the centre can be expected to experience increasing pressure for additional residential development.

## 2.10 Summary: Role and Function of Glenferrie Road-High Street

Glenferrie Road-High Street occupies a unique role in the context of the Melbourne retail environment. The centre serves a wider role than is typical for similar-sized centres and provides a diverse range of fresh food, café/restaurant, apparel and comparison shopping, retail and professional services. The centre can be characterised by the following features and roles:

- **High Profile Retail Location:** High Street and Glenferrie Road have a high profile and level of name-recognition across Melbourne and beyond.
- **Broad geographic draw:** High Street in particular tends to draw from a relatively wide geographic area, especially the café/dining and apparel stores.
- **Street-based centre:** A strong sense of street-based activity
- **Diverse trading/retail offer:** The breadth of retail and commercial services provided along Glenferrie Road in particular allows the precinct to attract customers with a wide range of needs. The range of retail and service options also assists in increasing the length of a visit.
- **Strong cultural heritage:** Glenferrie Road and High Street are endowed with a long history and numerous historic buildings. These elements add to the ‘flavour’ of the street, creating a more vibrant and engaging environment.
- **Commercial Office:** Glenferrie Road-High Street contains around 10,000m<sup>2</sup> of dedicated office floorspace and is not considered a major commercial office location.
- **Residential:** small resident population and low levels of housing provision. This locality is likely to continue to experience increased demand for residential development.

## 3 RETAIL ASSESSMENT

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This Chapter provides an overview of the competitive environment in which Glenferrie Road-High Street operates in both the retail and commercial office markets. This analysis provides a further understanding of the broader market context in which the centre is located, as well as providing an indication of its outlook for future development.

### 3.1 Trade Area Definition

Glenferrie Road-High Street serves a main trade area (MTA) which reflects the geographic region within which residents are likely to regularly use the centre for a range of day-to-day retail and other needs.

The boundaries of the MTA are based on a number of factors which include the strength of the retail offer in Glenferrie Road-High Street, the location and performance of competing centres, access to the centre via main road routes and via public transport, and existing travel to work patterns.

As shown in Figure 3.1 the following page, the MTA is located entirely to the south of the Monash Freeway and is generally bounded by the East Malvern Train Station, Waverly Oval and Darling Road to the east, Dandenong Road and Balaclava Road to the south, and Orrong Road, Chomley Street and Toorak Village to the west.

Further to serving local residents, Glenferrie Road-High Street is also a destination for people living across the broader inner and middle ring suburbs of Melbourne's eastern suburbs and beyond. This includes, both local workers and people who make special-purpose visits to one or other of the centre's retail, commercial or community attractions (such as the cluster of bridal boutiques located on High Street, Armadale).

### 3.2 Competition

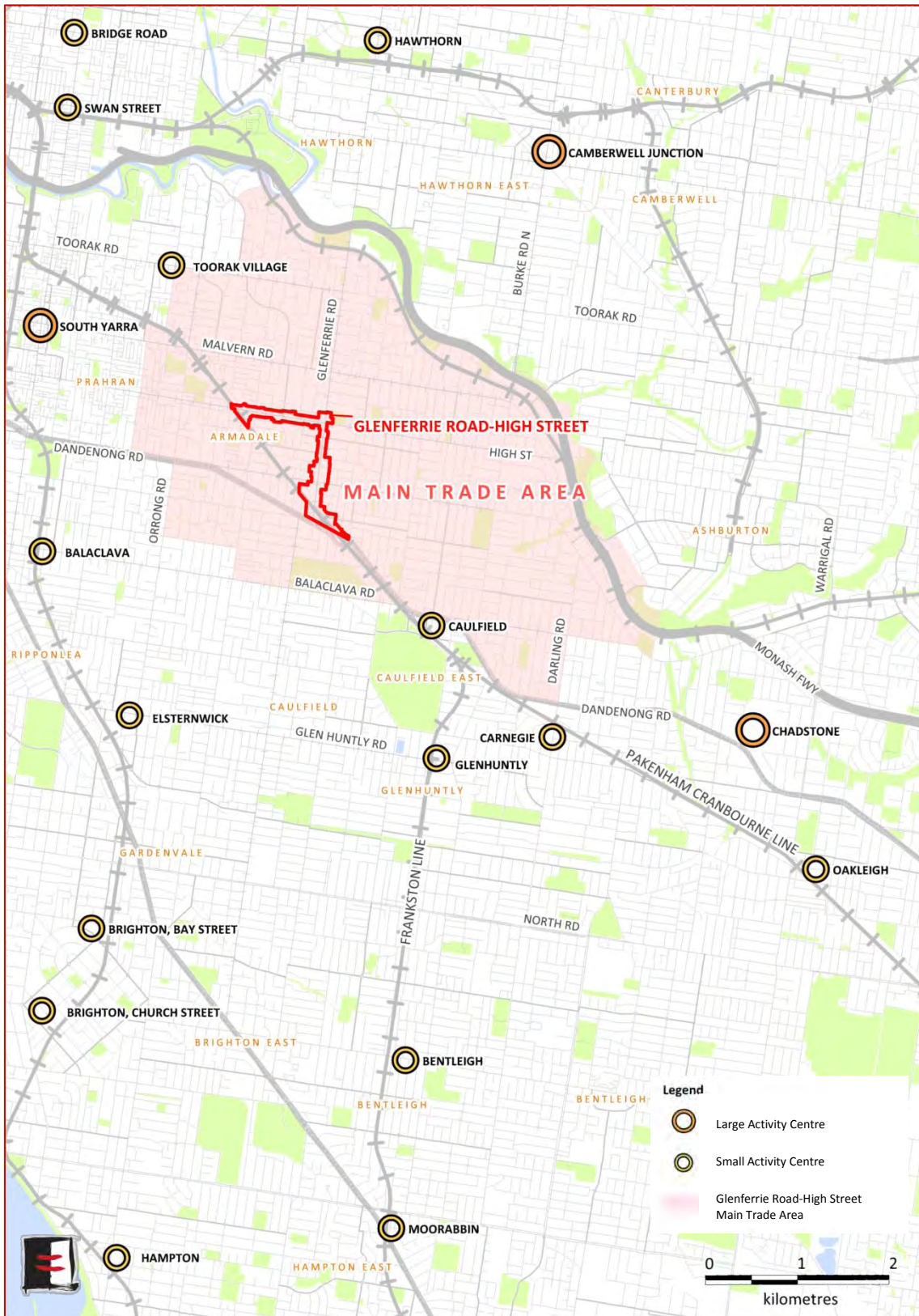
MTA residents visit a range of other activity centres and retail destinations which compete directly or indirectly with the Glenferrie Road-High Street Activity Centre.

The Melbourne CBD, South Yarra (Chapel Street), Chadstone Shopping Centre and Camberwell Junction are the larger higher-order centres in the region.

Toorak Village and Glenferrie Road (Hawthorn) draw trade primarily from the north-west of the MTA, while Caulfield, Carnegie, Glen Huntly, Elsternwick and Balaclava activity centres draw trade primarily from the south and south-west.

A number of smaller Neighbourhood Centres and groups of shops are also located in the MTA which serve the basic convenience needs of local residents. These centres are shown in Figure 3.1:

Figure 3.1: Glenferrie Road-High Street Main Trade Area



Produced by Essential Economics with MapInfo and StreetPro

### 3.3 Trade Area Population Forecasts

The population of the MTA served by the Centre is estimated at 62,190 persons in 2014.

In the period 2001 to 2014, the MTA population increased by +6,780 persons, at an average rate of +520 persons pa, or + 0.9% pa. This average rate of population growth is lower than the rate of +1.8% pa which occurred in Greater Melbourne over the same period; this reflects the generally well-established nature of the surrounding area.

As shown in Table 3.1, over the period 2001 to 2014 population growth in the MTA has accelerated and is estimated at +690 persons pa, or expanding at +1.1% pa between 2011 and 2014.

Over the period to 2031, MTA population is expected to increase by approximately 6,000 persons, to 68,190 persons in 2031, according to *Victoria in Future* and projections prepared by id Consulting. This represents a lower average rate of population growth of +350 persons pa, or +0.5% relative to current population growth levels.

The average growth rate of +0.5% pa for the MTA to 2031 is lower than the forecast growth rate of +1.3% pa forecast for Greater Melbourne over the same period. However, this growth rate for the MTA is generally consistent with the rates of population growth forecast for similar inner-middle-ring suburban areas of Melbourne.

**Table 3.1: Population Trends and Forecasts for Main Trade Area, 2001-2031**

	2001	2011	2014	2021	2031
<b>Population (No.)</b>					
Main Trade Area	55,410	60,120	62,190	64,890	68,190
<b>Average Annual Growth (No.)</b>					
Main Trade Area	-	+470	+690	+390	+330
<b>Average Annual Growth (%)</b>					
Main Trade Area	-	+0.8%	+1.1%	+0.6%	+0.5%
Greater Melbourne	-	+1.8	+2.0%	+1.9%	+1.6%

Source: ABS, *Victoria in Future*, id Consulting and Essential Economics

Note: Figures Rounded

### 3.4 Socio-Economic Characteristics

Table 3.2 presents a summary of socio-economic characteristics of MTA residents, based on data from the 2011 ABS Census of Population and Housing. These trade area characteristics are compared against the metropolitan Melbourne averages.

The data reveals the following about the demographic and socio-economic profile of MTA residents:

- **Income** levels in the MTA are significantly higher than the Greater Melbourne average, with median individual incomes +50% above and median household incomes +35% above the Greater Melbourne median.
- **Age Profile** of MTA residents is similar to the Greater Melbourne profile, with a median age of MTA residents of 37 years compared to a 36 years median for Melbourne. However, the

MTA does have a higher proportion 'young professional' residents compared to Melbourne. Approximately 27% of MTA residents are aged between 20 and 34 years compared to the Greater Melbourne average 23%.

- **Family Composition and Household Size.** A higher proportion of families in the MTA are couples without children, compared to Greater Melbourne (42% cf 35%). The MTA also has a lower proportion of one parent families (11% cf 15%). As such, the average household size of 2.3 persons per household in the MTA is significantly lower than the average of 2.6 persons per household for Greater Melbourne.
- **Origin.** The MTA has a relatively low degree of ethnic diversity compared to Greater Melbourne. 70% of MTA residents were born in Australia, with approximately 80% speaking only English at home. These percentages compare to approximately 67% and 70% for Greater Melbourne respectively.
- **Dwelling Type.** The MTA compared to Melbourne, is characterised by a high number of apartments (39% of housing stock cf 15% of housing stock) and semi-detached dwellings and terraces (18% of housing stock cf 12%).
- **Tenure.** The share of dwellings rented in the MTA (37%) is significantly higher compared to Greater Melbourne (28%), while the share of homes that are owned with a mortgage is significantly lower in the MTA (26%) compared to Greater Melbourne (38%).
- **Housing Costs.** Housing costs in the MTA in terms of both average rents (\$350/wk) and mortgage repayments (\$2,510/mth) are significantly higher than the Greater Melbourne averages (\$310/wk and \$1,840/mth).
- **Internet, Car Ownership etc.** Levels of car ownership are slightly lower in the MTA compared to Greater Melbourne (89% cf 91%), while a higher share of households in the MTA are connected to the internet (87% cf 82%).
- **Employment.** Unemployment in the MTA (4.3%) is lower than the Greater Melbourne average (5.5%), with a high labour force participation rate (69%) relative to Greater Melbourne (66%).
- **Occupation.** Approximately 90% of the MTA labour force are employed in white-collar occupations (Managers & Professionals, and Clerical & Sales workers), compared to Greater Melbourne (72%).

Overall the MTA has a socio-economic profile which is significantly higher than the metropolitan Melbourne average. This aspect is reflected in the higher levels of retail spending by MTA residents compared with the metropolitan area, as shown in the following section.



**Table 3.2: Socio-Economic Characteristics, Main Trade Area, 2011**

<b>Category</b>	<b>Main Trade Area</b>	<b>Greater Melbourne</b>
<b><u>Income</u></b>		
Median individual income (annual)	\$46,210	\$30,810
Variation from Greater Melbourne median	+50.0%	0.0%
% of persons (15 years or older) earning \$1,000pw or more	45.3%	29.2%
Median household income (annual)	\$94,000	\$69,510
Variation from Greater Melbourne median	+35.2%	0.0%
% of Households earning \$2,500pw or more	38.2%	21.6%
<b><u>Age Structure</u></b>		
0-4 years	5.4%	6.5%
5-19 years	15.4%	18.3%
20-34 years	26.6%	22.9%
35-64 years	37.5%	39.1%
65-84 years	12.5%	11.3%
85 years and over	2.6%	1.8%
<i>Median Age (years)</i>	37	36
<b><u>Country of Birth</u></b>		
Australia	70.3%	66.8%
Other Major English Speaking Countries	8.7%	7.6%
Other Overseas Born	21.0%	25.6%
<i>% speak English only at home</i>	78.7%	69.5%
<b><u>Family Composition</u></b>		
Couple family with no children	41.6%	34.8%
Couple family with children - Total	44.8%	47.9%
One parent family - Total	10.5%	15.3%
<b><u>Dwelling Structure (Occupied Private Dwellings)</u></b>		
Separate house	43.2%	72.7%
Semi-detached, row or terrace house, townhouse etc.	17.6%	11.6%
Flat, unit or apartment	38.8%	15.3%
<i>Occupancy rate</i>	90.2%	91.0%
Average household size	2.3	2.6
<b><u>Tenure Type (Occupied Private Dwellings)</u></b>		
Owned outright	35.4%	33.5%
Owned with a mortgage	26.3%	37.7%
Rented	37.4%	28.0%
<b><u>Housing Costs</u></b>		
Median monthly mortgage repayment	\$2,510	\$1,840
Variation from Greater Melbourne median	36.4%	0.0%
Median weekly rents	\$350	\$310
Variation from Greater Melbourne median	12.9%	0.0%
Share of occupied dwellings connected to the internet	87.3%	82.0%
<b><u>Car Ownership per Dwelling</u></b>		
None	11.3%	9.4%
One	42.1%	36.1%
Two	35.0%	38.0%
Three or more	11.6%	16.5%

Source: ABS Census 2011, and Essential Economics

Note: MESC Major English Speaking Countries – Canada, Ireland, New Zealand, South Africa, UK and USA

### 3.5 Retail Spending Analysis

Estimates of per capita retail spending by MTA residents have been prepared with reference to the *MarketInfo* retail spending model. *MarketInfo* is a micro-simulation model prepared by MDS Pty Ltd which uses data from the ABS Household Expenditure Survey, the ABS Census of Population and Housing, ABS Australian National Accounts, and other relevant sources.

Table 3.3 presents estimates of per capita retail spending in 2014 by trade area sector and compares these with the Greater Melbourne average. The spending data is presented in four major spending category groupings:

- **Food, Liquor and Groceries** – Fresh food, groceries and take-home liquor.
- **Food Catering** – Cafes, restaurants and takeaway food
- **Non-Food** – Apparel, homewares, bulky merchandise and general merchandise
- **Services** – Hairdressers, beauty salons etc.

MTA per capita retail spending is well above the Melbourne average for all four retail product categories. Total spending per capita by MTA residents is estimated at \$16,970 in 2014, which is +22% above the Melbourne average of \$13,960.

MTA per capita spending on Food Catering and Services is +45% and +42% higher than the Greater Melbourne average, respectively. The high levels of MTA spending on these largely discretionary retail categories reflect the higher incomes and greater spending potential of MTA residents.

**Table 3.3: MTA Per Capita Retail Expenditure, 2014 (\$2014)**

	<b>Food, Liquor and Groceries</b>	<b>Food Catering</b>	<b>Non Food</b>	<b>Services</b>	<b>Total Retail</b>
Main Trade Area	\$5,830	\$2,760	\$7,600	\$780	<b>\$16,970</b>
<i>Greater Melbourne Average</i>	<i>\$5,510</i>	<i>\$1,900</i>	<i>\$6,000</i>	<i>\$550</i>	<b><i>\$13,960</i></b>
Variation from Greater Melbourne Average	+6%	+45%	+27%	+42%	<b>+22%</b>

Source: MarketInfo; Essential Economics

Estimates of total retail expenditure by MTA residents are shown in Table 3.4 by applying the average spending levels described in Table 3.3 to the population estimates presented in Table 3.1.

Forecasts of spending have been prepared for the period to 2031, with application of real growth in spending per capita based on historical growth rates in retail spending over the past 20 years, as derived from ABS Australian National Accounts data.

Total spending by MTA residents is forecast to increase from \$1,068 million in 2014 to \$1,231 million in 2021, and to \$1,500 million in 2031. Annual growth of +2.0% is forecast over the entire period (expressed in constant 2014 dollars).

Spending on non-food product categories by MTA residents is forecast to increase from \$481 million to \$746 million over the period, and at a higher overall growth rate of +2.6% per annum. All figures are represented in constant 2014 dollars and therefore the effects of inflation are excluded from the analysis.

**Table 3.4: MTA Total Retail Expenditure, 2014 to 2031 (\$2014)**

Year	Food, Liquor and Groceries	Food Catering	Non Food	Services	Total Retail
<b>Total Spending</b>					
2014	\$364.2m	\$174.1m	\$480.5m	\$49.5m	<b>\$1,068.3m</b>
2021	\$393.5m	\$198.2m	\$578.0m	\$61.4m	<b>\$1,231.1m</b>
2031	\$434.7m	\$235.8m	\$745.8m	\$82.6m	<b>\$1,498.8m</b>
<b>Spending Growth</b>					
2014-2021	\$29.3m	\$24.1m	\$97.5m	\$11.9m	<b>\$162.8m</b>
2021-2031	\$41.2m	\$37.6m	\$167.8m	\$21.2m	<b>\$267.7m</b>
<b>Growth Rate</b>					
2014-2021	+1.1%	+1.9%	+2.7%	+3.1%	<b>+2.0%</b>
2021-2031	+1.0%	+1.8%	+2.6%	+3.0%	<b>+2.0%</b>

Source: MarketInfo; Essential Economics

### 3.6 Retail Potential

Three scenarios are assessed as a means of identifying potential for retail floorspace growth in the activity centre in the period 2014 to 2031. Basic inputs to the scenarios involve forecast growth in the MTA population (Table 3.1), associated retail spending (Table 3.4), and the opportunity for the centre to attract increased sales from both MTA and non-MTA residents (as shown in the scenarios).

The scenarios are as follows:

- Scenario 1: No Action to Enhance Retailing – Reduction in Market Share
- Scenario 2: Maintain Existing Market Share through Retail Enhancement
- Scenario 3: Increase Market Share through further Retail Enhancement

In essence, these scenarios indicate the various outcomes if no action is taken to improve retail activity in the centre (Scenario 1), compared with efforts required to at least maintain market share (Scenario 2) or to increase market share (Scenario 3).

For each of the scenarios, the existing retail floorspace is set at 70,000m<sup>2</sup>, the retail sales density is set at \$6,775/m<sup>2</sup> (which represents an average increase of 1% pa on the 2014 figure - Refer Table 2.2); and 80% of sales continue to be drawn from the MTA. The only variable is the market share that is achieved by 2031.

Table 3.5 shows the three scenarios and the calculations to derive at potentially supportable retail floorspace. These forecasts of retail floorspace potential are only an indicative guide of potential development outcomes.

Under **Scenario 1**, where no new actions are taken to increase market share through enhancement of retailing in the centre, no new retail floorspace is supportable to 2031 and the existing vacant floorspace of 7,000m<sup>2</sup> would likely continue to remain vacant over time.

Under **Scenario 2**, where market share is maintained at 30%, an increase of some 6,000m<sup>2</sup> is supportable, as well as the occupation of the 7,000m<sup>2</sup> of existing (2014) vacant retail floorspace.

Under **Scenario 3**, where a very modest increase in market share of 32% is achieved (up from today's 30%), an additional 11,500m<sup>2</sup> of new retail floorspace can be supported, as well as the occupation of the existing 7,000m<sup>2</sup> in vacant retail floorspace.

Important initiatives would need to be undertaken to increase market share in the face of continuing retail competition and to generate new uses for existing and new retail floorspace, as in Scenarios 1 and 2.

Floorspace growth could be accommodated through a number of initiatives, such as the expansion of the existing Malvern Central Shopping Centre, development of a future supermarket expansion on Glenferrie Road, and/or the redevelopment and intensification of the existing built form in the overall centre, particularly along High Street and around Malvern Station/Dandenong Road and the Armadale Station.

**Table 3.5: Scenarios Showing Glenferrie Road-High Street Potential Retail Floorspace Potential, 2014 to 2031 (\$2014)**

Variable	Scenario 1 No Action – Loss of Market Share	Scenario 2 Maintain Market Share at Current 30%	Scenario 3 Increase Market Share to 32%
Available MTA retail expenditures	\$1,489.8m	\$1,489.8m	\$1,489.8m
Market share	25% (*)	30%	32%
Sales to MTA residents (80% of all sales)	\$379.4m	\$449.6m	\$479.4m
Sales beyond MTA (20% of all sales)	\$94.9m	\$112.5m	\$119.9m
Total retail sales	\$474.3m	\$562.1m	\$599.3m
Retail floorspace supportable at \$6,775/m <sup>2</sup>	70,000m <sup>2</sup>	83,000m <sup>2</sup>	88,500m <sup>2</sup>
Existing retail floorspace	70,000m <sup>2</sup>	70,000m <sup>2</sup>	70,000m <sup>2</sup>
Additional retail floorspace supportable	Nil	+13,000m <sup>2</sup>	+18,500m <sup>2</sup>
Existing vacant retail floorspace	7,000m <sup>2</sup>	7,000m <sup>2</sup>	7,000m <sup>2</sup>
<b>Supportable new retail floorspace</b>	<b>Nil</b>	<b>+6,000m<sup>2</sup></b>	<b>+11,500m<sup>2</sup></b>

Source: MarketInfo and Essential Economics

Note: Scenario 1 data interpolated from existing situation; derived Market Share is 25.3% (rounded to 25%).

## 4 COMMERCIAL OFFICE ASSESSMENT

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Limited expansion of the commercial office market in Glenferrie Road-High Street is forecast over the next 10 to 15 years. As already noted, very limited redevelopment sites are available within the centre, which makes large-scale office development difficult. Nonetheless, the general Malvern/Armadale office market, of which Glenferrie Road-High Street is integral, is expected to remain a key office precinct for metropolitan Melbourne due to the centre's strong transport links, proximity to the CBD and the high skills level of the surrounding residential population.

Glenferrie Road-High Street is in a strong position to maintain a successful commercial office sector with a low vacancy rate into the future.

Over time, incremental growth or redevelopment of office space in the centre would be expected to occur. This is encouraged in order to ensure that the quality of office stock in the centre remains strong, particularly in the northern and southern parts of the centre where most of the dedicated office space exists.

As an aspirational goal for the Glenferrie Road-High Street Structure Plan, it is appropriate to allow for the development of approximately 20,000m<sup>2</sup> of commercial floorspace, with the majority located in the general Princes Highway Malvern Station Precincts area. Such an outcome is likely to be achieved over the longer-term in view of current economic conditions. Which do not support strong levels of office development.

However, seeking some intensive office use in Glenferrie Road-High Street is consistent with activity centre policy aspirations, yet reflects the significant physical constraints within the centre and the strong development potential in the nearby Caulfield area and in the balance of the Inner-East office market.

It is also important that the structure plan recognise the smaller-scale office functions in Glenferrie Road-High Street. These uses rely on exposure and accessibility to the large number of people using the centre and can be accommodated in shopfronts locations (e.g. banks), shop-top tenancies or in office developments providing relatively small tenancies.

## 5 RESIDENTIAL ASSESSMENT

### 5.1 Dwelling Trends by Type

As discussed in Section 1.3, increasing market acceptance of high-density residential development is evident in metropolitan Melbourne, especially in the inner and middle-ring suburbs.

In inner Melbourne - which includes the Local Government Areas of Darebin (C), Melbourne (C), Moonee Valley (C), Moreland (C), Port Phillip (C), Stonnington (C) and Yarra (C)- the share of total dwelling stock comprising flats, units or apartments has increased from 43% in 2001 to 50% in 2011, as shown in Figure 4.1. Furthermore, the share of higher density development, in flats, units or apartments of four or more storeys has increased from 31% in 2001 to 43% in 2011.

Over the same period, the share of total dwelling stock comprising flats, units or apartments in Armadale, Malvern and Glen Iris has remained consistent at approximately 40% of total dwelling stock. However, the share of higher-density development in flats, units or apartments of four or more storeys has doubled from 3% of dwelling stock in 2001, to 6% in 2011, highlighting the trend of higher-density development expanding outwards from the CBD and inner suburbs.

**Table 5.1: Share of Flats, Units and Apartments of Total Dwelling Stock, 2001-2011**

Category	Inner Melbourne	Armadale, Malvern and Glen Iris
<b><u>Flats, units and apartments</u></b>		
2001	43%	40%
2006	48%	41%
2011	50%	40%
<b><u>Flats, units and apartments of 4 or more storeys</u></b>		
2001	31%	3%
2006	40%	5%
2011	44%	6%

Source: ABS Census, 2011

Note: Armadale, Malvern and Glen Iris refer to the SA2 geography (ASGS) used by the ABS

### 5.2 Forecast Dwelling Demand

Over the period to 2011 to 2031, dwelling demand in the City of Stonnington is forecast to increase by additional + 15,390 dwellings, according to DTPLI's *Victoria in Future 2014*. Since 2011, some of this demand has already been met, mostly in the form higher density development in areas including Forrest Hill and the ChapelVision Area.

Since 2011, a total of approximately 2,200 apartments have either been constructed or are under-construction in the City of Stonnington, according to data sourced from Oliver Hume Research. The data highlights that the product mix, is essentially in 1 and 2 bedroom apartments.

Small area dwelling projections for the areas in which Glenferrie Road-High Street is situated, are shown in Table 5.2, and are based on recent id consulting forecasts commissioned by the City of Stonnington.

The combined area of Armadale and Malvern South extends from Malvern Road in the north to Dandenong Road in the south ,and from Toorong Road in the east to Orrong Road in the west.

**Table 5.2: Forecast Dwelling Growth, Armadale and Malvern South, 2014 to 2031**

<b>Study Area</b>	<b>2014</b>	<b>2021</b>	<b>2031</b>	<b>2014-2031</b>
<b><u>Number of Dwellings (No.)</u></b>				
Armadale	4,750	5,130	5,430	680
Malvern South	<u>3,140</u>	<u>3,350</u>	<u>3,500</u>	<u>360</u>
<b>Total Armadale/Malvern South</b>	<b>7,890</b>	<b>8,480</b>	<b>8,930</b>	<b>1,040</b>
<b><u>Average Annual Growth (No.)</u></b>				
Armadale		+55	+30	+40
Malvern		<u>+30</u>	<u>+15</u>	<u>+20</u>
<b>Total Armadale/Malvern South</b>		<b>+85</b>	<b>+45</b>	<b>+60</b>
<b><u>Average Annual Growth Rate (%)</u></b>				
Armadale		+1.1%	+0.6%	+0.8%
Glenferrie Road		+0.9%	+0.4%	+0.6%
<b>Total Armadale/Malvern South</b>		<b>+1.0%</b>	<b>+0.5%</b>	<b>+0.7%</b>

Source: id Consulting Note: Figures Rounded

The forecast show that the combined areas of Armadale and Malvern South are forecast to experience strong dwelling growth of approximately +60 dwellings per annum between 2014 and 2031. Armadale is expected to accommodate about two-thirds of the forecast dwelling growth.

The forecasts are considered to be on the conservatively low side and are based on known residential patterns at the time the forecasts were prepared.

Due to lack of appropriately zoned land in the surrounding area it is expected that Glenferrie Road-High Street, as an activity centre, will likely to accommodate in the order of 75%-85% of the projected dwelling demand for Armadale and Malvern South.

On this basis it is considered prudent to plan for dwelling growth in the activity centre in the order of +800 to +900 dwellings by 2031, at an average rate in the order of +50 dwellings pa.

This represents a modest 6-7% of total dwelling growth forecast for the City of Stonnington (VIF 2014), which highlights the important ongoing role of areas such as Forrest Hill and the ChapelVision Area in accommodating forecast residential demand.

## 6 ISSUES AND OPPORTUNITIES

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This Chapter identifies the issues facing Glenferrie Road-High Street Activity Centre, with a commentary on the type of response required to address these issues. Opportunities to implement specific actions to promote centre revitalisation are also identified.

### 6.1 Issues

The following issues have been identified for Glenferrie Road-High Street that will require an appropriate response in the Structure Plan.

#### ***Large Physical Size of Centre***

The walking distance from the intersection of Glenferrie Road and Dandenong Road, to Armadale train station via Glenferrie Road and High Street, is almost 2km. This is an extensive distance and is only marginally less than the length of Chapel Street from the Yarra River to Dandenong Road. Glenferrie Road and High Street are at a 90 degree angle and the intersection of both roads is the only functional link between both commercial strips. This has implications for how both strips interact with each other and how the broader Activity Centre is used by shoppers and other visitors.

***Response:*** *The Structure Plan should adopt a precinct-based approach that provides specific guidance for planning and development to particular parts of the centre. Specifically, it needs to reflect how customers and visitors use each precinct, and potentially visit multiple precincts in the one trip. An understanding of how the Glenferrie Road and High Street strips can integrate more closely will be a critical outcome.*

*Additionally, the issues relevant to businesses and traders across the centre will vary significantly. For example on High Street, changes in the tenancy mix are evident as a result of a relative decline in the bridal, high-end fashion, and antiques traders in this part of the centre.*

#### ***Diversity of Uses***

A high degree of diversity among traders and stakeholders means that the Structure Plan needs to deal with a complex range of issues relevant to particular individual components of the centre.

For example, historically, traders in Glenferrie Road are more closely linked to serving local residents daily shopping needs such as basic food and groceries. In contrast, traders in High Street attract a greater share of spending by non-local residents and discretionary spending on categories such as antiques and high-end fashion. In this context, High Street is generally more vulnerable to economic cycles than Glenferrie Road and in downward cycles High Street benefits more from the linkages to Glenferrie Road in terms of access to these shoppers than vice-versa.

Additionally, two Traders Associations (High Street Armadale Traders Association and the Glenferrie Road Malvern Business Association) operate within the centre with their own objectives for centre planning and development.

***Response:*** *While a precinct-based approach is supported, the need for integration throughout the centre needs to be prioritised, including a need for trader groups to collaborate regularly. Notably, improved*



*links near the intersection of High Street and Glenferrie Road are critical to the ongoing successful integration of the centre.*

### **Vacancies**

Currently, the overall vacancy rate across the centre is estimated at approximately 6%, which is at the higher end of the typical range of vacancies of between 4% and 6% for an activity centre that is performing in a reasonable manner, as evidenced regionally.

While no 'dead spots' are identified with regard to pedestrian activity, vacancy rates in the High Street strip are significantly higher than in Glenferrie Road, with a particular cluster of vacancies at the eastern end of High Street.

Vacancy rates are a key indicator of relative 'centre health', with a higher-than-typical vacancy rate creating negative impacts on shopper amenity and perception of a centre.

**Response:** *The number, type and location of vacant tenancies in Glenferrie Road-High Street need to be monitored closely and regularly. The Structure Plan needs to provide both short-term and permanent actions to activate underutilised areas and premises, including vacant tenancies.*

### **Accommodating Retail Demand**

The current Main Trade Area population 62,190 persons is forecast to increase to 68,190 persons by 2031, reflecting annual growth of 350 persons or 0.5% per annum. Combined with real growth in per capita retail expenditure by residents (+1.5% pa), total retail spending by residents is forecast to increase by an average of \$25 million or +2.0% per annum over the period to 2031 (expressed in constant 2014 dollars).

As a result, Glenferrie Road-High Street should capture a share of the overall increase in total retail expenditure by Main Trade Area residents over the forecast period. This can be reflected in either:

- The occupancy of existing vacant tenancies with new businesses, or
- Increased sales by existing businesses, or
- The creation of new retail shopfront floorspace through development opportunities.

**Response:** *Capacity exists for a significant share of increased retail demand to be accommodated through the filling of current vacancies in the centre, and through increasing sales levels for existing traders. The Structure Plan should therefore prioritise more efficient uses of existing commercial floorspace, while providing for modest allowances for increased floorspace as urban form allows.*

### **Accommodating Residential Demand**

Over the period to 2031, increased demand for dwellings in the City of Stonnington is forecast to occur. According to *Victoria in Future 2014* (VIF), an additional +15,390 dwellings are forecast for the municipality between 2011 and 2031, representing an increase of +4,530 dwellings on previous VIF forecasts (2012, figures rounded).

A portion of this demand (68%) can potentially be accommodated in the Forrest Hill and the ChapelVision Area (10,400 dwellings in total), but the balance in dwelling demand will increase the burden on Glenferrie Road-High Street to accommodate residential development.

**Response:** Evidence across Melbourne shows demand for higher-density residential development spreads outwards over time. As Chapel Street develops further, Glenferrie Road-High Street is expected to experience increasing pressure to accommodate higher-density residential. The Structure Plan needs to respond to this anticipated expansion in urban development.

### **Physical Constraints and Building Scale**

Glenferrie Road and High Street are located in a highly-established urban area, with small lot sizes and heritage values, which effectively limit re-development opportunities in the centre.

Additionally, the overall height and scale of buildings in the centre remains modest relative to development occurring at nearby centres, including Chapel Street, Caulfield and Elsternwick. Where development above three storeys occurs it is relatively 'hidden' from general view for most shoppers and visitors. Even the dedicated commercial office buildings near Dandenong Road are of modest scale (typically 3-storey) relative to commercial office development in other city fringe markets such as Richmond and Fitzroy.

Generally small lot sizes, heritage values and the low-scale of existing development in the Glenferrie Road and High Street locality will have implications for the type and extent of the future physical scale of development.

**Response:** The Structure Plan should support planning and built form guidelines that reflect the fine grained nature of development. The Plan should identify and promote the development of large sites where these are available. Where appropriate the Plan should support site consolidation.

## **6.2 Opportunities**

The following opportunities have been identified for Glenferrie Road-High Street that will require an appropriate response in the Structure Plan.

### **New Forms of Niche Retailing**

The number of traders operating in particular market niches (eg, bridal boutiques and antique shops) that are usually not present at other similar centres means that High Street attracts customers from across Melbourne. This has positive impacts on the trading levels of the more traditional retailers in the centre as shoppers attracted to (say) the antique shops can also direct expenditures to other retailers (eg, newsagents and books, cafes and coffee shops, etc). According to the High Street Shopper Survey 2012, the unique/speciality shops, fashion boutiques, and the quality of shops, were mentioned in the top 5 factors that respondents like about High Street.

Recently however, these types of niche traders have been declining in numbers, and this has had implications on the number of 'visitors' (ie residents from beyond the Main Trade Area) attracted to the centre. According to the High Street 2008 Shopper Survey, approximately 65% of shoppers in High Street were 'visitors' to the centre (living beyond local and surrounding postcodes); in 2012, only 47% of shoppers in High Street were 'visitors' to the centre, according to the 2012 survey.

**Response:** Potential exists to build on the history of High Street and Glenferrie Road as a unique Melbourne shopping destination that does things differently and better than other shopping centres. This means finding new niches in the retail sector and attracting supporting activities (such as urban manufacturing, professional services), providing attractive amenities, and developing an enhanced sense of 'place' for the centre.

### ***Celebrate Trader Diversity***

A very diverse range of traders are located across Glenferrie Road and High Street that is comparable to only a small number of locations in Melbourne, such as the CBD. For example, the David Jones mini-department store trades in proximity to an opportunity shop and cluster of medical consulting rooms, while High Street is characterised by bridal boutiques and high-end fashion, antique shops and high-end food retailing. The centre therefore captures a broad range of shoppers and other visitors.

**Response:** The Structure Plan needs to create greater awareness of the diversity which exists in High Street-Glenferrie Road in order to generate higher levels of multi-purpose shopping trips.

### ***Street-Based Atmosphere***

Glenferrie Road-High Street is overwhelmingly street-based, with the only enclosed components being the Malvern Central Shopping Centre and a number of arcades primarily linking to rear carparking. It is the unique street-based atmosphere which has historically earned community support.

**Response:** The Structure Plan must recognise the importance of retaining the centre's popularity with residents, despite the need to accommodate change over time. Retaining the popularity of Glenferrie Road-High Street with shoppers is essential in the face of increased competitive pressure from other centres.

### ***Transport Rich***

The centre is 'transport rich' in terms of access to road, rail and tram facilities and services, and active forms of access to the centre in walking and cycling. Within the centre a generally high standard of pedestrian activity and amenity is evident and this benefits both shoppers and traders. In particular, trams support the linear main street format and are a key component in the integration of centre.

**Response:** Growth opportunities in residential and commercial office development have the potential to leverage off these high levels of access to road, rail and tram facilities and services.

### ***Improve Linkages with Anchors***

A number of key activity generators are located within or on the periphery of Glenferrie Road-High Street, including:

- **Malvern Central** is a sub-regional centre containing approximately 15,000m<sup>2</sup> of retail floorspace and generating approximately \$ 120 million in turnover per year, and it attracts some 2.9 million visitors per year, according to the Property Council of Australia. Vehicular access to Malvern Central is via Glenferrie Road and Wattleree Road, while pedestrian access is only available via Wattleree Road.

- **Cabrini Hospital** is located a short distance east of the Glenferrie Road strip and has a relatively strong influence on the centre. The hospital, with 508 beds and a diverse range of medical and para-medical services located on-site, attracts significant numbers of staff, patients and visitors, a share of whom also visit the nearby activity centre who may not otherwise visit the centre as they do not live locally. The Cabrini Hospital also supports a large number of consulting rooms and medical services that are located within or on the fringe of the activity centre, and these medical facilities also attract people to the retail and other services in the activity centre.
- **Malvern Town Hall, City of Stonnington Offices and Police Station** which are located in the civic precinct in the north-east corner of the study area. Additionally, Council offices are expanding to the old Transfield Services Building at 311 Glenferrie Road which will further increase the exposure and influence of the precinct on the balance of the centre.
- **Other (non-Retail) activity generators** located within or on the periphery of Glenferrie Road, include the Malvern Tram Depot, Malvern and Armadale Train Stations, De La Salle College, and St Joseph's Primary School.

***Response:** Opportunities may exist to improve integration of key anchors the balance of the activity centre. For example, through increased development of medical and para-medical uses adjacent to Cabrini Hospital, and improved access links near the intersection of High Street and Glenferrie Road.*

## 7 ACTION PLAN

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This Chapter presents an action plan comprising a range of strategies that aim to achieve the objectives of the Structure Plan.

### 7.1 Centre Heart

- 1 **Develop a strategy for the intersection of High Street and Glenferrie Road** to become the symbolic ‘heart’ of the centre.

### 7.2 Retail Objectives

- 2 **To support more-intensive retail activity** by encouraging the redevelopment of the sites and tenancies in the centre. In particular we advocate an expansion of the existing Coles store and the potential for Malvern Central to expand in a way that improves integration with the surrounding activity centre.
- 3 **To support comparison shopping in Glenferrie Road-High Street**, with a particular emphasis on niche, independent and other non-chain stores (as appropriate, and not undermining the important role of major chain stores) by supporting appropriate retail floorspace growth, and ensuring these traders are well-represented and involved in marketing activities.
- 4 **To continue to work on improving the streetscape on Glenferrie Road-High Street** to ensure that the centre continues to be seen as ‘best practice’ in Melbourne as a suburban street-based shopping and commercial precinct.
- 5 **To create an evening shopping environment which is inviting, comfortable and safe.** Ensure that businesses seeking to trade in the evening are supported.

### 7.3 Other Objectives

- 6 **To allow flexibility for the provision of additional commercial floorspace** should demand/interest eventuate.
- 7 **To work with property owners to unlock the potential for higher density-housing and other above-shop commercial development.** This includes ensuring that the height limits applying in the centre are clearly understood by property owners and developers.
- 8 **To emphasise to developers the opportunity to incorporate residential and office components into mixed-use development schemes** during pre-application discussions.
- 9 **To review, and if necessary upgrade, cycling access and infrastructure to reflect the growing popularity of this form of transport.** Where appropriate, provide bike racks or storage that mean cyclists can leave their bikes in a location that is out of the way of traders and pedestrians. Support other improvements for public transport users and people walking to and from the centre.
- 10 **To accommodate higher residential densities**, particularly in Princes Highway precinct.
- 11 **To recognise, without precluding retail and commercial development opportunities, the concentration of community and civic functions on the north-eastern fringe of the centre.**

Maximise the opportunities for the cross-use of these community facilities with the balance of the centre located to the south and west.

12 **To implement a set of performance benchmarks for marketing and promotional activities** based on the following four themes:

- a) The activity will increase the amount of consumer spending in Glenferrie Road-High Street
- b) The activity will increase spending by existing customers, and/or generate sales from new customers
- c) The activity will generate ongoing visitation into the future, either directly or indirectly.

## 8 CRITICAL SUCCESS FACTORS

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### DOs

- 1 Do engage proactively with developers and property owners so that the development aspirations and objectives for the centre are clearly understood
- 2 Do encourage more intensive residential development in the centre of an appropriate scale
- 3 Do improve the pedestrian accessibility and amenity throughout the centre, including permeability at cross streets and across Glenferrie Road and High Street
- 4 Do encourage a strong evening and weekend economy
- 5 Do recognise the functional differences between High Street, Glenferrie Road, Malvern Central and the balance of other precincts located in the activity centre
- 6 Do celebrate and highlight the special attributes Glenferrie Road-High Street enjoy over other shopping destinations in Melbourne.

### DON'Ts

- 7 Don't forget to engage with traders and other stakeholders
- 8 Don't take the success of Glenferrie Road-High Street for granted, as retail is one of most dynamic and competitive sectors of the economy and **every** centre needs to evolve over time
- 9 Don't under-estimate the ability of centre revitalisation to create a wide range of economic and social benefits throughout the community
- 10 Don't waste time and energy on things you can't influence, so focus on practical and real-world outcomes.

**City of Stonnington**

**Glenferrie Road-High Street Structure Plan  
Social Impact Assessment**

Report prepared by  
ASR Research Pty Ltd  
Social and Leisure Planners  
November 2014



## Executive Summary

### Aims of Assessment

The aims of the Social Impact Assessment (SIA) are to:

- Identify the negative and positive social impacts - including an assessment of the severity/significance of these impacts - that could arise from the implementation of the *final draft Glenferrie Rd-High St Structure Plan*.
- Identify the actions that could be taken to mitigate/moderate the negative impacts and guarantee and potentially augment the positive impacts.

The findings/recommendations of the Assessment will inform the *final Glenferrie Rd-High St Structure Plan*.

### Focus of SIA

The primary focus of the SIA is on the development/change that may occur in the geographic area includes the High St, Glenferrie Rd and Dandenong Rd spines (also known as the Glenferrie Rd-High St Activity Centre), the Malvern and Armadale train stations, the Malvern tram depot, the Malvern Civic/Recreation/ Education Precinct and the Wattleree Rd Health Precinct (the Assessment Area).

The SIA also considers the development/change that may occur in the residential areas immediately east and west of the Glenferrie Road Spine (including Union St Reserve) and the Malvern Public Gardens.

### Potential change

The potential changes proposed or identified in the draft Local Structure Plan are as follows:

- Modest increase in infill development along High St and Glenferrie Rd
- Additional commercial and residential development to the south of the railway alignment near Dandenong Rd.
- An enhanced walking environment.
- Additional cycling infrastructure.

- The Wattleree Rd spine between Glenferrie Rd and Cabrini developed as a 'medical precinct'.
- An enhanced gateway to Glenferrie Rd from Dandenong Rd and improved presentation of carparking areas and train stations.
- Public realm improvements at strategic locations through the Assessment Area, e.g. at intersections, around the Council Offices/Town Hall, Library, Tram Depot and Cricket Ground.

### Impacts

#### Positive

- Increased local population creating more custom for the retail and hospitality outlets and potentially increasing the number of local small/home based businesses.
- Construction work and the opening of new retail/commercial outlets creating employment opportunities for local residents, particularly local tradespeople, youth and young adults.
- Redevelopment providing an opportunity to remove/redevelop unattractive buildings and replace them with buildings that better suit the visual character of the Activity Centre and Assessment Area.
- Development around Malvern Station improving the appearance of what is a less attractive area than the sections of Glenferrie Rd to the immediate north.
- Redevelopment expanding the dining and entertainment options of residents, workers and visitors.
- Redevelopment providing the opportunity for older residents living in the Malvern and Armadale to 'age in place' by downsizing but still living in their local area.
- Improved walkability and increased cycling activity:
  - Increasing physical activity levels
  - Making it easier and safer to get to destinations around the Assessment Area
  - Generally enhancing the attractiveness of the Activity Centre and Assessment Area

- Discouraging locals from using their cars to travel to the Activity Centre and as a result reducing traffic congestion and demand for carparking
- Increasing economic activity in the Activity Centre and boosting business profits, employment and local prosperity
- Improving safety and surveillance.
- Construction work and the physical changes made to improve walkability and encourage cycling slowing down the traffic flow through the Activity Centre. This will be positive for the people living, working and visiting the Activity Centre – less traffic noise, safer streets and less through traffic as drivers take alternative routes.
- The definition and promotion of the Wattletree Rd Medical Precinct growing the profile of medical services in the Precinct and improving access by concentrating and containing medical facilities in a defined area (note: the containment of facilities will be of particular benefit to residents living near the Cabrini Hospital who are concerned about the creep of medical facilities into the residential areas).
- Public realm improvements making the Activity Centre more visually appealing, increasing activity in some areas and helping to activate other areas that are seldom used. These improvements will draw more people into the outdoor spaces in the Activity Centre. This will have a positive impact on community pride and foster increased social interaction.

#### *Negative Impacts*

- Changes to the visual appearance of the Activity Centre along High St and Glenferrie Rd and near the Malvern Station with the skyline changing, views potentially being obstructed and new buildings looming over laneways and carparks.
- Construction causing noise and dust disturbance and potentially closing laneways and footpaths, impeding access to shops, offices and dwellings. This may have adverse short and possibly long term economic and health impacts on businesses, workers, customers and residents. Some businesses may be permanently affected by loss in custom.
- Existing retail outlets and dining and entertainment venues facing increased competition from new players and potentially making them less viable.
- Increased activity in the Activity Centre generally increasing the ‘noisiness’ of the Activity Centre, particularly in the evenings.

- Improved walkability making it more difficult for cars and trams and even bikes to travel through and around the Activity Centre and Assessment Area.
- More intense pedestrian and cycling activity increasing the potential for vehicle, cyclist and pedestrian conflict.
- Increased activity at and around late night entertainment venues potentially creating an uncomfortable environment for local residents and people leaving dining venues.
- The infrastructure installed to encourage walking and cycling – seats, bike parking facilities, signs, crossing treatments - adding clutter to the streets. This infrastructure may be visually intrusive, conflict with outdoor dining facilities and impede pedestrian flow during busy periods.
- Some sections of the local community not welcoming the changes and wanting the Area to stay as it is. This may result in the community becoming less cohesive and a divide forming between new and old residents or residents living in the new residential developments along High St and those living in the local streets.

#### **Augmentation/mitigation/moderation strategies**

The following actions could potentially augment the positive impacts and mitigate/moderate the negative impacts:

- Extensive and effective community engagement.
- Strict controls over any activity that may have an adverse impact and enforcement of these controls.
- Sensitive and careful urban and building design.
- Promotion of universal and age, youth, child and family friendly design principles.
- Education of builders/developers/proprietors of noisy venues etc.
- Measures that promote social interaction and build relationships.

#### **Other comments**

The draft Structure Plan is consistent with and will help to achieve many of the objectives that Council considers to be important with respect to urban design, community health and well-being and environmental sustainability. The Plan also responds in a comprehensive and effective manner to the community’s vision for the Glenferrie Rd–High St Activity Centre.

**TABLE OF CONTENTS**

<b>Executive Summary .....</b>	<b>2</b>
<b>1. Aims of Assessment.....</b>	<b>5</b>
<b>2. Assessment/Study Areas .....</b>	<b>5</b>
<b>3. The Study Area .....</b>	<b>6</b>
3.1 Key features/attributes .....	6
3.2 Demographic characteristics .....	6
3.3 Social Infrastructure in the Study Area.....	7
<b>4. Planning/Policy context.....</b>	<b>7</b>
<b>5. The community's views .....</b>	<b>8</b>
<b>6. Potential change in the Study Area .....</b>	<b>9</b>
6.1 Physical change .....	9
6.2 Visual change.....	9
6.3 Demographic change.....	10
6.4 Economic change.....	10
<b>7. Impact Assessment.....</b>	<b>10</b>
7.1 General impacts .....	10
7.2 Specific Impacts .....	11
7.3 Achieving Council's objectives.....	12
7.3 Responding to the community's vision .....	12

## 1. Aims of Assessment

The aims of the Social Impact Assessment (SIA) are to:

- Identify the negative and positive social impacts - including an assessment of the severity/significance of these impacts - that could arise from the implementation of the *final draft Glenferrie Rd-High St Structure Plan*.
- Identify the actions that could be taken to mitigate/moderate the negative impacts and guarantee and potentially augment the positive impacts.

The Assessment examines:

- The social impacts of the physical, demographic, environmental, visual and economic change that could result from the implementation of the draft Glenferrie Rd-High St Structure Plan.
- The implications that this change will have on the access of local residents to services and facilities located in or near the Structure Plan Area.

The Assessment specifically focuses on the appropriateness of change outcomes pertaining to community use, community connectedness, social inclusion, safety, health, universal access and ageing in place.

The findings/recommendations of the Assessment will inform the *final Glenferrie Rd-High St Structure Plan*.

## 2. Assessment/Study Areas

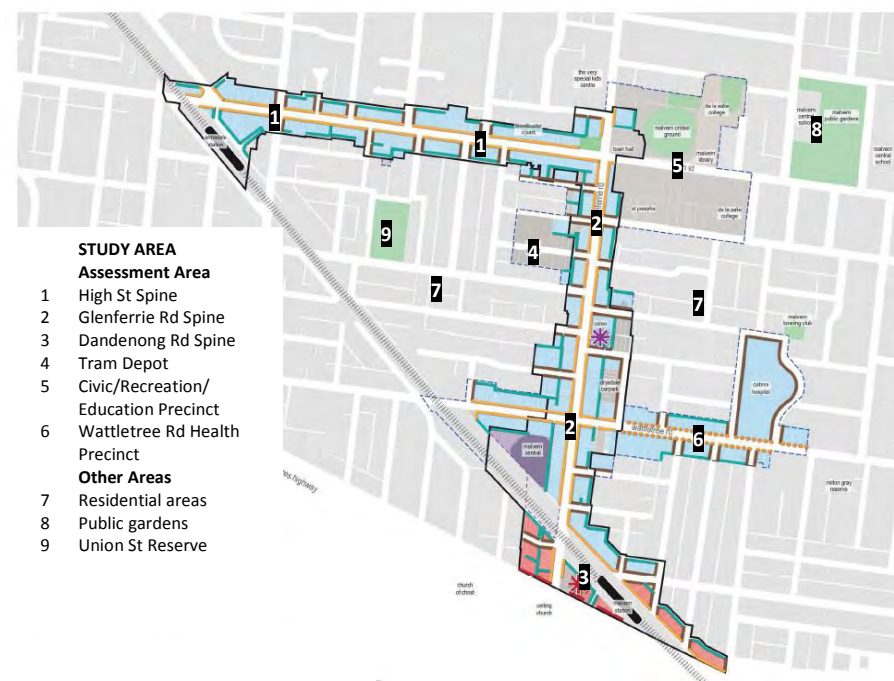
The primary focus of the SIA is on the development/change that may occur in the geographic area shown in Figure 1. This area includes the High St, Glenferrie Rd and Dandenong Rd spines (also known as the Glenferrie Rd-High St Activity Centre), the Malvern and Armadale train stations, the Malvern tram depot, the Malvern Civic/Recreation/Education Precinct and the Wattletree Rd Health Precinct.

The SIA will also consider the development/change that may occur in the residential areas immediately east and west of the Glenferrie Road Spine (including Union St Reserve) and the Malvern Public Gardens.

For the purposes of this report:

- The area which includes the High St, Glenferrie Rd and Dandenong Rd spines is referred to as the Glenferrie Rd-High St Activity Centre.
- The primary focus area is referred to as the Assessment Area.
- The Assessment Area combined with the adjacent residential areas, Union St Reserve and the public gardens are referred to as the Study Area.

Figure 1 – Assessment/Study Areas



### 3. The Study Area

#### 3.1 Key features/attributes

The Study Area is located about 7kms from the Melbourne CBD. Its significant features/attributes are as follows:

- A commercial/retail activity centre extending along High St, Glenferrie Rd and Dandenong Rd which has approximately 70,000m<sup>2</sup> of retail floor space and 30,000m<sup>2</sup> of commercial space. The retail floor space accommodates a diverse range of outlets and hospitality venues that cater for local and regional catchments.
- Four arterial roads traversing the Area – a highway (Dandenong Rd), two primary main roads (High St and Glenferrie Rd) and a secondary main road, Wattletree Rd.
- Tram routes along High St, Wattletree Rd and Glenferrie Rd which extend:
  - From Glen Iris and Malvern to the Melbourne CBD
  - From Kew to St Kilda.
- A large tram depot on Glenferrie Rd.
- The Pakenham Train Line and 2 train stations – Armadale and Malvern.
- A prominent civic/recreation/education precinct comprising Council offices, town hall, sports reserve, secondary college, 2 primary schools, church, police station, retirement living centre and public gardens.
- A local reserve, Union St, which contains play facilities and a public tennis venue.
- A large private hospital on Wattletree Rd with associated medical clinics.
- Built form which has significant heritage values and visual quality.
- Attractive, accessible and relatively quiet residential areas.

#### 3.2 Demographic characteristics

##### 3.2.1 The Study Area

The Study Area falls within the suburbs of Armadale and Malvern. The demographic characteristics of these suburbs are as follows:

- Compared to Greater Melbourne, Armadale and Malvern have:
  - Significantly higher proportions of females than Greater Melbourne and conversely lower proportions of males

- Significantly higher median household incomes.
- Compared to Armadale and Greater Melbourne, Malvern has:
  - A higher proportion of ‘couple with children’ households
  - A higher proportion of Australian born residents.
- Compared to Malvern and Greater Melbourne, Armadale has:
  - Significantly lower proportions of ‘couple with children’ households
  - A significantly higher proportion of young adults
  - A significantly higher proportion of ‘sole person’ households.

**Table 1 – Population Characteristics**

Characteristic	Armadale	Malvern	Greater Melbourne
Est. population 2011	8,760	9,504	4,000,000
Male	47.0	47.0	49.2
Female as % of total population	53.0	53.0	50.8
Child population (0-9 years) as % of total population	9.5	12.3	12.5
Youth population (10-19 years) as % of total population	7.6	10.8	11.2
Young adult population (20-34 years) as % of total population	30.0	21.0	22.9
Middle adult population (35-49 years) as % of total population	21.0	22.0	22.0
Older middle adult population (50-69 years) as % of total population	21.0	23.0	20.0
Older adult (70+) as % of total population	10.0	10.0	9.2
Australian born	65.0	71.0	64.0
Ave household size	2.1	2.5	2.6
Median weekly household income	\$1,711	\$2,017	\$1,333
Couple family with children as % of all households	36.0	50.0	47.9
Couple family without children as % of all households	49.5	37.0	34.8
One parent families as % of all households	11.0	10.0	15.3
Sole person households	35.0	27.0	23.3

Source – ABS Quickstats 2011

##### 3.2.2 Dwellings in the Activity Centre

In 2011, the Glenferrie Rd-High St Activity Centre contained around 165 dwellings and 270 residents. This is an increase of 55 dwellings and 85 residents since 2006. Some higher density development is now occurring in High St and near the Malvern Station and more development will occur in these areas in the future (source: GR-HS Activity Centre, Economic Technical Report 2014, Essential Economics).

### 3.2.3 People working, studying, shopping etc in the Study Area

It is estimated that 9,500 people work and 1,700 children study in Study Area. The majority of workers are managers, professionals, clerical staff and sales staff.

The primary catchment area (main trade area) for the Glenferrie Rd-High St Activity Centre includes the suburbs of Malvern, Armadale and Tooronga and parts of East Malvern, Toorak, Caulfield North and Prahran. This area has a population of around 62,000 people (source: GR-HS Activity Centre, Economic Technical Report 2014, Essential Economics).

### 3.3 Social Infrastructure in the Study Area

The following social infrastructure items are located in the Assessment Area and remainder of the Study Area:

#### In the Assessment Area

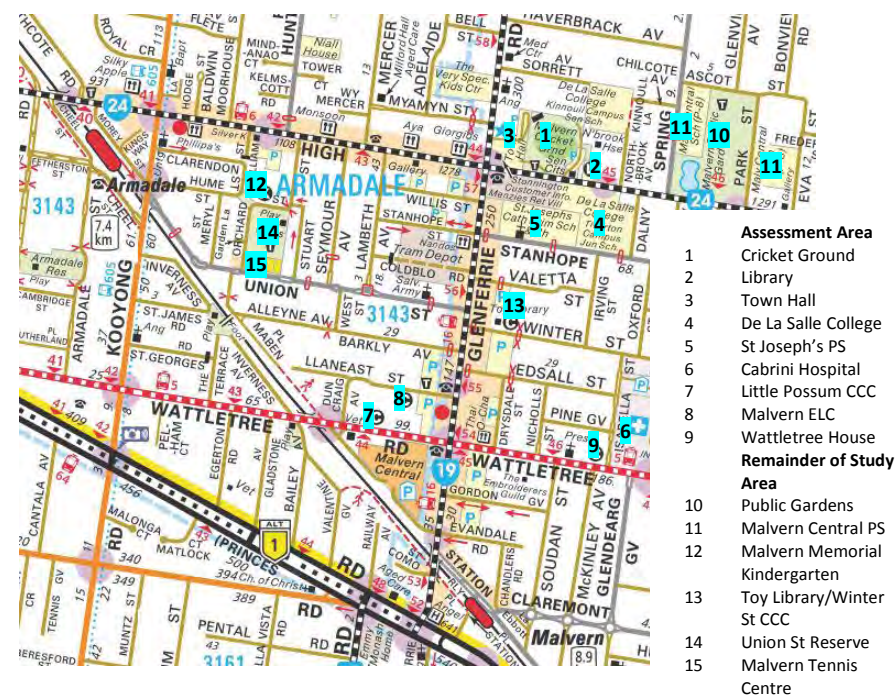
- Malvern Cricket Ground
- Malvern Library
- Malvern Town Hall
- Malvern Square
- De La Salle College
- St Joseph’s Primary School
- Cabrini Hospital
- Little Possums Child Care Centre
- Malvern Early Learning Centre
- Wattletree House Child Care Centre.

#### In the remainder of the Study Area

- Malvern Central Primary School
- Malvern Public Gardens
- Union St Reserve and Malvern Tennis Facility
- Malvern Memorial Kindergarten
- Stonnington Toy Library/Winter St Child Care Centre

There are also a number of social infrastructure items located close to the Study Area which could be used by residents of the Area (not mapped below). These items include a childcare centre, kindergarten, M&CH centre, a private girls’ school and aged care facilities.

Figure 2 – Social Infrastructure in the Study Area



### 4. Planning/Policy context

There are a number of Council planning and policy documents that need to be considered when undertaking the social impact assessment. These are:

- Council Plan 2013 – 2017
- Municipal Strategic Statement
- Municipal Public Health and Wellbeing Plan 2013-2017
- Activity Area Economic Analysis 2013

- Building Prosperity - Economic Development Strategy 2012-2016
- Public Realm Strategy 2010
- Sustainable Transport Policy/Walking Policy 2008
- Access and Inclusion Plan – A City for All 2014-2017
- Arts and Cultural Strategy 2011-15
- Youth Strategy 2010-2014
- Older Person’s Strategy 2008-2012
- Early Years Plan 2011-2016
- Cycle Strategy 2013-2018.

These documents indicate that Council encourages or places a high degree of importance on the following activities/facilities/matters with respect to land use planning, urban design and social infrastructure provision:

- Enhanced community health, well-being and safety.
- A community where all people feel connected.
- Appropriate housing available to all residents.
- High quality, accessible social infrastructure that meets needs.
- Sustainable transport including increased use of bikes and public transport and less uses of cars.
- Greening of streets.
- Reduction of carbon footprint.
- Community gathering places.
- Protection/preservation of heritage architecture.
- Protection/preservation/enhancement of landscape character.
- Vibrant retail and commercial sectors.
- Residential development in areas that have good access to public transport.
- Protection of residential amenity.
- Expanded and enhanced public realm.
- Equitable distribution of open space.
- Public places that supports/encourage formal and informal arts activity.
- Safe, walkable and accessible environments.
- Accessible buildings.

- Child friendly spaces.
- Opportunities for youth in the eastern end of Stonnington.
- ‘Main roads with trams’ converted to ‘main streets’ where residents, cyclists and public transport have priority.

## 5. The community’s views

Council asked the local community’s views to indicate its vision for the future development of the Assessment Area and the potential improvements that could be made to the Area. This two-stage consultation process involved forums with residents, business owners/traders, traders associations, local service providers and other key stakeholders. The responses were as follows:

- The community envisioned that The Assessment Area would be:
  - A thriving shopping precinct which caters in a balanced way for local and specialist retailers
  - A vibrant, inviting, attractive and clean space with well-designed green streetscapes, pedestrian connections and congregation spaces
  - A centre for local employment.
- The community:
  - Wanted more areas converted to green spaces
  - Wanted public spaces (carparks, laneways) activated through improved lighting, way-finding and landscaping
  - Wanted a considered approach to development that balances functional needs and heritage protection
  - Supported additional but ‘delicate’ residential and retail/commercial development as long as it was strictly managed, residential amenity was protected and existing commercial uses were not displaced
  - Supported the notion of a health precinct along Wattle tree Rd.
- With respect to individual sites in the Assessment Area, the community recommended that:
  - The Glenferrie Rd gateway (from Dandenong Rd) be enhanced: aged care, cinema, residential development, possibly late night venues
  - A green corridor be created between the railway line and Malvern Central

- Consideration be given to developing over the Malvern Station and railway line
- Access to the Malvern Station train be improved
- The Armadale Station be activated: improved public realm, shared zones, connections to surrounding areas, carparking, way-finding and landscaping
- The potential for activating the Tram Depot be explored
- The Malvern Town Hall/Civic Precinct be further activated: walking circuit, way-finding, improved landscaping
- Malvern Square be enhanced: more vegetation, congregation areas, better lighting
- Carparks be retained
- Rear carpark be optimised as public realm: more green spaces, lighting, public art
- Streets be considered as community hubs where pedestrians are given priority
- Facilities for cycling be provided: on and off-road routes, bike parking facilities, way-finding
- The second storeys of buildings and shop-tops be used for residential/office space
- Public toilets be provided
- Increased street life, including night life, be encouraged as long as activities are sensitive to surrounding residents.

## 6. Potential change in the Study Area proposed in the draft Structure Plan

The potential changes proposed or identified in the draft Local Structure Plan are as follows:

### 6.1 Physical change

- Modest increase in infill development along High St and Glenferrie Rd (mainly above shop residential and commercial development).
- Additional commercial and residential development to the south of the railway alignment near Dandenong Rd.
- An enhanced walking environment through:
  - The addition of pedestrian crossings at strategic locations, e.g. on Glenferrie Rd between High St and the crossing near Edsall St (investigation)
  - Improvements to footpath surfacing along High St

- Erection of way-finding signage
- Development of 'green routes' with high quality walking/cycling surfaces, safe road crossing points, seating and security lighting
- Improvements to arcades and laneways to make them safer and more attractive, such as better paving, lighting, seating etc.
- Additional cycling infrastructure including:
  - Long stay bike parking facilities at Armadale and Malvern stations, community facilities, cafes and parks
  - Bicycle lanes on Glenferrie Rd and High St and bicycle priority markings at signalised crossings
  - Crossing and path treatments/connections that enhance the cycling environment, e.g. connecting Union St Reserve to High St through a cycling bypass, converting off-road pedestrian paths to cycling paths.
- The Wattleree Rd spine between Glenferrie Rd and Cabrini developed as a 'medical precinct'.
- An enhanced gateway to Glenferrie Rd from Dandenong Rd and improved presentation of carparking areas and train stations.
- Public realm improvements at strategic locations through the Study Area, e.g. at intersections, around the Council Offices/Town Hall, Library, Tram Depot and Cricket Ground.

### 6.2 Visual change

The visual changes will largely result from the physical changes described in Section 6.1. People who live in, work, visit or travel through the Study Area will notice the following visual changes:

- More mixed use, above shop development along High St and Glenferrie Rd.
- Additional commercial/industrial development along Dandenong Rd and around Malvern Station.
- A generally 'greener' environment.
- Busier streets and pavements with more people walking, cycling, eating, shopping and gathering.
- Improved vistas and more attractive public spaces and buildings.



### 6.3 Demographic change

The Economic Technical Report (2014) suggests that the following dwelling and population growth could occur in or near the Study Area over the next 17 years:

- Around 850 dwellings and 1,500 people in the Glenferrie Rd-High St Activity Centre (based on 50 dwellings and 90 people per annum).
- 1,020 dwellings and around 2,040 people in Malvern and Armadale (based on 60 dwellings and 120 people per annum).
- 6,000 people across the catchment (or trade) area for the Glenferrie Rd-High St Activity Centre.

The Technical Report and draft Structure Plan does not make any comment on the change in the demographic make-up of the Glenferrie Rd-High St Activity Centre or Malvern and Armadale that will result from the population growth outlined above. As the majority of the additional dwellings will be moderately priced apartments (probably 1 and 2 bedroom), it is likely that:

- The demographic characteristics of the Malvern community will remain similar to what they are now.
- The demographic characteristics of the Armadale community will change moderately. With more apartment development, there is likely to be a reduction in the average household size, a slight decline in real terms in median household income and rises in the proportion of sole person households and young adult population as a proportion of total population.

### 6.4 Economic change

The draft Structure Plan suggests that economic activity in the Assessment Area will increase as a result of growth in the local resident population and the catchment area of the Glenferrie Rd-High St Activity Centre and works which will make the Centre more attractive to shoppers and visitors. The Plan forecasts that, as a result of this increased activity, the amount of retail and commercial floor space in the Glenferrie Rd-High St Activity Centre could rise by between 11,000m<sup>2</sup> (15%) and 20,000m<sup>2</sup> (66%) respectively.

## 7. Impact Assessment

### 7.1 General impacts

The community that will be impacted by the change in the Assessment Area can be divided into the following segments:

- Current residents, business owners, workers and students in and visitors to the Activity Centre.
- Future residents, workers and students in and visitors to the Activity Centre.
- Current residents of the residential areas in the Assessment Area - east and west of Glenferrie Rd.
- Future residents of the residential areas in the Assessment Area - east and west of Glenferrie Rd.
- People who regularly drive through the Assessment Area.
- People who regularly travel through the Assessment Area on public transport.

The change will impact these segments differently. For example, some existing residents may find the Activity Centre more attractive, lively and safer to move around. They will also have more shopping, eating and entertainment options. They will, most likely, consider these impacts to be positive. Conversely, some existing residents may find the Activity Centre too busy. They may have to constantly evade bicycles, be regularly disturbed by the noise of building work, have their access to their homes temporarily impeded by road and building works, have to compete for carpark spaces, have their views obstructed by new buildings, have to queue for their Saturday morning coffees and be unnerved at night walking down busier streets. They will find these impacts to be negative.

Future residents of the Activity Centre may have an entirely different experience; whether it is a positive or negative experience largely depending on where they have moved from and what expectations that have of their new local area. Some new residents will be pleased by their easy access to public transport and diverse shopping, dining and entertaining opportunities. However, others may be overwhelmed by the 'busyness and loudness' of the Centre. Some business owners may be pleased by the increase in shopper and diner numbers which results in more custom but others may be disheartened if this increased demand results in more competitors being attracted to the Centre.

## 7.2 Specific Impacts

The positive and negative impacts of the change that could occur in the Assessment Area on the various community segments and the potential severity/significance of these impacts are discussed in Table 2 on the following page.

In undertaking the SIA:

- It was assumed that the strategies outlined in the draft Structure Plan would be fully implemented which, in turn, would cause the changes outlined in Section 6 of this report to occur.
- An evaluation was made of how consistent the changes outlined in Section 6 of this report were with the views expressed by the community (see Section 5) and the matters that Council considers to be important with respect to Activity Centre development, urban design and social infrastructure provision (see Section 4).

In summary, the positive and negative impacts and the actions that could be taken to moderate/mitigate the negative impacts are as follows:

### *Positive Impacts*

- Increased local population creating more custom for the retail and hospitality outlets and potentially increasing the number of local small/home based businesses.
- Construction work and the opening of new retail/commercial outlets creating employment opportunities for local residents, particularly local tradespeople, youth and young adults.
- Redevelopment providing an opportunity to remove/redevelop unattractive buildings and replace them with buildings that better suit the visual character of the Activity Centre and Assessment Area.
- Development around Malvern Station improving the appearance of what is a less attractive area than the sections of Glenferrie Rd to the immediate north.
- Redevelopment expanding the dining and entertainment options of residents, workers and visitors.

- Redevelopment providing the opportunity for older residents living in the Malvern and Armadale to 'age in place' by downsizing but still living in their local area.
- Improved walkability and increased cycling activity:
  - Increasing physical activity levels
  - Making it easier and safer to get to destinations around the Assessment Area
  - Generally enhancing the attractiveness of the Activity Centre and Assessment Area
  - Discouraging locals from using their cars to travel to the Activity Centre and as a result reducing traffic congestion and demand for carparking
  - Increasing economic activity in the Activity Centre and boosting business profits, employment and local prosperity
  - Improving safety and surveillance.
- Construction work and the physical changes made to improve walkability and encourage cycling slowing down the traffic flow through the Activity Centre. This will be positive for the people living, working and visiting the Activity Centre – less traffic noise, safer streets and less through traffic as drivers take alternative routes.
- The definition and promotion of the Wattletree Rd Medical Precinct growing the profile of medical services in the Precinct and improving access by concentrating and containing medical facilities in a defined area (note: the containment of facilities will be of particular benefit to residents living near the Cabrini Hospital who are concerned about the creep of medical facilities into the residential areas).
- Public realm improvements making the Activity Centre more visually appealing, increasing activity in some areas and helping to activate other areas that are seldom used. These improvements will draw more people into the outdoor spaces in the Activity Centre. This will have a positive impact on community pride and foster increased social interaction.

### *Negative Impacts*

- Changes to the visual appearance of the Activity Centre along High St and Glenferrie Rd and near the Malvern Station with the skyline changing, views potentially being obstructed and new buildings looming over laneways and carparks.
- Construction causing noise and dust disturbance and potentially closing laneways and footpaths, impeding access to shops, offices and dwellings. This may have

adverse short and possibly long term economic and health impacts on businesses, workers, customers and residents. Some businesses may be permanently affected by loss in custom.

- Existing retail outlets and dining and entertainment venues facing increased competition from new players and potentially making them less viable.
- Increased activity in the Activity Centre generally increasing the ‘noisiness’ of the Activity Centre, particularly in the evenings.
- Improved walkability making it more difficult for cars and trams and even bikes to travel through and around the Activity Centre and Assessment Area.
- More intense pedestrian and cycling activity increasing the potential for vehicle, cyclist and pedestrian conflict.
- Increased activity at and around late night entertainment venues potentially creating an uncomfortable environment for local residents and people leaving dining venues.
- The infrastructure installed to encourage walking and cycling – seats, bike parking facilities, signs, crossing treatments - adding clutter to the streets. This infrastructure may be visually intrusive, conflict with outdoor dining facilities and impede pedestrian flow during busy periods.
- Some sections of the local community not welcoming the changes and wanting the Area to stay as it is. This may result in the community becoming less cohesive and a divide forming between new and old residents or residents living in the new residential developments along High St and those living in the local streets.

#### *Augmentation/mitigation/moderation strategies*

The following actions could potentially augment the positive impacts and mitigate/moderate the negative impacts (also see table 3):

- Extensive and effective community engagement.
- Strict controls over any activity that may have an adverse impact and enforcement of these controls.
- Sensitive and careful urban and building design.
- Promotion of universal and age, youth, child and family friendly design principles.
- Education of builders/developers/proprietors of noisy venues etc.

- Measures that promote social interaction and build relationships.

#### **7.4 Achieving Council’s objectives**

The draft Structure Plan is consistent with and will help to achieve many of the objectives that Council considers to be important (see Section 4 of this report). The implementation of the Plan will:

- Enhance community health, well-being and safety.
- Foster sustainable transport including increased use of bikes and public transport and less uses of cars.
- Green the streets.
- Provide more community gathering places.
- Protect/preserve heritage architecture.
- Enhance landscape character.
- Create vibrant retail and commercial sectors.
- Create residential development in areas that have good access to public transport.
- Protect residential amenity.
- Expand and enhance public realm.
- Create a safe, walkable and accessible environment.
- Convert Glenferrie Rd and High St from ‘main roads with trams’ to ‘main streets’ where residents, cyclists and public transport have priority.

#### **7.3 Responding to the community’s vision**

The draft Structure Plan responds in a comprehensive and effective manner to the community’s vision for the Glenferrie Rd – High St Activity Centre (see Section 5 of this report). All the views suggested in the consultation process have been covered in the Plan.

An area that is not mentioned in the draft Structure Plan but should be considered for inclusion is the provision of accommodation options for the elderly. More emphasis could be given in the Plan to providing local elderly residents with the opportunity to ‘age in place’.

Table 2 – Social Impact Assessment

CHANGE	IMPACTS	TYPE OF IMPACT			POTENTIAL DEGREE OF IMPACT
		POSITIVE	NEGATIVE	NEUTRAL	
Modest increase in infill development along High St and Glenferrie Rd (mainly residential and commercial development above shops).	<p>The draft Local Structure Plan anticipates that infill residential development over the next 17 years will generate an additional 800-900 dwellings and 1,500-1600 people in the Glenferrie Rd-High St Activity Centre and 1,020 dwellings and 2,040 people in Malvern and Armadale. It is anticipated that the dwelling and population growth will be gradual and relatively even over the 17 years.</p> <p>Most of the population increase will occur in Armadale and cause a moderate change to its demographics, i.e.</p> <ul style="list-style-type: none"> <li>- A slight reduction in the average household size and decline in real terms in median household income</li> <li>- Increase in sole person households as a proportion of all households</li> <li>- Increase in the young adult population as a proportion of total population.</li> </ul> <p>The demographic characteristics of the Malvern community will be largely unaltered by population growth. Its community will continue to age, but otherwise there will be little change.</p> <p>Therefore, from a social cohesion perspective, population growth will have little impact. The residents living in the area will notice little change, other than Armadale residents potentially discerning that their community is becoming younger.</p>			√	
	Although reasonably modest, the increase in population in Glenferrie Rd-High St Activity Centre and across Malvern and Armadale will lead to increased activity in the Activity Centre and more custom for the retail and hospitality outlets. This will have a positive impact on economic activity and local prosperity.	√			Moderate
	The increased population will place additional demand on local services and facilities – local kindergartens, childcare centres, schools, tennis centres, sports field, local fitness centres etc. However, it is anticipated that the additional demand will be minimal due to the size of the increase and the demographic characteristics of the new residents. The bulk of new population is likely to be single young adults and couples without children. Therefore, there will be little extra demand for early years services or schools and some minor additional demand for fitness centres and casual tennis.	√			Minor

CHANGE	IMPACTS	TYPE OF IMPACT			POTENTIAL DEGREE OF IMPACT
		POSITIVE	NEGATIVE	NEUTRAL	
	The draft Structure Plan anticipates that infill commercial development over the next 17 years will generate an additional 11,000m <sup>2</sup> and 20,000m <sup>2</sup> of retail and commercial floor space respectively. This extra floorspace will support additional employment and, potentially, provide more job opportunities for local residents, particularly local youth and young adults.	√			Moderate
	Infill development will change the visual appearance of the Activity Centre with some new buildings reaching as high as 3-4 storeys. Although development will be set back, it may obstruct the views for residents or workers who already occupy the second storey areas of existing buildings and loom over people using the back laneways and carparks.		√		Moderate but has the potential to be significant if not managed sensitively.
	Construction will cause noise and dust disturbance and potentially close laneways and footpaths, impeding access to shops, offices and dwellings. This may have adverse economic and health impacts on businesses, workers, customers and residents. Some businesses may be permanently affected by loss in custom.		√		Moderate but has the potential to be significant if multiple development occurs simultaneously and/or the disruption lasts for long periods.
	Construction may provide an opportunity to remove/redevelop unattractive buildings and replace them with buildings that better suit the visual character of the Activity Centre and Assessment Area.	√			Moderate but could be significant. It will depend on which sites are chosen for redevelopment.
	Development is likely to include the provision of new dining/café outlets and entertainment venues. This could have a positive impact in that it will expand the dining and entertainment options of residents and visitors. It could also have a negative impact in that it may make some existing venues less viable and generally increase the 'noisiness' of the Activity Centre, particularly in the evenings.	√	√		Positive – moderate Negative – minor but has the potential to be major if not managed carefully, particularly for businesses that have been at the Centre for a long time
	Construction work and the opening of new retail/commercial outlets may create employment opportunities for local residents/tradespeople.	√			Minor-moderate depending on the number of jobs and the take up/success rate of local residents and tradespeople in securing these jobs.
	The residential development will mainly be apartment buildings. This will provide opportunities for local older residents to downsize and 'age in place'.	√			Moderate

CHANGE	IMPACTS	TYPE OF IMPACT			POTENTIAL DEGREE OF IMPACT
		POSITIVE	NEGATIVE	NEUTRAL	
Additional commercial and residential development to the south of the railway alignment near Dandenong Rd.	Development in this location could have similar positive impacts to those outlined above but to a greater extent, particularly the negative impacts. The scale of development is likely to be more substantial than development in High St and Glenferrie Rd. Therefore, it could be noisier, more visually arresting (particularly as it may not be setback) and significantly change the character of the Area. It could also be beneficial. It could improve the vibrancy and the appearance of the area and create a gateway to the Activity Centre.	√	√		Positive – moderate Negative - moderate but could be significant if not carefully and sensitively managed.
An enhanced walking environment through: <ul style="list-style-type: none"> <li>- The addition of pedestrian crossings at strategic locations, e.g. on Glenferrie Rd between High St and the crossing near Edsall St (investigation)</li> <li>- Improvements to footpath surfacing along High St</li> <li>- Erection of way finding signage</li> <li>- Development of 'green routes' with high quality walking/cycling surfaces, safe road crossing points, seating and security lighting</li> <li>- Improvements to arcades and laneways to make them safer and more attractive, such as better paving, lighting, seating etc.</li> </ul>	These changes will improve 'walkability'. This will have significant benefits for people living, working and visiting the area. It will increase physical activity levels, make it easier and safer to get to destinations around and beyond the assessment area and generally enhance the attractiveness and vibrancy of the Activity Centre and Assessment Area. It may also discourage locals from using their cars to travel to the Activity Centre and as result reduce traffic congestion.  The increased vibrancy of the Activity Centre will in turn increase economic activity in the Centre which will boost business profits, employment and prosperity.	√			Significant
	The improved walkability, however, may make it more difficult for cars and trams and even bikes to travel through and around the Activity Centre and Assessment Area. Some shoppers and workers cannot avoid using their cars and may feel aggrieved that their shopping or work experiences are made more difficult by these walkability enhancements.  Also more intense pedestrian activity may increase the potential for vehicle and pedestrian conflict with pedestrians taking less care when they cross roads or walk down laneways etc.		√		Moderate
	Generally, increased activity in the Activity Centre should improve safety and surveillance. However, increased activity at or around late night entertainment venues may have the opposite effect with local residents and people leaving dining venues feeling threatened by unruly patrons leaving existing and potentially new late night venues.	√	√		Positive – moderate Negative – moderate but potentially significant if not managed carefully

CHANGE	IMPACTS	TYPE OF IMPACT			POTENTIAL DEGREE OF IMPACT
		POSITIVE	NEGATIVE	NEUTRAL	
<p>Additional cycling infrastructure including:</p> <ul style="list-style-type: none"> <li>- Long stay bike parking facilities at Armadale and Malvern stations, community facilities, cafes and parks</li> <li>- Bicycle lanes on Glenferrie Rd and High St and bicycle priority markings at signalised crossings</li> <li>- Crossing and path treatments/connections that enhance the cycling environment, e.g. connecting Union St Reserve to High St through a cycling bypass, converting off-road pedestrian paths to cycling paths.</li> </ul>	<p>These changes should encourage more people to cycle to, around and from the Activity Centre and Assessment Area. This increased cycling activity could have significant benefits for people living, working and visiting the area – more physical activity, less traffic, less noise, less pressure on carparks, easier to get to destinations. Like ‘improved walkability’, it should enhance the vibrancy of the Activity Centre and Assessment Area which in turn will boost increase economic activity and local prosperity.</p>	√			Significant
	<p>Again like ‘improved walkability’, greater bicycle activity in the Activity Centre may increase the potential for cyclist, vehicle and pedestrian conflict which could result in disharmony and possible serious injuries.</p>		√		Moderate
	<p>The infrastructure proposed to be installed to encourage walking and cycling – seats, bike parking facilities, signs, crossing treatments - could add clutter to the streets. This infrastructure may conflict with outdoor dining facilities and impede pedestrian flow during busy periods. It may also be visually obtrusive.</p>		√		Moderate
	<p>The construction work and the physical changes made to improve walkability and encourage cycling will slow down the traffic flowing through the Activity Centre. This will be positive for the people living, working and visiting the Activity Centre – less traffic noise, safer streets etc, less through traffic as drivers take alternative routes – but it will be negative and frustrating for tram users and people driving through to get to further destinations.</p>	√			Positive for local residents, visitors and workers - moderate
<p>The Wattletree Rd spine between Glenferrie Rd and Cabrini developed as a ‘medical precinct’.</p>	<p>This strategy will concentrate medical activity in a defined precinct. In time, this will enhance the profile of the precinct, help to contain the spread of medical facilities and hopefully improve the accessibility of the services with people being able to access multiple services in the one location.</p> <p>The containment of facilities to a defined area will be of particular benefit to residents living near the Cabrini Hospital who are concerned about the creep of medical facilities into the residential areas.</p>	√			Moderate
<p>An enhanced gateway to Glenferrie Rd from Dandenong Rd and improved presentation of carparking areas and train stations.</p>	<p>An enhanced gateway will make the area more welcoming and visually appealing. It will have little social impact other than making people living and working in the area more proud of their local environment.</p>			√	

CHANGE	IMPACTS	TYPE OF IMPACT			POTENTIAL DEGREE OF IMPACT
		POSITIVE	NEGATIVE	NEUTRAL	
More gathering points and public realm improvements at strategic locations through the Study Area, e.g. at intersections, around the Council Offices/Town Hall, Library, Tram Depot, Cricket Ground, laneways, carparks etc.	Public realm improvements will make the Activity Centre more visually appealing. It will increase activity in some areas and help to activate other areas that are seldom used. It will draw more people into the outdoor spaces Activity Centre. It will have positive impact on community pride and foster increased community interaction	√			Significant
	Some sections of the local community, however, may not welcome the changes described above, particularly those living in the surrounding residential areas. They may prefer their local area to stay as it is. They may not want 'green routes' or to have queue for a coffee. As a result, the community may become less cohesive with a divide occurring between some new and old residents or between some residents living in the new residential developments along High St and those living in the local streets.		√		Moderate



Table 3 – Mitigation/moderation strategies

Impact	Strategies
Changes to the visual appearance of the Activity Centre along High St and Glenferrie Rd and near the Malvern Station with the skyline changing, views being obstructed and new buildings looming over laneways and carparks.	<ul style="list-style-type: none"> <li>- Enforcing the building setbacks where necessary in the draft Local Structure Plan</li> <li>- Ensuring building design is consistent with local architectural character</li> <li>- Ensuring local residents, workers and business owners are appropriately informed about new development works</li> </ul>
Construction causing noise and dust disturbance and potentially closing laneways and footpaths, impeding access to shops, offices and dwellings. This may have adverse economic and health impacts on businesses, workers, customers and residents. Some businesses may be permanently affected by loss in custom.	<ul style="list-style-type: none"> <li>- Placing controls which will minimise the adverse impacts</li> <li>- Strictly enforcing these controls</li> <li>- Educating builders/developers</li> <li>- Ensuring local residents, workers and business owners are appropriately informed about any works etc that may impact on them</li> <li>- Investigating compensation measures for businesses that are adversely impacted</li> </ul>
Existing retail outlets and dining and entertainment venues facing increased competition from new players and potentially making them less viable.	<ul style="list-style-type: none"> <li>- There are no obvious mitigation strategies. Outlets and venues will have to develop their own strategies to deal with this competition</li> <li>- Council may be able to provide some support through its marketing and economic development units</li> </ul>
More activity in the Activity Centre generally increasing the 'noisiness' of the Activity Centre, particularly in the evenings.	<ul style="list-style-type: none"> <li>- Placing controls over 'noisy' venues and strictly enforcing these controls</li> <li>- Educating proprietors of venues</li> </ul>
Increased activity at and around late night entertainment venues creating an uncomfortable environment for local residents and people leaving dining venues.	<ul style="list-style-type: none"> <li>- Limiting the number of late night venues</li> <li>- Imposing liquor licensing controls</li> <li>- Conducting SIAs on late night venue applications</li> <li>- Placing appropriate controls over their activities and enforcing these controls</li> <li>- Educating licensees and staff</li> <li>- Installing CCTV at appropriate locations</li> <li>- Installing suitable lighting</li> <li>- Removing 'dark spots'</li> </ul>
Improved walkability making it more difficult for cars and trams and even bikes to travel through and around the Activity Centre and Assessment Area. People who rely on cars may be upset by the changes.	<ul style="list-style-type: none"> <li>- Ensuring that an appropriate balance is struck in the redesign and redevelopment of the Activity Centre and Assessment Area between the providing access to cars, improving walkability and encouraging cycling</li> <li>- Involving the community in this process</li> </ul>
More intense pedestrian and cycling activity increasing the potential for vehicle, cyclist and pedestrian conflict.	<ul style="list-style-type: none"> <li>- Ensuring that in the redesign and redevelopment of the Activity Centre and Assessment Area, potential conflict points between cyclists, pedestrians and vehicles are minimised.</li> <li>- Involving the community (residents and traders) in this process</li> <li>- Conducting education campaigns</li> <li>- Installing appropriate road treatments and signage</li> </ul>
Infrastructure installed to encourage walking and cycling – seats, bike parking facilities, signs, crossing treatments - adding clutter to the streets. This infrastructure may be visually intrusive, conflict with outdoor dining facilities and impede pedestrian flow during busy periods.	<ul style="list-style-type: none"> <li>- Ensuring these problem do not occur through sensitive and careful design</li> <li>- Involving the community (residents and traders) in this process</li> </ul>
Some sections of the local community not welcoming the changes and wanting the Area to stay as it is.	<ul style="list-style-type: none"> <li>- Consulting with the community (residents and traders) about the changes that will occur</li> <li>- Listening and being responsive to the views of existing residents</li> <li>- Implementing activities that will increase social interaction and build relationships between old and new residents</li> </ul>

## **Glenferrie Road – High Street Structure Plan**

### **Background Transportation Report**

November 2014

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## Table of Contents

<b>1. INTRODUCTION</b>	<b>2</b>
<b>2. ACCESS AND MOVEMENT ISSUES</b>	<b>2</b>
2.1 FOCUS ON VEHICLE MOVEMENT WITHIN THE CENTRE	2
2.2 TRAFFIC AND PARKING CONGESTION AROUND SCHOOLS	2
2.3 INCONSISTENT PEDESTRIAN ENVIRONMENT	3
2.4 HIGH STREET SPEED LIMIT IMPLICATIONS	3
2.5 LACK OF CYCLING INFRASTRUCTURE	3
2.6 DELAYS TO TRAMS	4
2.7 DEMAND FOR PARKING	4
<b>3. OPPORTUNITIES</b>	<b>5</b>
3.1 ENHANCED WALKABILITY	5
3.2 UTILITY TRIPS BY BICYCLE	5
3.3 ARMADALE STATION PRECINCT IMPROVEMENTS	6
3.4 ENCOURAGING SUSTAINABLE TRANSPORT IN NEW DEVELOPMENTS	6
<b>4. POLICY CONTEXT</b>	<b>7</b>
4.1 BACKGROUND	7
4.2 OBJECTIVES OF THE STRUCTURE PLANNING PROCESS	8
4.3 TRANSPORT POLICY	8
<b>5. TRANSPORT NETWORK</b>	<b>11</b>
5.1 ARTERIAL ROAD NETWORK	11
5.2 SURROUNDING STREETS	12
<b>6. WALKING</b>	<b>12</b>
6.1 POLICY	12
6.2 EXISTING CONDITIONS	13
6.3 CURRENT PROPOSALS	14
<b>7. CYCLING</b>	<b>15</b>
7.1 POLICY	15
7.2 EXISTING CONDITIONS	15
7.3 CURRENT PROPOSALS	17
<b>8. PUBLIC TRANSPORT</b>	<b>17</b>
8.1 POLICY	17
8.2 EXISTING CONDITIONS	18
8.3 CURRENT PROPOSALS	19
<b>9. MOTOR VEHICLES</b>	<b>19</b>
9.1 POLICY	19
9.2 EXISTING CONDITIONS – MOVEMENT	20
9.3 EXISTING CONDITIONS – PARKING	20
9.4 CURRENT PROPOSALS	21

## 1. INTRODUCTION

O'Brien Traffic has been engaged by the City of Stonnington to provide transportation advice in relation to the development of a Structure Plan for the Glenferrie Road - High Street (GRHS) Activity Centre.

This advice was mainly provided within two reports issued to Council in August 2014. These reports were an *Issues and Opportunity Report* dated 12 August 2014 and a *Background Transport Report* also dated 14 August 2014. These two reports have now been combined into this *Background Transportation Report* so that it can be provided as background information to accompany the Draft Structure Plan during the consultation phase.

The first part of this transportation report provides an analysis of the access and movement issues within the Activity Centre and identifies potential opportunities to be investigated as part of the structure planning process.

The second part of this report provides base of information on the policy context of transport within the activity centre and scopes existing conditions to assist in the creation of the Structure Plan.

## 2. ACCESS AND MOVEMENT ISSUES

The following issues have been identified for Glenferrie Road-High Street Activity Centre that will require an appropriate response in the Structure Plan.

### 2.1 Focus on Vehicle Movement within the Centre

Both Glenferrie Road and High Street are designated by VicRoads as having pedestrian, cycling and public transport priority. However, historically focus has been on planning for vehicle movement and on-street car parking. High Street also is designated as a 'traffic priority' route with associated clearways which has limited the improvement opportunities for other modes. This has resulted in a situation where the walking environment along Glenferrie Road is generally of a higher quality than High Street.

**Response:** The Structure Plan should support Council's Sustainable Transport Policy priority list of modes.

### 2.2 Traffic and Parking Congestion around Schools

The existence of schools within the study area particularly St Josephs and De La Salle adjacent to the Civic Precinct and Lauriston Girls School further north from the study area provides a significant attractor for vehicular traffic during pick-up and drop off times, which correspond with the morning peak, and bring forward the evening peak. Whilst it contributes to the Glenferrie Road local economy spine, this heavy traffic hinders safe and efficient movement of vehicles, cyclists and pedestrians.

**Response:** Opportunities to encourage greater utilisation of sustainable transport for the schools within the study area should be explored, through providing a high quality walking environment, Council supported in-school programs and designated safe routes. Increases in sustainable transport usage by students will naturally decrease the number of vehicle movements. Similarly, improved cycling facilities along Glenferrie Road may offer a better economic contribution than car based journeys to and from school.

### 2.3 Inconsistent Pedestrian Environment

A number of recent initiatives have prioritised pedestrian movement along Glenferrie Road with the implementation of 'continuous path crossings' and kerb build outs. Some of these measures are also present along High Street, although surfaces and intersection treatments are generally not of the same standard. Furthermore, there are no formal pedestrian crossing opportunities within 500 metres of the intersection of Glenferrie Road and High Street, requiring some visitors to the Centre to walk considerable distances to controlled crossing locations.

**Response:** The pedestrian infrastructure implemented on both streets should continue to be of a high standard, with a consistent approach to both High Street and Glenferrie Road adopted. Additionally, surveys of pedestrian crossing movements should be considered to determine whether additional signalised pedestrian crossings are warranted within the Centre.

### 2.4 High Street Speed Limit Implications

The speed environment (and posted limit) of 60 km/h reduces pedestrian amenity and makes informal crossing more difficult. Additionally, a 60 km/h speed limit increases the risks to cyclists and discourages less confident riders from using this mode of transport to access the Centre.

**Response:** The Structure Plan should strongly support the current proposal to reduce the speed limit on High Street to 40 km/h, which will support pedestrian and cycling activity within the Centre.

### 2.5 Lack of Cycling Infrastructure

Both Glenferrie Road and High Street form part of VicRoads' Principal Bicycle Network (PBN), but do not incorporate any dedicated cycling lanes. It is likely that the lack of these facilities discourages potential bike riders from cycling to the Centre, and is inconsistent with Council's Cycling Strategy and VicRoads' designation of both roads as priority cycling routes. External funding for these VicRoads-responsible projects is required to implement cycle facilities on these roads, and VicRoads currently do not have a budget for improvements for cyclists.

**Response:** Council should continue to lobby VicRoads for cycling infrastructure. As suggested by Council's draft Cycling Strategy, Council could fund some studies into potential facilities on Glenferrie Road and High Street; so that these projects are able to be implemented within a short time frame should funding become available.

## 2.6 Delays to Trams

The Glenferrie Road/ High Street Activity Centre is well served by public transport, particularly in relation to fixed rail. There are three separate tram routes operating along High Street, Glenferrie Road and Wattletree Road. Whilst providing access to the city, these tram services also provide access to and from local and nearby centres, such as Hawthorn, Prahran and St Kilda. Trams from these adjoining areas suffer significant delays at peak times due to the traffic congestion on those routes, making travel by tram less attractive to users.

**Response:** The Structure Plan should advocate the use of tram priority measures at traffic signals to reduce delays to tram users. Furthermore, the benefits of an eastbound part-time tram lane on High Street, operating during the evening peak hours should be investigated.

New and improved infrastructure appropriate to the Centre should be explored to provide a safer and highly accessible public transport network.

## 2.7 Demand for Parking

Provision of convenient car parking is of key concern to visitors to the Centre. Whilst there is generally sufficient short-term parking for shoppers, at times parking opportunities become limited. Surveys also reveal that shoppers on High Street who travel to the speciality shops may be seeking longer term car parking than is currently available. At times when there are limited parking opportunities available, the number of drivers looking for car parks and circulating also increases, this leads to increased congestion on the local road network.

Regarding increasing parking space demand there appears to be no opportunity for the Council to significantly increase parking supply without the construction of costly decked or underground parking structures. There is also limited opportunity to provide for additional customer parking on development sites (due to the fine grained nature of most sites).

**Response:** Given future development and increased activity in the Centre, planning for transport to and from the Centre must focus on more space efficient and sustainable modes of travel, as outlined in Council's Draft Integrated Transport Plan. Cars and commercial vehicles will need to be acknowledged and accommodated as part of a balanced approach to movement in the area, but should not be the main focus.

The Structure Plan should also support a parking system which maximises the use of existing car parking facilities. This could include changes to existing parking

restrictions to maximise the availability of car parking for visitors to the Centre. These changes could include the conversion of all day car parking to shorter term parking, a greater offering of 'car share' alternatives and potentially demand management. For shorter local trips and for worker parking, changes to car parking may influence a shift towards more sustainable modes of transport.

Alternatively, opportunities exist to explore well integrated development of existing surface parking areas into decked or underground parking. It is noted however that there may be significant cost and community barriers to this.

### 3. OPPORTUNITIES

The following opportunities have been identified for Glenferrie Road-High Street Activity Centre that will require an appropriate response in the Structure Plan.

#### 3.1 Enhanced Walkability

Irrespective of how visitors or residents to the Centre arrive, at some point they are all pedestrians. The provision of a good quality walking environment can add to the attractiveness of the Centre and encourage new visitors, whilst ensuring that existing users stay longer, whether for social interaction, shopping or eating. Whilst some public realm works have been undertaken already within the Study Area to improve the pedestrian realm, additional measures need to be explored to further enhance the walkability of the Centre.

**Response:** There are a number of measures which could further enhance walkability. There is little in the way of pedestrian way finding signage within the Centre or to connect to key nodes within the residential hinterland such as open space. If this were to be implemented it would assist pedestrians in finding their way to important destinations, and highlight walking times to train stations.

Measures such as ensuring developments fronting High Street and Glenferrie Road provide weather protection in the form of canopies would improve walkability during periods of inclement weather. The provision of more pause points through seats within the public realm for pedestrians to wait or rest also greatly enhances the quality of the pedestrian experience, and increases the desirability of walking as a transport mode.

#### 3.2 Utility Trips by Bicycle

The relative density of existing neighbourhoods in the vicinity of the activity Centre and the close proximity of key attractions and services (particularly in relation to the services offered on Glenferrie Road) are ideally suited to travel by bicycle. Given the potential growth in the number of people living and working in the Centre and the surrounding areas, the demand for travel is likely to increase in the future. Enabling and encouraging access to the Centre by bicycle has a number of benefits, including less vehicular congestion and reduced demand for car parking.

One type of bicycle trip that is not currently catered for is utility trips. These trips are generally for specific purposes such as to visit shops and services, and are shorter (up to 2 km), often at slower speeds. The typical characteristics of cyclists undertaking these trips are that they prefer low-stress routes and cycle in 'everyday' clothing. By providing cycling infrastructure aimed at this user type, demand could be reduced for other modes of transport.

**Response:** In addition to addressing the on-road cycling infrastructure issues, measures to encourage cycling for utility trips would include alternative designated routes on quieter streets through the activity centre, review of existing cycle parking facilities, the provision of additional parking facilities in areas of high demand (e.g. cafés), improved secure cycle parking at rail stations, and a bicycle wayfinding strategy that guides bike riders to the Centre via low stress routes.

### 3.3 Armadale Station Precinct Improvements

The area between Armadale Station and High Street comprises an assortment of buildings and infrastructure, including a good quality pedestrian link through Kings Arcade. The road network in this precinct generally consists of one lane streets and parking with narrow or no footpath. Considering the demand for pedestrian access between the station and High Street and the comparatively low number of vehicle movements to the adjoining uses, it is considered that the design of this area has been heavily focussed on providing for vehicle access over pedestrian amenity.

**Response:** Ability exists to enhance pedestrian access between the Station and High Street through the provision of 'after hours' pedestrian access through Kings Arcade. It is also recommended that a shared space (i.e. areas where cars are slowed to 10 km/h and pedestrians are given the space of the whole road reserve to use) is established along the length of Morey Street and Kingsway. These improvements should include public realm and lighting improvements. The benefits of natural surveillance of this area should also be considered in relation to any adjoining development proposal. New crossovers to Kings Way should be avoided where possible, or well managed to ensure pedestrian prioritisation. All of the above is supported by the existing Council's Walking Policy.

### 3.4 Encouraging Sustainable Transport in New Developments

Residential development within the Centre is well served by a variety of services and has the benefit of excellent public transport to the City and surrounding areas. Therefore new development in this location is ideally suited to encourage travel by sustainable modes, and limit the impact on the Centre through less demand for car parking and vehicular travel.

**Response:** The Structure Plan should support development which encourages low car use due to the availability of alternative transport modes and the wide variety of goods and services available in the Centre (and accessible by walking). In enabling



low car use developments, supporting measures such as the provision of cycle parking above the Planning Scheme requirements should be encouraged, in addition to supporting the provision of car sharing schemes and appropriate car parking policy.

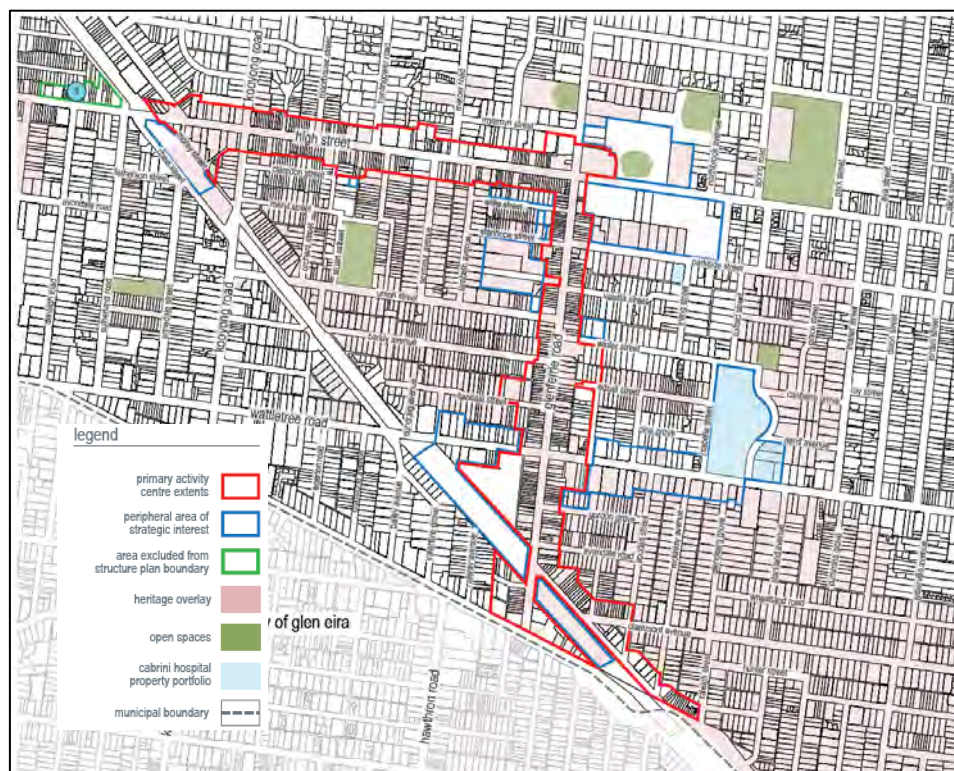
## 4. POLICY CONTEXT

### 4.1 Background

The Stonnington Planning Scheme designates the commercial centres of Glenferrie Road, Malvern and High Street, Armadale as separate Major Activity Centres. Within the Planning Scheme each of the centres has separate strategic directions, with Glenferrie Road, Malvern's role being to act as a local centre for goods and services, whilst High Street, Armadale's focus is speciality retailing with a regional focus.

The combined activity centre is also identified in the Metropolitan Planning Strategy (Plan Melbourne) as an 'existing activity centre'.

As part of the preparation of the Activity Centre Structure Plan, a primary and peripheral boundary was nominated. The Structure Plan boundaries are shown in **Figure 1**.



**Figure 1: Structure Plan Boundaries**

It is intended that the Structure Plan will set out a 10-20 year strategic framework for the future development of the centre. It will guide the current and future form and function of the centre in accordance with a shared vision. It will also provide a framework for the integration of Council's services and programs, existing policies and strategies and will consider the role of the centre in the context of the broader municipality and the region.

Transport is a key component of the structure planning process. Within Stonnington transport priorities are guided by the Sustainable Transport Policy, and supported by the emerging Integrated Transport Plan (ITP) which is a long-term plan integrating land use planning and transport.

## 4.2 Objectives of the Structure Planning Process

Structure planning is the process of creating a framework for the integrated development of an activity centre.

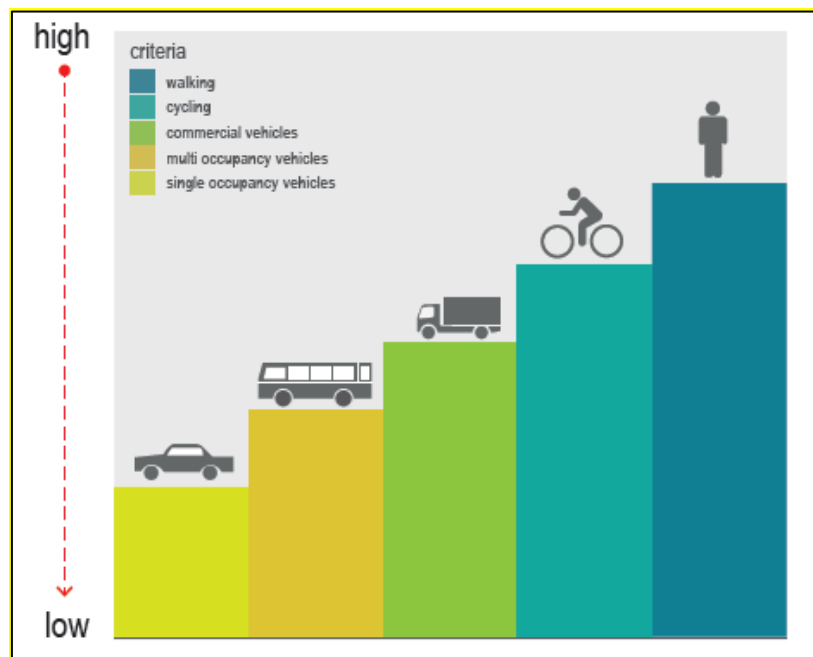
Key objectives of the structure planning process in relation to transport are outlined as follows:

- Set the framework for the use and development of the land in and around the centre to meet the future needs of the community and provide direction to investors about preferred locations for investments.
- Provide a mobility network and traffic and car parking management (including traffic generation, circulation and access) that encourages and supports sustainable transport mode choices.
- Identify opportunities to promote walkability and enhance pedestrian connectivity through public realm improvements and creative public/private design responses.
- Provide for well-designed and well located public spaces and public open space (including active and passive open space) that serves the needs of the community and visitors to the centre.
- Consider whether there are opportunities to provide for small workspaces/workshops and start-up businesses in laneways, at the rear of shops, in arcades, adjacent to car parking areas.
- Provide greater certainty for residents and developers about appropriate built form outcomes.

## 4.3 Transport Policy

The Sustainable Transport Policy (2008) guides Council's strategic, statutory, operational and service activities relating to the transport network. It aims to create an integrated, sustainable, safe, convenient, and accessible transport network that responds to the municipality's style and character, minimises impact on the environment and overall amenity, enhances liveability, promotes wellbeing, vitality and prosperity and benefits all users. It proposes this is achieved by a series of policy

principles, including; reducing car dependence; improving pedestrian, cycling and public transport connections and accessibility; and improving safety. In recognising that travel relates to the movement of people (and goods where appropriate), the Policy outlines a delivery priority that preferences sustainable transport modes as outlined in **Figure 2**.



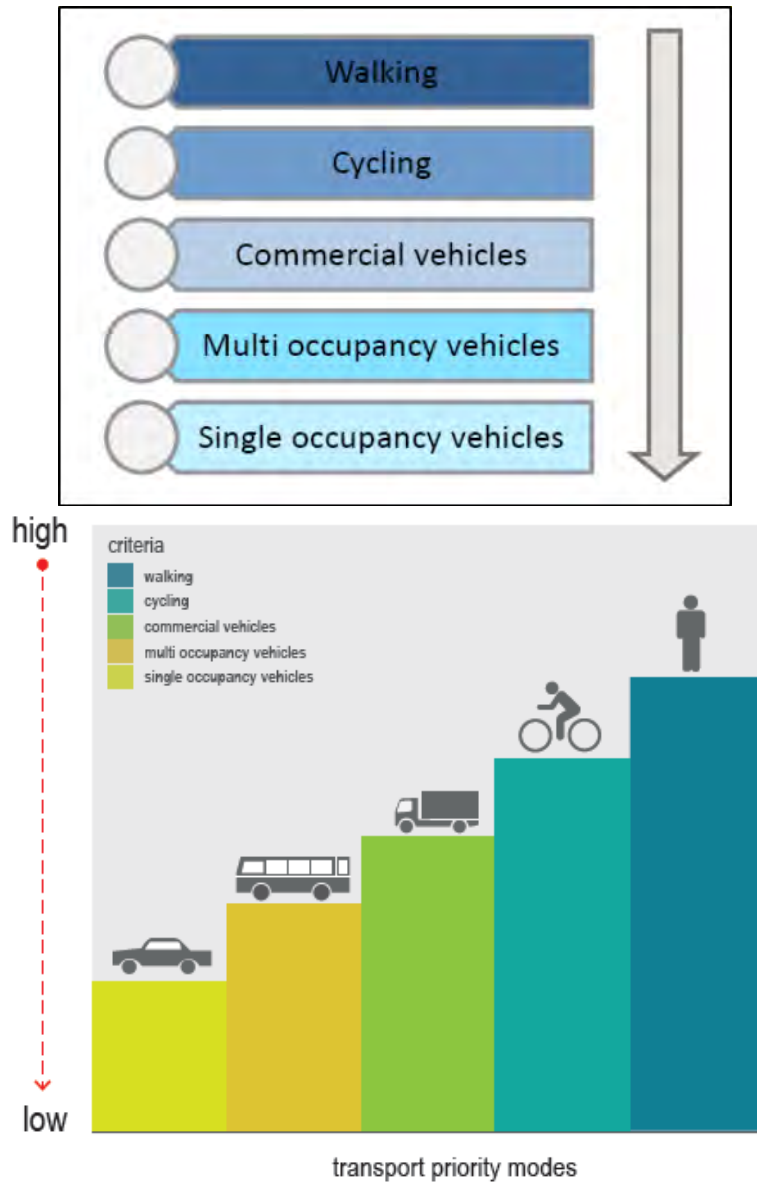
**Figure 2: Transport Priority Modes**

For reference it is noted that public transport is not included in this hierarchy. Whilst trams could be considered multiple occupancy vehicles, it is likely that public transport would sit above commercial vehicles in such a hierarchy.]

The Sustainable Transport Policy is supported by the Draft Stonnington Integrated Transport Plan (ITP). This is a long term plan with the aim of facilitating increased integration between transport and land use planning.

The objective of the strategy is integrate transport, land use planning and development to maximise accessibility, safety and sustainability of the transport network and the built environment. Central to its vision is the need for communities to be “well connected”, with facilities to encourage safe walking and cycling, the provision of good public transport and easy access to high quality local services. This policy includes a serves of strategies and actions to achieve this outcome.

The draft ITP identifies specific improvement projects to address deficiencies in transport. It recognises that travel relates to the movement of people (and goods where appropriate) and not to the movement of vehicles. Based on this approach, the draft ITP states that priority will be given to transport modes in the order outlined in **Figure 3**.



SOURCE: DRAFT STONNINGTON ITP

**Figure 3: Transport Priority Modes**

Note that the highest two priorities are walking and cycling and the lowest is single occupancy car travel.

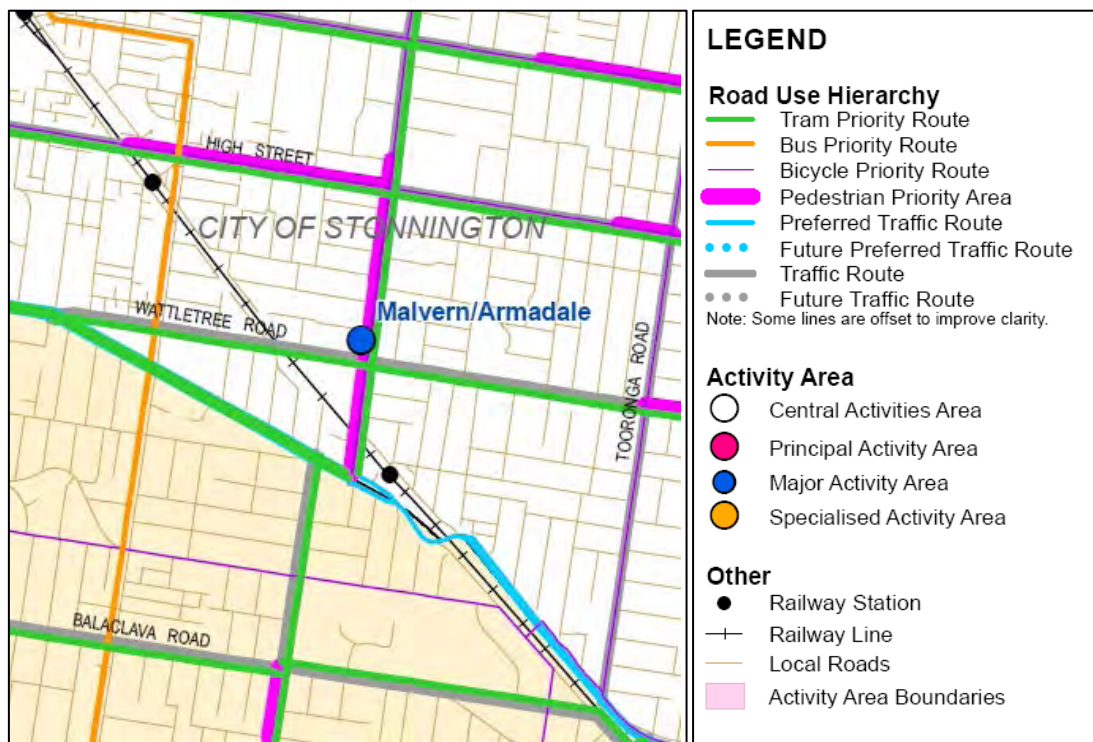
## 5. TRANSPORT NETWORK

### 5.1 Arterial Road Network

Glenferrie Road and High Street are the primary roads within the activity centre, and along with Wattletree Road are all declared state arterial roads, under the control of VicRoads. For these roads, VicRoads has operational responsibility, including responsibility for improvements and maintenance of road infrastructure. Access to these roads (from side streets and developments) is also the responsibility of VicRoads whose agreement is required for any changes. Council is responsible for the footpath areas along these arterial roads and parking.

In recent years, VicRoads has developed SmartRoads. SmartRoads is an approach that manages road space by giving priority use of the road to different transport modes at particular times of the day. This aims to support land use and transport planning and to better consider the effects on the surrounding community, rather than simply speed and ease of movement for motorised traffic. These plans often aim to encourage alternative vehicle routes around activity centres and to prioritise local transport including walking, public transport and cycling.

Within the Activity Centre, under SmartRoads both High Street and Glenferrie Road are designated as pedestrian priority areas. Both roads are also designated as tram and bicycle priority routes. However, High Street is also designated as a traffic route (refer Figure 3).



SOURCE: VICROADS SMARTROADS

Figure 4: Smart Roads Hierarchy

## 5.2 Surrounding Streets

All non-arterial streets within the Structure Plan area are under the control of Council. An aim of Stonnington's ITP is to make Stonnington more sustainable by having more people in the municipality choosing to walk, cycle and to use public transport more often and driving their cars less.

Design of the public realm is important in structure plans, due to the importance of promoting pedestrian access within activity centres to increase walkability, access to public transport, the viability of activity centres, and in providing opportunities for social interaction.

The Structure Plan is to take into account opportunities to encourage increased walkability and connectivity and provide for sustainable transport options such as bicycle and car share schemes on the surrounding streets.

## 6. WALKING

### 6.1 Policy

The draft ITP ranks walking as its top priority mode and notes that pedestrian accessibility is an important element of the transport system for the many short trips, including trips to public transport stops. It notes that walkability of areas can be affected by a perceived or actual lack of connectivity, safety concerns, attractiveness of streets, public realm, and inadequate weather protection. Glenferrie Road and High Street are also designated pedestrian priority areas in VicRoads' SmartRoads system.

The draft ITP lists key attributes of the public realm which assist in increasing walkability and connectivity as the:

- *Width of streets (including areas free of obstructions)*
- *Quality of paving and way finding signage;*
- *Adequate sight lines, lighting and other safety measures built into design (i.e. passive surveillance etc);*
- *Adequate weather protection;*
- *Amenity (i.e. street trees and visual outlook); and*
- *Location and type of pedestrian crossing points*

Stonnington also has Walking Policy, adopted in April 2011. The vision of the policy is:

*"To progressively make Stonnington's suburbs and retail precincts world-class walking areas, where it is safe and convenient to walk to destinations, where people are actively encouraged and enabled to walk, and where key community stakeholder groups and the community at large support Council's efforts to increase the amount of walking."*

The policy target is to:

*“increase the share of walking trips made by Stonnington residents in Stonnington by 50% by 2020.”*

The policy proposes a three pronged approach to achieving this target, through programs and events, information (including wayfinding signage), and good quality walking environments.

In regard to the provision of good quality walking areas, the policy highlights; flat footpaths with low gradients, pram ramps and tactile pavers; a high level of amenity with seating, lighting and landscaping; and a good ‘on-road’ environment with ample crossings, low speed limits and traffic management devices. The Policy recommends the *Pedestrian Planning and Design Guide* (December 2007) produced by the New Zealand Transport Agency as the preferred manual for providing good practice pedestrian infrastructure.

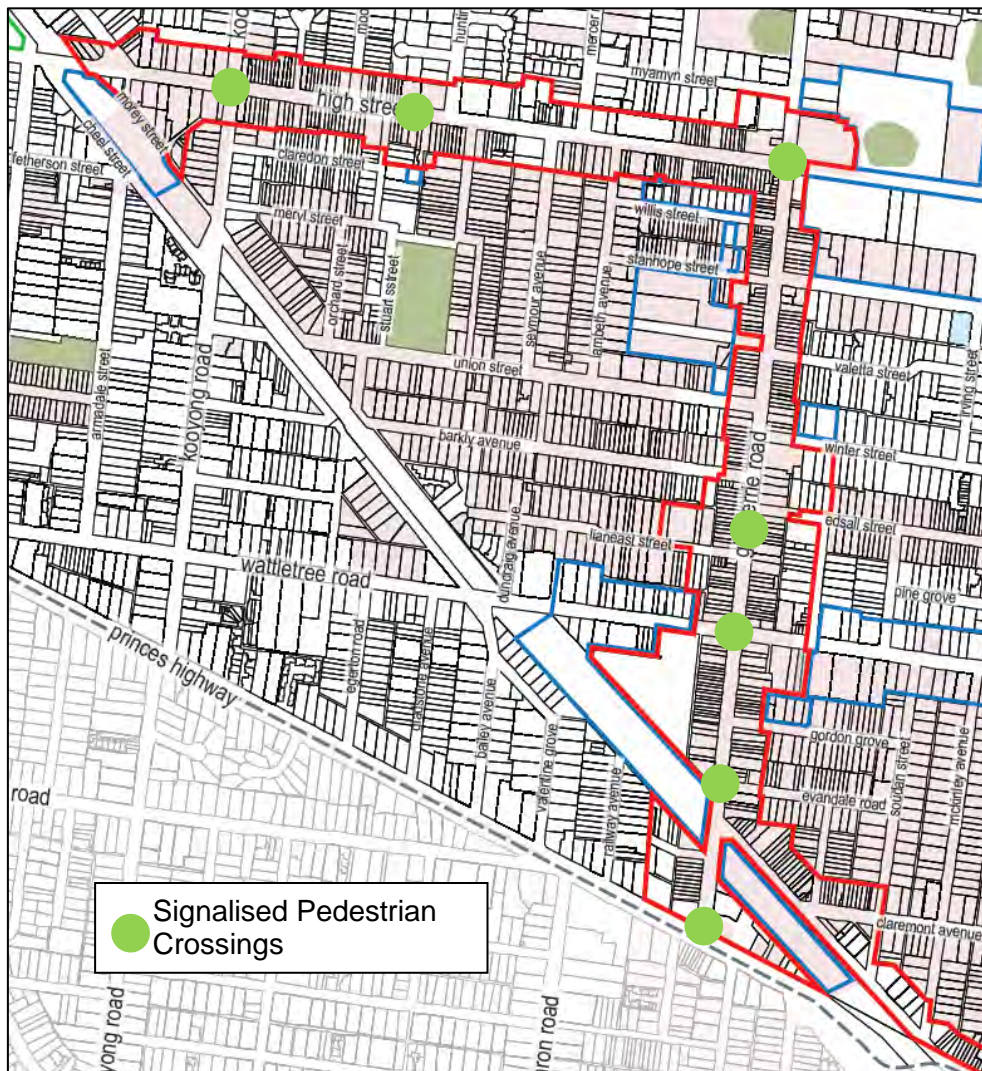
## 6.2 Existing Conditions

The walking environment along Glenferrie Road and High Street is generally of a high quality. In line with the level of activity on both these streets, pedestrian volumes are higher on Glenferrie Road than on High Street.

Footpaths on both streets are generally of a high quality, and are generally flat and even, and well maintained (although the surfaces are generally newer and of better quality on Glenferrie Road). ‘Continuous path of travel’ crossings have been installed over side roads all along Glenferrie Road, and on most side road crossings of High Street. In addition, kerb buildouts have been constructed on Glenferrie Road to provide improved visibility for exiting vehicles, reduced crossing widths, and additional space for seating or footpath trading. Footpath trading boundary indicators are installed and generally provide sufficient space, although at some locations along Glenferrie Road (where cafes operate) there can be localised pedestrian congestion at times.

A timed 40km/h speed limit operates along Glenferrie Road throughout the shopping centre, and while the 50 km/h default limit applies to Council Roads in the area, a 60 km/h posted speed limit is in place on High Street.

There are a number of signalised pedestrian crossings of Glenferrie Road and High Street, with both pedestrian operated signals and signalised intersections, and all with yellow ‘walksafe’ treatments. Some parts of these key streets are served well, however, the spacing between crossings west along High Street, and south along Glenferrie Road from the intersection of these two roads is 500 metres in each direction (refer **Figure 5**).



**Figure 5: Signalled Pedestrian Crossings**

On the side roads adjoining Glenferrie Road and High Street the footpath width and design is generally acceptable, with adequate provision of pram crossings. Street name signage is adequate, but there is little in the way of pedestrian wayfinding signage.

### 6.3 Current Proposals

VicRoads are currently investigating the implementation of a 24 hr 40 km/hr speed zone along High Street from St Kilda Road to Maitland Street, which would include all of High Street within the Centre. As part of this review they are also investigating the extension of the Glenferrie Road 40 km/h zone north from the intersection with High Street, and changes to its hours of operation.



## 7. CYCLING

### 7.1 Policy

The Sustainable Transport Policy ranks cycling as its second to top priority, and Council are currently in the process of updating their Cycling Strategy. The key aim of the draft Cycling Strategy is to:

*“enhance the physical and social environments in order to support more people to cycle, and people to cycle more often.”*

One of the core focuses of the strategy is ensuring good access to key local destinations, such as activity centres. The draft strategy includes a number of emerging strategic directions, these include:

- Continuing to develop and improve the cycling network and associated facilities to provide access to local places of congregation and prioritising the VicRoads designated Priority Bicycle Corridors;
- Supporting people at their destinations through enhancing the end-of-trip experience;
- Having safety as a paramount consideration, and to influence a culture of sharing of road space; and
- Reviewing all way-finding signage.

Glenferrie Road and High Street also form part of VicRoads Principal Bicycle Network (PBN), and are listed as bicycle priority routes in VicRoads SmartRoads system.

### 7.2 Existing Conditions

The medium density nature of residential development in the vicinity of the activity centre and the close proximity of key attractions and services support travel by bicycle. The layout of the street network in the surrounding area also provides for permeable travel north-south and east-west. However, the most direct roads are state arterials such as High Street and Glenferrie Road, which have heavy traffic at times, and limited space available for cycling.

As noted previously High Street and Glenferrie Road form part of VicRoads Principal Bicycle Network (PBN). This is a network of bicycle routes providing access to major destinations in the Melbourne metropolitan area. Whilst this designation highlights the importance of these roads for cycling, and raises the potential for inclusion of cycling facilities in the long-term, there are currently no bicycle facilities (for example cycle lanes), currently provided.

There is also an absence of alternative designated routes through the activity centre, although there are some signed informal bicycle routes on local streets with lower traffic volumes (refer **Figure 6**). However, whilst these are suitable for less confident cyclists travelling short distances (for example undertaking local utility trips to shops and schools), they are less suitable for long distance travel (such as cycle to work commuters).



SOURCE: TRAVELSMART

**Figure 6: Bicycle Routes around the Activity Centre**

There are a number of on-street bicycle parking hoops provided within the Activity Centre. Some of these are heavily utilised, which result in cyclists locking bicycles to less secure street furniture such as sign posts.

It is recommended that bicycle parking is provided at regular locations within the Activity Centre and reviewed at a regular basis (parking patterns can alter as businesses and community facilities change).

It is likely that the number of people living locally and cycling to rail stations as part of the commute may increase in the future. Currently, a small number of bicycle spaces are provided at Malvern and Armadale Rail Stations within the Activity Centre.

Wayfinding for cyclists is especially important for new cyclists as the most suitable routes may not coincide with the routes generally taken when walking or travelling by motor-vehicles. There are currently no bicycle wayfinding signs within the Activity Centre, apart from those indicating informal bicycle routes (these signs do not include destinations or distances).

### 7.3 Current Proposals

A number of bicycle infrastructure improvements have been identified in Council's emerging Bicycle Strategy. These include a review of bicycle wayfinding across the municipality, cycle lanes along High Street and Glenferrie Road within the Activity Centre, and cycle storage boxes on the approaches to the signalised intersections along these two arterial roads.

The proposed cycle lanes in High Street and Glenferrie Road include a shared parking and cycle lane in Glenferrie Road, and a peak hour cycle lane in High Street (similar to Sydney Road, Brunswick). However, external funding for these VicRoads-responsible projects is required for these VicRoads responsible roads, and VicRoads currently do not have a budget for improvements for cyclists.

## 8. PUBLIC TRANSPORT

### 8.1 Policy

The emerging Integrated Transport Plan lists the following objective in relation to public transport in Stonnington:

*'To facilitate an increase in the use of public transport'*

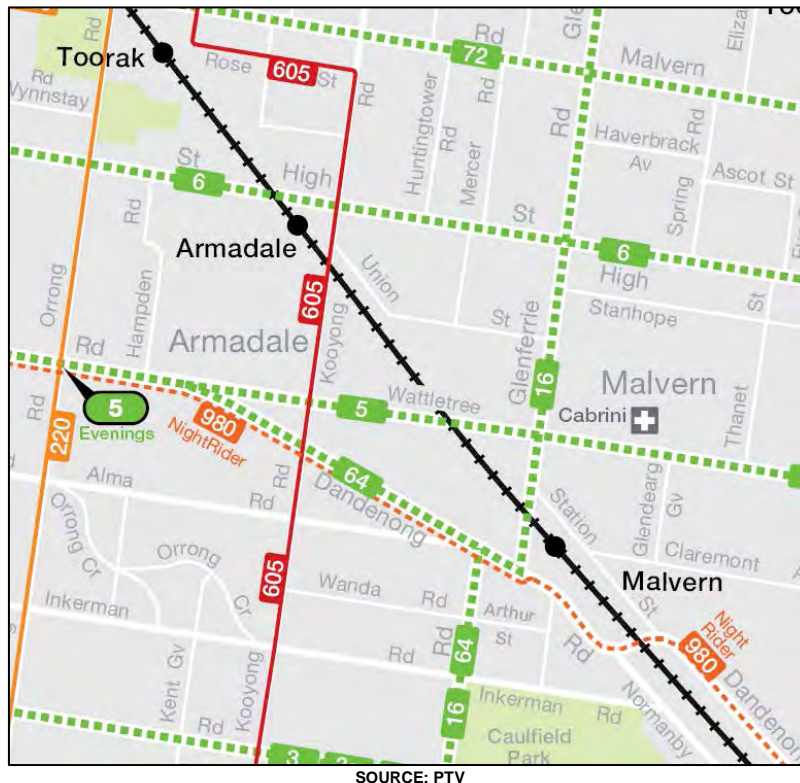
Within the Activity Centre, there are two rail stations, three tram routes and one bus route. These services are the responsibility of Public Transport Victoria (PTV), who are the statutory authority responsible for providing, coordinating and promoting public transport in Victoria. PTV contracts these services out to companies providing services such as Metro Trains, and Yarra Trams.

The biggest announcement by the Victorian Government in relation to services within the Activity Centre is the upgrade of the Dandenong Rail corridor (served by the two stations within the Centre) including new signalling and trains. These proposals are intended to improve passenger carrying capacity, and would impact positively on the ability of the existing services to cater for future population growth and mode shift within the Activity Centre. This upgrade requires additional investigation to understand the implication of freight route designation on passenger capacity.

In relation to trams, one legislative requirement will continue to impact on the design of stops and vehicles. This is the Disability Discrimination Act (DDA). The DDA requires that services are accessible to those with disabilities. For example, Yarra Trams in their Accessibility Action Plan outlines improving access to stops as an improvement priority. This has led to new accessible tram stops being implemented and new styles of tram stops being provided in some locations (for example the 'easy access' stop trial on Bridge Road, Richmond).

## 8.2 Existing Conditions

The Activity Centre is well served by public transport, particularly in relation to rail, with two stations being located in the Centre (Armadale, and Malvern). These stations are on the Frankston, Pakenham and Cranbourne lines, and within Zone 1. In addition there are three separate tram routes operating along High Street, Glenferrie Road and Wattletree Road. The route 605 bus also operates within the Centre along Kooyong Road. These services are shown in **Figure 7**.



**Figure 7: Public Transport around the Activity Centre**

Malvern Rail Station is approximately 150 metres walk from Glenferrie Road. It is accessible from both sides of the rail corridor, and includes prominent wayfinding signage. The station includes step free access from street to platform and is staffed in the morning peak period.

Armadale Station is of identical design, and is also staffed. However, the pedestrian route from the Activity Centre (High Street) is less obvious (although well signed), and is along a generally poor quality pedestrian environment along Morey Street, or alternatively through the privately operated Kings Arcade (limited opening hours) through to the intersection of High Street and Kooyong Road.

The numbers of passengers using Malvern Station is higher than those using Armadale Station.

All tram stops within the Centre are kerb access stops where passengers wait on the footpath, crossing the road when the tram arrives, whilst all traffic stops. These stops are not accessible for passengers with mobility impairments. Other criticisms include longer dwell times and higher safety risks than other stop types. Busier stops in the area include shelters and seating.

Tram priority is included at signalised intersections within the Centre, and a westbound morning peak tram only lane operates along High Street for the Route 6 tram. This provides quicker journey times than the adjacent traffic lane.

A tram depot is also located on Glenferrie Road within the Centre accessed via an unsignalised intersection in the vicinity of Valletta Street.

### 8.3 Current Proposals

As noted above the State Government has announced capacity improvements for the rail corridor.

## 9. MOTOR VEHICLES

### 9.1 Policy

Private vehicles (particularly single occupant vehicles) are the lowest priority under the emerging Integrated Transport Strategy. However, the predominant mode of transport within Stonnington is currently the motor vehicle. Although areas with higher residential density, a wide range of land uses and public transport services such as the Activity Centre have a lower proportion of the population travelling by motor vehicle, particularly to places of employment.

High reliance on private motor vehicles results in numerous problems, including congestion, road safety problems, and a less pleasant environment for other users (such as pedestrians and cyclists). VicRoads SmartRoads system sets out a network of 'primary traffic routes' for through traffic away from activity centres. In the vicinity of the Activity Centre, these routes are the Princes Highway for east-west travel and Williams Road for north-south travel.

Nearly all reported injury crashes occurring on the road involve at least one motor-vehicle. Council's Road Safety Policy (2008-2017) aims to reduce the road related fatalities and serious injuries in the Municipality by 30% over the ten year life of the Policy. It is noted that achieving this goal would save one life and prevent 47 serious injuries.

The Road Safety Policy includes the concept of 'Vision Zero', which is the philosophy of road safety that states that eventually no one will be killed or seriously injured within the road transport system. Its premise is that it can never be ethically acceptable that people are killed or seriously injured when moving within the road transport system.

The Vision Zero approach includes the following strategies:

- Aligning vehicle speed to the inherent safety of the system;
- Improving vehicles; and
- Stimulating the community to use the system in a safer way.

As part of the Policy, Council committed to investigating and applying innovative and current approaches to road and roadside road safety treatments. One new approach highlighted was the 'shared spaces principles' of road design. Shared spaces is a philosophy of road design that aims to reduce crash rates, particularly for pedestrians and cyclists. This approach includes shared spaces used by vehicles, pedestrians and cyclists with a minimum of signs and traffic controls and where decision-making is returned to users. This type of road space is engineered to naturally encourage lower speeds.

## 9.2 Existing Conditions – Movement

The main corridors for movement within the Centre are the arterial roads of Glenferrie Road (12,300 vehicles per day – 2012), High Street (16,600 vehicles per day – 2012) and Wattletree Road (13,100 vehicles per day – 2012). All other roads adjoining the Centre are local roads with the exception of Stanhope Street and Union Street, which are all under the control of Council. At peak times, the arterial roads in the area can become congested, with slow vehicle speeds and delays at intersections.

High Street and Glenferrie Road are approximately 14 metres wide through most of the centre, and generally consist of one traffic lane in each direction and parking on both sides. In peak periods, clearways operate on High Street and parking and stopping is restricted. In the morning peak, the clearway operates on the southern (westbound side), and on the opposite side and direction in the evening peak. In the morning peak one of the two lanes operates as a tram only lane providing tram priority.

## 9.3 Existing Conditions – Parking

There is a mix of on-street, off-street public, and off-street private parking within the centre. Parking restrictions apply to the on-street parking with typically a 1P restriction on Glenferrie Road, 2P restriction on High Street, and 2P restriction on one side of the side roads. Resident permit parking is in place on streets adjoining Glenferrie Road and High Street where there is predominantly residential development.

The largest off-street public parking facilities are the multi-level car park in Drysdale Street (2P restriction, except for the upper level which is unrestricted), and the at-grade car park on Winter Street (2P restriction). The largest private car park is the multi-level Malvern Central car park (690 spaces) accessed from Glenferrie Road.



Car park utilisation surveys have not been carried out for the centre in recent years, but anecdotal evidence is that whilst the available parking is highly utilised (especially the premium spaces on Glenferrie Road), there are generally convenient car parking spaces available with a 2P restriction.

Long term (all-day) parking is generally available in private car parks, or on the periphery of the centre (for example Glenferrie Road, north of High Street and in some local streets).

**9.4 Current Proposals**

VicRoads are currently investigating a 40 km/h speed limit for High Street (refer **section 6.3** of this report).

\* \* \* \* \*