

Feedback Summary and Next Steps:

Draft *Future Market Strategy*



Introduction

On 14 April 2021, Queen Victoria Market Pty Ltd (QVM Pty Ltd) released its draft five-year Strategy to support the Market's recovery from the pandemic and beyond for stakeholder feedback. This document provides:

- An overview of the stakeholder feedback process undertaken by QVM Pty Ltd
- A summary of feedback received from major stakeholders
- A summary of revisions that have been made to the Strategy informed by feedback and next steps.

Overview of the *Future Market Strategy*

The *Future Market Strategy* seeks to build on what people love about the Market and make it an even better place to visit, shop and trade.

The Strategy aims to preserve the Market's heritage and keep serving current customers, while enhancing the offer and experience to meet the needs of more Melburnians. A specific focus is attracting more people in the inner-city and people under 40 years of age who are currently underrepresented in Market visitation.

Supporting current traders to enhance existing offers as well as attracting innovative new businesses are priorities of the Strategy, supported by improvements to the trader experience, safety and operations, environmental sustainability and more.

Stakeholder feedback process

Over a six-week period, QVM Pty Ltd sought feedback on the draft *Future Market Strategy* from a range of people with an interest in the Market, including traders, customers, community and other stakeholders as follows:

- **Feedback from 110 Market traders and box hire operators** through 14 face-to-face engagement sessions, written and other verbal feedback. This represents approximately one quarter of businesses when taking into account traders with multiple leases and licences
- **182 feedback submissions** via the website form and email, largely from customers and local community
- **Meetings with a range of other stakeholders** including Victorian Government and local Parliamentary representatives; City of Melbourne; business and industry bodies; heritage bodies; and industry experts spanning retail, hospitality, events and property management.

Summary of stakeholder feedback

Feedback from Market traders and retail box hire operators

QVM Pty Ltd held 14 engagement sessions over a six-week period to seek feedback from Market traders and retail box hire operators on the draft *Future Market Strategy*. All traders were invited and encouraged to attend feedback sessions, or alternatively, provide separate written and verbal feedback.

110 Market traders and box hire operators provided feedback on the draft Strategy, largely through the intensive face-to-face engagement sessions, with a small amount of written and verbal feedback provided outside the sessions.

This represents approximately one quarter of businesses at the Market when taking into account those with multiple leases and licences. Based on previous trader engagement processes, this is a very high level of participation for Market traders based on previous engagement processes.

Summary of key feedback

The overwhelming majority of traders who provided feedback were either generally supportive or accepting of the overall draft Strategy.

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There was broad support for the following directions and proposals:

- **Attract more Melburnians, inner city locals and younger people**, provided current customers continue to be catered for (including tourists) and heritage is protected
- **Enhanced retail configurations**, including:
 - Reconfiguration of fruit and vegetable stalls from A-B Sheds to the Queen Street half of A-C Sheds and potentially D Shed
 - Reconfiguration and improved density of specialty shopping stalls in J-L Sheds and part of E Shed
- **Back of house/B2B area** in the Peel Street half of B, C, D Sheds
- **Fixed/lockable trading formats in Peel Street half of A/E Sheds** – some sought clarification that stall-based trading will be preserved, while others wanted more fixed/lockable formats than what is proposed
- **Allow stall-based specialty shopping traders to trade in the same position** to reduce time/cost of daily set-up/pack-down. Two traders expressed a preference/openness to rotating trading positions each day
- **Enhance/diversify the offer**, with some varied views about specific proposals as follows:
 - Most support more/diversified hospitality (including hospitality traders), with many accepting evening/7-day hospitality in some areas will help attract more people. Some felt the current level of hospitality is appropriate or cautioned against expanding the offer too much
 - General support to diversify the fresh produce offer – some felt more semi-prepared/ready-to-cook/ready-to-eat items will help attract new customers while others acknowledged the core ingredient offer also needs to remain to meet different customer needs
 - A number of traders felt the specialty shopping/services offer needs to be enhanced/diversified to help attract more Melburnians/locals, including some specific feedback about improving stall presentation
- **Enhancements to the Market experience**, such as more events and activations, weather protection and comfortable places to sit/dwell.

Feedback/areas requiring future clarification/work with traders

- General support for revised specialty shopping stall layout to improve customer experience, with **some anxiety/queries about trading locations and stall allocation criteria**
- While many acknowledged limited operating hours/days (particularly in the evening) are a barrier to attracting Melburnians, **most felt evening/7 day trade is not currently viable**. There was general sentiment that over time if there is customer demand there may be an opportunity to explore/trial this with traders
- Recognition that recent efforts to re-activate the Market and attract Melburnians on weekends have been effective, however **more consideration needs to be given to attracting people during the week**
- **Tenure for future trader leases and licences**, with general acceptance that those who are willing to invest in improvements (such as fit outs) would be offered longer tenure
- **Need to work with existing specialty shopping traders to enhance/diversify/fill gaps in the offer**, as well as attracting new traders
- **Ensure car park pricing is cost effective and prioritises Market visitors/customers** and interest in **exploring customer car parking discount/incentive** options with traders.

Renewal-related feedback for clarification and work with traders/City of Melbourne

- Significant **concern about disruption/impact of Renewal works**, particularly shed restorations, Trader and Northern Sheds – need to **work with impacted traders and factor in critical trading periods** to inform plans (multiple comments about avoiding disruption/relocating A, B, H, I Shed traders in lead up to Christmas)
- Vast majority believe a **minimum of 1,000 Market car parks in accessible locations** is required
- Core requirement for **space within the precinct for large trader vehicle/truck parking**
- Concern about **access to Queen Street for trader loading/unloading** during and following Renewal works
- Query about **plan for toilets in String Bean Alley** and general sentiment there are **insufficient amenities to serve traders and customers in the Peel Street half of J-M Sheds**
- Need to **work with retail 'box hire' operators to inform detailed plans for the back of house area** in the Peel Street half of C, D Sheds and **other changes that will have an impact on their operations**.

Feedback via website form and email

Over a four-week period, 182 submissions were made via the website form and via email from stakeholders with an interest in the Market, largely consisting of customers and local community. A small number of submissions from traders were received via the website and email which have been incorporated in the trader feedback summary.

Summary of key feedback

Due to the diversity of stakeholders there were varied views about the draft Strategy, with feedback largely relating to protecting heritage and character, and wider Renewal plans/works. Key themes and commentary included:

Feedback largely related to protecting heritage/character and Market Renewal plans/works.

- **Importance of protecting the Market's heritage/character**, including:
 - Comments about protecting heritage, no specific feedback on draft Strategy
 - Accept need to update infrastructure/offer/experience, but don't go too far
 - Want no change to the Market, with no comments on draft Strategy
 - General concern about changing the Market's heritage/character/core offer
- **Traders need to be supported** through affordable rent, security of tenure and input on future plans
- Importance of **convenient/affordable customer parking** and an **offer to cater to many customers/budgets**
- Need to **preserve core function and identity as a market** (main focus on fresh produce), with a number of submissions raising concerns about the Market becoming like a 'supermarket'/'shopping mall'
- The need to **preserve traditional stall-based trading for specialty shopping/services**
- Some **want to retain a traditional market shopping experience**, while **others want an enhanced offer, experience and environment to meet modern needs/expectations** in the following key areas:
 - More comfortable places to sit/relax/eat/drink
 - More specialised fresh produce offers (eg. Asian/Indian/Middle Eastern grocers, specialised delis, ready-to-eat/cook and semi-prepared items, and other products to reflect Melbourne's cultural diversity)
 - Diversified specialty shopping offer, with support for more local/quality goods – many described the current offer as being for tourists, repetitious and/or having imported/low quality goods
 - Enhanced and diversified hospitality options
 - More vegan options across all aspects of the offer
 - Evening trading hours to enable people to shop after work.

Key feedback areas for consideration (addressed in the final Strategy)

The below concerns were raised in many submissions which is not the intent and requires further clarification/explanation in the final Strategy:

- **Confusion about the term 'Food Hall'** which refers to the refurbishment and enhanced offer in the Food Court through Renewal. Some assumed this related to the Meat, Fish and Dairy Halls, which is not the case
- Concern the **focus on attracting more Melburnians**, in particular inner-city/younger people may **alienate other customers/visitors**. **Others feel more needs to be done to attract Melburnians**
- Clarification of the **definition of 'younger people'**
- **Currency of demographic data and market research sample sizes** that informed the draft Strategy
- **Absence of key performance indicators** to show how the Strategy will be measured/evaluated.

Note: Approximately 20-30% of submissions appeared to be similar or identical form responses informed by an organised campaign that may have contributed to unnecessary anxiety/confusion about fundamental changes to the Market's heritage, character, function and core offer, which is not planned. These responses were in stark contrast to the vast majority of trader feedback, which was generally accepting or supportive.

Renewal-related feedback for clarification and work with traders/City of Melbourne

Many submissions raised specific concerns about the details of Market Renewal plans. While these are out of scope of the draft Strategy, the below key feedback will be considered in future Renewal planning:

- **Removal of customer car parking from Queen Street** and the **current at grade Market car park**
- **Impact of changes to Queen Street access** on trader loading/unloading and viability of their businesses
- **Seeking an updated Business Case and Master Plan** for current Renewal plans.

Feedback received through meetings with other stakeholders

Meetings were held with a range of other stakeholders to seek feedback on the draft Future Market Strategy, including Victorian Government and Parliamentary representatives; City of Melbourne; business and industry bodies; heritage bodies; and industry experts spanning retail, hospitality, events and commercial real estate.

Summary of key feedback

Stakeholders were broadly supportive of the draft Strategy and understanding of the drivers, rationale and overall direction of the draft Strategy, **accepting adaptation is necessary to support the Market's recovery and future.**

There was general agreement **the draft Strategy respects the heritage and character of the Market** while making **necessary enhancements to be relevant and viable.**

Stakeholders were broadly supportive of the draft Strategy and the need for change for future viability.

Areas with the strongest support included:

- **Enhancements to attract more Melburnians**, particularly younger and inner-city people
- **Enhance/diversify the offer and experience** – specific comments:
 - Maintain a balance by retaining the essence/what is good about the Market while making changes to ensure it is relevant, accessible and affordable for a range of people
 - Enhancements should not detract from the core fresh produce offer
 - More/enhanced hospitality, places to sit/dwell and events will help attract younger/inner-city people
 - Need to enhance/diversify specialty shopping/services offer to be relevant to more Melburnians – strong support for proposed 'Melbourne Makers' precinct
- **Re-configuration of specialty shopping and Upper Market fruit and vegetable stalls**
- Enhancements to:
 - **Core Market and trader infrastructure/facilities and customer amenities**
 - **Improved operations and safety within the precinct**, including separation of vehicles from pedestrians and stronger vehicle access controls.

Feedback/areas for future consideration

- Need to **protect trader livelihoods/viability** and **work with traders to inform detailed implementation**
- Keep working with City of Melbourne and authorities to **address access for customers and traders to the Market in light of increasing traffic/congestion** in the surrounding area
- **Ensure plans meet heritage requirements**, including new trading formats and any additional facilities required under the Open Sheds/other parts of the Market to support more quick/casual food and drink.

Revisions to the Strategy and next steps

The feedback process has captured varied views about the future of Market. While Market traders and wider stakeholders were generally supportive and accepting of the draft Strategy, submissions from customers and community showed a diversity of views on the Market's offer, experience and operations.

This reinforces the need for a diverse Market offer and experience that meets the needs of a range of customers and visitors, existing and new. This is the aim of the *Future Market Strategy*.

Revisions to the final Strategy to address feedback

Changes have been made to the Strategy to address key feedback themes and concerns, balancing the varied views and needs of stakeholders. Feedback has been considered alongside requirements of the QVM Pty Ltd and the City of Melbourne, and data, research, insights and trader/customer feedback that informed the draft Strategy.

Key areas where there were differing views include:

- **Improvements to physical environment through the City of Melbourne Renewal Program** – some support/accept the need for modern infrastructure, while others oppose change or want minimal change
- **Enhancements to the offer and experience** – some customers/community believe the offer/experience needs to evolve to reflect contemporary customer/Melburnians' needs, while others want minimal or no change. In contrast, majority of traders and other stakeholders were generally supportive or accepting of the need for enhancements, with differing views about the degree and nature of change.

Summary of key Strategy revisions

Clarification/explanation in key areas to address key concerns/confusion:

- Importance of protecting the heritage and character/essence of the Market
- Acknowledge National and Victorian heritage listings
- 'Younger people' refers to people under 40 (underrepresented in visitation)
- Core offer/experience will be retained and built upon to meet the needs of current customers (including tourists), and to serve more Melburnians
- The Market will be a place with something for all people/budgets/lifestyles
- Fruit and vegetable trading will be preserved and will see a small increase in the reconfigured Upper Market area and with additional seasonal stalls
- More convenience/value-add items in the fresh produce offer will build on rather than replace the core ingredient offer (eg. semi-prepared/ready-to-cook/ready-to-eat options)
- Further explanation of what is meant by fresh produce convenience options (eg. semi-prepared/ready-to-cook/ready-to-eat) and hospitality (eg. eating and drinking on-site/take-away).

Strategy revisions clarify the intent and explain key areas to address concerns/confusion, and additions based on suggestions/feedback.

Elements added based on specific suggestions/feedback:

- Sample sizes added for 2021 and other market research referenced in the Strategy
- Key Performance Indicators added to show how success will be measured
- Updated population/demographic data based on latest available information and acknowledge likely short-term impact of the pandemic on international student numbers in the CBD
- References to retail 'box hire' operators added in relevant sections
- 'Food Hall' replaced with 'Food Court' to address confusion about it relating to the Meat, Fish and Dairy Halls
- Actions added in the appendix to address feedback:
 - Explore car park pricing and incentive options to encourage Market visitation and spending
 - Preserve core offer/experience to keep serving current customers
 - An offer and experience that caters to a broad range of customers at different price points
 - Work with City of Melbourne to ensure Renewal meets trader needs/to manage disruption.

Other areas for further consideration/action

A range of stakeholder feedback related to the following areas, which are outside the scope of the Strategy:

- Day-to-day Market operations
- Market Renewal plans/works
- Further detail to be worked through as part of the implementation of the Strategy over the next five years.

Feedback outside the scope of the Strategy will be considered through other mechanisms, including trader engagement and collaboration.

This feedback will be considered and addressed as follows:

- Share feedback related to Renewal plans/works with the City of Melbourne Renewal Team
- Continue working with the Trader Representative Committee and other traders where relevant to:
 - Inform Strategy implementation and to work through/resolve key operational challenges
 - Inform Renewal plans/works and resolve issues, together with the City of Melbourne Renewal Team.

Appendix 1 – Snapshot of people who provided feedback via website form (largely customers and local community)

