WARRNAMBOOL RETAIL STRATEGY

November 2007

Prepared by: Ratio Consultants

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WARRNAMBOOL
CITY COUNCIL

Warrnambool Retail Strategy

NOVEMBER 2007

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GLOSSARY

Acronym	Term	Definition
BG	Bulky Goods *	Large format retailing, generally comprising hardware, whitegoods, furniture and other large showroom-based uses.
CPC	Commercial, Professional and Community Services *	Encompasses office-based uses such as accountants, lawyers, employment agencies, real estate agents etc. as well as a range of community services such as neighbourhood houses, youth centres, and Centrelink.
DDS	Discount Department Store	A sub-regional retail store type, which offers a wide range of household goods. Examples include Big W, K-Mart and Target.
DSTM	Department Store Type Merchandise	An estimate of the proportion of retail trade for which department stores and discount department stores actively compete. In this study, estimates of DSTM are based on 80 percent of non-food retail goods expenditure.
DPCD	Department of Planning & Community Development	New State Government department established in mid 2007, now responsible for planning.
DSE	Department of Sustainability & Environment	State Government department previously responsible for planning, until mid 2007.
	Escape Expenditure	Refers to trade drawn from the City's *Primary Catchment Area* and spent outside of Warrnambool.

Acronym	Term	Definition
ERP	Estimated Resident Population	The Estimated Resident Population is the official population measure of Australia, for Local Government areas. ERPs are estimated at June 30 in each year based on annual dwelling unit approvals. Significant changes in the age of the population and local economy are also considered, to adjust the estimates in line with births, deaths and migration, in between June 30 and Census night in early August. The ERP is also adjusted to take into account the number of residents overseas on Census night and those who were not counted in the Census (DPCD 2007).
FGL	Food, Groceries and Liquor *	Specific type of retail activity, encompassing supermarkets, fresh food stores and liquor outlets.
	Gateway Plaza and Environs	Refers to the Gateway Plaza shopping centre and adjacent sites (both existing and in long term) identified for core retail functions in the Eastern Activity Precinct Structure Plan (Hansen and Hyder Consulting, 2004).
GLA	Gross Leasable Area	Measure of floorspace, which includes only the area used for sales, service provision or other profitable activity. Does not include storage areas, amenities etc.
	In-bound Expenditure	Refers to trade drawn from the City's *Regional Catchment Area* and spent in Warrnambool.
	Major Retail Attractors	Significant retail anchor stores including department stores, discount department stores and supermarkets.
	Market Share	Refers to the proportion of resident-based retail expenditures in defined geographic areas bound to the City of Warrnambool, or other defined destinations.

Acronym	Term	Definition
	Primary Catchment Area	Encompasses the City of Warrnambool and adjoining areas of Moyne Shire. The *Primary Catchment Area* is the area that generates most of the City's weekly and daily food and groceries trade. Within this area, almost all food and groceries purchases, and the majority of non-food purchases are directed to centres and precincts in Warrnambool.
RCA	**Regional Catchment Area**	The *Regional Catchment Area* encompasses the City's *Primary, Secondary and Tertiary Catchments*, and is the geographic area from which the City draws almost all of its regular and irregular trade.
	Retail Commercial Floorspace	Refers to the provision of:- ▪ food, groceries and liquor; ▪ household goods; ▪ bulky goods; ▪ retail services; ▪ commercial and professional; ▪ trade; and ▪ vacant floorspace (normally capable of use as retail-commercial floorspace). Encompasses a wider range of uses than *Shopfront Floorspace*.
	Retail Floorspace *	Refers specifically to retail goods and services, including *Food, Groceries and Liquor*, household goods and services such as dry cleaners, hairdressers, newsagents and post offices.
	Retail Services *	These encompass a range of commercial services available to the public and conducted from a shopfront environment.

Acronym	Term	Definition
RTD	**Retail Turnover Density**	Is a measure of the productivity ($) of retail floorspace being the ratio of annual retail turnover to gross leasable area. Various commodity groups and store types have characteristic and distinctive retail density requirements.
	Secondary Catchment Area	Extends between 20 and 60 kilometres from Warrnambool. Residents in the secondary catchment area tend to use Warrnambool as their regular shopping destination for most weekly needs, and a wide range of discretionary needs.
	Shopfront floorspace	Refers to floorspace utilised for goods and services sold from a ground-floor active shopfront and encompasses food, groceries and liquor, household goods, bulky goods and retail services floorspace.
	Tertiary Catchment Area	Extends across an area 50 to 90 kilometres from Warrnambool. Residents in this area tend to use Warrnambool as an important regional centre for purchases of household and bulky goods. Most food shopping by residents in this area is undertaken at local centres. The area is also characterised by high levels of competition to other regional cities for purchases of household and bulky goods.

* Refer Appendix A for full classification of store types comprising each of these categories.

1 STATEMENT OF INTENT

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1 Statement of Intent

Purpose

The Warrnambool Retail Strategy (2007) provides policy directions for the planning and management of activity centres in the municipality of Warrnambool, to guide the development of the City's retail-commercial system over the next 25 years.

The City of Warrnambool

Warrnambool is south-western Victoria's pre-eminent city with a current population of 32,000 people (June 2006). The City serves a region in excess of 9,000 square kilometres, spanning six municipalities.

The City serves as the regional shopping, commercial and professional services centre for this region in south-western Victoria and comprises of a network of activity centres that provide varying degrees of retail, commercial, professional and trade services.

Warrnambool's role as a regional trading and services hub effectively means that the provision of retail, commercial, trades and professional services, facilities and floorspace is geared for a population significantly higher than that which resides within the City of Warrnambool boundaries.

Future Directions for Warrnambool's Retail-Commercial System

Over the past 20 years, there have been significant developments in Warrnambool's retail system. In particular, the rise of the Eastern Activity Precinct (EAP) has created the most significant bulky goods precinct west of Geelong. The development of Gateway Plaza shopping centre has provided a modern facility to serve the needs of east Warrnambool and surrounding districts.

The magnitude of change in the City's retail system will be significant over the next 25 years. Research undertaken for the Strategy has found that by 2016, it is likely that the City's retail system will have developed into a bimodal system, with almost equal distributions of retail floorspace concentrated in the City Centre and the EAP. Each of these key precincts will provide complementary roles and functions. The City Centre will continue to provide the primary retail focus for Warrnambool, with the most significant concentration of core retail facilities and specialty stores. The EAP will provide a regional bulky goods function, complemented by the district retail role of Gateway Plaza and Environs.

Warrnambool is about to enter a new phase of retail development, whereby new major stores, together with national brand specialties will locate in the City. The overall effect of this change will be positive for Warrnambool, further reinforcing its role as a regional trading and services City. New investments present unique historic opportunities for the revitalisation and renaissance of Warrnambool's City Centre. Previous retail strategies for Warrnambool (Essential Economics 2001-2003), and the current Strategy have consistently affirmed the primacy of the City Centre, both as the primary activity centre in Warrnambool and as the regional retail centre and business district for south-west Victoria.

The test of the effectiveness of the Strategy, is the extent to which real opportunities will be afforded to the City Centre to generate new developments encompassing the new major regional-level stores. Concurrently, to reinforce and improve existing precincts and allow for the expansion of the activity centre network to meet the needs of small communities and growth areas, there is a need for further investment at the EAP and in a number of new centres and precincts.

To achieve this, the Retail Strategy provides a set of principles and a strategic framework for the future development of retailing and commercial services in Warrnambool in a way that seeks to maximise sustainable outcomes in the public interest. In this context, the Strategy seeks to achieve the following:

- give effect to the long-standing primacy of the City Centre, through facilitating new major investment;
- consolidate and strengthen the EAP, through the expansion of the precinct to deliver a range of new services and roles that complement the City Centre;
- facilitate the development of several, strategically-located neighbourhood and local convenience centres to support developing areas and small communities, including Dennington/Warrnambool West and Allansford;
- support the ongoing improvement of Northpoint Village, as an important neighbourhood centre for the developing northern Warrnambool area; and
- encourage the development of new niche or lifestyle retailing to support and diversify key tourism developments, including the Woollen Mills, Fletcher Jones and the Harbour Precinct.

Objectives for the Retail Strategy

The Warrnambool Retail Strategy sets out a framework for the development of the City's activity centre network. Based on a range of economic, land use planning, access and social principles, the Strategy gives direction to investment and governance of the City's activity centre system, to provide for the needs of current and future residents of Warrnambool's regional catchment area.

The guiding principles for the Strategy are:-

- **Maximise the City's Regional Role.** Warrnambool's economy and its capacity to support future populations is, in large part, determined by its regional retailing and services role. Maximising the City's regional role as a retailing, administrative, health and professional services, education, hospitality and tourism focus for western Victoria in turn optimises opportunities for investment and employment in the City;
- **Investment.** Facilitating long-term investment flows to each of the City's activity centres and precincts and particularly the City Centre, is essential to ensure that attractive, high-amenity environments and competitive facilities are available for the future population of Warrnambool;
- **Strategic Balance.** There is a critical need to provide a framework and direction for the revitalisation of the City Centre, which will be severely compromised by new regional level investment in the Eastern Activity Precinct;
- **Potentials for Redevelopment and Renascent Change.** Warrnambool's City Centre is the iconic heart of the City and its region. State and local policy supports the maintenance and consolidation of the City Centre's pre-eminent regional role. There are significant, realistic potentials for redevelopment and renascent change in the City Centre and the Strategy will provide a framework to achieve these potentials;
- **Access to local facilities.** Equitable access to local shopping and service facilities is a principle that has been applied to the assessment of future activity centre requirements for the City.

Policy Position Statement

Council has a long-standing position that the continuing primacy of the City Centre is integral to Warrnambool's long-term prosperity and liveability. The Municipal Strategic Statement emphasises the importance of the City Centre. Council now seeks to give effect to this position by supporting and facilitating the development of new major stores in the City Centre. To this end, Council will assist in the consolidation of sites, where feasible, and proactively attract investment and new major stores to establish in the City Centre, by working in partnership with the community and other stakeholders.

Council will continue to support the ongoing consolidation and development of the Eastern Activity Precinct. In line with this position, new investment will be encouraged in the precinct to deliver expanded range of complementary roles and services to the City Centre. The Flying Horse Inn is an important development at the eastern end of the precinct, diversifying the range of activities and functions in the EAP.

The development of new strategically-located neighbourhood and local centres is also supported at Dennington/Warrnambool West, Allansford and Merri River North area, while the importance of Northpoint Village neighbourhood centre is also recognised. Additional convenience centres are also provided in the Strategy, to meet existing and future needs in developing areas and smaller communities, in addition to supporting new employment areas.

Council seeks to provide more diverse tourism precincts, by encouraging the development of complementary niche and lifestyle retailing to provide interest for visitors to the city. Several new projects of importance to the development of the City's tourism industry include the Woollen Mills site, Fletcher Jones and the Harbour Precinct.

Activity Centre Performance Objectives

The Warrnambool Retail Strategy provides measures and policies to ensure a balanced and robust retail/commercial hierarchy. The Strategy is based on a recognition of the need to maintain a sustainable activity centre balance that maximises community benefits to enhance the range and accessibility of goods and services at both a local and regional scale. The principal objectives for the key categories of centres provided in the hierarchy are to:-

- Consolidate and enhance the current and future role of the Warrnambool City Centre. This will involve effective management of the City's activity centre system to consolidate the City Centre's pre-eminent retail role;
- Consolidate and develop Gateway Plaza and Environs as the secondary retail centre in Warrnambool and local centre to residents living in east Warrnambool and surrounding districts;
- Effectively manage the existing bulky goods floorspace in the Eastern Activity Precinct as well as bulky goods floorspace yet to come into operation in the precinct. This will involve restricting the use of floorspace within the precinct, to ensure other forms of retailing do not locate in shopfronts intended for bulky goods retailing;
- Ensure equitable access to local shopping and service facilities for all Warrnambool residents;
- Ensure that there is an effective provision of convenience retailing to meet the day-to-day needs of local residents by supporting a network of local and convenience centres and facilities.

The recommended Strategy proposes a framework that establishes policy principles, objectives and performance indicators for a diversity of considerations that relate to the planning and management of activity centres in the municipality. These encompass:-

- an activity centre hierarchy;
- activity diversity;
- the physical structure of centres;
- consumer demand and land supply;
- out-of-centre retailing;
- accessibility;
- competition and choice;
- sustainability; and
- community and neighbourhood development.

Implementation Objectives

The Warrnambool Retail Strategy is focused upon:-

- structure planning;
- development planning;
- specific strategic objectives for each of Warrnambool's activity centres
- consumer demand management;
- impact assessment guidelines for planning and rezoning applications; and
- monitoring and cyclical review.

The Strategy seeks to facilitate the consolidation of existing network of centres and the development of several new supporting centres, to optimise community benefits and the long-term investment potentials of the City across a wide range of sectors of the economy.

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2 INTRODUCTION

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2 Introduction

2.1 Context

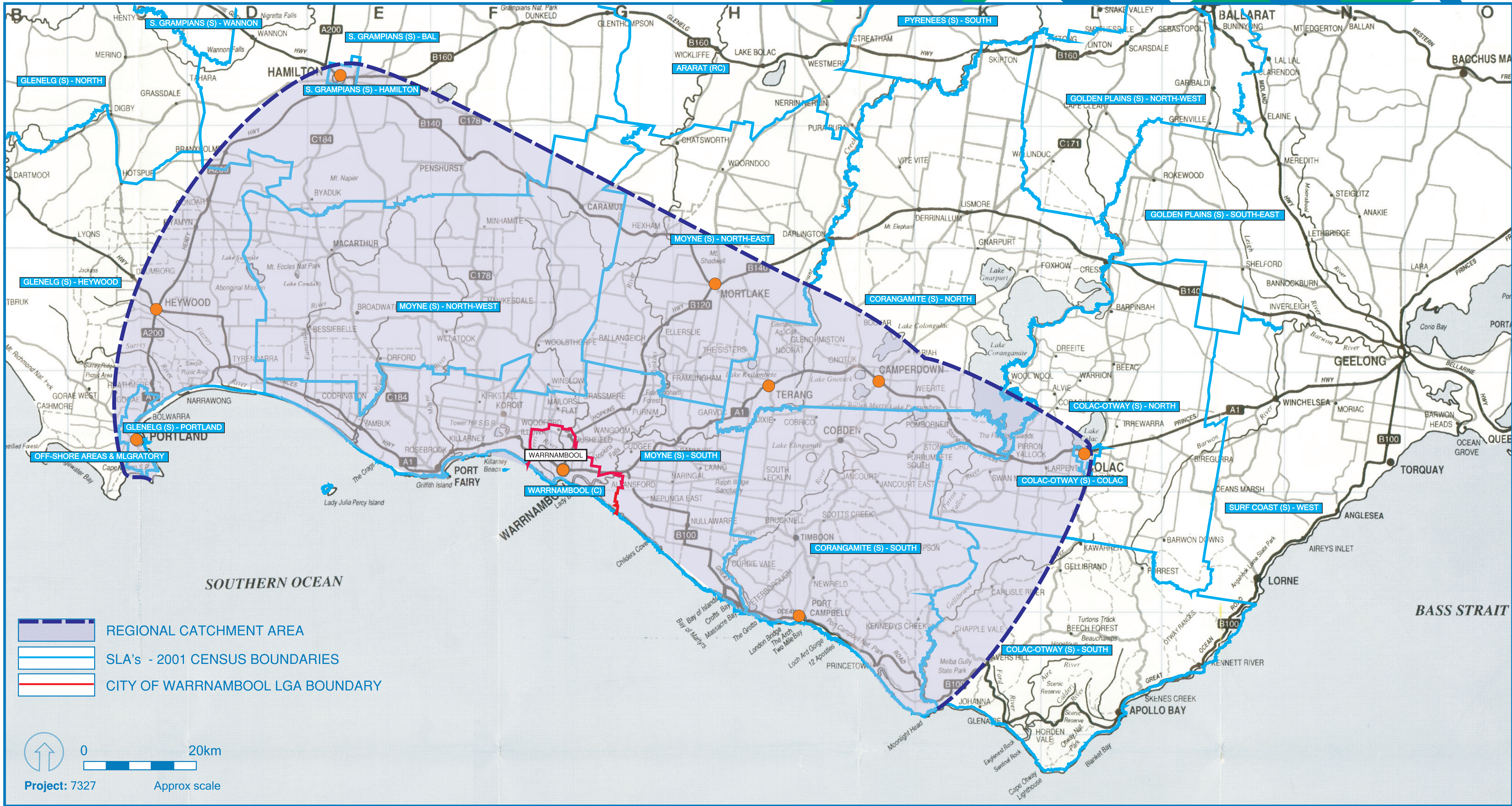
In June 2006, Ratio Consultants was engaged by Warrnambool City Council to prepare the Warrnambool Retail Strategy (2007) for the City. The Retail Strategy is directed to provide a policy framework for the future management of retail and commercial floorspace for Warrnambool over the period 2006 to 2031.

Warrnambool is located 260 kilometres south-west of Melbourne and has a current population of 32,000 people (June, 2006). The population is projected to increase to 44,400 people by 2031 (projections by Ratio Consultants, December 2006).

The City serves as the regional shopping, commercial and professional services centre to a region that encompasses 9,000 square kilometres, from Colac to Hamilton and Portland (as shown in Figure 1). This broader area in the south-west region is referred to in the Strategy as Warrnambool's Regional Catchment Area (RCA). The City's RCA has a current population of 98,100 persons, which is expected to increase to 108,400 persons by 2031.

The City's role as a regional trading and services hub effectively means that the provision of retail, commercial, trades and professional services, facilities and floorspace is geared for a population significantly higher than that which resides within the City's boundaries. Hence, there is a clear need to develop a network of activity centres that fulfil a wide range of retail, commercial and social functions to address the needs of this region.

In this context, the Warrnambool Retail Strategy provides a policy framework to consolidate the City Centre's role as south-west Victoria's principal activity centre and its key regional trading and services hub.



WARRNAMBOOL RETAIL STRATEGY

for WARRNAMBOOL CITY COUNCIL NOVEMBER 2007

by RATIO CONSULTANTS

FIGURE 1

WARRNAMBOOL & THE REGIONAL CATCHMENT AREA (RCA)

2.2 OBJECTIVES OF THE STUDY

The Strategy is directed to providing:-

- a vision for the long-term development of activity centres in Warrnambool;
- an assessment of future retail, commercial and related floorspace requirements to meet the City's needs over the next 20 years and beyond;
- strategic principles to ensure long-term optimal development and sustainability of Warrnambool's activity centres;
- a policy framework to guide the future allocation of retail floorspace throughout the municipality to meet a range of needs for regional, neighbourhood and local services and to ensure the sustainable development of a hierarchy of attractive, accessible and viable centres and precincts;
- assessment guidelines for new retail developments; and
- a framework for the regular monitoring and review of Warrnambool's activity centre system and commercial precincts to regularly assess the progress of the implementation of the Strategy and identify required improvements to the Strategy.

2.3 STUDY AREA

The principal study area for the Strategy is the City of Warrnambool (as shown in Figure 1). The activity centres located within the Study Area are referred to as the 'activity centre network' or 'system'. The Strategy is directed towards developing a sustainable and accessible hierarchy of activity centres across the municipality that delivers the greatest diversity of goods, services and employment opportunities to a network of centres to best meet the needs of the local community, regional population and visitors to the City.

2.4 STUDY PROCESS

The Study was conducted over five key phases, culminating in three key milestones (as illustrated in Figure 2).

Phase One: Project Inception

Phase 1 of the Study was directed towards developing a strong understanding of the objectives, desired outcomes and scheduling of the Study. It encompassed the following:-

- an inception meeting between the Strategy's Steering Committee (representatives from Council, responsible for the management of the study) and the Consultants;
- confirmation of work program, key milestones and critical dates;
- handing over of relevant reports, policy documents, data and other relevant background material to the Consultants;
- formulation of base maps for the Study; and
- identification of key stakeholders and contacts for the consultations.

Phase Two: Research, Surveys and Analysis

Phase 2 of the Study was directed towards collecting the primary data required for the Study and involved undertaking surveys, quantitative data analysis and consultations, and comprised the following tasks:-

- a policy and literature review was undertaken in order to develop a strong contextual understanding of the Study and the Study Area, and planning and development issues facing Warrnambool;
- demographic analysis of the City of Warrnambool and the RCA, including projections to household and population numbers and the age structure of the population;
- in-centre surveys were undertaken at existing activity centres located in Warrnambool, to determine visitor catchments, visitation patterns to the centres, community needs and priorities for each centre. In the City Centre, 320 surveys were undertaken, while 52 were completed in the Eastern Activity Precinct;
- phone surveys were undertaken in a total of 360 households in Terang, Port Fairy, Hamilton, Port Campbell, Camperdown and Portland. The survey provided information on Warrnambool's market share together with estimates of in-bound retail expenditures to the City;
- a floorspace survey and functional analysis was undertaken to gain an understanding of how Warrnambool's City Centre operates and its strategic context within Warrnambool and the RCA;

- floorspace data for all other existing centres in Warrnambool was obtained and a comparative analysis was prepared of floorspace structures in all activity centres in Warrnambool. This enabled the Consultants to gain an in-depth understanding of the function of all centres, and their relationship within the activity centre system and in the context of Warrnambool and the RCA;
- developer, stakeholder and community consultations were undertaken. The objective of the consultations was to identify key issues in the delivery of retail and commercial services in Warrnambool and to identify an overall vision for the role of existing centres. Information was also obtained in relation to developer intentions and potentials for new retail and commercial instruments; and
- car parking utilisation surveys in the Warrnambool City Centre. A low vacancy rate in car parking spaces within the City Centre was identified in the community consultation and in-centre surveys. The Consultants surveyed and mapped car park utilisation in the City Centre over three days, during peak periods. The results provided important information on variations in car parking utilisation across the City.

The key findings with relation to the policy review, in-centre surveys, floorspace surveys, functional analyses and developer, stakeholder and community consultations were presented to the Steering Committee in the Warrnambool Retail Strategy Discussion Paper (August 2006).

Phase Three: Detailed Assessments

Phase 3 involved detailed assessments of retail-commercial floorspace supply and demand in Warrnambool, and comprised the following tasks:-

- assessments of the visitor catchments of key activity centres, together with patterns of in-bound expenditure;
- development of market-based assessments of the supply and demand of retail and commercial floorspace and the development of future projections of retail-commercial floorspace requirements for the City, for the periods 2006 – 2016 and 2016 – 2031. The assessment took into account the existing supply of retail-commercial floorspace in Warrnambool, approved retail-commercial floorspace yet to be fully developed, Warrnambool's market share within the RCA and net additional floorspace requirements for the City; and
- future office floorspace needs were prepared for the City. Assessments were based on the long term trends of office floorspace take-up in the City.

The key findings of the detailed assessments were presented to the Steering Committee in January 2007.

Phase Four: Strategy Development

Phase 4 is devoted to the formulation of the Retail Strategy, involving preparation of the following components:-

- A Context and Policy Statement that provides the policy setting for the Warrnambool Retail Strategy and sets the strategy within the broader perspective of the State Planning Policy Framework (SPPF) and Warrnambool's Local Planning Policy Framework (LPPF);
- A Strategic Policy Framework to define and direct the application of policy for the Retail Strategy. The framework sets out the major policy areas addressed by the Strategy, planning principles and policy objectives for each identified activity centre in Warrnambool and provides performance indicators for the optimal operation of each of these centres;
- An implementation and management framework that provides guidance for the future planning and management of activity centres, in relation to:-
  - recommendations and guidelines for development and structure planning;
  - retail and commercial floorspace requirements for Warrnambool;
  - guidelines for undertaking impact assessments;
  - consideration of statutory planning controls that may be required in the implementation process; and
  - a recommended process for monitoring and cyclical review.

Phase Five: Strategy Resolution

The analysis and assessments undertaken in Phases 1 to 4 have culminated in the development of the Final Warrnambool Retail Strategy. The Strategy has now undergone a process of review, including:-

- presentation of the Strategy to Council, for review;
- non-statutory public consultation for the Strategy over a four-week period from June to August during which the community and other stakeholders provided comments and made submissions to the Strategy;
- review of submissions to the Strategy made by the community and industry stakeholders;
- resolution of the Strategy, to reflect issues identified by Council, the community, stakeholders, including the Department of Planning and Community Development (DPCD); and
- final presentations to the Steering Committee and Council.

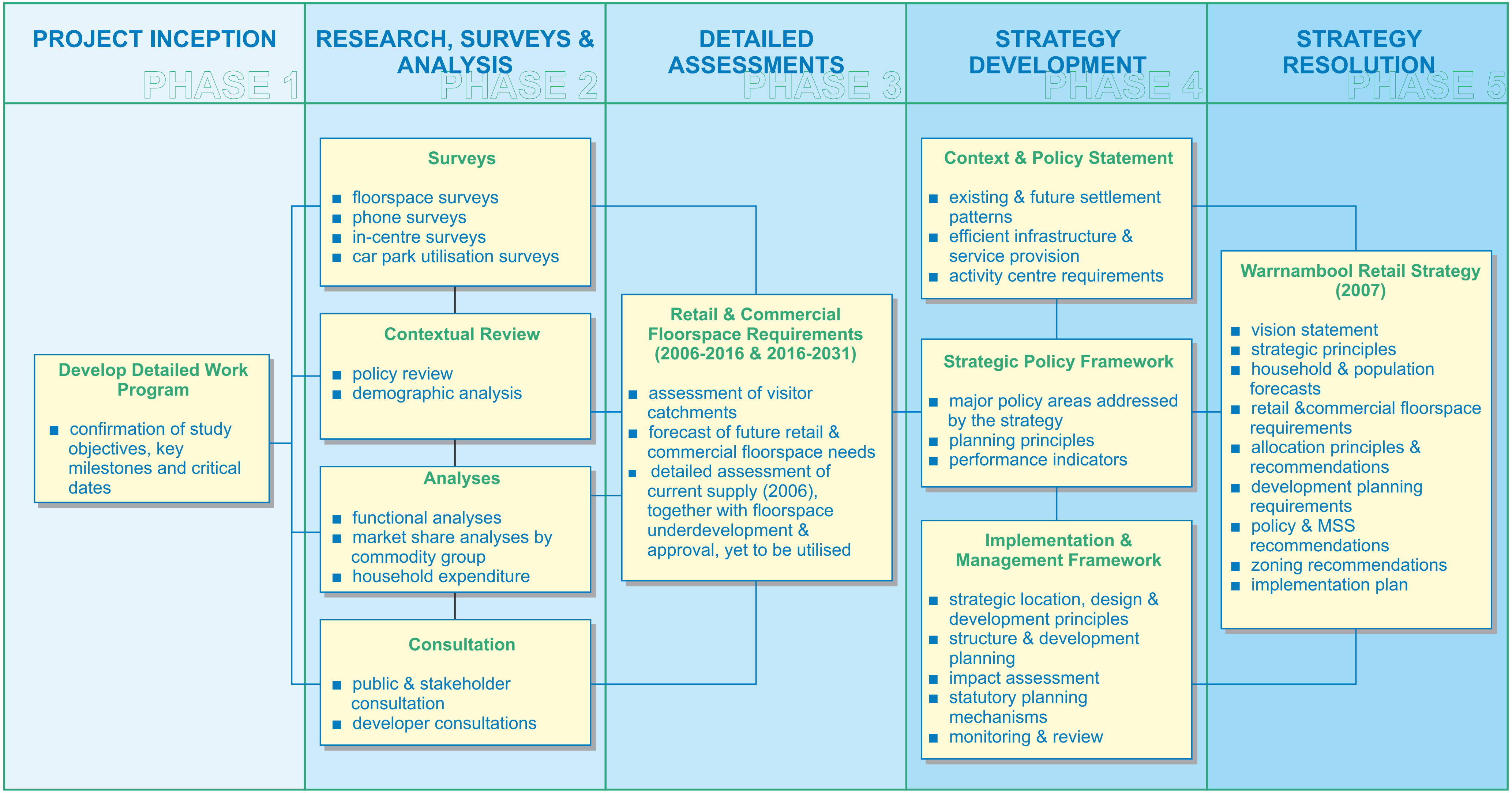


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FIGURE 2
WARRNAMBOOL RETAIL STRATEGY STUDY PROCESS

2.5 OUTCOMES

The principal outcomes of the Study are:-

- a policy and strategic context review;
- detailed assessment of the structure and function of the existing activity centre system in Warrnambool;
- an analysis of visitation patterns to activity centres in Warrnambool, from within the Warrnambool Local Government Area (LGA) and the RCA;
- an assessment of future retail and commercial floorspace and land requirements from 2006 to 2031 for Warrnambool's existing activity centres and for new activity centres to support emerging communities in Dennington/Warrnambool West and Allansford;
- context and policy statement for the Retail Strategy;
- implementation and management framework; and
- recommended actions and priorities for Council.

3 POLICY CONTEXT

3 Policy Context

The Warrnambool Retail Strategy was prepared within a clearly defined context established by State and local planning policy. This section outlines the State and local planning policies that have shaped the recommendations of the Retail Strategy.

3.1 STATE PLANNING POLICY FRAMEWORK

The State Planning Policy Framework (SPPF) provides broad, overarching planning principles and objectives for a number of issues relevant to future planning in Warrnambool including:-

- settlement principles;
- environmental management;
- economic development; and
- infrastructure provision.

Settlement

State planning policy recognises the need to develop sustainable urban settlement areas that are supported by infrastructure and a range of commercial, social and recreational services and facilities.

Specifically, planning is required to anticipate the needs of existing and emerging communities through the "provision of zoned and serviced land for housing, employment, recreation and open space, commercial and community facilities and infrastructure" (Warrnambool Planning Scheme, Clause 11.03-1).

Economic Development

State policy requires that planning "is to contribute to the economic well-being of communities and the State as a whole by supporting and fostering economic growth and development by providing land, facilitating decisions, and resolving land use conflicts, so that each district may build on its strengths and achieve its economic potential." (Clause 11.03-5)

Of direct relevance to the Warrnambool Retail Strategy, the policy basis for co-locating commercial, community and recreational services is provided in the SPPF, through the "concentration of major retail, commercial, administrative, entertainment and cultural developments into activity centres (including strip shopping centres) which provide a variety of land uses and are highly accessible to the community" (Clause 17.01-1).

Specifically, activity centres should be planned to:-

- "Provide a range of shopping facilities in locations which are readily accessible to the community;
- Incorporate and integrate a variety of land uses, including retail, office, education, human services, community facilities, recreation, entertainment and residential uses where appropriate;
- Provide good accessibility by all available modes of transport (particularly public transport) and safe pedestrian and cycling routes, and to encourage multi-purpose trip-making to such centres;
- Facilitate ease of pedestrian movement between components of centres, public transport interchanges and parking areas;
- Maximise opportunities for the co-location, multiple use and sharing of facilities;
- Provide child care facilities to a level consistent with the role of centres;
- Minimise the effects of commercial development on the amenity of residential and parkland areas; and
- Provide attractive environments for community activities" (Clause 17.01-2).

Infrastructure

State policy relating to infrastructure provision requires that planning supports the development of existing and future urban settlement areas through the "efficient provision and maintenance of infrastructure, including the setting aside of land for construction of future transport routes" (Clause 11.03-4).

Of direct relevance to the Retail Strategy, planning is to ensure that "access is provided to developments in accordance with forecast demand taking advantage of all available modes of transport and to minimise impact on existing transport networks and the amenity of surrounding areas" (Clause 18.02-2).

The principles set out in the SPPF are intended to guide the development of State and local strategic frameworks and policy. In the context of the Warrnambool Retail Strategy, the SPPF has directly and/or indirectly influenced:-

- settlement and land use policy in the Warrnambool Planning Scheme;
- activity centre principles and objectives;
- accessibility principles in relation to urban settlement and activity centres; and
- the need to maximise existing infrastructure and servicing, in the planning and development of existing and future activity centres.

3.1.1 State Policy and Activity Centres

The Warrnambool Retail Strategy sets out a framework to enable the development of a sustainable network of activity centres to meet the needs of existing and future communities in Warrnambool and south-west Victoria. Metropolitan Policy provides clear policy direction for the development of sustainable, compact cities and is of direct relevance to the Strategy.

A key objective of the Metropolitan Policy is to “facilitate sustainable development that takes full advantage of existing settlement patterns and investment in transport and communication, water, sewerage and social facilities” (Clause 12.01-1). To achieve a consolidated settlement pattern, the policy encourages the concentration of “new development at activity centres near current infrastructure and in areas best able to cope with change” (Clause 12.01-2).

Activity Centre Policy

The Metropolitan Policy highlights the role of activity centres in achieving a consolidated urban form and in meeting the commercial, social and recreational needs of communities. It is policy that the development of the activity centre network provides:-

- *“A range of centres that differ in size and function;*
- *… a focus for business, shopping, working, leisure and community facilities;*
- *Provide different types of housing, including forms of higher density housing;*
- *Is connected to public transport; and*
- *Maximises choice in services, employment and social function”.*

(Clause 12.01-2)

Metropolitan Policy seeks to reinforce the convenience of activity centres by encouraging integration of a wide range of land uses (including housing, commercial, social and recreational facilities and services) in centres, or concentrated around them. Metropolitan Policy also encourages the development of centres that are well connected to public transport and walking and cycling networks. An activity centre system based on these spatial relationships will:-

- *Reduce the number of private motorised trips, to and from activity centres;*
- *Increase economic activity and business synergies;*
- *Broaden the mix of uses appropriate to the type of centre and needs of the population it serves;*
- *Provide focal points for the community; and*
- *Improve access by walking, cycling and public transport to services and facilities for local and regional populations.*

(Clause 12.01-2)

The policy identifies that an optimal activity centre system is one which best meets the commercial, social and recreational needs of communities, through provision of an activity centre hierarchy.

Metropolitan Policy sets out an activity centre classification system, which comprises five activity centre types:-

- Central Activities District;
- Principal Activity Centres;
- Major Activity Centres;
- Specialised Activity Centres; and
- Neighbourhood Activity Centres.

In addition to these centres, Melbourne 2030 also addresses Out-of-Centre Developments.

The classification system identifies the key functional characteristics of each activity centre type and out-of-centre developments, outlining a number of strategic objectives to guide the future development and location of each centre type (refer Table 1).

TABLE 1 . ACTIVITY CENTRE CLASSIFICATION SYSTEM UNDER STATE POLICY (CLAUSE 12: METROPOLITAN DEVELOPMENT)

Classification	Key Characteristics	Future Strategic Development Objectives
Central Activities District (CAD)	Largest centre of activity with the greatest variety of uses and functions, including retail, housing, highly specialised personal services, education, government and tourism. Well served by public transport network.	Preferred location for activities of regional significance. Location for activities that have significant impact as trip generators, drawing visitors from around the City of Warrnambool, as well as the Regional Catchment Area (RCA). Planned and managed to retain its position as the prime office and retailing centre in the region, as well as a significant destination for visitors.
Principal and Major Activity Centres	A mix of activities that generate a high number of trips, including business, retail, services and entertainment. Well served by multiple public transport routes. Serves a large catchment covering several suburbs and attracting activities that meet metropolitan needs. Has the potential to grow and support intensive housing developments without conflicting with surrounding land uses.	Encourage more mixed use development in appropriately located centres. Plays an important role as a focus for community activity, services and investment. Location for priority government investment and support. Focus for a range of government and community facilities and services. Improve accessibility of centres by developing new Principal and Major Activity centres along existing public transport networks.
Specialised Activity Centres	Provides a mix of economic activities that generate a significant number of journey to work trips, in addition to attracting many visitors. As the name suggests, specialized industries are encouraged to develop within Specialised Activity Centres, including complementary mixed uses that do not compete with the role of the CAD or Principal and Major Activity Centres.	Should only contain uses that support the primary function of the centre. Mixed, complementary uses are encouraged to locate these centres, however should not compete with the attraction and role of the CAD or Primary and Major Activity Centres. Requires similar accessibility options as other centres.

Classification	Key Characteristics	Future Strategic Development Objectives
Neighbourhood Activity Centres (NAC)	A limited mix of uses meeting local convenience needs. Generally less than 10,000m^2 of retail floorspace. Accessible to a viable population by walking and cycling. An important community focal point with provision for the co-location of community services.	Encourage walking, cycling and local public transport use. Encourage the development of NACs near or within existing or future settlement areas. Location of NACs should be designed in conjunction with local public transport services. Encourage higher density housing (where appropriate) in and around NACs.
Out-of-Centre Development	Typically refers to large format stores usually developed as a precinct or cluster, and located separately from established activity centres.	State Policy discourages Out-of-Centre development outside of established activity centres with good access and visibility from major highways or main roads. Preference given to locations in or on the border of an activity centre. Ensure out-of-centre proposals are only considered where the proposed use or development is of net benefit to the community in the region served by the proposal. Discourage developments of metropolitan, State or national significance in out-of-centre locations, unless they are on the Principal Public Transport Network and in highly accessible locations.

Whilst the activity centre classification system has not been directly applied in the Warrnambool Retail Strategy, the need to develop centres within clearly defined parameters is recognised. The need to identify the roles of centres, types of services to be provided and the relationship of centres within this system, is acknowledged throughout the Strategy. A policy framework for the development of existing and future activity centres in Warrnambool is provided in Section 7: Proposed Retail Strategy.

In summary, State Policy provides key policy objectives to provide a sustainable land use system, encompassing the need to consolidate urban settlement areas, focused upon activity centres, road and public transport networks and utilisation of existing infrastructure.

The activity centres policy identifies an optimal activity centre system, comprising of a hierarchy of centres that vary in function and size, to best meet the needs of communities. The principles underlying State Policy have influenced the structure, scope and emphasis of the Warrnambool Retail Strategy. In particular:-

- the classification structure of activity centres in the recommended Strategy's policies and performance criteria identified for activity centres; and
- the future management and planning of existing and future activity centres.

3.2 LOCAL PLANNING POLICY FRAMEWORK

The Local Planning Policy Framework (LPPF) provides direction to the planning and development of Warrnambool. It addresses policy areas encompassing housing, environment, economic development and infrastructure. The Municipal Strategic Statement (MSS) is a significant component of the LPPF, providing an overarching direction for local planning policy, presenting *"...a concise statement of the key strategic planning, land use and development objectives for the municipality"* (Clause 20.01). Local Planning Policies also form part of the LPPF, setting out "detailed directions that will guide the day to day decision making about geographic or thematic issues" (Clause 22.00).

Warrnambool City Council recently completed its three year review of the Warrnambool Planning Scheme. As a result of this review, changes to the MSS (Clause 21) and Local Planning Policies (Clauses 22.01 - 22.04) were incorporated into the planning scheme (Amendment C43, December 2006), following the recommendations of strategies recently adopted by Council.

3.2.1 Municipal Strategic Statement

The MSS identifies a number of significant issues and opportunities to be addressed by long-term strategic planning for Warrnambool, encompassing the broad land use themes outlined in State planning policy. A number of issues have informed the recommendations of the Retail Strategy, including:-

- population growth and the need to provide additional housing to support the City's growing population. Population projections for Warrnambool indicate that the future resident population will reach approximately 44,000 people (projections by Ratio Consultants, December 2006);
- an ageing population and the need to concentrate housing around existing and new commercial, social and recreational services and infrastructure;
- the need to protect Warrnambool's coastal environment and landscape character from mounting development pressures;
- the need to support emerging communities by locating retail, commercial and community services in proximity of residential areas. Similarly, the need to consolidate settlement areas around existing activity centres, particularly through provision of higher density housing around the Warrnambool City Centre and medium density housing in proximity to the Eastern Activity Precinct;
- a lack of office accommodation in the City Centre;
- development pressures to establish restricted retailing at the outskirts of Warrnambool;
- increasing demand for community facilities, particularly in residential growth areas; and
- increasing demand for car parking in the City Centre (Clause 21.02).

These strategic issues have been recognised by Council and the community and were reflected in the Strategic Framework Plan (Figure 3). The Plan provided a broad vision for the future distribution of residential, industrial and commercial development in Warrnambool and seeks to consolidate the City's urban form on the basis of:-

- existing settlement patterns and infrastructure provision;
- the existing spatial distribution of activity centres;
- anticipated population growth and the potential to consolidate future urban settlement in and around existing services and infrastructure;
- the need to provide commercial, social and recreational services in support of emerging communities; and
- the protection of Warrnambool's coastal environment.

The MSS addressed the policy objectives relevant to activity centre development in the City of Warrnambool, under planning themes, including housing and economic development, summarised below.

Housing

In anticipation of population growth in the City of Warrnambool and future housing needs, the MSS recommends redevelopment of existing residential areas and development of greenfield sites over a 15 year timeframe. Areas identified to accommodate immediate and long-term urban residential growth are:-

- The North East Corridor, comprising *"the area generally bound by Aberline Road to the east, Mortlake Rd (Hopkins highway) to the west, Dales and Whites Roads to the south and land north of Wangoom Road."* (Clause 21.05).
  - This corridor is estimated to support 700 residential lots (or 15 years residential land supply).
  - The MSS also identifies opportunity to develop additional community, retail and recreational services in this area, at the corner of Wangoom and Mortlake Roads (Northpoint Village), in support of the expanding community.
- Dennington and North Dennington, located north-west of the City Centre.
  - This residential growth area is expected to yield an additional 400 residential lots over the long-term.
  - The MSS supports the development of additional commercial and community services to support this expanding community (the proposed Dennington/Warrnambool West Neighbourhood Activity Centre).

- North of Merri River, located east of Dennington.
  - The MSS identifies this area as long-term residential land supply for Warrnambool.
  - Up to 750 lots could be developed in the long-term, with 400 lots to be subdivided in the next 15 years.
  - Dennington/Warrnambool West neighbourhood centre will provide for the commercial and community services needs of the establishing community in this part of the city.
- Hopkins Point Road, located south-east of the City Centre, along the coast.
  - Up to 450 new residential lots will be provided in this area, requiring a mix of high and low density areas in order to protect sensitive environmental land along the dunes, river and ridgeline.
  - The Eastern Activity Precinct, including Gateway and Environs, would support the commercial and community services needs of this developing community.
- Warrnambool City Centre.
  - While redevelopment opportunities are limited, there is an opportunity to provide additional dwellings through development of higher density housing.
  - Higher-density development in the City Centre will address short term growth needs for the City and provide the preferred location for new tourist and holiday accommodation. (Clause 21.05-1).

The Strategy is directed towards providing a sustainable activity centre system in support of the City's current and future population. The intensification of residential land uses around existing activity centres, such the Warrnambool City Centre and the Eastern Activity Precinct (EAP), as well as the development of new residential areas, therefore has significant implications for the Retail Strategy. The proposed urban settlement pattern form the basis of the recommendations for the management and development of activity centres within Warrnambool's retail system, outlined in Section 7: Proposed Retail Strategy.

Economic Development

The MSS identifies a retail hierarchy within Warrnambool's activity centre system. The hierarchy comprises:-

- *"the Warrnambool City Centre as the principal retail and commercial centre for the south-west region of Victoria;*
- *...other retail components including the Eastern Activity Precinct (which acts as a secondary retail centre) and a network of smaller centres ranging from small shopping centres to approximately 20 general and convenience stores; and*
- *bulky goods retailing...concentrated along the Princes Highway."*

(Clause 21.01)

The MSS encourages new retail and commercial development to locate in Warrnambool's existing activity centres, and also encourages the development of new centres in support of emerging communities, particularly in Dennington and the north-east corridor.

Current policy statements for the development of Warrnambool's existing and future activity centres in the MSS are provided in Table 2, below.

TABLE 2. MSS: DEVELOPMENT OBJECTIVES FOR EXISTING AND PROPOSED ACTIVITY CENTRES

Activity Centre Type	Relevant Policy Statement
Warrnambool City Centre	▪ Maintain the City Centre as the pre-eminent commercial and tourism focus for the city and the region ▪ Consolidate future new retail development within the city centre
Eastern Activity Precinct	▪ Consolidate future new retail development within the Eastern Activity Precinct ▪ Support the emerging bulky goods focus at the eastern entrance to Warrnambool
Neighbourhood and Local Centres	▪ Convenience based retailing (to be provided) within smaller neighbourhood centres such as Dennington/Warrnambool West and Northpoint.

Source: Warrnambool Municipal Strategic Statement, Clause 21.07-1

The MSS seeks to retain the primacy of the City Centre through the consolidation and strengthening of "…the city centre's retail and other service functions, particularly as this is the principal centre servicing the surrounding catchment and the wider south-west region of Victoria." (Clause 21.01).

Further clarity is required, however, in defining the future role of activity centres within the EAP. Currently, the MSS encourages new retail and office space development to locate in the EAP, however is not implicit in defining the role of the precinct as secondary to the City Centre. As the MSS identifies the EAP as the "*…priority area for bulky goods development."* (Clause 21.07-1), the issue principally affects the definition of the role of Gateway Plaza and Environs, not the bulky goods development.

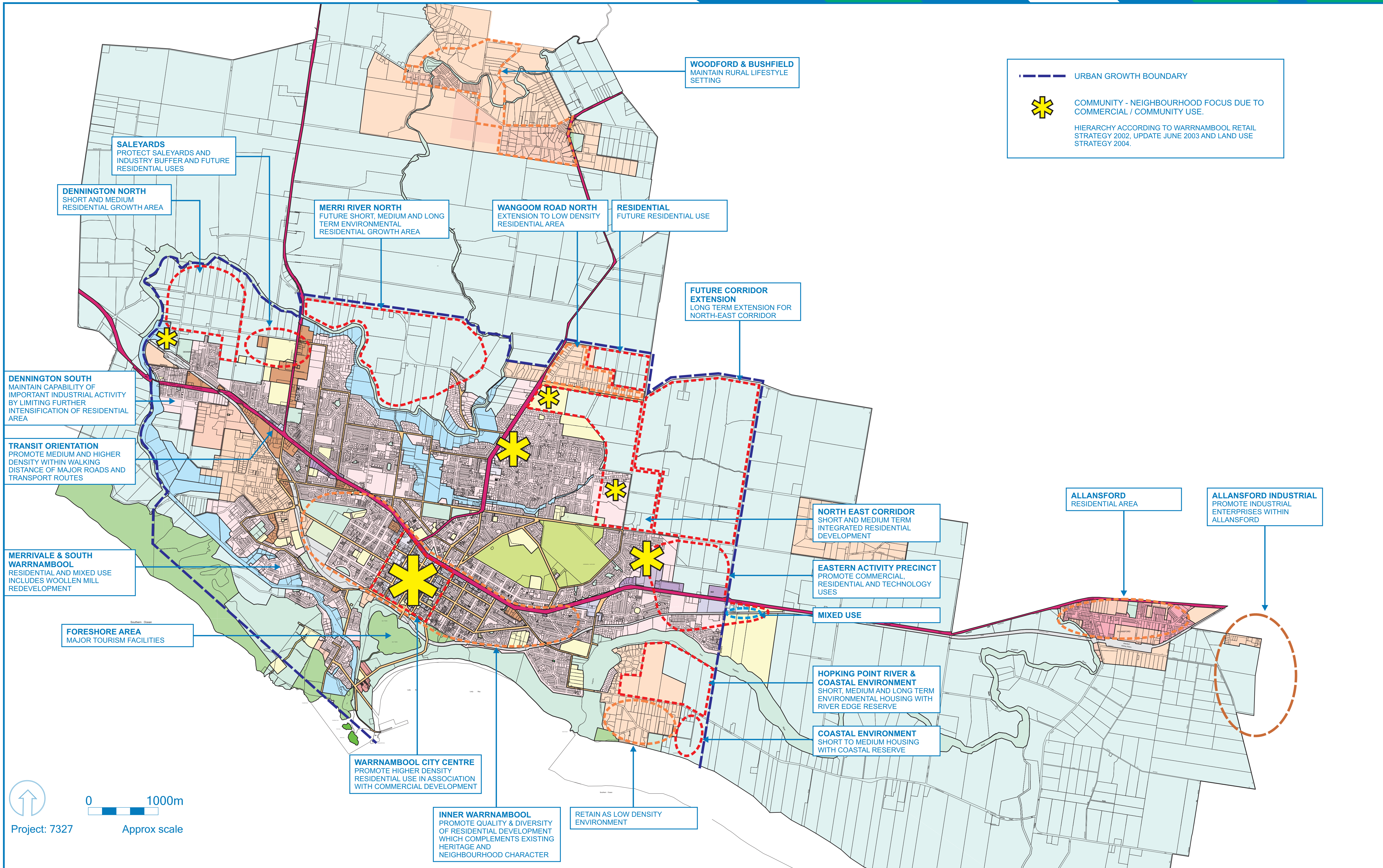
To provide clarity on this issue, the Retail Strategy (2007) will provide a clear policy framework for the development of current and future activity centres, including Gateway Plaza (refer Section 7: Proposed Retail Strategy).

In summary, the Municipal Strategic Statement (MSS) provides a framework and principles for the planning and development of Warrnambool. These reflect Council objectives, together with current and likely future needs of Warrnambool's community. The MSS seeks to consolidate urban development in Warrnambool, through redevelopment of existing settlement areas, development of greenfield areas, the current spatial distribution of activity centres and infrastructure and service provision.

The MSS identifies a retail hierarchy within the City, where the City Centre is the primary retail centre, the EAP is the district retail centre and a number of neighbourhood and local centres are also identified to provide for the day-to-day needs of communities. The MSS also recommends the development of neighbourhood activity centres in Dennington and the north-east corridor.

The Retail Strategy seeks to clearly define the role of activity centres within the City's future activity centre system, particularly Gateway Plaza and Environs. The Retail Strategy provides a clear policy framework to guide the ongoing management and development of centres (refer Section 7: Proposed Retail Strategy). This framework was directly influenced by local planning policy and addresses the need to:-

- facilitate new development opportunities in the City Centre, to retain its primary retail and services function;
- support the role of Gateway Plaza and Environs as a complementary retail centre that provides for the local needs of residential communities in east Warrnambool;
- reinforce the role of the EAP as the preferred location for bulky goods developments and complementary services and trades;
- establish and support neighbourhood activity centres in Dennington and at Northpoint Village;
- establish new convenience centres to support small communities on the City's fringe; and
- provide for the development of niche or specialised retailing to diversify and support key tourism developments.



WARRNAMBOOL RETAIL STRATEGY

for WARRNAMBOOL CITY COUNCIL NOVEMBER 2007

by RATIO CONSULTANTS

FIGURE 3

STRATEGIC FRAMEWORK PLAN

Source: Warrnambool Planning Scheme Municipal Strategic Statement

3.3 INITIAL DEVELOPMENT OF THE RETAIL STRATEGY (2001-2003)

Essential Economics prepared the original Retail Strategy in association with Planning by Design for Warrnambool City Council in 2001. Subsequently, Essential Economics prepared the Warrnambool Retail Strategy Update with an initial draft in November 2002 and a later draft in June 2003.

Purpose

The purpose of the Retail Strategies was to guide the development of the "City's retail sector and its outlook for further development over the next decade" (Essential Economics 2001). The 2001 Strategy "aimed at providing an overall context within which to implement the Urban Design Framework (2001) prepared for the city centre, while also providing the context for potential retail development across the municipality including the city centre, Gateway Plaza and other retail focal points". Notably, the Urban Design Framework provided for the development of several new major retail attractors in the City Centre, on underutilised sites including car parks (David Lock & Associates et al. 2001).

3.3.1 Outcomes of the Retail Strategies

The previous Retail Strategies (Essential Economics, 2001-2003) have:

- enabled further retail development at Northpoint Village in north Warrnambool, expanding from a convenience centre to a 6,000m^2 neighbourhood centre, facilitated by Amendment C37 to the Warrnambool Planning Scheme;
- provided for up to 12,000m^2 of additional retail floorspace to be developed at Gateway Plaza shopping centre (Essential Economics 2003), subject to "market demand";
- facilitated rezoning of land owned by Sherwood Scott (west of Gateway Plaza shopping centre) be rezoned to Business 1 Zone, to accommodate additional retail floorspace;
- enabled expansion of Gateway Plaza shopping centre, to accommodate a further 10,505m^2 gross leasable area (GLA);
- facilitated the development of south-west Victoria's pre-eminent bulky goods precinct in the EAP;
- provided for up to 4,830m^2 of new retail and commercial floorspace in the City Centre (Essential Economics, 2003).

3.3.2 Demand Issues

There are two key facets in relation to the examination of demand by Essential Economics:

- demand was applied as a quantified measure of future retail floorspace requirements for the period 2001 to 2011, providing forecasts of supportable retail floorspace for the City for 'Food and Services' and 'Non Food' floorspace (Essential Economics, 2002: Pages 8 & 9).
- demand was applied as a philosophical or policy concept where the future distribution of retail floorspace would be subject to (future) market demands (Essential Economics, 2002: Page 17).

The original Warrnambool Retail Strategy (Essential Economics, 2001) recommended that an additional 17,500m2 retail floorspace be developed in Warrnambool by 2011. The recommendations for the distribution of future floorspace allocations included:-

- "*Allocate 5,000m^2 to Gateway Plaza, having regard for the existing permit and current plans for the upgrade and expansion of the Centre".*
- "*Allow 12,500m^2 to locate in the CBD and also at other sites*" (refer Essential Economics 2001: Section 7.3)

The 2002 Retail Strategy Update confirmed the projected floorspace requirements assessed in 2001 (Essential Economics 2002: Page 9).

The 2001 Strategy was intended to provide "a process for monitoring and review of this Retail Strategy so that changes in demography, retailing, competition and other factors can be suitably addressed".

Essential Economics' retail demand assessments concluded that limited retail floorspace was supportable in Warrnambool to 2011, and that:

> *"the land areas recommended for rezoning will potentially accommodate an area of retail floorspace which exceeds the level of supportable retail floorspace up to the year 2011".*

(Essential Economics, 2002: Page 16)

3.3.3 City Centre Development

The Retail Strategy (2001-2003) adopted a strong policy stance in relation to the need to maintain the City Centre's role as the primary retail precinct in Warrnambool and South-West Victoria. The Strategy emphasised:

> *"the primacy of the CBD and the need to ensure that all efforts are made to consolidate and strengthen the CBD's retail and other service functions, particularly as this is the principal centre serving the surrounding catchment and the wider south-west region of Victoria".*

(Essential Economics, 2002: Page 16)

The 2001 Strategy had also previously emphasised the need to:

> *"ensure the CBD is presented in an attractive and functional way in terms of retail function and focal points, streetscape, heritage, car parking etc - these are aspects now addressed in the Warrnambool City Centre Urban Design Framework (June 2001), and are endorsed in this Retail Strategy"*

(Essential Economics, 2001: Section 7.2)

The development opportunities identified in the CBD Urban Design Framework (David Lock Associates 2001), and endorsed in the 2001 Retail Strategy included:

- additional supermarket floorspace;
- discount department store facilities;
- bulky goods retailing;
- specialty shops; and
- tourist retailing.

The following observations, however, were made in the 2002 Strategy (Page 11):

- *"There is only very limited opportunity to provide new retail floorspace in the CBD. There is a critical shortage of development/redevelopment sites in the CBD..."*
- *"Expansion of the CBD to the west is very unlikely for the foreseeable future in view of the relatively high cost of land acquisition (particularly as dwelling prices have increased in this area) and because retailers contemplating a CBD location do not want to be separated from the core CBD area".*
- *"Need to keep supermarkets and discount department stores in the CBD, wherever possible..."*
- *"Coles in the CBD is 'tired' in terms of retail presentation and shopping amenity, and is a small store compared with conventional full-line supermarkets - this anchor should be accommodated ... if possible".*
- *"Big box retailers (or bulky goods outlets) cannot suitably locate in the CBD because of their locational requirements which preferably include highway frontage..." and*
- *"Lack of suitably located car parking remains a major issue..."*

While the Retail Strategy Update (2002) recommended that "there should be no upper limit on the volume of retail floorspace in the CBD; this will be determined by market interest and commercial viability and by the availability of acquiring suitable sites and associated costs" (Essential Economics, 2002: Page 16).

A floorspace allocation was not identified for the CBD; however recommendations for Gateway Plaza and Environs included to "*encourage retail expansion of Gateway Plaza (possibly up to 12,000m² in retail floorspace in the longer term)."* (Essential Economics, 2002: Page 17).

While the Strategy recognised the difficulty of redeveloping sites within the City Centre, it did not examine the impacts of directing investment in 'big box' retailing (such as supermarkets and discount department stores) to other centres *"where market demand exists"*.

3.3.4 Eastern Activity Precinct

The expansion of the Eastern Activity Precinct was also encouraged in the 2001 Strategy, emphasising the need to ensure:

- *"...the refurbishment and expansion of the Gateway Plaza proceeds as planned, and to ensure that this project is supported by the retail community in Warrnambool as an important and necessary development of the City's retail sector"; and*
- *"...future new retail development is suitably planned and located in such a way that major new retailing is consolidated and is not dispersed away from existing foci, namely the CBD and Gateway Plaza and the emerging bulky goods focus at the eastern entrance to Warrnambool".*

While the role of Gateway Plaza as an important retail centre for the City was emphasised in the Strategy, the need to strengthen and enhance the bulky goods precinct was also recognised. The Strategy identified that:

- *"There is demand for further opportunity to locate bulky goods retailers in Warrnambool, and this general locality (the Eastern Activity precinct) is considered to be the most appropriate in view of (a) market interest and (b) lack of suitable sites elsewhere in the CBD";*
- *"Bulky goods retailers typically seek large, level sites which enjoy highway frontage (for exposure), can accommodate the large 'footprint' of these stores (often 2,500m² or more), and can accommodate carparking at grade"; and*
- at the time of preparation of the Strategy, several major approvals were yet to be acted upon, and the proposed expansion of the precinct was supported by the Strategy as *"hardware and trade supplies could be a development for part of this floorspace and this would be an appropriate location".*

(Essential Economics 2002: Page 12)

In an analysis of issues affecting each centre in Warrnambool, in relation to Gateway Plaza, the 2002 Retail Strategy Update emphasised:

- *"this long-established centre (1986) needs to have the opportunity to expand and incorporate new retail activity in an integrated manner";*
- *'recent strategic review of zonings in the environs of Gateway Plaza and Mahoneys Road … need to be considered"; and*
- *"AMP, owners of the Gateway Plaza, are considering seeking a rezoning of land to Business 1 zone east of the shopping centre for future retail development; the land covers 30,000m² in retail floorspace, plus carparking".*

(Essential Economics 2002: Page 12)

The recommendations of the 2002 Retail Strategy Update included to:

- *"Encourage retail expansion at Gateway Plaza (possibly up to 12,000m² in retail floorspace in the longer term). Management indicate that their expansion plan involving land to the east of Gateway Plaza … is a 15 year perspective. Expansion may occur in that period."*
- *"Rezone to Business 1 zone the land located to the east of Gateway Plaza …. to enable expansion of Gateway Plaza; this site could accommodate 12,000m² of retail floorspace and on-site carparking."*
- *"Rezone to Business 1 zone the land located to the west of Gateway Plaza to enable future retail use and development, with pedestrian access to existing Gateway Plaza."*

It was considered that "*these recommendations take into account the assessments contained in the Design Framework for The Gateway Activity Centre and stakeholder/owner interests, and acknowledge the need to plan today for future retail development in an orderly manner. There is a need to enable the expansion of Gateway Plaza (hence the recommended rezoning to B1Z to the east), as well as allow for further consolidation of this locality where market demand exists*" (Essential Economics, 2002: Page 17).

3.3.5 Conclusion

Previous Retail Strategies for Warrnambool (Essential Economics, 2001-2003) recognised the primacy of the City Centre (or CBD) as the principal retail and commercial trading centre for south-west Victoria. Floorspace allocations were then recommended for each of Warrnambool's activity centres, on the basis of market demand.

Significant developments arising from these strategies include the expansion of Gateway Plaza and Environs, and bulky goods precincts in the EAP and Northpoint Village. These developments have enabled the activity centre network to better meet the needs of growing local communities, and to an extent, south-west Victoria.The development of the EAP has added significant value to Warrnambool's retail-commercial system, delivering regionally-significant bulky goods clusters, a competitive, high-quality secondary centre, and created a strong entry to the City.

In line with the identified need to review the Retail Strategy on a regular basis (Essential Economics, 2001), the Retail Strategy (2007) has reviewed the overall demand for retail floorspace in Warrnambool. In general terms, the analysis indicates there are no significant net additions required to retail floorspace prior to 2016 (refer Section 6), beyond meeting the requirements for new major stores and local centres.

The Retail Strategy (2007) provides direction for future floorspace allocations, on the basis of overall demand for retail goods and services across the City. Unlike the 2001-2003 strategies, future floorspace provision across Warrnambool's activity centres is based on the preferred distribution of new major retail stores. These major stores affect the functional operation of the activity centre hierarchy (described in Sections 5 and 7.7).

Based on a clear hierarchy of centres and major store components, the Retail Strategy (2007) provides directions for the next phase in the evolution of Warrnambool's activity centre network, by giving effect to the City Centre's primary retail and commercial trading role. The consolidation of the Eastern Activity Precinct should be encouraged, to enhance its role as the regional bulky goods focus. The potential for Gateway Plaza and Environs to further develop should be maintained for the future, however, in line with the previous Retail Strategies (Essential Economics 2001-2003), the timing of any significant expansion is likely to be in longer-term, post-2016.

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4 SETTLEMENT & FUTURE DEMAND CONTEXT

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4 Settlement and Future Demand Context

4.1 Strategic Context of the City of Warrnambool

Warrnambool is south-west Victoria's principal retailing and services centre. The City draws its retail trade from a broad area across south-west Victoria that extends 50 to 90 kilometres from the City. This area is referred to as Warrnambool's Regional Catchment Area (RCA), as illustrated in Figure 4.

The RCA was defined on the basis of in-centre surveys conducted in the Warrnambool City Centre, Gateway Plaza and Homemaker Centre (undertaken by Ratio Consultants, July 2006) and from phone surveys undertaken in Terang, Port Fairy, Hamilton, Port Campbell, Camperdown and Portland (prepared by Ratio Consultants, November 2006).

The City's RCA has three distinctive components:-

- a primary catchment area that encompasses the City of Warrnambool and adjoining areas of Moyne Shire;
- a secondary catchment area that extends between 20 and 60 kilometres from Warrnambool and includes adjoining areas of Moyne and Corangamite Shires; and
- a tertiary catchment area that extends 50 to 90 kilometres from Warrnambool and includes adjoining areas of Moyne, Glenelg, Corangamite, Southern Grampians and Colac-Otway Shires.

The RCA, including primary, secondary and tertiary components, are illustrated in Figure 4.

The population of the RCA utilise Warrnambool's retail, commercial, professional and trade services and facilities. Demographic trends underpin the demand for retail and commercial floorspace, in particular, population and household growth and decline. It is therefore necessary to fully understand current and projected trends in the region, so the future role of activity centres in Warrnambool can be assessed.

Section 4.2 onwards, will discuss the determinants of retail-commercial floorspace demand for the City.

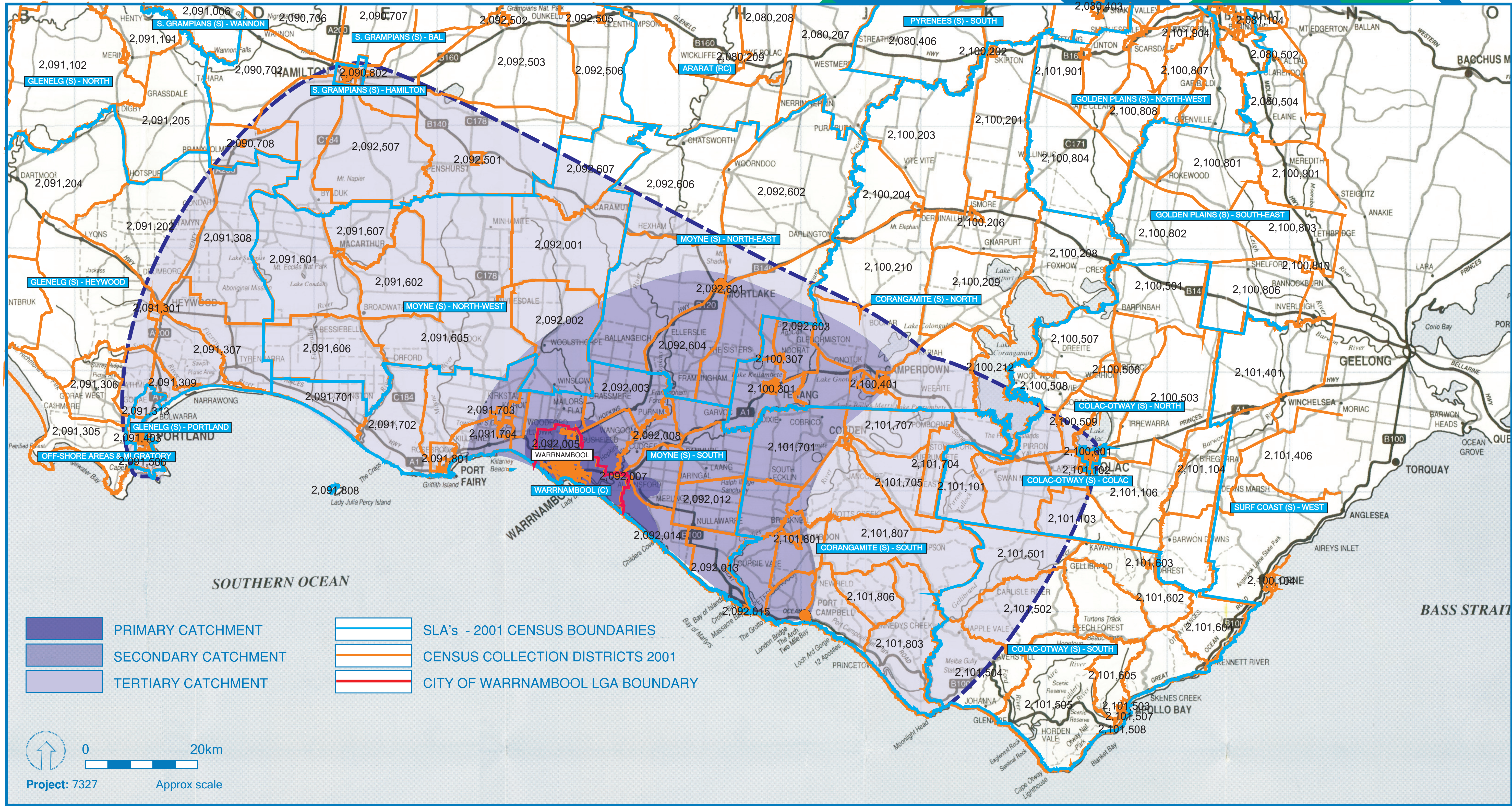

FIGURE 4

WARRNAMBOOL'S CATCHMENT CHARACTERISTICS

Source: In-centre survey & analysis, Ratio Consultants (March 2007)
Phone survey & analysis, Ratio Consultants (November 2006)

4.2 DETERMINANTS OF RETAIL AND COMMERCIAL FLOORSPACE DEMAND

The factors that determine the demand for retail and commercial floorspace requirements for the City of Warrnambool are:-

- the current and projected population of Warrnambool's Regional Catchment Area (refer Table Set A, Table A.8);
- changing patterns of household retail expenditures (refer Table Set C, Table C);
- current levels and patterns of in-bound expenditure i.e. expenditures by resident households to Warrnambool, from areas outside the City (refer Table Set D, Table D);
- the existing and future supply and structure of retail-commercial floorspace in Warrnambool (refer Table Set F, Table F.4);
- current and projected patterns of escape expenditure to areas outside the City of Warrnambool from the Regional Catchment Area, for two development scenarios. Firstly, where Warrnambool attracts an additional discount department store, and secondly, where Warrnambool attracts an additional discount department store <u>and</u> a new department store. (Table Set D and E); and
- current and future productivity requirements for retail floorspace (measured as annual turnover ($) per square metre of gross leasable area) (refer Table Set G).

Table 3 provides a summary of the influence of each factor in the determination of retail-commercial floorspace requirements for the City. Further discussion of each of these factors is provided in the subsequent sections of this report.

TABLE 3. DETERMINANTS OF RETAIL AND COMMERCIAL FLOORSPACE

Factor	Impacts on Retail and Commercial Floorspace Demand	Assessment Undertaken	Operating Assumptions in the Floorspace Demand Projections
Population Trends in the RCA	Warrnambool draws its trade from the RCA. Population trends within the catchment i.e. population growth and decline have implications on the viability of existing activity centres and future floorspace demand. Over long periods of time, population growth is a significant factor that will generate additional demand for retail and commercial floorspace.	The Department of Sustainability and Environment's, Victoria in Future (2004) population projections were used in the assessment for Warrnambool's RCA. Projections for Warrnambool's population (to 2031) were prepared by Ratio Consultants and derived from the Victoria in Future data. The Consultants' assessment of population trends in the RCA is provided in Table Set A, Table A.8.	It is assumed that the population projections prepared by DSE and Ratio Consultants for the RCA will be achieved.
Changing patterns of Household Retail Expenditure	Future retail floorspace requirements are determined by the number of residents in the regional catchment area and the level of household retail expenditures generated by residents within the catchment area.	Retail goods expenditure profiles for household residents in the RCA were prepared for the periods June 2006, 2016 and 2031 (refer Table Set C, Table C). The profile represents the estimated (June 2006) and projected (2016, 2031) household expenditure on retail goods within the RCA.	Refer to Table B2.
Current and future patterns of In-bound Expenditure	Given Warrnambool's significant regional role, in-bound expenditure i.e. retail trade that is drawn from outside the City of Warrnambool, will generate demand for retail goods services in the City, and consequently, retail floorspace demand.	In-bound expenditure was determined on the basis of the phone survey results in Terang, Port Fairy, Hamilton, Port Campbell, Camperdown and Portland. This information is reflected as 'market share' analysis in Table Set D, Table D.	It is assumed that the sample of respondents, to the phone survey and therefore the results, were representative of broader RCA population's expenditure profile.

Factor	Impacts on Retail and Commercial Floorspace Demand	Assessment Undertaken	Operating Assumptions in the Floorspace Demand Projections
Current and future patterns of escape expenditure	Escape expenditure represents the expenditures of household residents in the City of Warrnambool bound to activity centres outside the City. Escape expenditures reduce demand for retail goods and services within Warrnambool and increase regional demand for retail goods.	Assumptions on levels of current and projected escape expenditure were made by the Consultants.	
Retail-commercial floorspace supply	To determine future demand, the existing retail-commercial floorspace in the City of Warrnambool must be quantified. Recommendations for future retail-commercial floorspace allocation is based on what is required in addition to the existing supply (i.e. net additional floorspace).	A detailed inventory of the existing retail-commercial floorspace supply (as at 2006) was undertaken by the Consultants in:- ▪ the Warrnambool City Centre; ▪ the Eastern Activity Precinct, including: – Gateway Plaza shopping centre; – Harvey Norman centre; – Homemaker Centre; and – Bunnings. ▪ Northpoint Village. (refer Table Set F, Table F.1) In addition, the inventory quantified approved floorspace that is currently or yet to be developed (refer Table Set F, Table F.2).	It is assumed that the approved floorspace that is current or yet to be developed will be brought into operation by 2016. Assessments of future floorspace demand and supply (2016 onwards) assumes that the floorspace supply includes this developed or developing approved floorspace (refer Table Set F, Table F.4).
Current and future productivity requirements for retail-commercial floorspace	Retail productivity (measured as retail turnover densities or annual turnover per square metre of gross leasable area) is a measure of returns to traders and indicates the economic sustainability of retail and commercial tenancies.	An assessment of actual and required retail turnover densities for the 2005/06 period was made, based on Warrnambool's current retail system (actual) and industry standards for retail turnover density (required). The Consultants also projected retail turnover density requirements for the periods 2015/16 and 2030/31, based on projected industry standards.	Levels of retail turnover density observed in June 2006 were projected for the periods 2015/16 and 2030/31.

4.3 POPULATION PROJECTIONS FOR WARRNAMBOOL AND THE RCA

Population and household projections for the City of Warrnambool were included in the floorspace demand assessment outlined in the Strategy. Analyses of population change were undertaken at the statistical local area (SLA) level for areas within the primary, secondary and tertiary catchments of the trade area. The historic and projected data are provided in Table 4.

In summary, the results indicate that:-

- a reasonable level of population growth is expected in Warrnambool's RCA. The estimated resident population (ERP) is expected to increase from 96,000 people in 2006 to 106,500 people by 2031 (projections by Ratio Consultants, December 2006), representing 11 percent growth over the 25 year period;
- growth will be concentrated in the primary catchment. Based on the Consultants' projections, population numbers in the primary catchment will increase by 38 percent from 2006 to 2031. Contrastingly, population numbers in the City's secondary and tertiary catchments are projected to decline by 2 and 4 percent respectively for the same period; and
- household numbers are expected to increase in the City of Warrnambool from 2006 to 2031 (projections by Ratio Consultants, December 2006) from 12,086 in 2006 to 18,485 in 2031, representing a 53 percent increase in household numbers for the period.

The calculations that form the basis of the findings discussed in this section are provided in Table Set A: Population Projections (2006 - 2031) and Table Set B: Household Retail Expenditure Profiles.

TABLE 4. RCA: HISTORIC AND PROJECTED ESTIMATED RESIDENT POPULATION (1991-2031)

Regional Catchment Area by Statistical Local Area (SLA)	% of SLA in Catchment (Based on 2001 Boundaries)	Estimated Resident Population (as at June 30)								
		1991	1996	2001	2006	2011	2016	2021	2026	2031
PRIMARY CATCHMENT										
Warrnambool (C)	100.00	26,280	27,370	29,630	31,590	33,780	36,230	38,690	41,330	43,764
Moyne (S) – South	9.26	960	970	960	990	1,010	1,040	1,070	1,090	1,100
TOTAL: PRIMARY CATCHMENT		**27,320**	**27,240**	**28,340**	**30,590**	**32,580**	**34,790**	**37,270**	**39,760**	**42,420**
SECONDARY CATCHMENT										
Moyne (S) – South	82.39	8,550	8,660	8,550	8,850	9,020	9,270	9,480	9,660	9,790
Moyne (S) – North-East	73.10	2,080	1,950	1,830	1,710	1,660	1,500	1,360	1,230	1,110
Moyne (S) – North – West	19.34	650	600	560	510	500	450	400	360	330
Corangamite (S) – North	70.80	7,570	7,070	6,850	6,600	6,450	6,210	5,970	5,740	5,510
Coranagamite (S) - South	38.50	3,090	3,010	3,030	3,010	2,960	2,950	2,940	2,930	2,910
TOTAL: SECONDARY CATCHMENT		**13,510**	**21,940**	**21,290**	**20,820**	**20,680**	**20,590**	**20,380**	**20,150**	**19,920**
TERTIARY CATCHMENT										
Moyne (S) – North-East	7.95	230	210	200	190	180	160	150	130	120
Moyne (S) – North-West	61.50	2,080	1,910	1,770	1,640	1,600	1,430	1,290	1,160	1,030
Moyne (S) – South	8.35	870	880	870	900	910	940	960	980	990
Glenelg (S) – Portland	100.00	11,270	10,770	10,710	10,660	10,850	10,830	10,800	10,790	10,780
Glenelg (S) – Heywood	52.43	3,490	3,270	3,210	3,190	3,260	3,240	3,210	3,170	3,120
Corangamite (S) – North	5.94	630	590	570	550	540	520	500	480	460
Corangamite (S) – South	61.50	4,940	4,810	4,850	4,800	4,740	4,720	4,700	4,680	4,650
S. Grampians (S) – Hamilton	98.24	9,950	9,290	9,250	9,120	9,100	8,900	8,710	8,510	8,310
S. Grampians (S) Bal	32.44	1,830	1,760	1,710	1,640	1,650	1,560	1,480	1,390	1,300
Colac-Otway (S) – South	15.34	510	510	530	630	580	590	610	610	620
Colac-Otway (S) – Colac	95.09	10,380	9,860	9,960	9,950	10,670	10,700	10,790	10,910	11,020
Colac-Otway (S) – North	23.21	1,660	1,620	1,640	1,610	1,450	1,450	1,450	1,450	1,450
TOTAL: TERTIARY CATCHMENT		**53,060**	47,840	45,480	45,270	44,880	45,530	45,040	44,650	44,260
TOTAL: Regional Catchment Area		**93,890**	97,020	95,110	96,680	98,140	100,910	102,690	104,560	106,600

Source: RCA Derived from DSE, Victoria in Future (VIF) 2004 Projections, Warrnambool population derived from Ratio Consultants' Population Model

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4.4 GENERATORS OF RETAIL FLOORSPACE DEMAND

Future retail floorspace demand for Warrnambool's activity centres are set out in Section 5: Warrnambool's Activity Centre System. Future floorspace demand is influenced by a number of demographic and local industry trends, including:

- Escape and inbound expenditure patterns, influenced by potential changes to residents' choices of shopping destination and Warrnambool's retail offer;
- Tourism activities and their influence on inbound expenditure;
- Household income structure of the resident population, and the likely structure of changes to income levels;
- Structural changes in household retail expenditure patterns, impacting upon demand for different types of goods and therefore floorspace; and
- The changing nature of retailing, and the evolution of store types and retail distribution logistics.

4.5 TOURISM IN WARRNAMBOOL

Tourism plays an important role in Warrnambool, which is the major commercial centre along the Great Ocean Road, in Victoria's Great South Coast Region (as shown in Figure 5). Annually, tourism makes a significant contribution to the local economy. Since 1999, total expenditure on tourism along the Great Ocean Road has risen steadily experiencing an average annual change of 2.6 percent. From 2004 to 2005, total expenditure in the region has increased by $50 million, or 4.7 percent (Tourism Victoria, 2006).

In 2005, the Great Ocean Road received the highest levels of domestic tourism expenditure of any tourism region in country Victoria, with combined overnight and daytrip visitors spending a total of $1.1 billion in 2005 (Tourism Victoria, 2006). The Great Ocean Road also received the highest level of expenditure for domestic overnight trips in 2005, with $735 million being spent in the region's tourism industry, and a further $340 million derived from domestic daytrip visitors.

The growth in the region's tourism industry has had significant impacts on Warrnambool's local economy, with the takings from tourism accommodation rising from $2.1 to $2.7 million from December 2001 to 2006. An additional 100 guest rooms have been developed in Warrnambool, with four new establishments commencing operation (ABS 2001-2006). Recent discussions with local industry indicate that by the end of June 2007, another 75 rooms will be operational.

A range of tourism activities are offered in Warrnambool, including environment or nature-based and cultural heritage attractions, in addition to a range of events. The current Tourism Development Plan 2004-2007 identifies a number of opportunities to strengthen the local tourism industry, including:

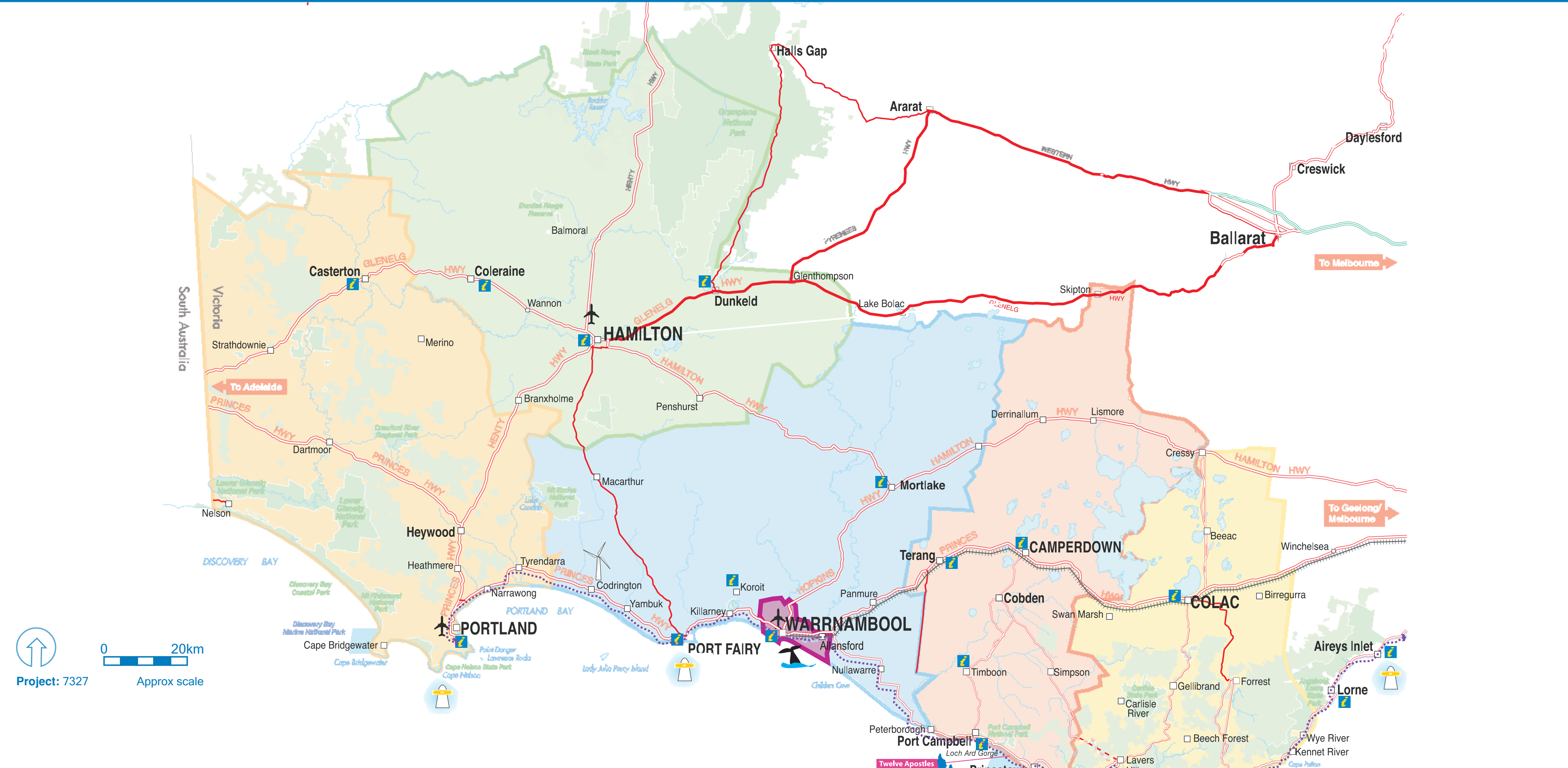
- further development of the food and wine industry;
- development of an international standard golf course;
- enhancements to the harbour area, including a retail and dining precinct;
- improvements to Flagstaff Hill;
- broader marketing of Warrnambool's shipwreck heritage and the 'Shipwrecked' sound and light show;
- indigenous cultural experiences; and
- developing conference and event market potential.

In addition to an expanded range of tourism facilities, the plan outlines the need for substantial infrastructure improvements, including upgrade of the Melbourne to Warrnambool rail line, and an expansion and upgrade of the Warrnambool regional airport in order to attract a regular passenger service.

While the Great Ocean Road has the highest expenditure of any tourism region in country Victoria, the region has a relatively modest yield per visitor, reflecting high visitor numbers and a low per capita spend. Of the ten regional tourism areas in Victoria, the Great Ocean Road is ranked third for per visitor spend of domestic overnight customers and ninth for domestic daytrip expenditure per visitor. The Tourism Development Plan 2004-2007 identifies that the tourism industry is currently constrained by "the lack of diverse accommodation, inadequate services to support natural attractions, seasonality and a lack of designated tourist drives through the hinterland" (Tourism Victoria, 2004: Page 4).

While current visitation data for both domestic and international visitor markets indicate a downward-trend in the overall level of visitation, domestic and international visitors will impact upon the level of retail floorspace provision in the future. Further investment in local infrastructure and tourism facilities will impact upon the level of visitation, influencing the level of inbound expenditure on retail goods.

It is recognised that the specific floorspace requirements set out in *Section 5: Warrnambool's Activity Centre System* may vary, according to changes in the proportion of trade drawn from outside the City of Warrnambool's Regional Catchment Area. These changes are likely to be relatively minor, and are unlikely to cause such significant variation in the floorspace requirements of the city to require additional major components. Furthermore, they are also unlikely to require the further evolution of centres outside the identified hierarchy and scope of each centre's role defined in *Section 7: Proposed Retail Strategy* in the short or medium term.



NATIONAL PARK
STATE FOREST
MARINE NATIONAL PARK
STATE HIGHWAY
TRAIN LINE
AIRPORT
INFORMATION CENTRE
12 APOSTLES
WIND FARM
LIGHTHOUSE
WHALE WATCHING
GREAT OCEAN ROAD
GLENELG SHIRE
SOUTHER GRAMPIANS SHIRE
MOYNE SHIRE
WARRNAMBOOL CITY
CORANGAMITE SHIRE
COLAC-OTWAY SHIRE

FIGURE 5
GREAT SOUTH COAST TOURISM REGION
Source: Great South Coast Healthy Lifestyle Victoria, Investment Prospectus

4.6 REVIEW OF AUSTRALIAN RETAILING TRENDS

Retailing in Australia, particularly at the regional city and centre level, is highly dynamic. A series of important social, economic and technological factors have reflexively influenced social values, preferences and behaviour patterns. Within this context, there have been significant changes in the workplace, family and home and in patterns of habitual and discretionary behaviour, which encompass shopping. The impacts on retailing have been further amplified by changes to products and services, store types and formats and consequential changes to the layout and amenity of shopping centres and precincts. Key changes have encompassed:

- **the theming of centres,** to provide a range of specialised trading precincts within activity centres, such as food halls, fashion malls, sports and leisure precincts, electronics and business services.
- **creation of distinctive social spaces,** to provide places for people to meet or gather, relax, and participate in a range of social and cultural events, such as viewing of exhibits and observing performances. This has led to the development of new public spaces and mixed-use spaces, encompassing both internal and external environments.
- **emergence of new types of stores,** which are focused on particular products or life-cycle groups.
- **emergence of mid-sized stores,** offering an enhanced product and service range to that provided by traditional specialty shops, but still cater for a well-defined niche market, in contrast to department and discount department stores.
- **the development of entertainment type retailing,** where a new market has been developed that links new technology with leisure/lifestyle requirements (focused on home-based theatre systems, computers and electronic games).
- **changes in layout and store formats of department stores,** necessitated by increased specialisation and competition with discount department and specialty stores. An ongoing trend that has developed over the past ten years, is the shift from providing a generic store-brand, to a targeted market-segment approach, with a focus on personalised service and high-quality store environments, and distinctive store brands.
- **the emergence of a seven-day trading week for a range of stores and services.** These are particularly focused in the supermarket and small household goods sectors. In larger centres, this is extended to a wide range of stores, encompassing most forms of discretionary purchases.
- **integration of shopping and leisure retailing.** This encompasses a range of commercial and entertainment activities and product stores, linked to sport, cinema and the arts.

- the emergence of new specialised stores to cater for small business.
- increased provision of professional services in centres.
- increased range of community facilities and services in centres.
- significant increase in lifestyle products and services.
- increasing popularity of fairs and farmers markets.
- emergence of new types of fresh food retailing.

These trends, which are still unfolding, are likely to have a significant future effect on retailing in Warrnambool.

4.7 CONCLUSIONS

The Warrnambool Retail Strategy has been influenced by several factors. They encompass:-

- the historic and future settlement pattern in Warrnambool. In particular the appropriateness of developing neighbourhood activity centres in areas identified as future residential growth areas will be assessed;
- the characteristics of Warrnambool's retail trade catchment. As discussed in Sections 4.2 and 4.3, the characteristics of Warrnambool's regional trade catchment (i.e. population growth in the catchment area and household expenditure) will impact on future retail floorspace demand and consequently, the structure of the City's activity centre system;
- the City's role as the shopping, commercial and trade service provider for south-west Victoria. The regional retail and commercial role of Warrnambool effectively means that the provision of floorspace in the City is geared towards a population higher than which reside within Warrnambool's municipal boundaries. Consequently, recommendations for activity centre development within the City is also in consideration of demand generated by inbound expenditure from regions beyond the City's LGA; and
- the retail productivity requirements of stores (i.e. retail turnover density). In order to maintain the City's retail system as an attractive and yield-competitive asset for retailers and property owners, retail turnover densities must be maintained at industry standard levels. Net additional floorspace requirements for the City, as identified in the Strategy were determined in consideration of these requirements.

5 WARRNAMBOOL'S ACTIVITY CENTRE SYSTEM

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5 Warrnambool's Activity Centre System

5.1 The Current Activity Centre System

Warrnambool's retail commercial system consists of over 650 establishments, which comprise more than 220,000 square metres (m^2) gross leasable area (GLA) of floorspace (refer Table Set F, Table F.1, including vacant floorspace in the City Centre and Homemaker Centre and yet to be developed floorspace at Bunnings (Stage 2)). The City's retail-commercial system is a major source of employment in Warrnambool, providing approximately 2,335 jobs in 2001, accounting for 19.2% of the City's workforce.

Warrnambool's City Centre has historically been the focus of all major retail activity and investment, in particular, prior to 1985 when almost all retailing was located in the City Centre. Since 1985, there has been a significant shift in investment patterns, resulting in the development of new activity centres and precincts outside the City Centre. The changing distribution of retail floorspace has delivered a more accessible activity centre system, providing for a range of day-to-day and weekly needs closer to the growing northern and eastern areas of the City, and encouraging shorter trips for people to meet their basic requirements.

Three important changes have occurred over the past 21 years to significantly alter the structure and distribution of Warrnambool's activity centre system. These comprise the following developments:-

- The development of the Eastern Activity Precinct, presenting a high-quality built form and landmark entry to the City along Raglan Parade. The precinct encompasses:
  - Gateway Plaza and Environs: Focused upon a free-standing centre anchored by a full size supermarket and discount department store, with a total retail floorspace of approximately 14,740m^2 GLA, in addition to an isolated strip of shops and offices on the adjacent Sherwood Scott land, separated by a new major collector road;
  - Bulky goods clusters: Offering the largest single concentration of bulky goods developments of any location in regional Victoria; and
  - The Flying Horse Inn mixed use development (proposed at the time of the floorspace surveys, and under construction at the time of Strategy finalisation).
- The recent development of Northpoint Village, a new neighbourhood centre to service the growing North Warrnambool area, which is anchored by a medium size supermarket.

At present, the existing provision of retail and commercial floorspace (m^2 GLA) in Warrnambool is distributed across three activity centres and precincts, and several convenience nodes. The distribution of floorspace is summarised in Table 5, and the locations of centres are illustrated in Figure 6.

TABLE 5. DISTRIBUTION OF RETAIL-COMMERCIAL FLOORSPACE (2006) (M^2 GLA)

Centre	Floorspace Type	Floorspace (m^2 GLA)
Warrnambool City Centre	Retail and Commercial Floorspace	**155,432**
Eastern Activity Precinct		
Gateway Plaza and Environs	Retail and Commercial Floorspace	14,101
Harvey Norman	Bulky Goods	11,232
Homemaker Centre	Bulky Goods	27,491
Bunnings	Bulky Goods	13,370
Subtotal: EAP		**66,194**
Local Centres		
Northpoint Village	Convenience Retail	**1,272**
Local Convenience Centres	Convenience Retail	**538**
Total Retail-Commercial Floorspace in Warrnambool		**223,436**

Source: Floorspace Surveys prepared by Ratio Consultants, July 2006

5.1.1 Current Patterns of Access to Centres

Currently, access to Warrnambool's activity centres is principally by private motorised vehicles, easily accessible from the arterial road network. As shown in Figure 7, each centre is connected via winding local bus routes that service local neighbourhoods and loop through the City Centre, which acts as the central 'hub' for the City's public transport system.

In addition to fostering more sustainable local trip-making by reducing dependency on cars, public transport provision is an essential component in ensuring more equitable access to goods and services. The role of public transport in ensuring access and participation in the range of activities and functions of activity centres is particularly relevant for youth, older people and those who do not have access to a vehicle.

In line with future residential growth and the development of new activity centres, the existing bus services will need to be revised. To maximise the accessibility, efficiency and frequency (and therefore convenience) of Warrnambool's public transport services, it is important that planning for new activity centres enables the integration of public transport services into the development, to provide safe access. In addition, the planning of new residential areas and subdivisions should provide a collector road structure that enables ease of access to bus services for all future dwellings within 400 metres walking distance.

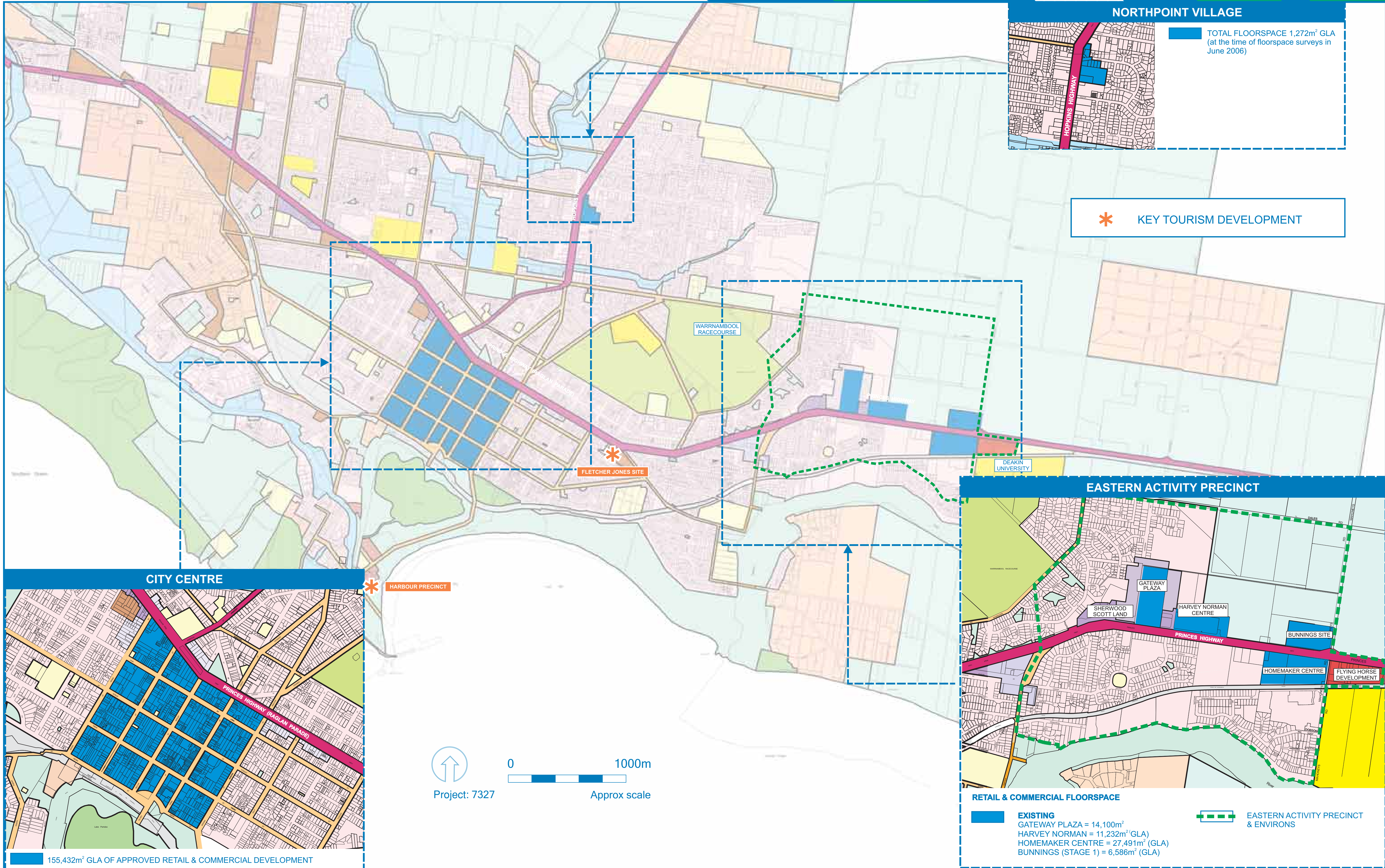

FIGURE 6
WARRNAMBOOL'S ACTIVITY CENTRE SYSTEM (2006)
Source: Floorspace surveys, Ratio Consultants, July 2006

WARRNAMBOOL RETAIL STRATEGY

for WARRNAMBOOL CITY COUNCIL NOVEMBER 2007

by RATIO CONSULTANTS

FIGURE 7

EXISTING BUS NETWORK SERVICING WARRNAMBOOL'S ACTIVITY CENTRES

5.2 EXISTING ACTIVITY CENTRE NETWORKS AND RELATIONSHIPS

5.2.1 The Activity Centre Hierarchy Framework

Establishing a clear relationship between activity centres is imperative to the long-term sustainability of Warrnambool's retail-commercial system. Applying an activity centre hierarchy framework based on State Policy, the optimal activity centre system will comprise a 'primary' activity centre that provides a diverse range of retail, commercial, professional, trade and community services. The primary or principal activity centre is the highest tier of the hierarchy and is characterised by:-

- catchments that extend over several suburbs (or in Warrnambool's context, extends beyond the City's municipal boundaries);
- diversity of activities, with potential for additional scope to accommodate ongoing investment and change in retail, office, service and residential markets; and
- its support of the public transport network, and accessibility to motorists, cyclists and pedestrians.

These centres are supported by several lower order activity centres (e.g. neighbourhood activity centres) that are intended to provide a range of retail goods and services to local communities, closer to residential areas. The development of local neighbourhood centres supports the State planning objective of developing 'walkable neighbourhoods', where residents are encouraged to walk or ride to local centres to access convenience retail and community services, providing an important social function.

Importantly, the framework described above ensures that floorspace is best utilised to serve the needs of the community, by optimising both the range and diversity of goods, services and activities offered in the area, and optimising their distribution, to maximise local accessibility.

5.2.2 Warrnambool's Current Activity Centre Hierarchy

As discussed in Section 3: Policy Context, the existing Municipal Strategic Statement and local planning policies identifies a clear activity centre hierarchy for Warrnambool.

The distribution of centres has evolved into a largely bi-modal system, comprising of two significant retail developments - the Warrnambool City Centre and retail development in the Eastern Activity Precinct. Several neighbourhood and local convenience centres, support these centres, providing for the local community's day-to-day needs.

Applying a hierarchy framework, centres in Warrnambool are classified into a four-tier hierarchy, as shown in Figure 8

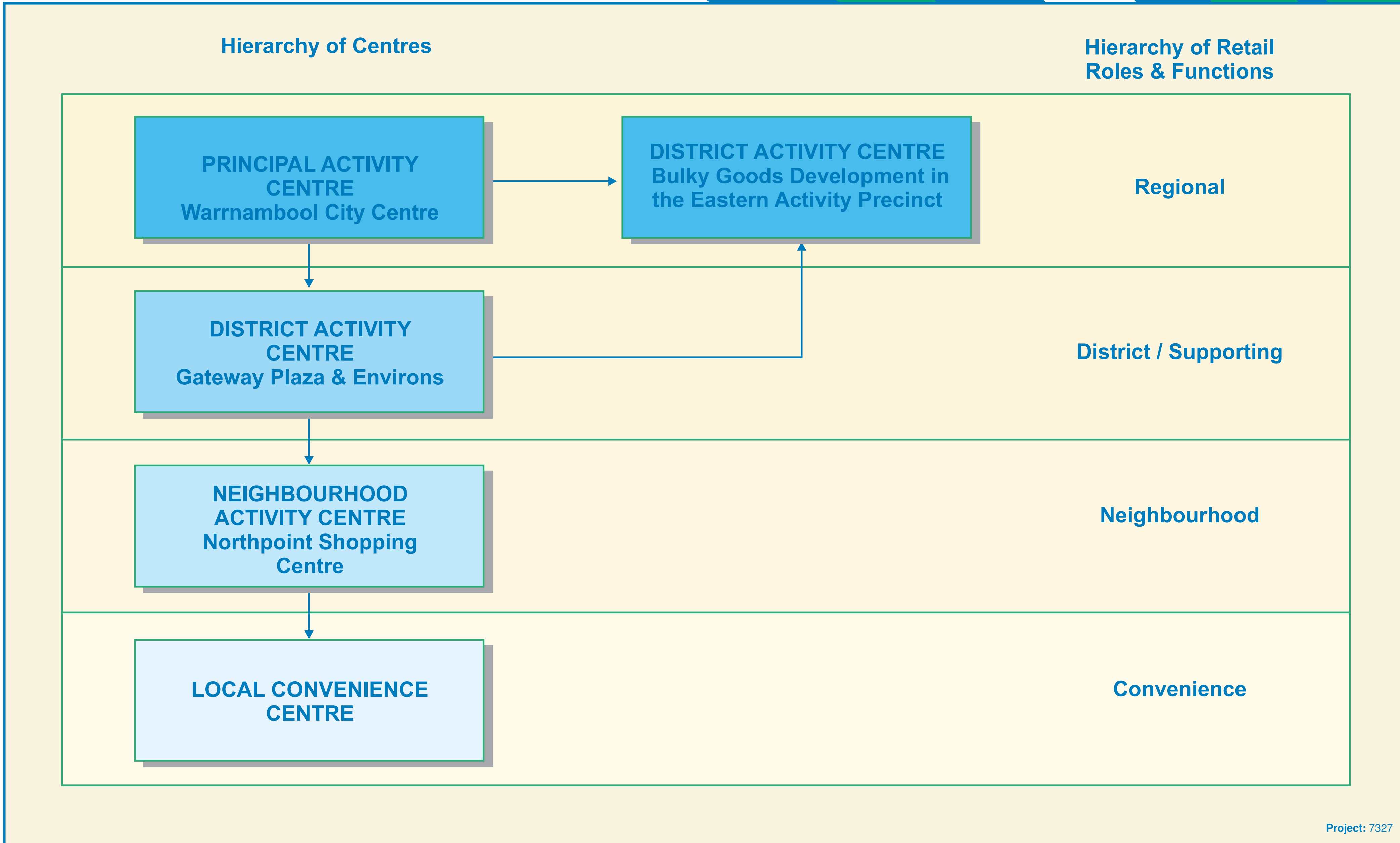

FIGURE 8
WARRNAMBOOL'S ACTIVITY CENTRE HIERARCHY

Warrnambool City Centre

The Primary Activity Centre

The City Centre forms the highest tier in the activity centre hierarchy and plays a primary retail and commercial role for Warrnambool and south-west Victoria. The centre provides the most diverse range of retail, commercial, professional, community and trade services in Warrnambool and is characterised by:-

- the largest concentration and greatest mix of retail and commercial floorspace in the City's activity centre system (comprising 69.1 percent of retail-commercial floorspace in Warrnambool); and
- a retail trade catchment that extends beyond the municipal boundaries and encompasses the regional catchment area highlighted in Figure 1.

Local planning policy encourages the primacy of the City Centre be retained and new retail and commercial development is to be allocated in the City Centre before further allocation of retail and commercial floorspace in the EAP.

Eastern Activity Precinct

The second tier of the Activity Centre hierarchy

The next tier of the functional activity centre hierarchy comprises Warrnambool's 'district activity centre', and fulfils two major roles in the City, as:

- the 'secondary' or 'supporting' retail centre, defined as the retail and commercial floorspace at Gateway Plaza shopping centre and its surrounding environs, including the north-west corner of Gateway Road and Raglan Parade. The retail centre provides a supporting role to the City Centre, and has significantly improved the accessibility of basic goods and services to the growing eastern communities;
- a regional bulky goods precinct, offering a wide range of goods at the existing Harvey Norman, Homemaker Centre and Bunnings sites. Current developments will further strengthen the regional role of the bulky goods clusters, encouraging a greater regional role for the EAP.

The historical development of Gateway Plaza and Environs has occurred in response to a number of issues. Firstly, the need to provide for the retail goods and services needs of the growing eastern communities in Warrnambool, in particular, their day to day and weekly shopping requirements. Secondly, due to the constraints placed on major retail development in the City Centre. In past retail strategies (Essential Economics 2001-2003), this has been attributed to low floorspace vacancy rates in the City Centre and fragmented land ownerships, which have effectively constrained the size of building footprints and affected development costs due to the need to assemble land.

Of the City's total occupied retail goods floorspace, 13 percent is located in Gateway Plaza and Environs. Local planning policy intends the role of Gateway Plaza as a secondary shopping centre to the City Centre, providing a supporting role due to its comparatively limited range and scale of other (non-retail) functions.

The bulky goods clusters provide a regional function in the District Activity Centre. The Warrnambool bulky goods retailing sector has developed outside the City Centre (the historic location for bulky goods) over the past 10 years. The change in the distribution of bulky goods in Warrnambool has occurred in response to both increased regional demand and the limited number and scale of available sites in the City Centre, where bulky goods have historically been clustered along Raglan Parade. The Eastern Activity Precinct provides a high-quality entry into the City, focused on Raglan Parade. Bulky goods developments represent the majority of new retail activity in Warrnambool in the last 10 years, currently providing 32 percent of occupied retail goods floorspace in the City (refer Appendix D: Tables F.1A, F.1B).

The bulky goods developments in the EAP provide the largest single concentration of bulky goods retailing in south-west Victoria (as shown in floorspace surveys undertaken by Ratio Consultants in 2006). Consequently, these developments are significant service providers within south-west Victoria and draw their retail trade from an area that encompasses the RCA.

The Flying Horse Inn mixed use development further strengthens the EAP, by introducing a wider range of functions and activities to the area, including a licenced hotel and additional food and drink premises.

Northpoint Village

The third tier of the Activity Centre hierarchy

The third tier of Warrnambool's activity centre system is the 'neighbourhood activity centre'. Northpoint Village is the only existing neighbourhood centre in Warrnambool and provides an important community function for the growing north Warrnambool community. Neighbourhood centres generally provide for the day-to-day and weekly retail needs of the local community and act as a hub for community services and social activities.

Northpoint Village was originally developed as a cluster of local shops on Mortlake Road, and has recently undergone a significant expansion to accommodate a medium size supermarket and associated specialty shops.

- At the time of the preparation of the Draft Retail Strategy, there was approximately 1,270m² GLA of retail-commercial floorspace at Northpoint Village, accounting for less than 1 percent of total floorspace in Warrnambool. The centre offered only a small cluster of local shops – reflecting its former role as a convenience centre.
- The recent completion of the development of the supermarket and associated specialty shops, increased the total retail-commercial floorspace by over 4,200m² to 5,565m² GLA.

The centre offers some medical services and entertainment functions, strengthening its social role. The provision of a general medical practice and tavern also diversify the centre to ensure it offers a broader non-retail role, enabling the centre to operate as a ‘community hub’ for north Warrnambool.

Convenience Centres

The fourth tier of the Activity Centre Hierarchy

The fourth tier of the activity centre hierarchy is convenience centres. Currently, there are no designated convenience centres in the city, typically comprised of several specialty shops that are not anchored by a supermarket. The role of convenience centres is to provide access to basic goods and services at a local level, and offer a range of retail store types.

Typically the viability of convenience centres is limited due to small catchments, limited passing trade, and a low level of competitiveness with larger centres (reflecting the significantly smaller range of goods and services offered).

A number of convenience nodes are already established in Warrnambool, principally comprising isolated milkbars. In some of these locations, other complementary uses are gradually clustering around the store, including medical and personal services. Overall, however, the existing convenience nodes account for less than 1 percent of retail-commercial floorspace in Warrnambool.

5.3 STRUCTURAL ANALYSIS OF THE RETAIL-COMMERCIAL FLOORSPACE SYSTEM

5.3.1 Warrnambool's Floorspace Structure in 2006

A detailed analysis has been undertaken of the retail-commercial floorspace system in Warrnambool, based on an inventory of floorspace in Warrnambool's existing centres. For the purpose of developing a framework for the long-term management of Warrnambool's activity centres, it is also important to take into account current changes in the system and the impacts of these changes on the distribution of floorspace and demand.

As discussed in the previous section, the Strategy highlights the importance of maintaining a clear hierarchy between Warrnambool's activity centres which addresses the appropriate allocation and distribution of floorspace across the City.

The Consultants prepared an inventory of the current supply of retail-commercial floorspace in Warrnambool (June 2006). To gain a deeper understanding of the function of each centre, the floorspace surveyed was then allocated to the major commodity groups of:-

- food, groceries and liquor (FGL);
- retail non-food;
- bulky goods (BG);
- commercial, professional and community services (CPC);
- trade services; and
- vacant floorspace.

The distribution of retail-commercial floorspace (as at June 2006) in Warrnambool is summarised in Table 6 and outlined in greater detail in Table Set F: Tables F.1A, F.1B. The distribution of floorspace by commodity group indicates the role of each centre to its catchment population (i.e. which services are utilised by visitors to the centre), the centre's influence on consumption patterns, and the role of the centre relative to other centres. These elements effectively define the role of each centre and its place in activity centre hierarchy.

Table 6 summarises the current distribution of floorspace in Warrnambool by type of activity by centre. It can be seen that:-

- high concentration of total food, groceries and liquor floorspace is located in the City Centre (81.7 percent), compared to 13.8 percent at Gateway Plaza, 3.4 percent at Northpoint Village and 1.1 percent at other local centres.
  - The food and groceries shopping trip is the mainstay of activity centre shopping and accounts for 58.9 percent of per capita retail goods expenditure for residents living within the City of Warrnambool and the statistical local areas (SLA's) that comprise the Regional Catchment Area(RCA) (refer Table Set B, Table B.4).
  - This means that a high proportion of personal expenses for residents living within the Warrnambool RCA are contributed to food, groceries and liquor sales.
  - Given the high concentration of FGL services in the City Centre, it is considered that a high proportion of retail goods sales are attributable to the centre.
- the high dependency on food and grocery shopping as a significant component of activity centre sustainability is also reflected in the number of supermarkets located in Warrnambool.
  - There are currently at least five supermarkets located in the City, the highest number being in the City Centre.
- there is a similarly a high concentration of commercial, professional and community services (CPC) in the City Centre, which generally refers to office space, community services, restaurants and other entertainments services and facilities.
  - The concentration of CPC floorspace in the City Centre indicates that the centre functions as a significant employment centre (office space), a destination for recreation and entertainment (restaurants, cinema, entertainment centre etc) and provides an important community function (civic and community services).
- there is a significant amount of bulky goods floorspace in the City. Bulky goods floorspace is concentrated in the EAP and to a lesser extent, the City Centre.
  - At the time of undertaking the floorspace surveys (July 2006), approximately 4 percent of bulky goods floorspace was located in the City Centre.
  - Comparatively, approximately 59 percent of bulky goods floorspace was located in the EAP. This does not account for floorspace developed at Bunnings, or vacant floorspace at the Homemaker Centre at the time of the survey.
  - The distribution of bulky goods floorspace illustrates the history of retail development in the City.
  - Prior to the development of the EAP, the City Centre was a significant location for bulky goods.
  - The current distribution of floorspace emphasises the higher order role of the City Centre and the trend for locating restricted retailing 'out-of-centre'.
- there is a low floorspace vacancy rate in the City Centre, with only 2 percent of total floorspace in the centre currently vacant.
  - Low vacancy rates in the City Centre have played a significant role in the evolution of Warrnambool's activity centre system.

- Historic population growth in Warrnambool has generated demand for additional retail goods floorspace in the City, and as a consequence of the lack of available floorspace and large (re)development sites in the City Centre, this demand has been accommodated in the EAP.
- Low vacancy rates in the City Centre have significant implications for the sustainability of the City's activity centre system, particularly the balance that is to be maintained in floorspace distribution and function in centres. This will be discussed in detail in subsequent sections of the report.

As at July 2006, there was approximately 120,330m2 GLA of occupied retail goods and services floorspace, or "shopfront floorspace" in the City (as shown in Table 7). Of this:-

- 68.7 percent of total shopfront floorspace is located in the City Centre;
- approximately 30 percent is located in the Eastern Activity Precinct (EAP); and
- the balance (1.5 percent) comprises neighbourhood and local or convenience centres. Most of this floorspace is located at Northpoint Village (noting that these figures represent the activity centre system prior to the expansion of Northpoint Village from a convenience centre to a neighbourhood centre).

TABLE 6. EXISTING SUPPLY OF RETAIL-COMMERCIAL FLOORSPACE (2006)

Centre Type	Centre	Shopfront Floorspace					Services Floorspace		Total: All Centres
		Total FGL	Total Retail Non-Food	Bulky Goods	Total Occupied Retail Goods	Retail Services	Commercial and Trade Services	Vacant	
Principal Activity Centre	**Warrnambool City Centre**	**24,315**	**33,989**	**14,351**	**72,655**	**10,047**	**66,965**	**3,116**	**153,739**
District Activity Centre (Eastern Activity Precinct)	Gateway Plaza	4,109	10,114		14,254	232	194	64	**14,743**
	Harvey Norman and environs			10,010	10,010	524	697		**11,232**
	Homemaker Centre			10,797	10,797			16,694	**27,491**
	Bunnings							13,370	**13,370**
	Total: EAP	**4,109**	**10,144**	**20,808**	**35,062**	**756**	**891**	**30,138**	**66,846**
Neighbourhood and Local Centres	Northpoint	1,012	110		1,122	150			**1,272**
	Other	338			338	200			**538**
Total: All Centres		**28,791**	**29,775**	**44,243**	**35,159**	**109,176**	**11,153**	**67,857**	**33,253**

Source: Floorspace surveys, Ratio Consultants, July 2006, Local/Convenience floorspace taken from *Warrnambool Retail Strategy, 2003 Update,* Essential Economics.

TABLE 7. DISTRIBUTION OF SHOPFRONT FLOORSPACE (M^2 GLA, %)

Centre	Floorspace Type	Floorspace (m^2 GLA) *	Floorspace (%)
Warrnambool City Centre	FGL, Retail Non-food, Bulky Goods, Retail Services	**82,700**	**68.7**
Eastern Activity Precinct			
Gateway Plaza	FGL, Retail Non-food, Retail Services	14,490	12.0
Harvey Norman and environs	Bulky Goods, Retail Services	10,540	8.8
Homemaker Centre	Bulky Goods	10,800	9.0
Sub-Total: Eastern Activity Precinct		**35,820**	**29.8**
Northpoint Village	FGL, Retail Non-food, Retail Services	**1,270**	**1.1**
Local/Convenience Centres	FGL, Retail Non-food, Retail Services	**540**	**0.4**
Total: All Centres		**120,330**	**100.0**

Source: Floorspace surveys, Ratio Consultants, July 2006 (Refer Appendix D: Table F.1A)

* Rounded figures account some minor variations in subtotals.

5.3.2 Warrnambool's Floorspace Structure in 2016

It is important to note that Warrnambool's retail system is currently undergoing a number of significant changes. Existing planning approvals will further change the City's retail structure and geographic distribution, with additional bulky goods stores currently being developed, and existing permits for further expansion of Gateway Plaza likely to be acted upon.

At the time of the floorspace survey, undertaken by Ratio Consultants for the Retail Strategy (July 2006) there were two major developments in the EAP that were either in the final stages of completion (the Bunnings development) or had recently completed their construction phase and were partially tenanted (the Homemaker Centre). In addition, the expansion of Northpoint Village was underway, providing a new supermarket and associated specialty shops (completion mid-2007).

In order to properly assess the long term retail floorspace requirements for the City of Warrnambool, it is necessary to take account of the full effect of these new developments together with all existing retail approvals being developed and brought into operation. Total existing approvals issued by the City of Warrnambool that are yet to be utilised (as at January 2007) are as follows:-

- approved additional retail goods and services floorspace across the city as a whole (that is additional shopfront floorspace) amounts to approximately 24,000m^2 GLA; and
- a further 10,500m^2 GLA has been approved for commercial, professional and community services and for trade services.

Details of approved floorspace (location and type of floorspace) that were included in the assessments of future floorspace supply, is provided in Table Set F, Table F.2.

Of the retail floorspace approvals, based on the gross additions of floorspace to the system:-

- less than 20 percent will be developed in the City Centre;
- a further 14,470m^2 GLA will be added to the EAP (about 60 percent of the retail approvals); and
- a further 4,600m^2 GLA was being added to Northpoint Village at the time the floorspace surveys were being undertaken. It is important to note that the Northpoint Village expansion accounted for 19.3 percent of the retail approvals considered in the analysis of Warrnambool's Floorspace System at 2016.

It will be noted that retail commercial floorspace approvals in the City Centre will result in relatively minor additions to net additional retail commercial floorspace due to losses of redeveloped floorspace.

On the basis that the retail and commercial floorspace approvals are brought into operation by 2016, the supply of retail floorspace in the City will be as follows:-

- total occupied shopfront floorspace (both retail goods and services) will be approximately 166,100m^2 GLA;
- of this quantum, about 50.7 percent will be in the City Centre;
- 45.5 percent will be in the EAP; and
- the balance, 3.8 percent, will be primarily located at Northpoint Village together with a relatively minor level of floorspace (less than 600m^2 GLA) at convenience stores.

An essential part of the analysis of Warrnambool's future retail floorspace requirements involved an examination of current planning approvals for the development of new retail goods floorspace in the City. For the purposes of the assessment, it was assumed that current approvals at 2007 would be fully developed by 2016.

This analysis indicates that new retail investment either underway or approved is primarily located in the EAP and at Northpoint. Aside from the Co-op development, no significant approvals were identified in the City Centre at the time this report was prepared.

From the 1990s to 2016, investments in Warrnambool's retail sector have and will continue to strengthen the City's retail system. These investments have enhanced the retail system significantly, improving the range and accessibility of retail goods to Western Victoria. Key investments include:

- the development of a first class bulky goods precinct, rivalling the scale and diversity of other clusters in regional Victoria;
- further consolidation of the Eastern Activity Precinct retail node is both approved and currently underway, focused on Gateway Plaza; and
- development of the Northpoint Village Activity Centre.

On the basis of current investments, by 2016, **the City's retail system will have evolved to a distinctly different system than in the 1990s, where retail investment was primarily concentrated in the City Centre.**

A new spatial distribution of retail floorspace has emerged, to support the growing population in the east and north Warrnambool.

Historically, almost all retail services in Warrnambool have been concentrated in the City Centre, a trend that is expected to continue to 2016 and beyond.

By 2016, there will be an approximate balance of Occupied Shopfront Floorspace in the City Centre and the EAP. Approximately 50 percent of Warrnambool's occupied shopfront floorspace (comprising retail goods and services) will be in the City Centre, about 4 percent in local and neighbourhood centres and the balance, some 46 percent will be located in the EAP.

The two major retail nodes will each provide distinct and largely complementary roles, as their future structures to 2016 indicates (refer Table F.3).

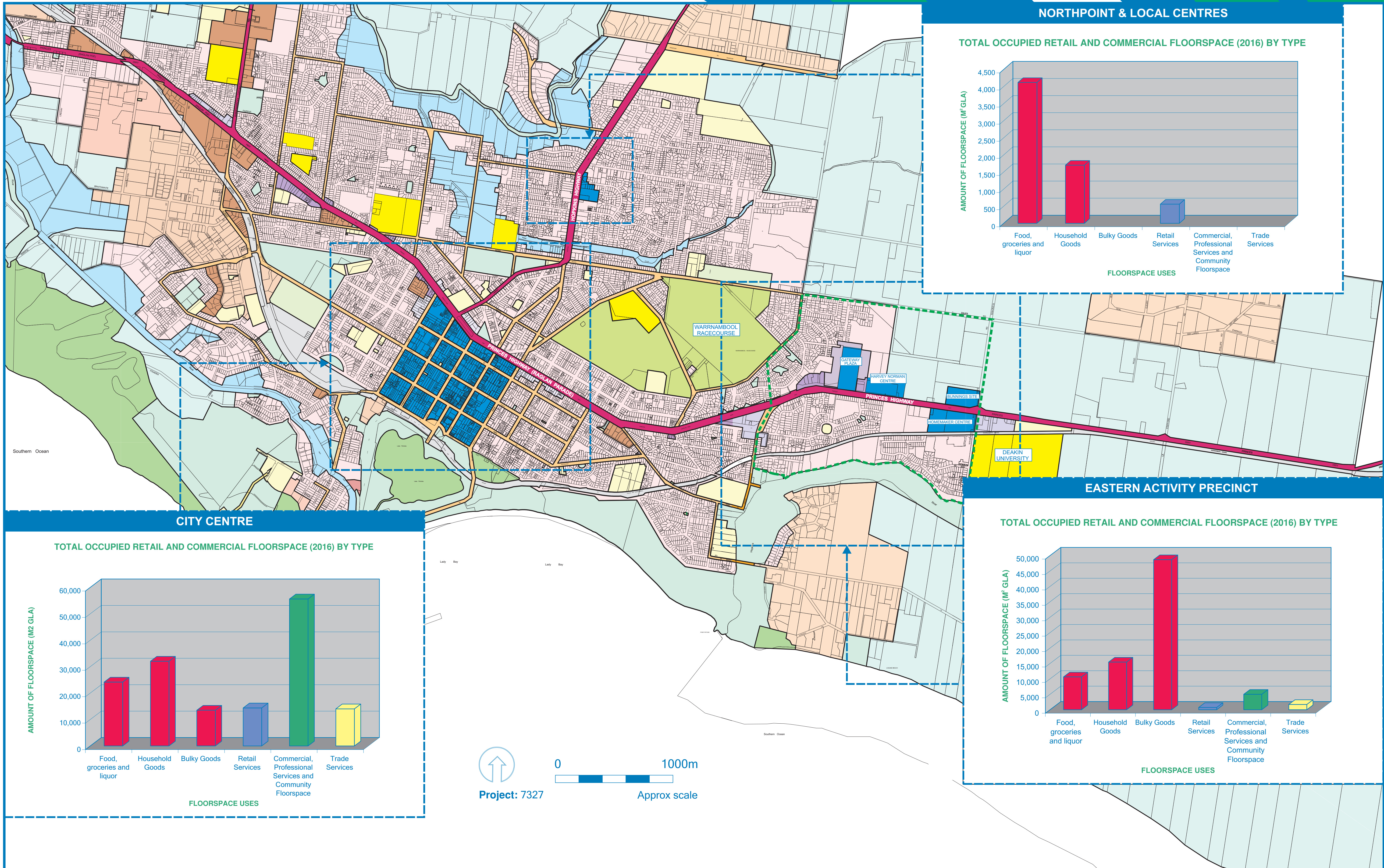

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FIGURE 9
DISTRIBUTION OF FLOORSPACE IN WARRNAMBOOL (2016)
Source: Floorspace surveys, Ratio Consultants, July 2006

TABLE 8. MINIMAL ESTIMATED DEVELOPED FLOORSPACE (YEAR ENDED 30 JUNE 2016)

Centre	Potentially Occupied Floorspace Based on Existing Approvals and allows for a 4% Vacancy Rate										
	Shopfront Floorspace						Services Floorspace				
	Food, Groceries and Liquor	Household Goods	Bulky Goods	Total Occupied Retail Goods Floorspace	Retail Services	Total Occupied Shopfront Floorspace	Commercial and Professional Services	Trade Services	Total Services Occupied Floorspace	Vacant	Total Retail and Commercial Floorspace
Warrnambool City Centre	**24,180**	**32,070**	**13,520**	**69,780**	**14,390**	**84,170**	**55,630**	**14,040**	**69,670**	**6,410**	**160,250**
Eastern Activity Precinct											
Gateway Plaza and Environs	9,540	15,490	1,040	26,060	230	26,280	2,140		2,140	1,190	29,600
Bulky Goods*	180		47,630	47,810	510	48,310		1,710	1,710	2,090	52,100
Flying Horse Inn Redevelopment	960			960		960	2,880		2,880	160	4,000
Total: Eastern Activity Precinct	**10,680**	**15,490**	**48,670**	**74,830**	**740**	**75,550**	**5,020**	**1,710**	**6,730**	**3,440**	**85,700**
Neighbourhood and Local Centres	**4,120**	**1,710**		**5,830**	**550**	**6,370**				**270**	**6,640**
Total: City of Warrnambool	**38,980**	**49,240**	**62,210**	**150,410**	**15,690**	**166,100**	**60,650**	**15,750**	**76,400**	**10,100**	**252,600**

* Bulky goods developments in EAP includes: Harvey Norman, Homemaker Centre and Bunnings

Note: assumes floorspace approvals inventoried in December 2006 are developed by 2016.

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5.3.3 Conclusion

From 1985 to 2006, the City's activity centre network has evolved from a highly concentrated system almost entirely focused in the City Centre, to a largely bimodal system with almost equal distributions of retail floorspace at the City Centre and the EAP. The system has largely evolved due to a lack of development opportunities for provision of additional retail floorspace in the City Centre.

It is imperative that new retail and commercial investment has the opportunity to develop in Warrnambool, to meet future demand for retail services and create an impetus for the regeneration of existing centres. New investment breathes life into centres through redevelopment and streetscape renewal, which generates interest from shoppers with the introduction of new retailers, and contributes to overall amenity improvements.

The analysis of existing and future floorspace systems forms an important basis for the assessment of future retail floorspace requirements for Warrnambool. Other considerations that need to be taken into account include the City's current and future regional trading role, returns required for retail floorspace, projected population and expenditure growth together with current and future patterns of market share. These are discussed in the following sections.

5.4 PATTERNS OF ESCAPE AND INBOUND RETAIL EXPENDITURES

In assessing future retail floorspace demand for the City, it is important to consider escape and inbound retail expenditure to Warrnambool. Escape expenditure refers to the amount of household expenditure that is spent by Warrnambool households or residents at activity centres outside Warrnambool. Inbound expenditure refers to the amount of retail trade that is generated in Warrnambool, from households beyond the City.

5.4.1 Escape Expenditure

Escape expenditure was assessed based on an analysis of household retail expenditure, occupied retail floorspace, inbound expenditure and an assessment of services available at activity centres in the RCA. As at November 2006, patterns of retail escape expenditures by households resident in Warrnambool and the Regional Catchment Area were as follows (refer Table D):-

- for food, groceries and liquor, escape expenditures were estimated at approximately 5 percent of household retail expenditures; that is, the average level of expenditures on food, groceries and liquor by household resident in the City that was expended in centres and at locations outside the City was estimated to be 5 percent of household expenditures;
- for clothing, footwear and other household goods (i.e. retail non-food), escape expenditures were estimated to be 13 percent of household retail expenditures; and
- for bulky goods, escape expenditures were also estimated at 13 percent of household retail expenditures.

Escape expenditure occurs when residents travel to activity centres outside the City to shop and to utilise commercial, professional and trade services. Generally, escape expenditure occurs when:-

- particular goods and services are not available; or
- when residents purchase goods whilst on holidays, travelling to and from work, or whilst visiting other cities and/or towns.

The escape expenditures estimated for all commodity groups are relatively low, compared to metropolitan standards, reflecting Warrnambool's role as a significant shopping, commercial and trade service destination in south-west Victoria. A combination of its wide regional catchment and scale relative to other centres in the region has contributed to the low levels of escape expenditure, and high levels of inbound expenditure. It will be noted that escape expenditures increase in the secondary catchment area and further increase significantly in the tertiary catchment area. Therefore the highest potential to reduce escape expenditures lies in the increased attraction of Warrnambool in its secondary and tertiary catchment areas.

5.4.2 Inbound Expenditure

The current distribution of inbound expenditure, or market shares in the City's Regional Catchment Area was established through telephone surveys designed and co-ordinated by Ratio Consultants, and undertaken by Sweeney Research (November 2006).

The survey responses were used to identify Warrnambool's regional catchment from which the City draws its retail trade. The catchment comprises of a broad area in south west Victoria, that extends 50 to 90 kilometres from the City. The City's regional catchment area has three distinct components (refer Appendix D: Table A.11):-

- a **primary catchment area** that encompasses the City of Warrnambool and adjoining areas of Moyne Shire. Residents in this area tend to do almost all of their retail goods and services shopping in the City of Warrnambool. The City provides both local and regional services for the primary catchment area. In June 2006, the population of the primary catchment area was approximately **32,580 persons**;
- a **secondary catchment area** that extends between 20 and 60 kilometres from Warrnambool. Residents in the secondary catchment area tend to use Warrnambool as their regular weekly shopping destination. It is also the primary centre for purchases of household and bulky goods. In June 2006, the population of the secondary catchment area was approximately **20,680 persons**; and
- a **tertiary catchment area** extending 50 to 90 kilometres from Warrnambool. Residents in this area tend to use Warrnambool as an important regional centre for purchases of household and bulky goods. Most food shopping by residents in this area is undertaken in local centres. In 2006, the population of the tertiary catchment area was approximately **44,880 persons.**

The City relies on each of the catchment areas to varying degrees. Warrnambool's retail goods sales are estimated at approximately $541 million for 2005/06 at June 2006 constant prices. These were drawn from the RCA (refer Appendix D: Table Set E and Table 9 below) as follows:-

- approximately 61.2 percent from the primary catchment area;
- 23.0 percent from the secondary catchment area;
- approximately 13.8 percent from the tertiary catchment area; and
- the balance, approximately 2 percent of retail sales from beyond the tertiary catchment area (and RCA).

The surveys and analyses also indicate that the City draws almost all of its food, groceries and liquor trade from the primary catchment area (approximately 70.6 percent) but relies significantly on its regional catchment and areas beyond the primary catchment for household and bulky goods trade (about 46.0 percent of household and bulky goods trade is drawn from the City's secondary and tertiary catchments areas and beyond). This is summarised in Table 9.

TABLE 9. WARRNAMBOOL'S CURRENT RETAIL GOODS TRADE BY SOURCE AREA

Regional Catchment Area	% of Warrnambool's Current Retail Goods Trade by Source Area			
	Food, groceries and Liquor	Retail Non-Food	Bulky Goods	Total: Retail Goods
Primary Catchment	70.6	51.8	49.9	61.2
Secondary Catchment	22.6	19.8	28.5	23.0
Tertiary Catchment	5.8	25.4	18.6	13.8
Trade from beyond the RCA	1.0	3.0	3.0	2.0
City of Warrnambool: Total Retail Goods Sales	**100.0**	**100.0**	**100.0**	**100.0**

Source: Analysis by Ratio Consultants, refer Table Set E, Table E.1

On the basis of the surveys, market share contours were established for each major commodity group. Estimates of market share were then made for each statistical local area across the RCA.

The market share contours for Food, Groceries and Liquor, Retail Non-Food and Bulky Goods are presented in Figures 10 to 12. Each contour line represents the proportion of retail trade (as a percentage) drawn from the area bound between the City of Warrnambool and the contour line. As an example, Figure 10 which illustrates market shares for Food, Groceries and Liquor shows that 60 percent of total inbound food, groceries and liquor trade to Warrnambool, is drawn from the City of Warrnambool and a portion of Moyne South and Moyne North West statistical local areas.

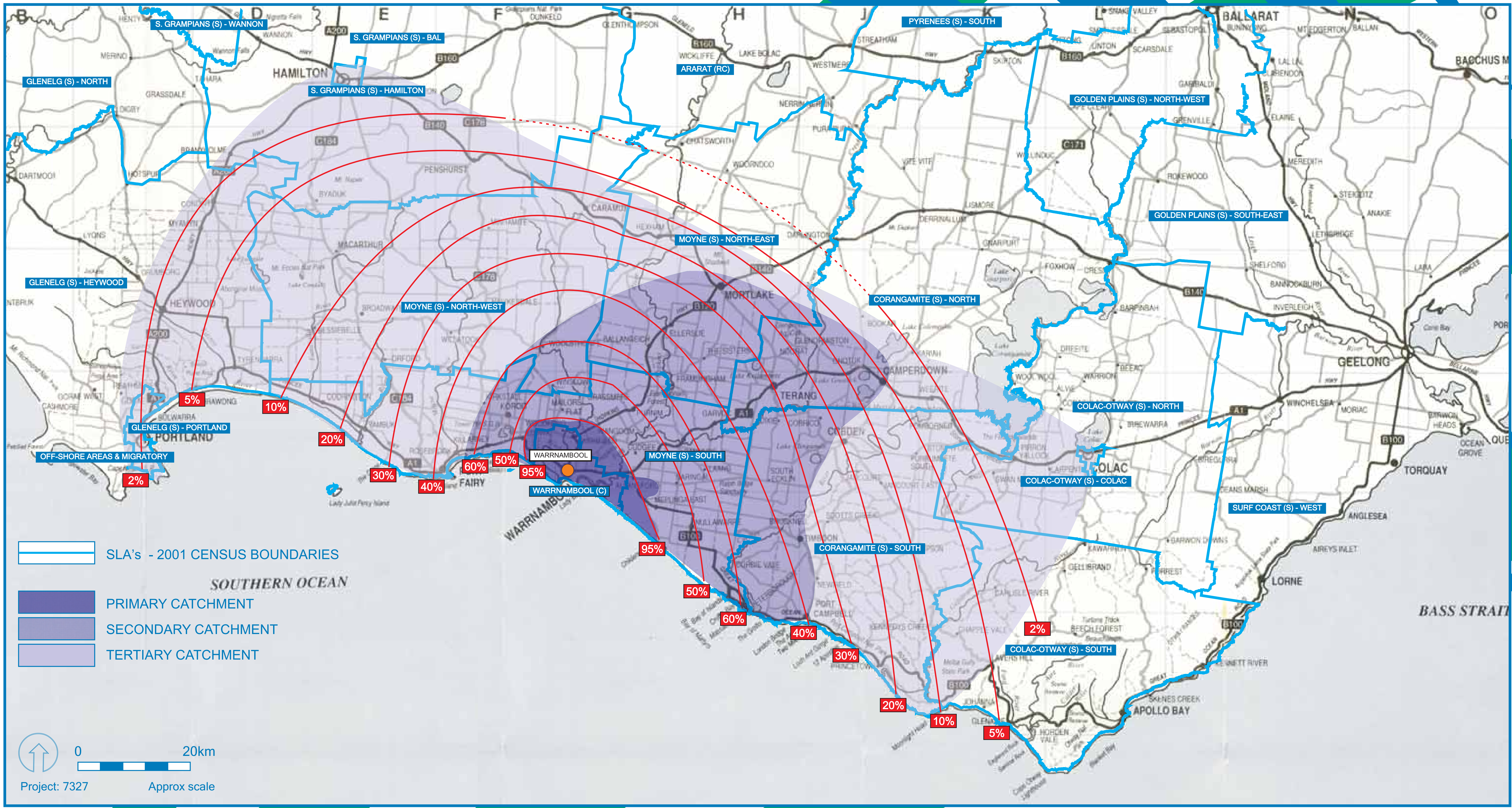

FIGURE 10
FOOD, GROCERIES & LIQUOR
ESTIMATED DISTRIBUTION OF MARKET SHARES
Source: In-home telephone survey, (November 2006)

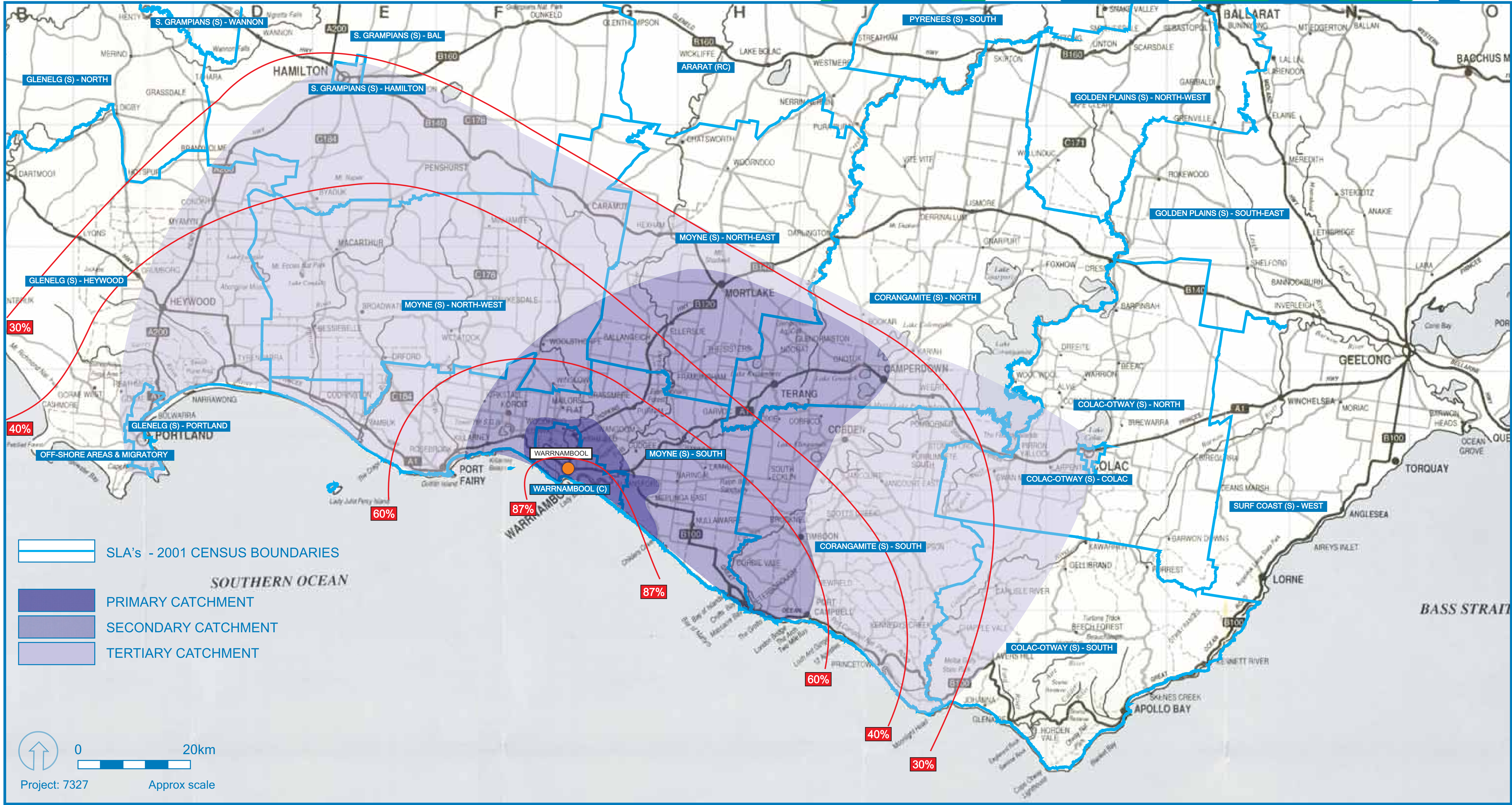

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FIGURE 11
HOUSEHOLD GOODS
ESTIMATED DISTRIBUTION OF MARKET SHARES
Source: In-home telephone survey, (November 2006)

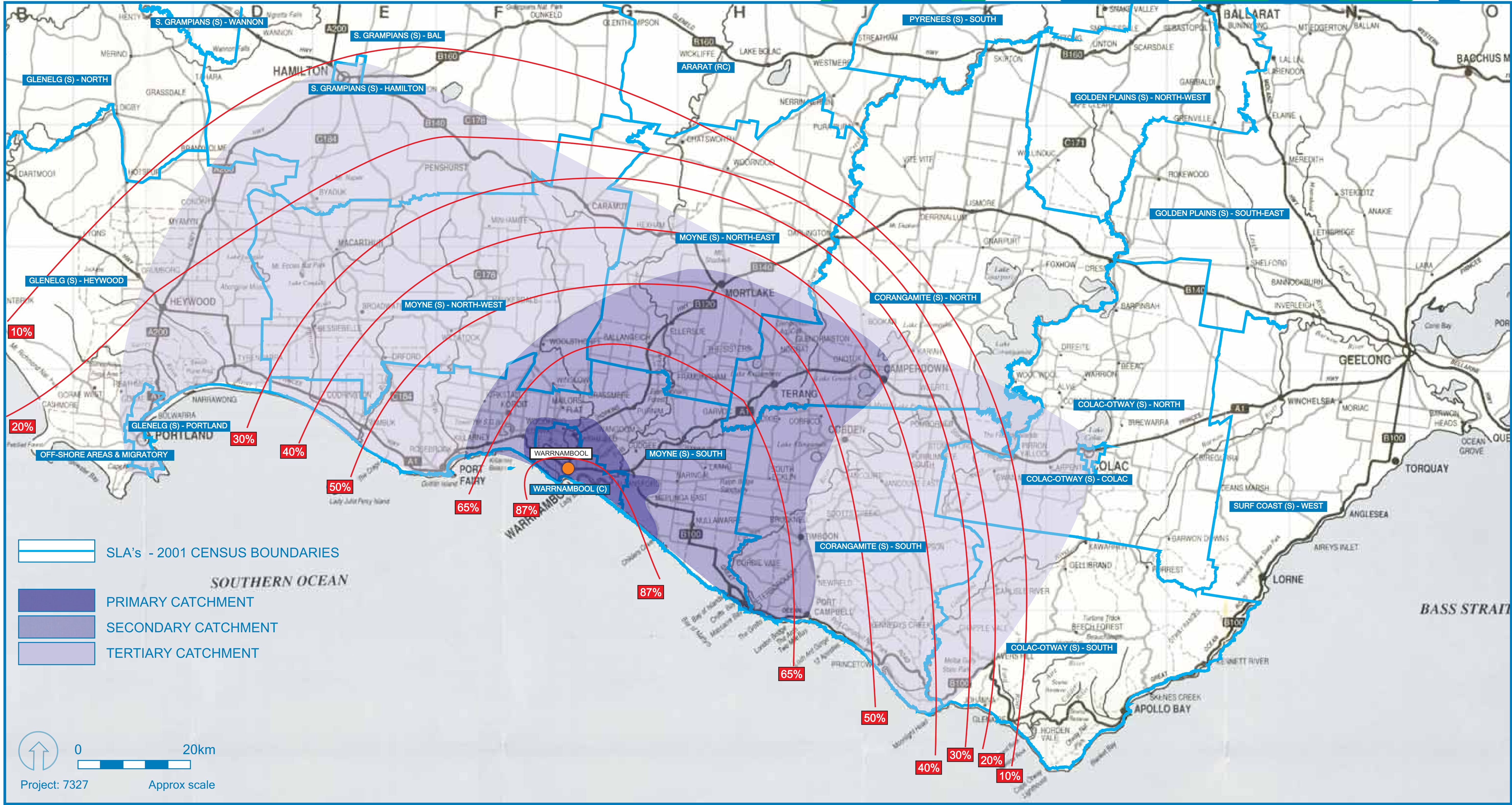

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FIGURE 12
BULKY GOODS
ESTIMATED DISTRIBUTION OF MARKET SHARES
Source: In-home telephone survey, (November 2006)

5.5 VISITOR BEHAVIOUR PATTERNS

To establish visitor behaviour patterns, and their impact on expenditure, in-centre surveys were undertaken in July 2006 and March 2007 at the City Centre. These surveys are supplemented by some data from the MapInfo Dimasi in-centre surveys of visitors to Gateway Plaza, a survey commissioned by the landowner, AMP. Over 320 respondents were surveyed in the City Centre (March 2007), over a two day period over peak periods during the week (Friday and Saturday), while 52 persons were surveyed at Gateway Plaza (July 2006).

Aspects of visitor behaviour and demographics that were surveyed include:-

- visitation frequency;
- length of stay at activity centres;
- mode of travel; and
- stores and services visited within each activity centre.

5.5.1 Trip Purposes and the Role of Centres

The in-centre surveys provided information on reasons for visiting activity centres. Table 10 provides a comparative analysis of the surveyed centres and the primary motivations for visiting the centres. Reasons for visiting the centres were most commonly identified as:-

- shopping;
- meeting friends;
- work;
- eating out;
- professional services;
- study;
- recreation and leisure; and
- passing through.

The survey responses show that ‘shopping’ is the most common reason for visiting the surveyed centres, however the proportion of respondents who shopped at Gateway Plaza is significantly higher than the City Centre. This indicates that visitors tend to visit the centre principally for its shopping attractions, and emphasises the diversity of activities and services available at the City Centre, as people visited it for a much wider range of reasons.

Significantly, a higher proportion of visitors to the City Centre nominated 'meeting friends' as their reason for visiting the centre, compared with only 3.0 percent of visitors to Gateway Plaza and Environs. While the City Centre provides a central community space, offering a range of social activities, Gateway Plaza and Environs does not play a significant role as a focus for social interaction in the local area, which is a key function of centres intended to provide for local communities' needs.

TABLE 10. REASONS FOR VISITING WARRNAMBOOL'S ACTIVITY CENTRES

Reasons for Visiting	Warrnambool City Centre (% respondents)	Gateway Plaza (% respondents)
Shopping	38.0	81.0
Meeting Friends	14.8	3.0
Recreation/Leisure	11.0	-
Work	10.8	1.0
Eating Out	8.8	3.0
Study	3.3	-
Professional Services	2.4	-
Passing through	2.2	2.4
Other	4.0	12.0
Total	**100.0**	**100.0**

Source: In-centre surveys, Ratio Consultants, March 2007 and MapInfo Dimasi, Surveys.

5.5.2 Visitation Frequency Patterns

A notable characteristic of the visitation patterns to the City Centre is the relatively high proportion of daily and frequent visits to the centre (65 percent). Gateway Plaza also has a significant proportion of daily and frequent visits to the centre, with 75 percent of visitors attending the centre regularly (refer Table 11).

The survey results show that a significantly higher proportion of 'weekly or fortnightly' visitation to the City Centre than Gateway Plaza, with 22.7 and 7.7 percent respectively. A higher proportion of respondents at Gateway Plaza visited 'less frequently' than the City Centre, referring to visitations that occur once a month, hardly ever or infrequently.

The in-centre surveys indicate that 75 percent of visitors travel to Gateway Plaza on a daily or regular basis, reflecting its convenience role in the provision of day-to-day and weekly needs of the eastern Warrnambool area. The nature of services offered at the centre and the role of the centre as a local shopping centre, is reinforced by the dominant reason for visitation being shopping, with a limited range of other functions being provided by the centre.

TABLE 11. VISITATION FREQUENCIES TO WARRNAMBOOL'S ACTIVITY CENTRES

Centre	Warrnambool City Centre (% respondents)	Gateway Plaza (% respondents)
Daily / Several Times a week	65.7	75.0
Weekly / Fortnightly	22.7	7.7
Less Frequently	11.6	17.4
Total	100.0	100.0

Source: In-centre surveys, Ratio Consultants, March 2007 and July 2006.

5.5.3 Length of Stay

Length of stay analysis at activity centres provides further indications of the local, district and regional roles of centres. Short stay trips generally indicate the local convenience role of a centre (less than one hour). Longer stay trips (more than two hours) generally reflect multiple visitations and/or comparison shopping. As Table 12 indicates, both centres provide a balance of local and multiple-visitation/comparison shopping roles.

TABLE 12. LENGTH OF STAY PATTERNS

Centre	Less than 1 hour stay (%)	1 - 2 hour stay (%)	More than 2 hours stay (%)	Total
Warrnambool City Centre	21.5	28.2	51.3	**100.0**
Gateway Plaza	23.0	35.0	42.0	**100.0**

Source: In-centre surveys, Ratio Consultants, March 2007 and July 2006.

5.5.4 Stores and Services Visited

The in-centre surveys asked respondents to identify the services and stores they were visiting at the time of the survey. The results of the surveys verified the importance of activity attractors (retail and other types of attractors) for both the City Centre and Gateway Plaza.

In the case of the City Centre, principal attractors included:-

- Supermarkets (Coles, IGA, Aldi and Safeway);
- Discount Department Store (Target);
- Clothing stores;
- Banks;
- Fresh food outlets;
- Cafes and restaurants;
- Post office; and
- Professional and commercial services.

In the case of Gateway Plaza, principal attractors included:-

- Supermarket (Coles);
- Discount Department Store (Kmart);
- Clothing stores;
- Fresh food outlets;
- Credit Union; and
- Cafes.

5.5.5 Multi-purpose trip-making

The number of multi-purpose trips to Warrnambool's main retail centres indicates the strength and diversity of the retail role that each fulfils, indicating the relative strength of each centre.

In the case of the City Centre, the high proportion of trips to three or more stores indicates a relatively high level of multi-purpose trips, with over 60 percent of trips being to three or more stores. A greater proportion of trips to Gateway (approximately 70 percent) are also to three or more stores, which reflect its strong retail role, and influence on the Warrnambool's retail system (refer Table 13).

These results indicate that the City Centre is not currently functioning as a true City Centre, as the diversity of roles and functions that it provides does not significantly differentiate the multiple roles or attractions that the City Centre provides from the Eastern Activity Precinct's retail-dominated function. In order to function as a true regional centre, the City Centre needs to be strengthened through the development of more attractors and a high quality shopping environment to encourage a greater proportion of multi-purpose trips.

In floorspace terms, the City Centre has a significant stock of retail specialty floorspace. The City Centre needs new powerful regional attractors to reinforce the main street and generate higher levels of activity. These attractors will add value to the existing stock of specialty shops and encourage new tenancies and new investment, renewal and regeneration of the street-based system.

TABLE 13. MULTI-PURPOSE TRIP MAKING

Number of Stores, Services and Activities Visited	City Centre (%)	Gateway Plaza (%)
0	0.32%	0.00%
1	2.89%	5.77%
2	33.76%	23.08%
3	27.01%	13.46%
4+	36.3%	57.6%
Total	100.00%	100.00%

Source: In-centre surveys, Ratio Consultants, March 2007 and July 2006.

5.5.6 Modes of Travel to Activity Centres

The in-centre survey results provide information on modes of travel to the centres surveyed. It was found that for all centres, there is a high reliance on private transportation, that is, motorised vehicle trips. Motorised trips represented 69.4 percent of trips to the City Centre, compared to 88.0 percent to Gateway Plaza (refer Table 14).

Walking, cycling and public transport access to the City Centre was reasonable, with 18.1 percent of visitors to the City Centre walking or cycling, whilst 12.4 percent took public transport. The MapInfo and Dimasi surveys showed that a significantly smaller proportion of visitors to Gateway Plaza cycled, walked or took public transport to the centre, with only 5 percent of visitors walking or cycling and 7 percent taking public transport.

TABLE 14. MODES OF TRAVEL TO WARRNAMBOOL'S ACTIVITY CENTRES

Centre	Motor Vehicle trips %)	Walk / Cycle (%)	Public Transport trips (%)	Total
Warrnambool City Centre	69.4	18.1	12.4	**100.0**
Gateway Plaza	88.0	5.0	7.0	**100.0**

Source: In-centre surveys, Ratio Consultants, March 2007; and MapInfo and Dimasi Surveys.

5.5.7 Origin of Visitors to Warrnambool's Activity Centres

The in-centre survey results also provide information on the origin of visitors to Warrnambool's activity centres, providing an indicator of the extent to which each centre plays a diversity of roles for the areas outside of its Regional Catchment Area (RCA) (refer Table 15).

In the case of the City Centre, less than 75 percent of visitors are from Warrnambool, and a further 12 percent are from other parts of its RCA. These results indicate that the City Centre has an extensive regional catchment and services a broad area in south-west Victoria. The results also show that the City Centre provides an important focus for both interstate and overseas visitors - reflecting its tourism role. Approximately 10 percent of the survey sample were tourists.

TABLE 15 PLACE OF RESIDENCE - VISITORS TO WARRNAMBOOL'S ACTIVITY CENTRES

Residential Location of Visitors	City Centre (%)
Warrnambool	73.7
Balance of RCA	12.3
South-west Victoria (other)	4.1
Victoria - Other	6.8
Interstate	1.7
Overseas	1.4
Total	100.00%

Source: In-centre surveys, Ratio Consultants, March 2007 and July 2006.

* Comparative data for Gateway Plaza and Environs subject to further verification.

5.5.8 Summary

The in-centre surveys undertaken across the City Centre and Gateway Plaza shopping centre indicate that the two centres play significantly different roles.

The City Centre and Gateway Plaza both provide significant retail functions in providing for the day-to-day and weekly needs of the Warrnambool population. The City Centre, however, also plays a significant role for the broader south-west Victorian region, reflected by the number of visitations that occur on a weekly, fortnightly and less frequent basis. In addition to this, the City Centre draws visitors from other parts of Victoria, interstate and even overseas.

The City Centre's diversified function as a retail, commercial, community and trade centre is reinforced by the wide range of reasons why people visit the centre, in comparison to the limited, retail-dominated function of Gateway Plaza. The greater proportion of multi-purpose trips, particularly to six or more stores at Gateway Plaza, reflects its strong retail function. In comparison, the level of multi-purpose trips to the City Centre and Gateway indicate that the City Centre is not functioning as a true City Centre, as despite its multiplicity of other roles and functions, it does not attract the highest proportion of multi-purpose trips.

The results reinforce the need to significantly strengthen the City Centre's retail role through further development of Warrnambool's Activity Centre System, in order to enhance its vitality, retail offer and sense of place.

5.6 CENTRE-BY-CENTRE ANALYSIS

The centre by centre analysis outlines the spatial and functional characteristics of each of Warrnambool's existing activity centres, in order of their positions in the activity centre hierarchy.

5.6.1 WARRNAMBOOL CITY CENTRE

The Warrnambool City Centre is focused upon Liebig Street, the City's historic main street that features a number of heritage buildings, which contribute to its overall character and sense of place. As indicated in *Section 5.3 Structural Analysis of the Retail-Commercial Floorspace System*, the City Centre is the focus for significant commercial, professional and community services activities that provide for the needs of south-west Victoria.

The presence of a strong core retail role and clustering of shop-front activities along the main street is critical for the maintenance of a sense of activity, and provision of a high-quality urban environment that acts as a social focus for the local community and broader region. It is essential that the City Centre retains its role as strong and diverse regional centre, underpinned by a modern, competitive and attractive retail core.

PHOTOGRAPH 1: WARRNAMBOOL CITY CENTRE CLOCK TOWER

Basic Characteristics

Location and Setting	Representing the 'historic heart' of Warrnambool, retail development first established in the main street: Liebig Street. The City Centre is generally bound by Raglan Parade, Banyan Street, Merri Street and Henna Street.
Role	The Warrnambool MSS identifies the City Centre as the primary retail centre in Warrnambool, and that it plays a multiplicity of other roles for the RCA. The City Centre is the pre-eminent commercial, professional and trade services hub for the RCA, plays a significant social role and provides the major focus for the community. In addition, the City Centre is the major centre serving the Great Ocean Road tourism region, with an expanding range of tourism activities and facilities.
Retail and Commercial Floorspace	The City Centre's diverse range of roles is reflected in its floorspace structure, which is comprised of:- ▪ approximately 153,740m^2 GLA of retail and commercial floorspace (GLA), of which there is: – 24,330 m^2 GLA of food, groceries and liquor stores; – 33,990 m^2 GLA of household goods stores and discount department stores; – 14,350m^2 GLA of bulky goods stores; – 10,050 m^2 GLA of retail services; – 66,970 m^2 GLA of commercial, professional and community services (CPC) and trade services. – less than 2 percent of vacant retail and commercial floorspace.
Major Tenants	Coles, Safeway, Target, Warrnambool Co-op, Aldi

Accessibility and Pedestrian Movement	A predominantly car based centre, with ample public transport (i.e. bus) access to the site. Pedestrian accessibility to the centre is generally good; however the in-centre survey results (Ratio Consultants, March 2007) indicate that pedestrian accessibility within the centre and between precincts of the centre is poor.
Public Transport Access	The City Centre is served by Bus Routes 1 to 8, which connect to all of Warrnambool's existing residential areas.
Car Parking	Ample on-street and off-street car parking is provided within the City Centre (as discussed further in the section on car parking in the City Centre).
Development Opportunities	Approximately 4,800m^2 GLA of net additional retail commercial floorspace has been approved for the City Centre. Forecast floorspace requirements indicate that this additional space will be developed by 2016 (based on Ratio Consultants' assumptions).

Functional Analysis

The floorspace surveys undertaken by the Consultants in July 2006 demonstrated that the spatial distribution of retail and commercial floorspace within the City Centre can be divided into six distinct precincts (refer Figure 13). These precincts were identified as the Core, Western Business, Civic, Raglan, Professional Services and Eastern Precincts.

The functional analysis of the City Centre helped to identify the following components of the centre:-

- the centre's multi-functional role;
- highly and less frequently utilised areas of the centre; and
- car parking utilisation by area.

The spatial boundaries of the six assessed precincts within the City Centre are indicated in Figure 13 and discussed below. A detailed inventory of floorspace by major commodity group for each precinct is provided in Appendix D: Table Set F, Table F.1A & F.1B.

Core Precinct

Historic retail development is located in the Core Precinct and is primarily focused on the main street - Liebig Street. The precinct is characterised by higher densities, very low vacant floorspace and a high proportion of shopfront floorspace (accounting for 80 percent of all retail commercial floorspace in the precinct). Retail shopfronts located in the Core Precinct accounts for 34 percent of total retail shopfront floorspace located in the City Centre.

Western Business Precinct

The Western Business Precinct is located immediately west of the Core Precinct and developed as a result of low development opportunities in the Core Precinct. The precinct accommodates a high proportion of all retail commercial floorspace in the City Centre (approximately 37 percent) and provides a good mix of retail, commercial and professional services.

Approximately 52 percent of floorspace within the Western Business Precinct is accommodated in retail shopfront floorspace.

Civic Precinct

Comprising the southern region of Liebig Street, including Council offices, art gallery, regional performing arts centre and South-West TAFE, the Civic Precinct is a focus for cultural and civic services. The precinct accounts for only 5 percent (approximately 7,860m^2 GLA) of the City Centre's total floorspace. This precinct offers a significant public space associated with the art gallery and has the potential to develop as a community focal point.

Raglan Precinct

The Precinct comprises of larger scale developments with frontage to Raglan Parade. In total, the Raglan Precinct comprises of approximately 42,120m^2 GLA of retail commercial floorspace in the City Centre (or 27 percent of all retail commercial floorspace in the centre). Relatively significant development opportunities are located in the Raglan Precinct, with approximately 56 percent of all vacant floorspace in the City Centre located within the precinct.

Services Precinct

A concentration of trade and commercial services are located in the western region of the City Centre. The precinct is separated into a north-west and south-west precinct by residential development. Approximately 68 percent (or 10,400m^2 GLA) of floorspace in the precinct is represented by Commercial, Community and Trade Services floorspace.

Eastern Precinct

Located on the eastern edge of the City Centre, the precinct interfaces residential development located on the eastern fringe of the City Centre and accounts for only 5 percent of all retail floorspace in the City Centre. Floorspace provision within the precinct is dominated by office space and other services floorspace, with approximately 80 percent of floorspace within the precinct occupied by community, professional and community services.

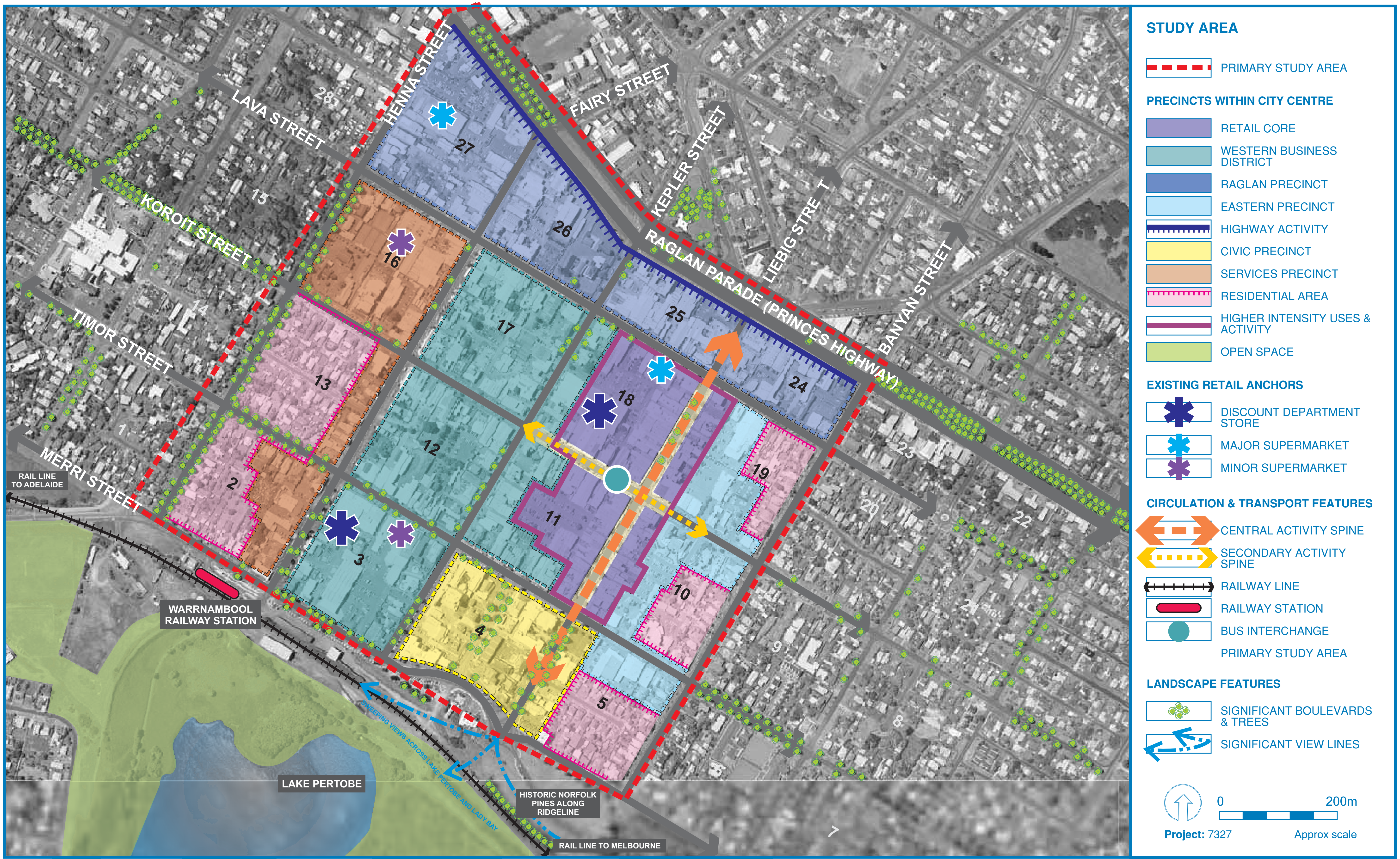

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FIGURE 13
CITY CENTRE FUNCTIONAL ANALYSIS

City Centre Opportunities and Constraints

Previous Retail Strategies prepared for Council by Essential Economics (2001 to 2003) emphasised that the major barriers to the development of new major stores and significant investment in the upgrade and renewal was “a critical shortage of development/redevelopment sites” (2002: Page 11), further compounded by the costs of land acquisition and consolidation, and the need for retail frontages to the City Centre’s streets. Notwithstanding these difficulties, previous strategies identified a “need to keep supermarkets and discount department stores in the CBD, wherever possible, as anchor tenants” (Essential Economics 2002: Page 11).

Several submissions to the Draft Retail Strategy raised concerns about the constraints of heritage controls and fragmented land parcels, on the City Centre’s development potential. These constraints were considered to significantly impact upon the City Centre’s capacity to accommodate new major stores, which require large land areas and significant requirements for car parking.

Heritage and Design Constraints

A preliminary analysis has been undertaken in the finalisation of the Retail Strategy to assess the impact of heritage constraints and land ownerships on the development potential of the City Centre. A combination of sieve and thematic mapping techniques has been utilised in order to analyse constraints on development in the City Centre (refer Figure 14). The heritage overlays and design and development overlays affecting the City Centre have been mapped, effectively defining the unconstrained land. A number of site-specific controls exist in the City Centre, which may affect development opportunities. The site specific controls, however, principally affect the properties fronting onto Kepler Street, Timor Street and Liebig Street, south of Koroit Street.

An assessment of development potential based on the extent of the heritage and design and development overlays would suggest that the Core and Western Business Precincts (refer Figure 13: City Centre Functional Analysis) have quite limited development opportunities and are relatively constrained. A more detailed examination of the Schedules to the Overlays, and the assessments of individual properties in the Warrnambool Heritage Gap Study (Heritage Matters Pty Ltd, 2007) and the Victorian Heritage Register, clearly indicates that the majority of site specific controls relate to external treatments and facades. There are many examples of historical buildings in established City Centres, that have been redeveloped to accommodate new investment, while restoring and enhancing the existing heritage character of the area. In Warrnambool’s City Centre, very few properties have internal alteration controls, and those that are affected by these controls are on the periphery of blocks, and therefore do not constrain development opportunities in the retail core area.

Land Ownership Issues

As shown in the City Centre Development Opportunities Analysis (refer Figure 13), the land ownerships within the City Centre are relatively fragmented, with each block of the City Centre subdivided into multiple small and irregular parcels. At the heart of several blocks fronting onto Liebig Street in the retail core area, there are several large carparks that could be developed to deliver new major retail stores.

The Warrnambool City Centre Urban Design Framework (David Lock & Associates et al, 2001) identified that these car parks could be developed. Previous Retail Strategies (Essential Economics 2001-2003), however, identified several barriers to the implementation of the Urban Design Framework, including the costs of development, car parking requirements and need for better management of the City's retail core, through marketing, regulation of trading hours and coordinated management of the tenancy mix.

The Essential Economics Retail Strategy also considered that "*the Target carpark is a perennial issue, but commercial reality indicates that the site would be costly to develop, and in any event, the site does not provide potential retailer(s) with adequate exposure to CBD shoppers as any development would be effectively hidden from view from the surrounding streets. Central carpark redevelopment is likely to be a longer term opportunity for the CBD*" (2002: Page 12).

Development Opportunities Identified in the City Centre

In the period of non-statutory community consultation for the Draft Retail Strategy, a submission was received from Urbanomics (2007), on behalf of the Central Warrnambool Property Alliance, a group of 25 landowners with extensive landholdings in the City Centre, who have a long-standing commitment to Warrnambool and strong ties to the community. The Alliance "*is committed to working with Council, retailers and the community to implement the final Warrnambool Retail Strategy. It acknowledges that the active and coordinated involvement of the City Centre landowners is a key ingredient to the city achieving its potential*" (Urbanomics 2007).

Historically, the fragmented land ownership patterns have imposed significant constraints on the development of the City Centre. With the emerging landowners group seeking a more coordinated approach and partnership to deliver Council's long-standing vision for the City Centre, there is now a realistic possibility that key redevelopment projects can be delivered.

Several major development opportunities have been identified by the Central Warrnambool Property Alliance, as shown in Figure 14. These include:

- improvement of the frontages to Raglan Parade, with new developments that improve the gateway to the City Centre's northern edge;
- redevelopment of Block 18, the Target and Coles site. While it is acknowledged that the Coles is currently undergoing redevelopment, the new store is approximately 2,360m² GLA, significantly smaller than the standard store size of approximately 3,500m² GLA;
- redevelopment of Block 19, requiring consolidation of land and car park development;
- new tourism developments: to strengthen the City Centre's relationship with the foreshore and harbour precinct;
- redevelopment of key sites in the Western Business precinct; including the corner of Koroit and Fairy Streets, formerly occupied by Wannon Water; and
- redevelopment of Block 11, requiring consolidation of land ownerships and car parks.

Historically, the fragmented land ownership patterns have imposed significant constraints on the development of the City Centre. With the emerging landowners group seeking a more coordinated approach and partnership to deliver Council's long-standing vision for the City Centre, there is now a realistic possibility that key redevelopment projects can occur in the heart of the retail core.

A number of supporting developments across the City Centre have also been identified, and further detailed planning should be directed to refine these proposals and provide for a number of other significant developments. Detailed planning of the City Centre will also need to address issues which have been historically identified as barriers to major retail investment, including car parking, pedestrian accessibility and the street frontage requirements for major stores.

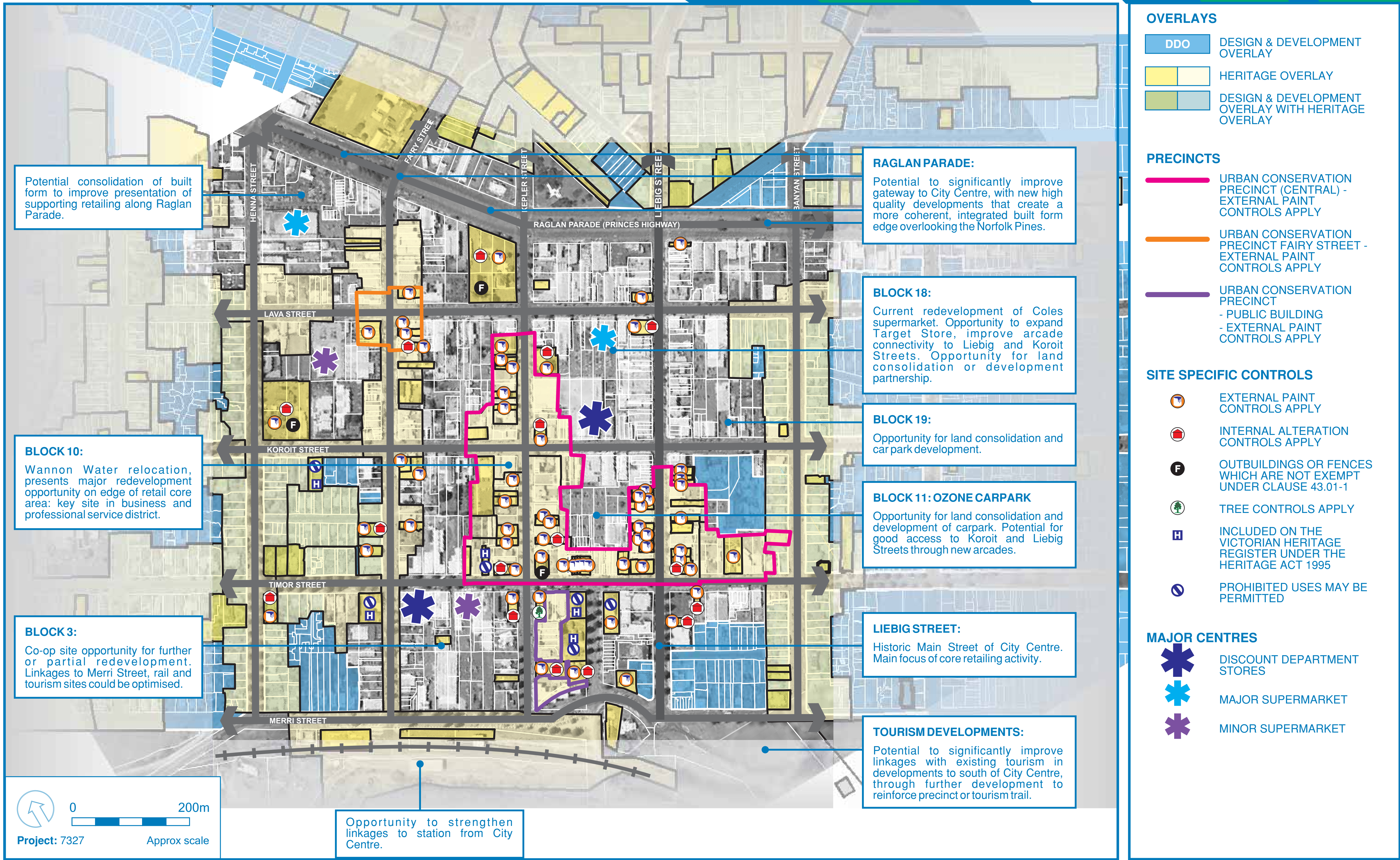

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FIGURE 14

CITY CENTRE DEVELOPMENT OPPORTUNITIES ANALYSIS

Car Parking Analysis

The in-centre surveys undertaken by Ratio Consultants in July 2006 and March 2007 highlighted community attitudes to car parking provision in the City Centre. An issue commonly expressed by visitors was the unavailability of car parking spaces in the centre and in particular, close to core retail precincts of the centre.

A survey of car parking utilisation was undertaken by the Consultants in November 2006. Car parking occupancy for selected on-street and off-street parking locations were surveyed over the following days:-

- Thursday (2.15pm to 4.15pm);
- Friday (4.30pm to 6.30pm); and
- Saturday (10.00am to 11.00am).

Car Parking Supply

The City Centre is characterised by a significant amount of on and off street parking. Table 17 below illustrates the distribution of car parking spaces by functional precinct.

TABLE 16. CITY CENTRE CAR PARKING SUPPLY

Precinct	No. of On-street Car Parking Spaces	No. of Off-street Car Parking Spaces	Total	% of Total Available Parking (%)
Western Business Precinct	740	673	1,413	39.3
Civic Precinct	219	138	357	9.9
Core Precinct	184	-	184	5.1
Raglan Precinct	378	243	621	17.3
Eastern Precinct	292	374	666	18.5
Trade and Commercial Precinct	289	61	350	9.7
Total	**2,102**	**1,489**	**3,591**	**100.0**

Source: Ratio Consultants, November 2006

A high proportion of car parking spaces in the City Centre are provided as on-street parking (approximately 59 percent). A large proportion (39.3 percent) of total car parking available in the City Centre is located in the Western Business Precinct. Significant parking within the precinct is provided at the Target Underground Car Park and Coles/Youngers Car Park (refer to Figure 15).

The car parking supply by block within the City Centre is illustrated in Appendix C.

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FIGURE 15

CITY CENTRE CAR PARKING PLAN

Car Parking Demand

Selected areas of the Western Business, Civic, Core, Raglan and Eastern Precincts were assessed during the survey period and assessed as:-

- **Very High to Full Capacity** (>90 percent of car spaces were occupied);
- **Relatively High Capacity** (75 to 89 percent of car spaces were occupied);
- **Moderately High Capacity** (65 to 74.9 percent of car spaces were occupied);
- **Moderately Low Capacity** (40 to 64.9 percent of car spaces were occupied);
- **Relatively Low Capacity** (20 to 39.9 percent of car spaces were occupied); and
- **Very Low Capacity** (less than 20 percent of car spaces were occupied).

A complete inventory of the survey findings is provided in Appendix B.

Survey Findings

The survey results indicate that on average, car parking utilisation on the Thursday was moderately low. On average, car parking utilisation on Friday and Saturday varied, particularly between the functional precincts within the City Centre.

Given the range of car parking occupancy observed on these two days, the discussion provided in this section is based on an assessment of utilisation across the Friday and Saturday survey period.

Significant findings of the survey are as follows:-

- Car parking within the Core Precinct was the most utilised, relative to other precincts in the City Centre.
  - On average, car parking utilisation reached 'relatively high' capacity levels on both Friday and Saturday.
  - In particular, on-street parking located on Liebig Street (bound by Lava Street to the north and Timor Street to the south) generated the greatest demand, with 81.5 percent of parking at this location utilised on the Friday and 86.4 percent were utilised on the Saturday.
- Similarly, parking demand within the Western Business Precinct was relatively high.
  - In particular, the Coles/Youngers car park, located on Block 18 of the City Centre (refer to Figure 16 and 17) was highly utilised, reaching 79.0 percent of capacity on Friday and 94.2 percent on Saturday.

- Car parking demand was consistently ‘relatively high’ in select locations of the Core and Western Business Precincts.
  - Within these two precincts, Lava Street, Liebig Street and Koroit Street generated the greatest demand.
  - Interestingly, parking utilisation in other locations adjacent to these parking locations areas were under utilised.
  - For instance, on average, utilisation of Parkers car park, located in Block 19 of the City Centre, Cramond car park and Ozone car park in Block 10 were all ‘very low’ on Friday (refer Figures 15 and 16).

The survey results highlighted that car parking demand was generated in limited areas of the Core and Western Business Precincts. In particular, the Coles/Youngers car park, located behind the Target and Coles sites were highly utilised. Similarly, there was high demand for on-street parking located on Liebig Street, between Lava Street and Timor Street. On balance, car parking utilisation averaged ‘moderately low’ capacity across the survey period, reflecting between 40 to 64.9 percent occupancy of car park spaces.

Interestingly, the car parking survey results highlighted that the sentiment of a ‘lack of car parking provision’ in the City Centre was not reflected in the survey results. Rather, it appears that visitors to the centre are competing for a limited number of spaces, predominantly located on Liebig Street and within Block 18 of the City Centre, whilst at grade and on-street parking located adjacent to these areas are under utilised.

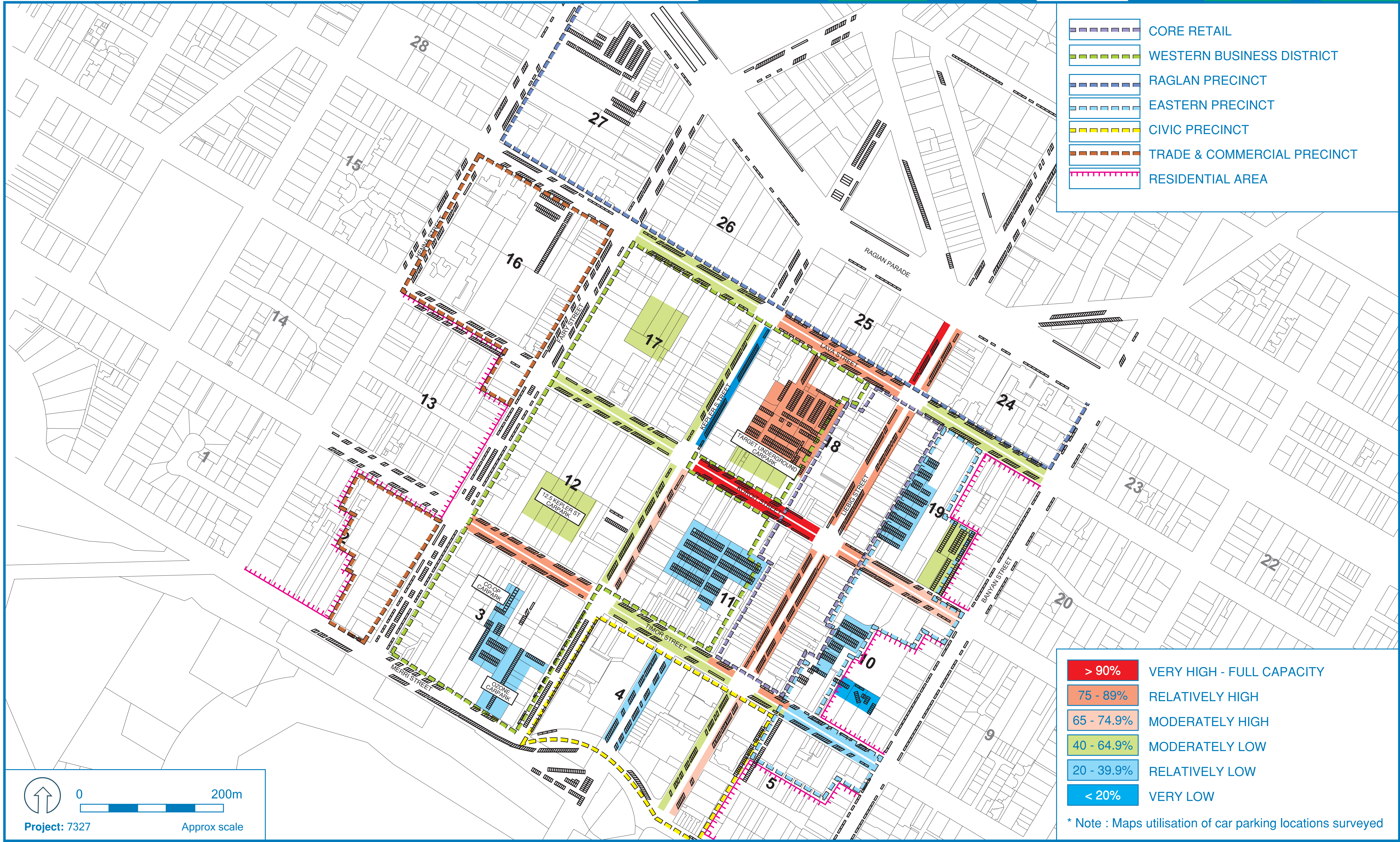

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FIGURE 16

CITY CENTRE: CAR PARKING UTILISATION

FRIDAY 10TH NOVEMBER 2006

Source: Ratio Consultants

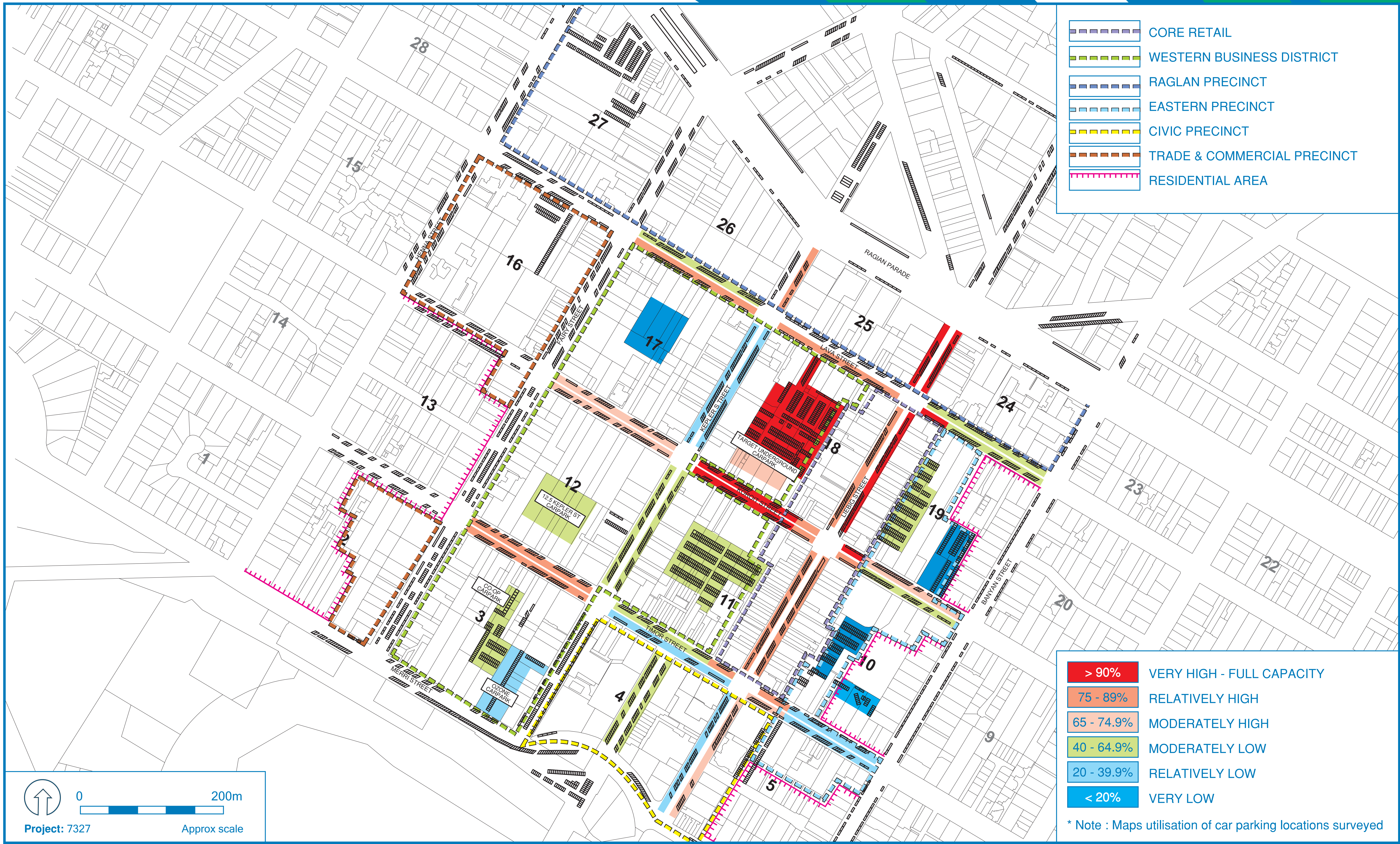


FIGURE 17
CITY CENTRE: CAR PARKING UTILISATION
SATURDAY 11TH NOVEMBER 2006
Source: Ratio Consultants

5.6.2 EASTERN ACTIVITY PRECINCT

Gateway Plaza and Environs

PHOTOGRAPH 2: GATEWAY PLAZA STREET-FRONTAGE

Basic Characteristics of Gateway Plaza and Environs

Location and Setting	Signifying the beginning of retail development in east Warrnambool, Gateway Plaza shopping centre established in 1985 as a secondary centre. Located within the Eastern Activity Precinct, the centre has highway frontage to Raglan Parade.
Role	The Warrnambool MSS identifies Gateway Plaza as the secondary retail centre in Warrnambool, relative to the City Centre. It provides for a wide range of convenience and weekly shopping functions, serving the needs of the east Warrnambool area and surrounding districts. In addition, it caters for a range of discretionary needs, arising from its discount department store anchor. A limited social, services and community role is offered by the centre, with few social activities, and commercial or trade services provided at the site.
Retail and Commercial Floorspace	Comprising of 14,743m^2 GLA, distribution of floorspace at the centre includes:- ▪ 4,109m^2 GLA of food, groceries and liquor; ▪ 10,144m^2 GLA of household goods floorspace; and ▪ 232m^2 GLA of retail services floorspace; and ▪ 194 m^2 GLA of professional and community services floorspace.
Major Tenants	Kmart, Bi-Lo

Accessibility and Pedestrian Movement	As a predominantly car-based centre, accessibility to the centre is via Raglan Parade (MapInfo, January 2007). The Eastern Activity Precinct Structure Plan proposes higher density housing and mixed use development in the vicinity of the existing centre, particularly in north-east Warrnambool. As these proposed uses develop, greater connectivity, particularly to settlement areas in the north, will be provided. The Structure Plan also proposes greater pedestrian connectivity to the centre, however at this point in the centre's evolution it lacks connectivity to surrounding neighbourhoods.
Public Transport Access	The centre is served by Bus Routes 4, 5, 8 and 9.
Car Parking	Ample at grade car parking is provided at the centre.
Development Opportunities	An additional 10,390m^2 GLA has been approved for the centre, however further development of major retail attractors may tip the strategic balance between the primary and secondary retail centres in Warrnambool. A further 5,100m^2 of retail development has been approved on the Sherwood Scott land, east of Gateway Plaza shopping centre.

Bulky Goods Developments

PHOTOGRAPH 3: THE HOMEMAKER CENTRE: STREET-FRONTAGE

PHOTOGRAPH 4 THE HARVEY NORMAN CENTRE: STREET-FRONTAGE

Basic Characteristics of Bulky Goods Developments

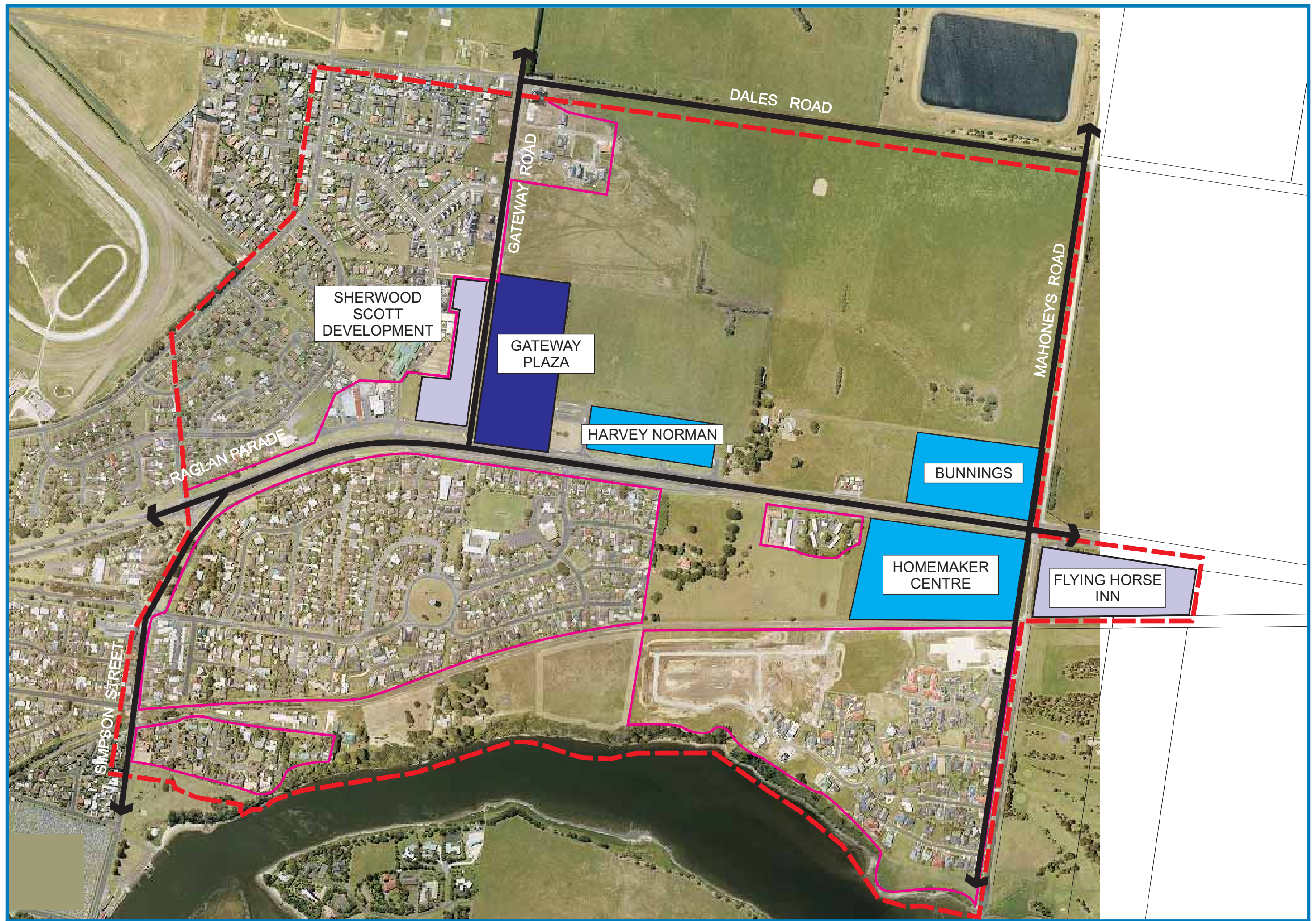
Location and Setting	Located within the Eastern Activity Precinct (EAP), with highway frontage to Raglan Parade, bulky goods floorspace has developed as three major clusters within the precinct, with limited integration of developments.
Role	Bulky goods development within the EAP represents the largest concentration of bulky goods floorspace in south-west Victoria. Given this, the precinct plays an important regional role.
Retail and Commercial Floorspace	It is estimated that by 2016, 50,680m^2 GLA of bulky goods floorspace will be developed at the precinct and distributed over three clusters (i.e. Bunnings, Harvey Norman and Homemaker Centre). At present, approximately 60 percent of this floorspace is vacant or yet to be developed.
Major Tenants	Harvey Norman, Good Guys, The Warehouse, Forty Winks, Bunnings and Harris Scarfe.
Accessibility and Pedestrian Movement	All three bulky goods clusters are highly accessible from the main highway. Pedestrian linkages to the clusters are relatively poor.
Public Transport Access	The centre is served by Bus Route 9.
Car Parking	Ample at grade car parking is provided at each of the centres.
Development Opportunities	Bulky goods represent a high proportion of new floorspace that has developed in Warrnambool in the last 10 years. Future bulky goods floorspace requirements for the City indicate that no additional bulky goods floorspace is required, in addition to what has developed or is yet to come into operation.

The functional relationships between the Bulky Goods developments and Gateway Plaza are illustrated in Figure 18. As shown, the different clusters have developed as independent destinations, with significant gaps in the urban fabric, and limited provision of pedestrian, bicycle or public transport systems to enable circulation within the precinct. Over time, the Eastern Activity Precinct structure plan (Hansen, 2004) will increase the level of integration between properties, but until further development takes place on greenfield sites, limited opportunities exist to reduce dependency on private vehicle trips within the precinct.

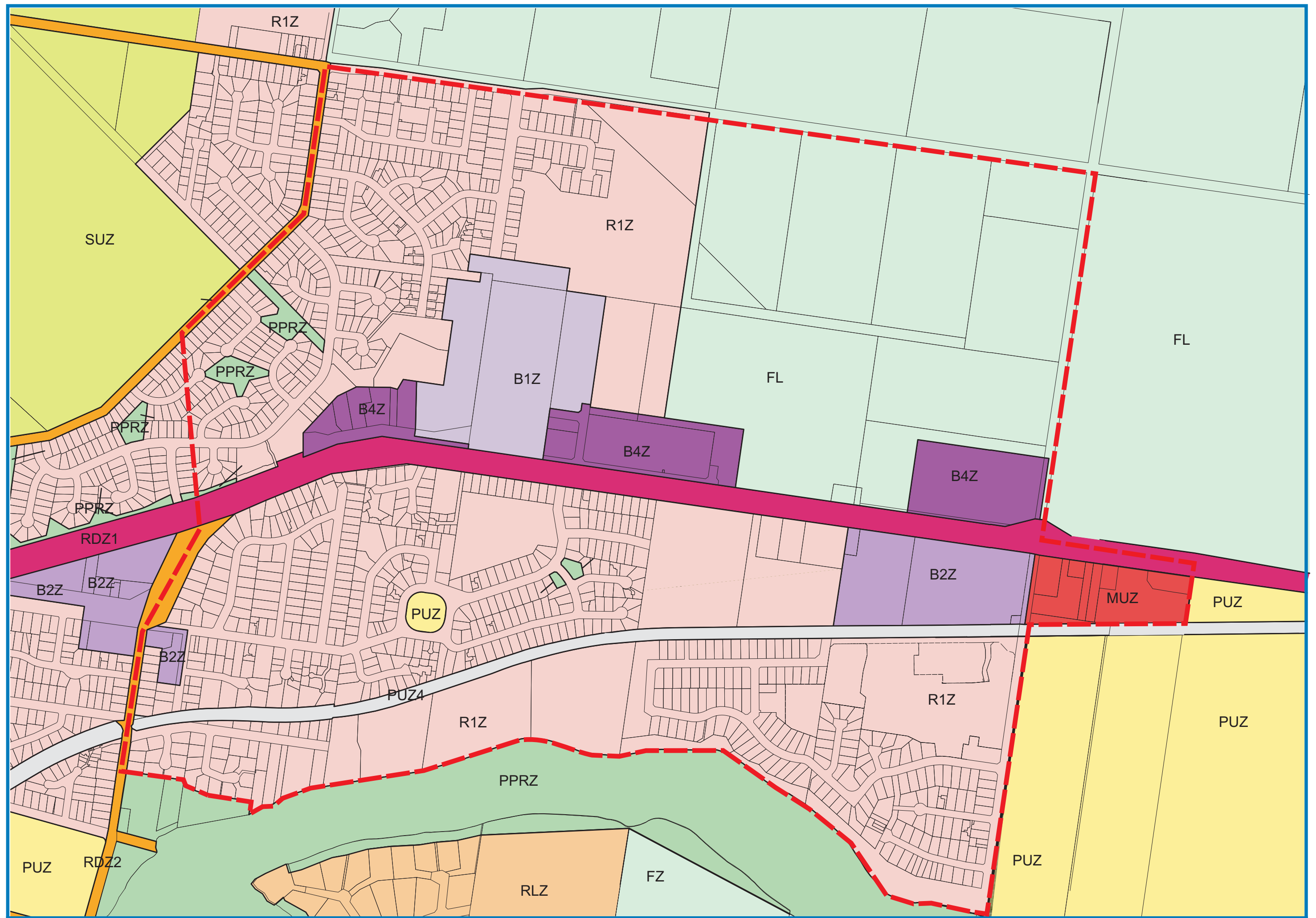
Flying Horse Inn Development

The Flying Horse Inn development at the eastern end of the precinct has recently been rezoned from Farming Zone to Mixed Use Zone. The site has already been developed with some dwellings and a church. At the time of finalising the Retail Strategy (2007), construction of a service station, food and drink premises and a licensed hotel were underway, diversifying the range of activities in the EAP.

Further improvements to the Flying Horse Inn site and adjacent sites could significantly improve the integration of the development with the precinct, to optimise physical and visual connectivity. Opportunities include strengthening of pedestrian and cyclist linkages, provision of active interfaces between developments and implementation of a uniform streetscaping and landscape scheme across the EAP.



EASTERN ACTIVITY PRECINCT & ENVIRONS BOUNDARIES
RESIDENTIAL EDGE = EXISTING / DEVELOPING
CORE RETAIL
BULKY GOODS
FUTURE COMMERCIAL DEVELOPMENT



B1Z	BUSINESS 1 ZONE
B2Z	BUSINESS 2 ZONE
B4Z	BUSINESS 4 ZONE
PUZ1	PUBLIC USE ZONE - SERVICE AND UTILITY
PUZ2	PUBLIC USE ZONE EDUCATION
PUZ4	PUBLIC USE ZONE TRANSPORT
PUZ5	PUBLIC USE ZONE CEMETERY/CREMATORIUM
RDZ1	ROAD ZONE CATEGORY 1
R1Z	RESIDENTIAL 1 ZONE
FZ	FARMING ZONE
RLZ	RURAL LIVING ZONE
SUZ1	SPECIAL USE ZONE - SCHEDULE 1
PPRZ	PUBLIC PARK AND RECREATION ZONE

0 500m

Project: 7327 Approx scale

FIGURE 18
EASTERN ACTIVITY PRECINCT & ENVIRONS: FUNCTIONAL ANALYSIS

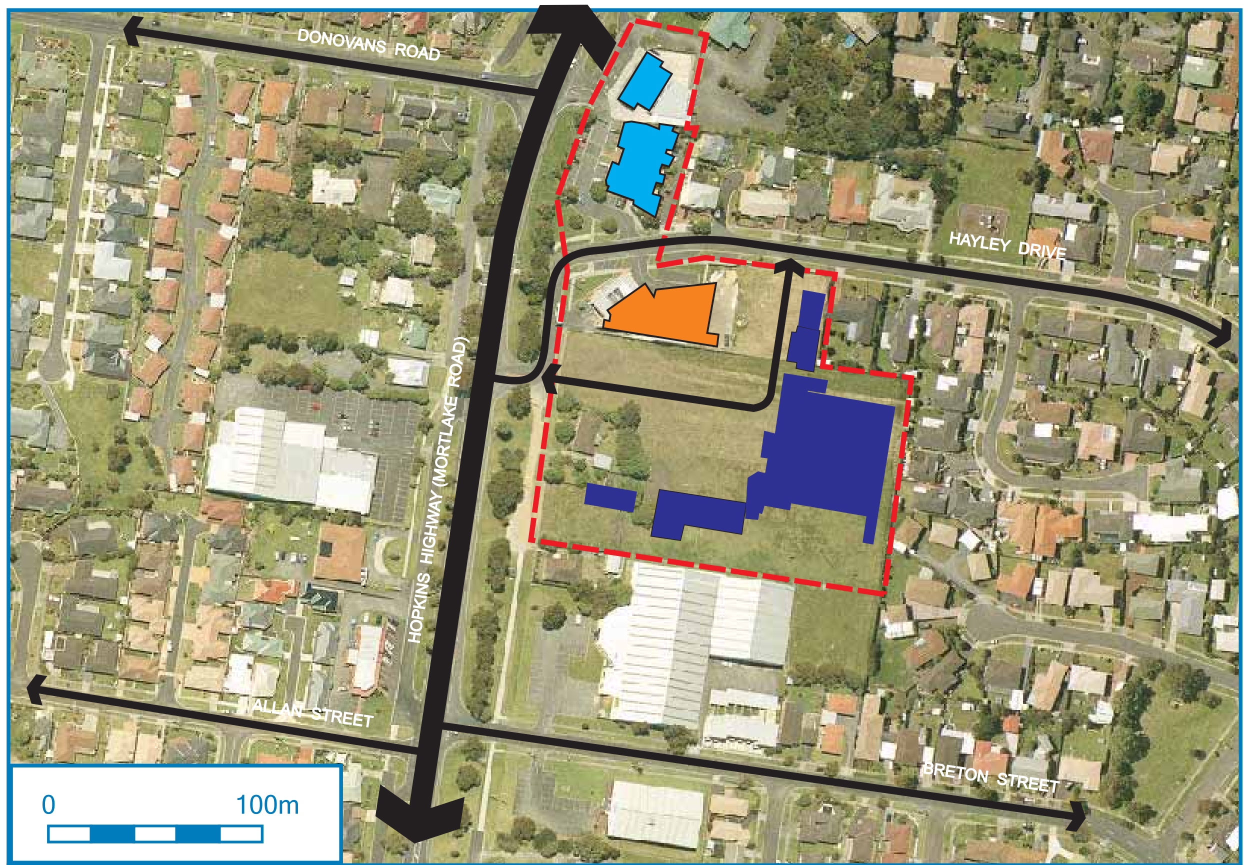
5.6.3 Northpoint Village

Basic Characteristics

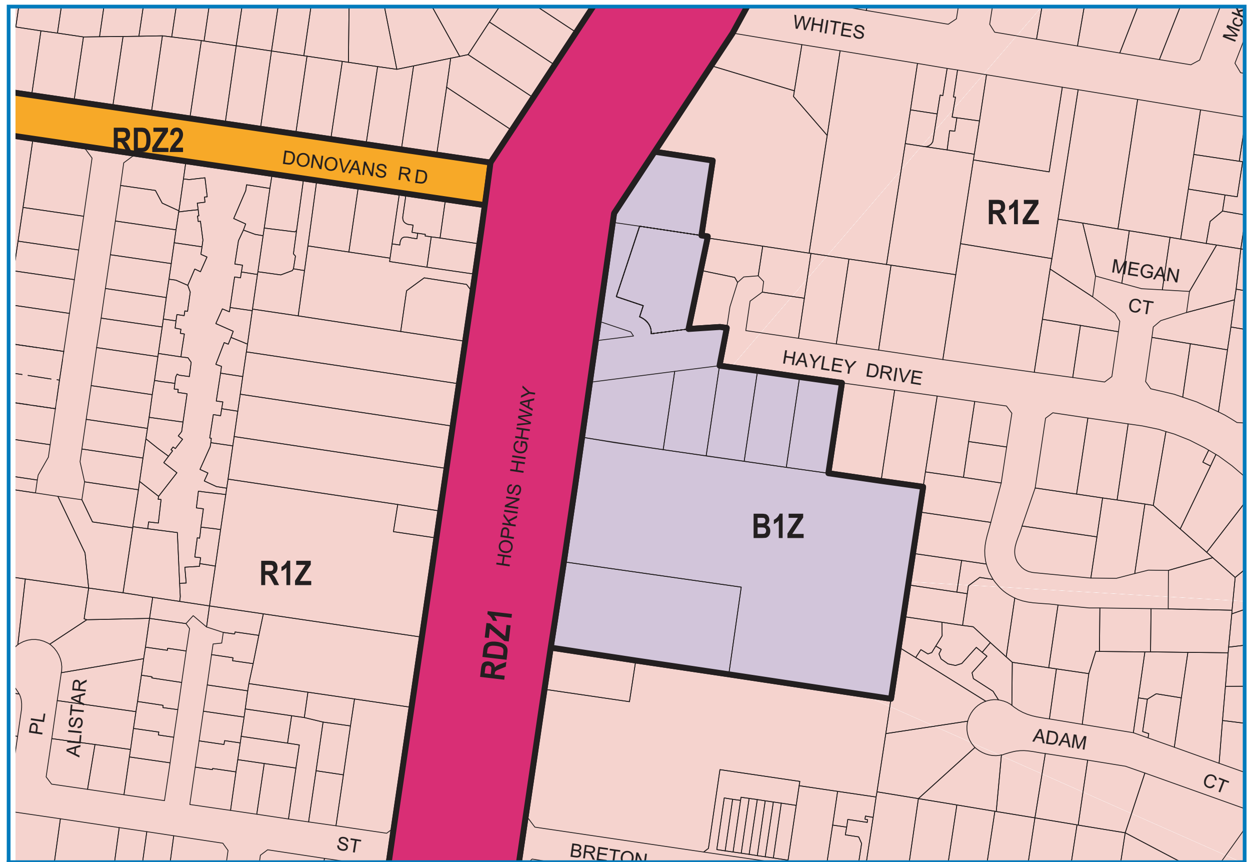
Location and Setting	Northpoint Village is located in north Warrnambool, with frontage to Mortlake Rd. Currently, 1,272m^2 GLA is located at the centre which represents 70.2 percent of retail commercial floorspace, distributed to local centres in Warrnambool.
Role	The centre provides an important local retail function for residents living in north Warrnambool. An additional 4,293m^2 GLA has recently been developed at Northpoint. The expansion of the centre provided for a supermarket and additional specialty retail and community services.
Retail and Commercial Floorspace	It is estimated that by 2016, local centres will represent 2.6 percent of all retail commercial floorspace in Warrnambool (accounting for floorspace at Northpoint Village and a further 538 m^2 GLA at other local centres across Warrnambool). The largest concentration of floorspace for local centres will be accommodated at Northpoint Village.
Major Tenants	Coles Supermarket - 2,375 m^2 GLA
Accessibility and Pedestrian Movement	Northpoint Village is highly accessible to motorists, pedestrians and cyclists.
Public Transport Access	Northpoint Village is served by Bus Route 2.
Car Parking	At grade car parking is available at Northpoint Village. Additional car parking is proposed in the expansion of the centre.
Development Opportunities	In anticipation of residential growth in the north and north-east Warrnambool area, an additional 4,293m^2 GLA has recently been developed at Northpoint Village, with some land remaining for future development.

Figure 19 shows the context of the existing Northpoint Village, recently upgraded to a neighbourhood level centre with the development of a supermarket immediately south of the existing local shops. Well integrated with the surrounding north Warrnambool residential growth area, the centre will grow to provide a more significant community focus in coming years.

Principles for the development of new neighbourhood centres and local centres are set out in Section 7: Proposed Retail Strategy, to ensure that the future development of these centres maximises their accessibility, amenity and enables built form outcomes which improve the quality of the suburban environment.



BOUNDARY OF THE CENTRE
CORE RETAIL
RETAIL (OTHER)
TAVERN



B1Z BUSINESS 1 ZONE
R1Z RESIDENTIAL 1 ZONE
RDZ1 ROAD ZONE CATEGORY 1
RDZ2 ROAD ZONE CATEGORY 2

0 100m
Project : 7327 Approx scale

FIGURE 19
NORTHPOINT: FUNCTIONAL ANALYSIS

5.6.4 Existing Convenience Nodes and Isolated Milkbars

Research undertaken for the Strategy identified a number of existing clusters of small businesses or commercial activities and isolated milkbars across the City. The majority of these are located on local streets, central to residential areas, and provide an important function in providing access to a limited range of basic day-to-day needs. Others are located in the City's industrial precincts, operating to meet the needs of workers across a more limited range of hours.

The viability of isolated shops in residential areas and industrial areas is limited. In residential areas, the viability of small shops is compromised by small residential catchments and a limited ability to compete with larger, accessible centres that offer a wider range of goods and services. Combined with the need to trade for long hours to maximise convenience for the local population, these shops generally do not provide a profitable business setting, adversely impacting upon the social and economic wellbeing of the operators (often families). In industrial areas, the viability of lunch shops and milkbars is limited by shorter trading hours and their lack of residential catchment, as they principally serve a transient population.

In the case of convenience nodes in residential areas, there is the opportunity to consolidate and reinforce these businesses by encouraging the development of home-based businesses and services within close proximity to each store. These activities could include childcare, hair and beauty salons or medical centres.

There are limited opportunities to strengthen the viability of convenience nodes in industrial areas, however, where possible, take away shops and other complementary uses could be clustered to provide a focus for the working population.

5.7 RETAIL GAP ANALYSIS

Retail gap analysis is based on an assessment of the comparative tenancy compositions in centres and cities of comparable market scale and role. The analysis is used to identify opportunities for particular tenancies in regional cities and activity centres.

In the preparation of the Final Warrnambool Retail Strategy, the gap analysis was undertaken for a number of major regional cities. The analysis identified locations of major attractors, comprising department stores, discount department stores and supermarkets, in addition to national-brand specialty shops. For each store, the analysis was further classified by location, to understand the distribution of these stores by primary and secondary centres.

The cities included in the assessment were: Albury, Ballarat, Geelong, Mildura, Shepparton, Traralgon, Wagga Wagga and Wodonga, all of which play a regional role, with substantial catchments that serve large rural areas.

The assessment included identification of:-

- retailers that could be introduced to Warrnambool, based on the available diversity of stores and services available in the larger cities of Geelong and Ballarat;
- a detailed comparative assessment of the retail offer in Warrnambool in relation to cities of similar size or role; and
- assessment of the distribution of major attractors in other regional cities.

5.7.1 Store Development Opportunities

The analysis identified a number of opportunities for new major stores and national specialty brands including the potential for:-

- Big W store;
- Myer Store;
- a more diverse range of higher-order women's fashion stores and boutiques;
- a more comprehensive range of men's clothing and fashion stores; and
- specialty and gourmet food retailers.

In addition to these identified needs, new store types are currently under development in other regional areas, including:-

- fresh food and organic produce stores;
- new lifestyles stores; and
- rise of farmers markets.

Significant growth in tourism would generate demand for additional types of lifestyle stores and hospitality services.

5.7.2 Distribution of Attractors in Regional Cities

A clear distribution of major attractors in regional cities has emerged from the gap analysis.

The assessment showed that:

- department stores and discount department stores are important to the regional role and function of provincial cities;
- virtually all regional cities with populations in excess of approximately 30,000 have department stores or discount department stores in their city centres or CBDs;
- most regional cities in Victoria and southern New South Wales, with a population in excess of approximately 30,000 people have secondary retail centres outside their CBDs. As a general rule, these secondary centres tend to be anchored by a single discount department store, and one or two supermarkets.

  At the time of the finalisation of this report (November 2007), the following cities reflected this pattern of investment: Ballarat, Bendigo, Dubbo, Albury and Mildura.
- there are several cities of comparable or larger size than Warrnambool, where there is no discount department store-based centre outside the CBD.

  Examples include: Bathurst, Orange, Wodonga and Wagga Wagga.
- There are examples of planned and fully integrated double discount department store based centres outside CBDs, however these are located in cities of some significant size with threshold urban populations in excess of 70,000 people.

  Examples include: Geelong, with a population of over 200,000 people, and Mid Valley with a core urban population of 70,000 people.

5.7.3 Conclusion

The review of regional cities in Victoria and southern New South Wales clearly indicates that it is the 'normal' case for regional cities in excess of 35,000 people to either have all department and discount department stores in their city centres, or to have a single discount department store-based secondary centre (that is, outside their CBDs).

There are no identified, comparable sized cities to Warrnambool, where the secondary centre is anchored by two discount department stores, or any department store.

6 RETAIL/COMMERCIAL FLOORSPACE REQUIREMENTS (2006-2031)

Note: This page has been intentionally left blank.

6 Retail/Commercial Floorspace Requirements (2006 – 2031)

6.1 Introduction

The Strategy provides a framework for the long-term management of the City's activity centre system, informed by the future retail and commercial floorspace requirements for the City.

The current and approved floorspace supply of the City was taken into account, together with projected upward shifts in market share that could be expected to occur with new major retail stores and higher levels of utilisation of the bulky goods precinct. The analysis also takes into account the long-term underlying demand for commercial, professional and trade services floorspace.

This section of the report outlines Warrnambool's retail and commercial floorspace requirements over the next 25 years, and addresses the distribution of future floorspace across Warrnambool's activity centres.

Two scenarios have been considered in estimating the future floorspace requirements of Warrnambool's activity centre system:

- Scenario One - assuming a single additional discount department store establishes in Warrnambool;
- Scenario Two - assuming a discount department store and department store are developed in Warrnambool.

Both of these developments will impact upon the City's future floorspace requirements, and have been considered in the analysis outlined in *Section 6.3*.

It is important to note that the Strategy does not propose a retail floorspace allocation system, and therefore that the assessments of future retail floorspace requirements are only intended to provide a guide as to the current and likely future state of the market. There are other important considerations which have been used in the Strategy, such as the strategic importance of new major stores to the City and the service and equity considerations for new local centres.

6.2 METHODOLOGY

The Warrnambool Retail Strategy is informed by the analysis of current and future retail and commercial needs to meet the needs of the current and projected population of the Warrnambool Regional Catchment Area (RCA).

Qualitative and quantitative assessments were undertaken in order to assess future floorspace requirements, and establish current levels of demand. Qualitative assessments included:-

- A community workshop facilitated by the Consultants and held in Warrnambool in October 2006;
- Face-to-face industry and developer consultations;
- Telephone surveys of residents in the RCA in November 2006; and
- In-centre surveys conducted by the Consultants, in Warrnambool in July 2006 and March 2007.

The workshop and in-centre surveys indicated the types of improvements the local community would like to see in Warrnambool's activity centres. The role of each centre was confirmed by visitation patterns recorded during the in-centre survey period (discussed in detail in Section 5), and the vision for activity centre development articulated during the community workshop.

The methodology used to estimate future floorspace demand and supply involved:-

- detailed expenditure analyses by small area in the City's RCA;
- surveys of existing market share throughout the RCA;
- projections of market share changes throughout the RCA based on floorspace currently under development or at completion together with approvals granted by Council and the likely impacts of these approvals;
- retail turnover density requirements;
- projections of real growth in retail goods expenditures (that is over and above the consumer price index);
- estimates of trade likely to be generated from beyond the RCA;
- existing retail floorspace in the City as at July 2006;
- approvals granted by Council for new retail development (as at January 2007);
- projections of population growth or decline by Statistical Local Area (SLA) in the RCA;
- estimates of shifts in market share that may occur in Warrnambool and its RCA as a consequence of major store developments and optimal levels of utilisation of the bulky goods precinct;
- current and projected provision of retail, trade and commercial services floorspace required for Warrnambool, taking into account the needs of the City and its RCA.

6.3 PROJECTED DEMAND (2006-2031)

Projected retail demand to determine Warrnambool's future floorspace requirements have been estimated for two development scenarios for the City's retail-commercial system. Both Scenarios have different estimated market shares for the primary, secondary and tertiary catchment areas, in addition to different impacts on the amount of trade drawn from outside of the Regional Catchment Area. The specific market-share estimates for each of the two scenarios are outlined in Appendix D: Table D, and forecast retail sales outcomes of these market share outcomes are shown in Appendix D: Table J.1.

The global impacts on the City's sales of a discount department store (Scenario 1) and the further addition of a department store (Scenario 2) are as follows:

- Assuming Scenario One:
  - the City's retail goods sales are projected to increase from approximately $541 million in 2006 (June 2006 constant prices) to approximately $745 million by 2016 (at June 2006 constant prices).
  - on the basis that Scenario One is maintained, and no further significant addition to the stock of discount department and department stores occurs prior to 2031, then the projected retail sales for the City would rise to approximately $1,199 million (at June 2006 constant prices).
- Assuming Scenario Two:
  On the basis that in the initial time period (by 2016) both a discount department store and a department store are built in the City, then retail sales are projected to rise as follows:
  - from approximately $541 million in 2006 (June 2006 constant prices) to approximately $794 million by 2016 (at June 2006 constant prices).
  - a further rise to approximately $1,237 million by 2031 (at June 2006 constant prices).

In summary, the addition of a discount department store (Scenario One) and the further addition of a department store (Scenario Two), each add significantly to the City's global market share and future real levels of sales. In turn, this will translate to additional employment that the City will be able to sustain. These outcomes reflect the significant contribution that these stores will make to the improvement of the City's retail offer and its ability to be able to complete at a higher level with the larger provincial cities of Ballarat and Geelong.

The assessment of the demand and supply of department and discount department stores is discussed in Section 6.6.

6.3.1 Estimated Future Retail Sales by Major Commodity Group

Utilising the two scenarios outlined above, future retail sales were forecast for Warrnambool's RCA for the years ending 2015/16 and 2030/31 (refer Table Set E, Tables E.2 to E.5).

- In terms of total **retail goods sales**, over the 25 year period from 2005/06 to 2030/31, at June 2006 constant prices:
  - Under Scenario One, with the establishment of a new discount department store, total retail sales will increase by $657.6 million, representing an overall increase of 121.4 percent; or
  - Under Scenario Two, with the establishment of a new department store and discount department store, total retail sales will increase by $694.6 million, representing an overall increase of 128.4 percent.
- For **food, groceries and liquor**, over the 25 year period from 2005/06 to 2030/31, at June 2006 constant prices:
  - Under Scenario One, total retail sales would increase by $213.3 million or 75.3 percent; or
  - Under Scenario Two, total retail sales would increase by $218.5 million, representing a 77.1 percent rise.
- In terms of **household goods**, over the 25 year period from 2005/06 to 2030/31, at June 2006 constant prices:
  - Under Scenario One, total sales would rise by $266.6 million or 176 percent; or
  - Under Scenario Two, total sales would increase by $287.4 million or 189.7 percent.
- For **bulky goods**, over the 25 year period from 2005/06 to 2030/31, at June 2006 constant prices:
  - Under Scenario One, total sales would rise by $177.8 million or 166.9 percent; or
  - Under Scenario Two, total sales would increase by $189.3 million or 177.7 percent.

6.3.2 Total Future Floorspace Requirements (2016/2031)

The gross future floorspace requirements for Warrnambool's activity centres are set out in Table 17. These estimates are based on the higher scenario (Scenario Two), which encompass an additional discount department store and department store being established in the City. This will increase the market share within the RCA, reduce escape expenditures from the primary catchment area and increase net inbound expenditures from the secondary and tertiary catchments and beyond.

TABLE 17. WARRNAMBOOL: ASSESSED TOTAL FUTURE FLOORSPACE REQUIREMENTS (2006-2031)

Major Commodity Group	Total Floorspace Required m^2 GLA Year ended 30 June		
	2006	2016	2031
Food, Groceries and Liquor	29,770	39,980	52,830
Household Goods	44,240	58,950	80,950
Bulky Goods	35,160	41,220	58,780
Total Occupied Retail Goods Floorspace	***109,180***	***140,150***	***192,550***
Retail Services Floorspace	11,150	12,620	18,650
Total Occupied Shopfront Floorspace	***120,330***	***152,770***	***211,200***
Commercial, Professional and Community Services	54,940	77,440	99,940
Trade Services	12,910	16,780	23,750
Total Services Floorspace	***67,860***	***94,230***	***123,690***
Total Occupied Retail and Commercial Floorspace	**188,190**	**247,000**	**334,890**
Allowance for vacant floorspace	7,840	10,290	13,950
Total Retail, Commercial and Services Floorspace Requirement	**196,030**	**257,290**	**348,840**

Source: Analysis by Ratio Consultants, June 2007. Refer Appendix D: Table H.7.

6.4 SUPPLY CONSIDERATIONS (2006-2016)

6.4.1 Current Supply (2006)

Assessments of the current supply of retail and commercial floorspace in the City of Warrnambool are based on inventory undertaken in the City Centre, the Eastern Activity Precinct and Northpoint Village (refer Table Set F, Tables F.1A & F.1B).

For the purposes of assessing future floorspace demand, the existing supply was analysed on a centre by centre basis, centre type basis and by major commodity group. A detailed discussion of the existing retail-commercial floorspace structure in Warrnambool is provided in Section 5.3.

6.4.2 Projected Supply at 2016

It is important to note that at the time of undertaking the floorspace surveys, a significant component of the developed floorspace had only recently been developed (largely in the EAP), and was vacant or under construction at the time of the inventory. In addition to this floorspace, there a number of approvals in place that are likely to be acted upon. It is therefore important in assessing future retail floorspace requirements to take full account of retail floorspace developments emerging in the system.

Accordingly, the Strategy has provided an assessment of the likely future floorspace supply by 2016, taking into account the existing stock of developed floorspace and current approvals. This assessment is set out in Appendix D: Table F.4.

The supply assessment assumes that all existing permits will be utilised by this date, and that the average rate of vacant floorspace will fall back to approximately 4 percent of total retail floorspace.

In summary, assuming all existing retail and commercial floorspace approvals are developed by 2016:-

- a total of 252,600m^2 GLA of retail-commercial floorspace will be operational in Warrnambool;
- a total of 166,100m^2 GLA of occupied shopfront floorspace will have been developed across the City, of which:
  - 50.7 percent of total occupied shopfront floorspace will be located in the City Centre;
  - 45.5 percent will be located in the EAP;
  - 3.8 percent will be located in local centres, primarily at Northpoint Village, with a relatively minor level of floorspace (less than 600m^2 GLA) at convenience stores.

6.5 NET ADDITIONAL FLOORSPACE REQUIREMENTS

The assessment of net additional floorspace requirements was undertaken by reconciling the projected gross floorspace demand, against the estimated retail floorspace supply utilising existing development and approvals. As indicated above, it was assumed that this will occur by 2016.

On this basis, the net additional retail and commercial floorspace requirements were assessed (refer Table 18 and Appendix D: Table H.8).

TABLE 18 NET ADDITIONAL FLOORSPACE REQUIREMENTS (2006-2031)

Major Commodity Group	Net Additional Floorspace Required m^2 GLA		
	2006 - 2016	2016 - 2031	2006 - 2031
Occupied Shopfront Floorspace (excluding Bulky Goods)	***10,730***	***34,850***	***45,580***
Bulky Goods Floorspace	No further floorspace required.	No further floorspace required.	No further floorspace required.
Commercial, Professional and Community Services	16,800	22,500	39,300
Trade Services	1,040	6,960	8,000
Total Services Floorspace	***17,840***	***29,460***	***47,300***

Source: Analysis by Ratio Consultants, June 2007: Refer Appendix D, Table Set H, Table H8.

The assessments of net additional floorspace requirements, set out in Table 19 above, indicate that for the period 2006 to 2031:

- There is a net additional requirement for 10,730m2 GLA of Occupied Shopfront floorspace (excluding bulky goods) over the period from 2006 to 2016, and a further 34,850 m2 GLA to meet the City's overall demand – supply needs in the following period (2016 to 2031).
- This analysis allows for and indeed incorporates, the provision of a future discount department store and a future department store.
- There are no significant additional requirements for bulky goods floorspace over the forecast period.
- There are significant net additional requirements for Commercial, Professional and Community Services, even in the short term of 16,800m^2 for 2006 to 2016. As Table 19 shows, there is a long-term demand of approximately 39,300m^2 of commercial, professional and community services floorspace, over the 25 year period.

6.6 PROJECTED DEMAND AND SUPPLY FOR DEPARTMENT AND DISCOUNT DEPARTMENT STORE FLOORSPACE

It will be noted that the overall assessment of retail floorspace requirements for Warrnambool has incorporated two scenarios for the future development of major stores in the City. Scenario One provides for the development of a discount department store. Scenario Two provides for a further addition of a department store. In this section, the specific demand-supply impacts on department and discount department stores in the City were assessed.

The current supply of department and discount department stores (termed Department Store Type Merchandise, and abbreviated as DSTM) floorspace in the City was 15,700 m^2 GLA (as at June 2006, refer Table J.2, Column 3).

As indicated above, Scenario One provides for the addition of a discount department store. For the purposes of the analysis, a store of 5,500 m^2 GLA was assumed to be developed by 2016. On this basis, the assessment indicated that there would be a marginal overprovision of DSTM floorspace at this time. By 2031, however, there would be a significant under-supply of DSTM (approximately 8,000 m^2 GLA).

The assessment of Scenario Two (comprising the addition of both a new discount department store and a department store) was undertaken, on the basis that the scenario would be operational by 2016. For the purposes of the assessment, it was assumed that the department store would have a floorspace of 12,000 m^2 GLA. Under this scenario, there would be a notable oversupply of DSTM at this time. However, by 2031, DSTM floorspace would virtually be at balance.

It will be noted that the analysis assumed that all of the existing discount department stores remain in operation throughout the forecast period. Any withdrawals of tenancies and floorspace would of course, increase the net additional DSTM requirements. Secondly, the assessment of a demand-supply floorspace balance is based on the application of a Retail Turnover Density (RTD) requirement of \$3,000 per m^2 GLA per annum at 2005/06 increasing to \$4,239 per m^2 GLA per annum (at June 2006 constant prices) by 2031.

6.6.1 Summary

If a department store was to locate at Warrnambool in addition to a discount department store by 2016, there would be a balance of demand and supply floorspace on the basis that the DSTM floorspace in the City would trade at a lower real level than allowed for in the analysis. In this situation, the addition of a department store is a matter of commercial judgement by the proponents, and not a policy issue in this context.

However, it is clear from the analysis that the addition of both a discount department store and a department store will add significant investment, trade and employment value to the City, and these stores can be readily justified in terms of net community benefit. As the analysis shows, the City can readily sustain both stores over the forecast period.

6.7 CONCLUSIONS

The analysis of Warrnambool's retail floorspace requirements provided separate assessments for the two major categories of retail floorspace, as broadly reflected by policy, Victorian Planning scheme zoning provisions and the different locational requirements of each type. The categories encompass:

- **retail goods and services floorspace,** excluding bulky goods (termed shopfront floorspace); and
- **bulky goods floorspace.**

The following assessments were undertaken:

- Market-based analyses of city-wide retail floorspace requirements, that is a general demand-supply assessment of retail floorspace requirements for the City as a whole;
- Major store requirements;
- Local centre requirements; and
- Tourism requirements.

6.7.1 General demand-supply assessments

The analysis has found that at a general, city-wide level, no additional retail floorspace is required for Warrnambool over the period 2006 to 2016, both for retail goods and services and for bulky goods, over and above identified needs for new major stores, specified local centres and tourism requirements.

Over the period 2016 to 2031:

- There is a projected need for approximately 40,930m^2 GLA for retail goods and services floorspace, in addition to identified needs for new major stores, local centres and tourist centres;
- There is no general demand for additional bulky goods floorspace in this period, however by 2031 Warrnambool's bulky goods requirements will be approximately at balance.

6.7.2 Major Store Requirements

The assessments undertaken in the Final Retail Strategy (2007) provided specific analyses of department store and discount department store future demand and supply. The analysis indicates that:

- the likely effect of a new discount department store and department store will reduce escape expenditures from the City for a range of goods and services, while increasing the City's market share in its RCA.
- the City can sustain the addition of both a discount department store of approximately 5,500 m² GLA and a department store (approximately 12,000 m² GLA) over the forecast period (refer Section 6.6).

In conclusion, the development of additional major stores will strengthen the City's role as a regional destination for shopping, and improve its competitiveness with other major provincial cities in its secondary and tertiary catchments.

6.7.3 Local Centre Requirements

Notwithstanding the limitations on additional overall retail floorspace requirements for the City, the study identified that additional local centre development is warranted to service the Dennington/Warrnambool West, Allansford and Merri River North areas. The Strategy also provides flexibility for the development of additional new local convenience centres to support new employment areas in the future. Recommendations for development of these centres are set out in Section 7.

It is recommended that provision be made to allow for the following centres to be developed, in line with the locational and siting requirements set out in Section 8.2:

- a neighbourhood centre be developed in the Dennington/Warrnambool West area that provides:
  - a small-medium sized supermarket in the range 1,500 to 2,000m² GLA;
  - a complement of specialty stores and services not to exceed 1,000m² GLA.
- local convenience centres be developed in the Allansford and Merri River North areas, subject to the locational and siting requirements set out in Section 8.2, that provide:
  - a convenience store, not to exceed 700m² GLA;
  - a complement of specialty stores and services not to exceed 500m² GLA.

Existing Convenience Nodes and Isolated Milkbars

The Strategy encourages consolidation of activities around existing milkbars and convenience nodes, in order to optimise the viability of these uses. While no expansion of the retailing component is planned, it is recommended that where appropriate, the development of complementary services and commercial activities around these nodes (in line with the discretionary uses of the relevant zone) should be supported to strengthen the viability of each existing node.

Retailing for Tourist Developments

The Strategy recommends that provision be allowed for convenience-level retailing to be developed as part of planned, integrated tourism attractions in order to optimise the level of service and attraction. It is recommended that retail components of tourist developments should generally not exceed 500m^2 GLA, comprising niche lifestyle and service retailing. Each development should be considered on a case-by-case basis, including an assessment of the overall tenancy mix proposed.

6.7.4 Office and Trade Services Floorspace Requirements

The Strategy has identified significant additional floorspace demands for commercial, professional and community services (approximately 39,300m^2) over the period from 2006 to 2031. Some additional demand was identified for trade services floorspace (approximately 8,000m^2) over the forecast period.

6.7.5 Summary

While no additional floorspace requirements have been identified in some sectors of Warrnambool's retail-commercial system for the foreseeable future, the development of further major attractors in Warrnambool is supported by the Strategy. These major components will add to the vitality and viability of centres, attracting a higher level of visitation from within Warrnambool's Regional Catchment Area and increasing the levels of expenditure within the City's activity centres.

Major new retail investment offers significant community benefits by attracting new investment, and enhancing centres through improvements and upgrades to the retail offer, presentation and overall amenity of centres. In the case of Warrnambool, the positive impacts of the development of major attractors are particularly relevant to the City Centre, to enhance its existing regional retail and commercial role.

The assessments for future floorspace needs highlighted several issues that have been considered in the development of the Strategy, identified that:-

- bulky goods developments will need to obtain high returns on retail floorspace, to approach industry standards, in order to provide good returns to retailers and to ensure the long-term viability of the centres; and
- the EAP is defined as the 'supporting retail centre' in the City and will accommodate a significant amount of retail floorspace by 2016. It is estimated that approximately 45 percent of shopfront floorspace will be concentrated in the precinct. By 2016, retailing in Warrnambool will have evolved to a bi-modal system, whereby the distribution of floorspace and major attractors may undermine the City Centre's role as the principal activity centre and primary retail centre in south-west Victoria.
- there is a need to support and facilitate new significant retail and commercial investment in the City Centre in order to ensure its long-term role as the region's principal activity centre, and maintain its primary retail role.
- although the floorspace requirements for food, groceries and liquor retailing are low there is a need to provide sufficient future retail floorspace outside the City Centre and the Eastern Activity Precinct. Some floorspace allocations have been made for new centres to support the growing residential community in Dennington/Warrnambool West and provide for a level of convenience retailing in Allansford and the Merri River North growth area. In addition to these three new centres, the Strategy supports the development of additional retail outside the designated centres which specifically supports the development of new tourism facilities in the City of Warrnambool.

In the longer-term, to 2031, net additional retail-commercial floorspace requirements for the City amount to 47,300m^2 GLA. On this basis, there is long-term demand for retail and commercial goods and services in Warrnambool, driven by a growing population in Warrnambool and increasing inbound expenditure from with the RCA.

The assessments indicate that at a global level, in respect of retail floorspace requirements, no significant additions to the system are likely to be warranted on an overall demand-supply basis for the foreseeable future, over and above targeted additions to the system. These targeted additions include the development of new major stores (which will impact upon the level of inbound trade, particularly in household goods and bulky goods retailing), in addition to the provision of identified new neighbourhood and local centres and ermerging tourism facilities. The assessments indicate that significant additional floorspace is likely to be required for office uses (including commercial, professional and community services) over the next 20 years and beyond. Current projections also indicate that selected additional floorspace will be required to meet trade services needs.

In conclusion, the assessments indicate that retail floorspace in the City is at a global level, basically "at balance". The introduction of new major stores will raise the level of both demand and supply to a new balance. The analysis provides no warrant for significant retail floorspace increases over and above targeted needs. This assessment necessarily relies on current population projections, new or unforeseen circumstances such as major resource investments may significantly alter the situation. The significant additional floorspace demand identified for office uses was verified in consultations with stakeholders and Council, and will need to be progressively addressed over the next five years and beyond.

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7 PROPOSED RETAIL STRATEGY

7 Proposed Retail Strategy

7.1 Retail Strategy

The penultimate phase in the development of the Study is the Retail Strategy. The purpose of the Strategy is to:-

- provide a clear policy framework to guide the orderly planning and development of the City's existing and future activity centres consistent with State and municipal planning objectives;
- ensure that the existing and future provision of activity centres take full account of the established hierarchy of activity centres in the City, and the regional role of Warrnambool's City Centre as the principal activity centre serving south-west Victoria;
- provide a policy framework for the sustainable planning, development and management of existing and future activity centres in the City to meet the current and future needs of residents in the City and its RCA; and
- provide guidance for the management of activity centres and precincts, to ensure that each centre and precinct can be developed to its optimal level and fulfil sustainable, diverse and complementary roles.

7.2 Principal Elements of the Strategy

The proposed Strategy comprises several key elements. These are illustrated in Figure 19 and comprise:-

- Context and Policy Statement

  The statement sets out the key settlement and development contextual patterns that characterise the particular conditions of the City and relevant State and local policies that need to be reflected in the Warrnambool Retail Strategy.

- Strategy Policy Framework

  The framework sets out the major policy areas addressed in the Strategy, together with key principles, objectives and performance indicators to guide the existing and future provision of centres and their planning and management.

- **Implementation and Management Framework**

  The Strategy contains principles and guidelines for the implementation of the Warrnambool Retail Strategy, with reference to structure and development planning and guidelines for future planning and development applications and the conduct of impact assessment for these applications.

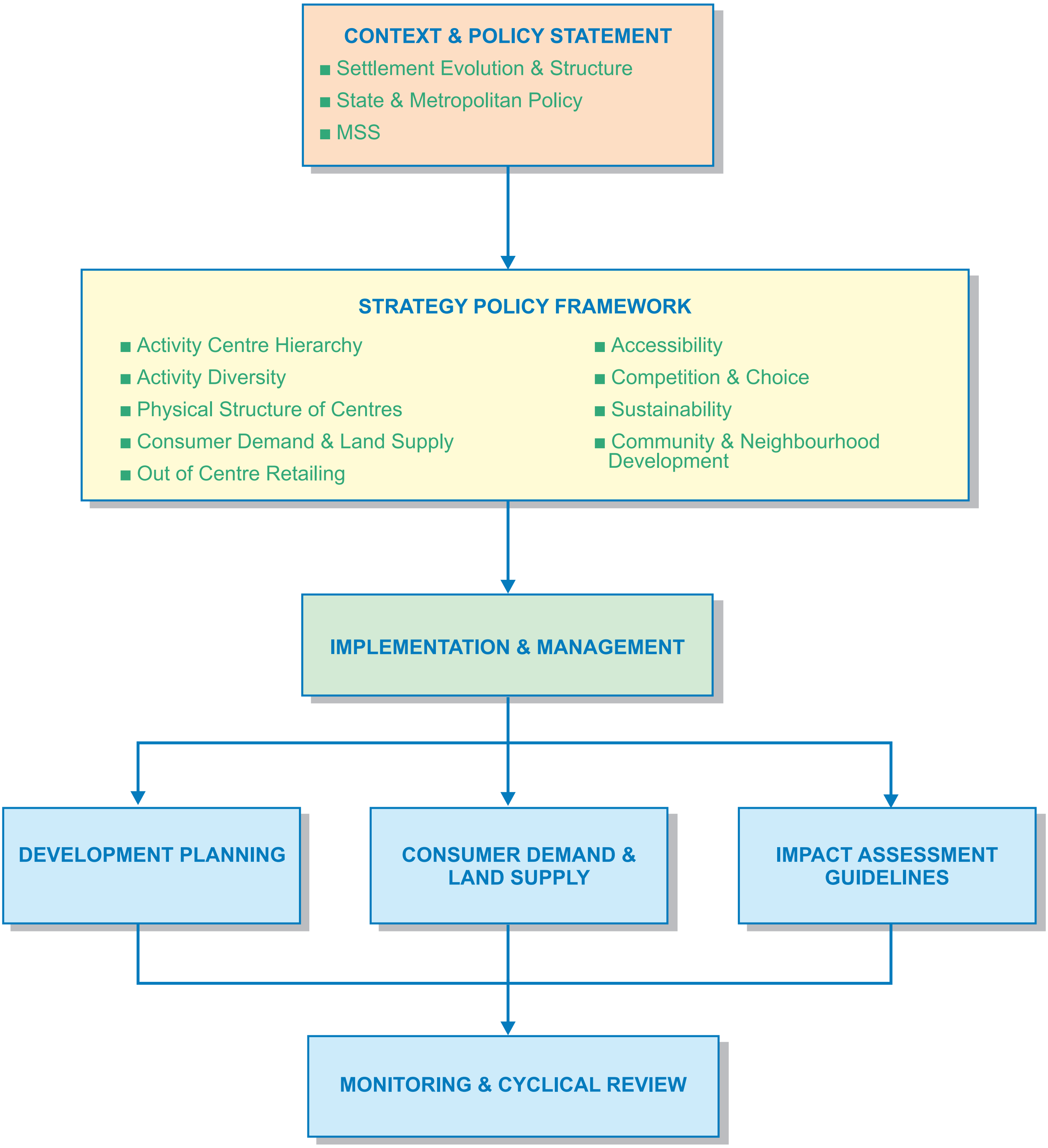

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FIGURE 20
OVERVIEW OF THE WARRNAMBOOL RETAIL STRATEGY

7.3 CONTEXT AND POLICY STATEMENT

As discussed in Section 3: Policy Context, State and local planning policies have directly and indirectly influenced the direction of the Retail Strategy.

As described in the State Planning Policy Framework (SPPF), State planning policy is directed to providing a clear policy framework for the *"...fair, orderly, economic and sustainable use and development of land"* (Clause 11.01) for the benefit of current and future populations.

The SPPF identifies seven overarching principles that inform land use and development planning, relating to:-

- settlement;
- environment;
- management of resources;
- infrastructure;
- economic well-being;
- social needs; and
- regional co-operation.

These seven principles are considered to address the various social, economic and environmental needs of communities and encompass such land uses as housing, open space, activity centre development and infrastructure provision.

The role of land use and development planning in ensuring these needs are met, is set out in State planning policy. The SPPF provides specific planning objectives to ensure that land is appropriately zoned and developed in a sustainable manner, in order to address the current and future needs of communities, under the seven planning themes.

Clause 12 (Metropolitan Development) of the SPPF is of particular relevance to the Warrnambool Retail Strategy. The policy encompasses the principles that inform land planning, with relation to urban settlement and activity centre development. The policy seeks to minimise urban sprawl through the consolidation of urban settlement patterns and the development of activity centres as a focus for social, commercial and recreational activity, within settlement areas. Of particular relevance to the Retail Strategy, the role of activity centres in providing for the social, economic and environmental needs of communities is defined in the Metropolitan Policy.

Whilst the SPPF provides the overarching principles for planning and development in Victoria, the Municipal Strategic Statement (MSS) represents a translation of State planning policy to reflect local community needs.

The Warrnambool MSS reflects the aspirations and needs of the Warrnambool community and provides a vision for the long-term management and development of land uses within the City. The MSS seeks to consolidate Warrnambool's urban settlement pattern within a clearly defined urban boundary (refer to Figure 3, Strategic Framework Plan) to ensure that settlement is established around the existing provision of services and infrastructure and to conversely protect the City's coastal environment, natural landscape and rural land uses from urban land uses.

The Strategic Framework Plan provides direction for sustainable land use based on:

- the consolidation of housing around the City's existing activity centres. In particular, the Framework Plan encourages the development of higher density housing in proximity of the City Centre and the EAP;
- the expansion of residential development to accommodate the expected population growth in the City, with the most significant short- to medium-term growth areas located around Dennington/Warrnambool West and northern Warrnambool. In turn, the Framework Plan identifies the need to develop a range of commercial, social and recreational services to support the needs of these communities; and
- the preservation of the City's coastal environment and rural land uses, through the implementation of an urban growth boundary, generally encompassing the existing urban settlement area and designated growth areas. The urban growth boundary should extend just north of the Merri River growth area, and encompass the existing Eastern Activity Precinct boundary, the Warrnambool foreshore in the south and Dennington in the west.

The spatial distribution of Warrnambool's activity centres outlined in the Strategy generally reflects the Strategic Framework Plan of the MSS, however to meet the needs of developing communities and isolated areas, the Strategy also provides for:

- A new neighbourhood activity centre is proposed to service the needs of the future Dennington/Warrnambool West community;
- The new neighbourhood centre in northern Warrnambool (Northpoint Village), has recently opened;
- New convenience centres for Allansford and the Merri River North growth area.

The proposed activity centre system is intended to meet the following community objectives:-

- a place where current and future communities enjoy a quality lifestyle, through the multifunctional neighbourhood activity centres in close proximity to residential areas;
- a place where environmental sustainability is applied as a guiding principle, through the development of activity centres along public transport routes that may also be accessed by walking and cycling; and
- a place where social needs and economic development are balanced and integrated, by ensuring that activity centres develop within a clear activity centre hierarchy.

7.4 STRATEGY POLICY FRAMEWORK

The proposed policy framework for the Retail Strategy is summarised in Table 20. The key principles that form the basis of the recommendations of the Strategy are defined in the policy framework. Informed by State and local planning principles for activity centre development, the framework identifies the key policy areas that affect activity centre planning. The framework also provides policy directions and performance indicators for each major policy area.

The first defining elements of the Strategy Policy Framework are the major policy areas addressed by the Strategy. These policy areas encompass the following:-

- activity centre hierarchy;
- activity diversity;
- physical structure of centres;
- out-of-centre retailing;
- accessibility;
- competition and choice;
- sustainability; and
- community and neighbourhood development.

Planning principles have been developed for each of the policy areas. These provide the underlying rationale and basis for each policy in terms of net community benefit for existing and future communities.

The Policy Framework also identifies a set of performance indicators whereby a range of aspects of activity centre provision, structure and performance are recommended to be monitored to assess the effectiveness of the Strategy in the management of the existing and future activity centre system.

TABLE 19. STRATEGY PRINCIPLES, OBJECTIVES AND PERFORMANCE INDICATORS

POLICY AREA	PRINCIPLES	OBJECTIVES	PERFORMANCE INDICATORS
Activity Centre Hierarchy	1. A preferred hierarchy framework is identified for Warrnambool as comprising:- ▪ the City Centre as the Principal Activity Centre and primary retail centre; ▪ the Eastern Activity Precinct as the District Activity Centre, encompassing: – Gateway Plaza and Environs as the secondary retail activity centre in the City; – the EAP as the preferred location for bulky goods retailing. ▪ neighbourhood activity centres to support residential communities; and ▪ local convenience centres. 2. Community needs are best met when retail-commercial floorspace is distributed across centres within an activity centre hierarchy framework, and co-located with a diverse range of social, commercial, retail and residential uses. 3. The primary retail centre in Warrnambool is the City Centre, providing higher order goods and services as well as a diverse range of services. The centre is intended to serve an extensive catchment, which draws from south-west Victoria. 4. The Strategy does not support the development of an additional primary retail centre, or support the development of other centres within Warrnambool to an extent that compromises the role of the City Centre as the primary activity centre and with a primary retail function. 5. The Strategy supports the development of viable levels of floorspace within each activity centre that do not undermine the role of other centres, or prevent regeneration or ability to respond to change. 6. The Strategy supports the development of walkable neighbourhoods, encourages the development of neighbourhood activity centres to support future urban growth areas and isolated communities. The two identified future neighbourhood centres are: ▪ Dennington/Warrnambool West; ▪ Northpoint (recently upgraded from a local or convenience centre role at the time of the finalisation of the Retail Strategy). 7. Local or convenience centres should be developed in line with the local community's needs, subject to demonstrable community benefits and meeting of the other principles, objectives and performance indicators outlined in the Strategy. Two new convenience centres have been identified as part of this study: ▪ Allansford; and ▪ Merri River North growth area. 8. New convenience retail or commercial facilities should be provided as part of integrated tourism developments, to provide access to a complementary range of goods and services to meet the needs of visitors.	1. Protect the role of the City Centre as the principal retail and activity centre in Warrnambool by facilitating the development of new major retail attractors or anchor stores. 2. Consolidate the hierarchy of activity centres in Warrnambool through:- ▪ Planning and design; and ▪ Provision of retail, commercial and community services at centres, to reflect the role of the centre within the activity centre hierarchy. 3. Provide a flexible floorspace allocation system that enables centres to adapt to change, regenerate and improve the level of environmental amenity, within the defined scope of their designated role in the hierarchy. 4. Provide an assessment framework for the management of existing and future activity centres to meet the needs of current and future populations of Warrnambool's RCA.	1. Proportion of investment and net additional retail floorspace developed in each of Warrnambool's Activity Centres from 2006 to 2016, and 2016 to 2031. 2. Distribution of new major attractors or retail anchors across Warrnambool. 3. Proportions of designated social, community and commercial activities located within activity centres and within walkable catchments of centres. 4. The extent to which activity centres in the City meet current and projected needs. 5. The extent to which new facilities and new centre provision impact on existing activity centres and contribute to the net community benefits of existing and future communities of Warrnambool's RCA.

POLICY AREA	PRINCIPLES	OBJECTIVES	PERFORMANCE INDICATORS
Activity Centre Diversity	1. Activity centres should contain a balance of activities to provide for a wide range of needs, minimise unnecessary trips, maximize accessibility and optimise the utilisation of urban land. 2. Further development of the City Centre should enhance its diversity and level of activity, to support its increasing role as a focus for the region's tourism industry. 3. Emerging and future activity centres and precincts should offer sufficient diversity to effectively support the City maximising its industrial and tourism potential. 4. Provide for the development of multifunctional roles in new centres and in the expansion of existing centres, appropriate to the designated position in the hierarchy.	1. Provide a diverse range of services at activity centres. 2. Encourage the co-location of community, social, cultural and entertainment activities with retail and commercial activity. 3. Locate higher density retailing in core precincts of major activity centres and encourage office space uses to locate on upper levels. 4. Locate higher density housing at the interfaces of activity centres. 5. Facilitate the development of entertainment, hospitality, accommodation and associated tourism activities, facilities and services in the City Centre.	1. Proportion of social, community, cultural and entertainment services located at each of the activity centres within the hierarchy. 2. Proportion of office space uses within the City Centre. 3. Proportion of non-retail based visitation to activity centres. 4. Proportion of tourism and hospitality businesses in the City Centre.
Physical Structure of Centres	1. Activity centres should be developed as compact, attractive precincts. 2. Activity centre design should focus on providing a safe and attractive environment, with opportunity for street-based activity. 3. Activity centres should be focused on core activity area linked by high quality pedestrian and cycling networks. 4. Activity centre should be located in highly visible and accessible locations, on main streets or highways. 5. Activity Centres should provide a community focus or meeting place.	1. Define the functional areas of activity centres. 2. Ensure that new development locates in existing centres, if appropriate, and safe pedestrian linkages are provided to highly frequented precincts within activity centres. 3. Provide a high-amenity urban structure to centres, with a central community space.	1. Extent of total land occupied by each activity centre compared to the total provision of activity floorspace. 2. Proportion of active and inactive shopfronts. 3. Proximity of new development to established core districts of activity centres. 4. Provision of a functional and central town square, plaza or park integrated with pedestrian and open space linkages in development plans.
Out of Centre Retailing	1. Ad-hoc bulky goods developments are discouraged. 2. Bulky goods retailing will develop in highly accessible locations, preferably on main highways, with good access for pedestrian and cyclists. 3. Bulky goods development should be consolidated in existing precincts, in particular in the EAP. 4. The development of additional convenience nodes or isolated milkbars should be discouraged. 5. The consolidation of existing convenience nodes and milkbars should be encouraged. 6. Consolidate bulky goods precincts with other complementary retail premises and services, such as trade services and automotive retailing.	1. Bulky goods retailing will develop in defined restricted retailing precincts, within the existing activity centres and along main highways. 2. Ensure that existing and developing bulky goods floorspace is retained for retail premises. Ensure 'shop' floorspace is principally utilised for restricted retailing, and not converted to other retail uses. 3. Stage further development in the EAP to fill gaps in the urban fabric. 4. Cluster non-retail and small commercial or service activities around existing convenience nodes to strengthen their viability. 5. Direct discretionary use permit applications outside designated centres to focus on areas within walking distance (400 metres) of existing convenience nodes and isolated milkbars.	1. Further bulky goods developments should locate in the Eastern Activity Precinct. 2. Proportion of bulky goods floorspace in the Eastern Activity Precinct. 3. Reduced frontages of undeveloped land parcels between existing developments in the EAP. 4. Number of discretionary use planning permit applications for sites in close proximity to existing convenience nodes and isolated milkbars.

POLICY AREA	PRINCIPLES	OBJECTIVES	PERFORMANCE INDICATORS
Accessibility	1. Net community benefit is maximized through the provision and maintenance of pedestrian, cycling and public transport networks to activity centres.	1. Ensure that the planning and development of activity centres identify both existing and future pedestrian, cycling and public transport networks, linking the centre to residential areas, other centres and key public uses. 2. Ensure the locations of new activity centres have strong linkages to existing and proposed community infrastructure and/or commercial developments.	1. Activity centres should be accessible to pedestrians living within an 800 metre catchment and accessible to motorists living within a 3 kilometre catchment. 2. Plan the locations of new centres in growth areas to ensure local and collector road networks 'feed into' each centre.
Competition and Choice	1. Consumer choice and competition are important elements of a market-based system, encouraging continuous improvement and innovation in customer service, retail offer, pricing and to an extent, the quality of the built form. 2. The activity centre system should provide a sufficiently flexible framework to accommodate existing and future patterns of retail and commercial competition, within defined roles of centres.	1. Ensure there is provision for existing and future businesses to locate within activity centres, particularly the City Centre. 2. Enable further amenity improvements to existing centres, particularly to improving the quality of frontages and the public realm.	1. Extent to which existing and future businesses can meet the needs of the community. 2. Extent to which businesses can develop in activity centres, appropriate to the level of service offered and the activity centre hierarchy. 3. Extent to which tourism expenditure can be captured by the local Warrnambool economy.
Sustainability	1. Activity centres should develop within established residential areas, where infrastructure and access networks have established or are establishing. This will reduce pressure to develop land outside of established communities.	1. Ensure that future activity centre consolidation, change and development reflects best practice in relation to environmental, social and economic sustainability.	1. Extent to which future development meets economic performance criteria and standards (e.g. RTD levels). 2. Extent to which future activity centres meet the social needs, values and aspirations of the community it serves. 3. Extent of sustainable water use and conservation measures utilised in activity centre design. 4. Proportion of street frontages, walkways and public spaces accessible via natural sunlight. 5. Extent of renewable energy resources utilised in activity centres. 6. Vacancy rates of floorspace in each activity centre.
Community and Neighbourhood Development	1. Walkable neighbourhoods will be achieved when activity centres are developed within walkable catchments of residential communities. Access to activity centres is an important consideration when planning for new residential communities. 2. The liveability of residential neighbourhoods will be maximized when new activity centres are planned at the outset for integration with surrounding neighbourhoods. 3. Ensure that planning for new centres incorporates the community's values and aspirations into the vision for new centres.	1. Ensure that new communities are supported by activity centres and that these centres provide for day-to-day needs. 2. Ensure the development of new centres provides for the development of a sense of community through participation in vision-setting and development of public spaces. 3. Ensure that new centres are accessible by walking and cycling, and enhance non-motorised travel options to existing centres. 4. Ensure that the range of services located in activity centres reflect the needs of communities in its catchment. 5. Future neighbourhood activity centres must have regard for the role of the City Centre, Gateway Plaza, Northpoint Village and other convenience centres in Warrnambool.	1. Pedestrian accessibility within new residential neighbourhoods is enabled through integration of internal and external circulation systems. 2. The proposed scale of centres reflects the size of the population served and considers the role of existing activity centres that impact on the role of the proposed centre. 3. Community participation levels in structure or development planning for activity centres.

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7.5 ACTIVITY CENTRE HIERARCHY OBJECTIVES

The following objectives have been formulated to guide planning and development of the activity centres hierarchy in Warrnambool:-

- recognise and reinforce the primacy of the Warrnambool City Centre as the Principal Activity Centre and primary retail centre in the City, as well as its role as the pre-eminent shopping and services centre for south-west Victoria;
- within this context, support and facilitate retail and commercial development opportunities in the City Centre;
- consolidate the development of additional major retail attractors and anchor stores within the City Centre;
- encourage the development of neighbourhood activity centres in support of growing residential communities at Dennington/Warrnambool West and Northpoint;
- encourage the development of a convenience activity centre at Allansford;
- provide for a level of flexibility to ensure that convenience retailing can be integrated with new tourism developments to provide for the needs of visitors to the city and encourage the establishment of other complementary uses to create mixed-use nodes;
- ensure that bulky goods retailing develops within the designated restricted retailing precinct located in east Warrnambool and is managed accordingly;
- ensure that the existing and future activity centre system is capable of accommodating future retail, commercial and leisure requirements according to the centre's role within the activity centre hierarchy;
- ensure that the development of existing and future activity centres in Warrnambool support the consolidation of urban settlement, as recommended in State planning policy and reflected in Warrnambool's Strategic Framework Plan;
- ensure that activity centre consolidation and development is consistent with and contributes to the economic, social and environmental sustainability of Warrnambool;
- ensure that the current and future activity centre system for Warrnambool will meet the range of needs of current and future populations; and
- recognise the important social roles of Warrnambool's activity centres, within the Warrnambool Regional Catchment Area, as a means of addressing the social needs of communities.

7.6 THE RECOMMENDED ACTIVITY CENTRE HIERARCHY

The recommended hierarchy of activity centres maintains the current activity centre system, comprising the following existing activity centre locations:-

- the Warrnambool City Centre;
- the Eastern Activity Precinct; and
- Northpoint Village.

In addition, the Retail Strategy proposes that a Neighbourhood Activity Centre be developed in support of the emerging residential community in Dennington/Warrnambool West, and Local Convenience Centres be developed to support the residential communities of Allansford and the Merri River North growth area.

7.6.1 The Principal Activity Centre and Primary Retail Centre

Warrnambool City Centre

The City Centre is recognised and defined in the MSS as the primary retail centre in Warrnambool. Applying the activity centre framework prescribed in State policy, the Retail Strategy recognises the structure and functional characteristics of the City Centre to play the role of a Principal Activity Centre, secondary only to the Melbourne CBD - Victoria's Central Activities District (CAD) (refer to Section 3).

The Retail Strategy seeks to enhance and consolidate the diversity of activities, social, economic and employment role of the City Centre within the context of the City and the wider south-west Victoria region. The role and future function of the centre is outlined in *Section 7.7: The Roles and Functions of Centres*. Strategic design principles for the development of the City Centre are outlined in *Section 8.3.*

Consistent with State and Local planning policy, the Retail Strategy seeks to reaffirm and consolidate the primary retail and services function of the City Centre by encouraging new retail, commercial, entertainment, recreational, tourist and community services to locate in the City Centre. The centre will fulfil a wide range of important retail, commercial and social functions and will provide a significant employment focus in south-west Victoria.

Historically, the City Centre has provided a significant social focus for the city and its region, playing a number of important regional roles, including retailing, administrative, professional and business services, community, health and entertainment functions. Centred upon Liebig Street, the City Centre's role as a strong and diverse regional centre is underpinned by a significant retail core. The retail shopfronts, encompassing a wide range of goods and services, form the core of activities that provides a strong social and business focus for Warrnambool and its region. The street-based nature of the City Centre, underpinned by its retail role, provides an attractive, high-amenity business setting, offering a wide range of functions that support the City Centre's diversity of commercial, community and business activities.

The likely potential of new major stores to locate in Warrnambool presents a historic opportunity for the City Centre. A proposed discount department store and department store will provide new regional attractors that will significantly improve the City's trading and service role, and add to its regional competitiveness.

It is critically important for the long-term vitality and viability of the City Centre, in terms of its role as a strong and diverse regional centre, that its retail role is consolidated and strengthened by further retail development in Warrnambool. In line with the directions of the Municipal Strategic Statement and previous Retail Strategies (Essential Economics 2001-2003), the primacy of the City Centre should be maintained as the Principal Activity Centre for south-west Victoria. The development of further regional attractors, such as a department store and a discount department store, should therefore be directed to the City Centre.

7.6.2 The District Activity Centre and Supporting Retail Centre

The Eastern Activity Precinct (EAP) is recognised as the district activity centre in Warrnambool (Figure 20), playing a supporting role to the City Centre in terms of its retail role. The centre is a highway-based trading precinct, which is unified by the Highway, providing a central focus for the development.

The EAP comprises of the following key developments:-

- Gateway Plaza and Environs;
- Harvey Norman and Environs;
- the Homemaker Centre;
- Bunnings; and
- Flying Horse Inn development.

The role and future function of the centre is outlined in Section 7.7: The Roles and Functions of Centres. Strategic principles for the development of the EAP are outlined in Section 8.3: Strategic Objectives for Warrnambool's Activity Centres.

Gateway Plaza and Environs

Gateway Plaza and Environs comprises the existing Gateway Plaza shopping centre as well as land located to the north and east of the centre, earmarked for the approved expansion of the centre (refer Figure 20). Gateway Plaza and Environs also incorporates land located west of the existing shopping centre, identified in the Retail Strategy as 'Sherwood Scott' land.

The Retail Strategy identifies the role of Gateway Plaza and Environs as the 'secondary or supplementary retail centre' in Warrnambool, fulfilling an important neighbourhood retail and community role to the east Warrnambool community and ex-urban districts. In terms of its retail role, the centre is intended to provide for an extensive range of weekly and day-to-day shopping requirements, together with a range of supporting comparison shopping requirements.

The Strategy provides flexibility for Gateway Plaza and Environs to develop in the long-term, particularly as new residential estates are developed in the north-east and east Warrnambool regions. Future development of Gateway Plaza and Environs should be consistent with retail and activity centre hierarchy outlined in this Retail Strategy (refer to Section 5).

The Strategy provides for the development of additional specialty retailing (including food and household goods stores) to locate at Gateway Plaza and Environs, as settlement in the north-east and east Warrnambool develops. The principal objective of further floorspace development is to improve the quality of the public realm, and allow for diversification of the types of goods and services offered at the centre.

In particular, the relationship between the Sherwood Scott development, west of Gateway Road, and Gateway Plaza should be strengthened. The district retail centre should operate as an integrated 'core' of activities, rather than two discrete developments. A number of improvements to each site will improve the integration of the developments, including better pedestrian and vehicular linkages, provision of active interfaces between the two developments and a comprehensive landscaping scheme.

Fundamentally, further expansion of the centre must not undermine the pre-eminence of the City Centre, in particular, its primary retail role. In this context, it is recommended that Gateway Plaza and Environs remain as a single discount department store-based centre.

Bulky Goods Precinct

Harvey Norman and environs, Homemaker Centre and Bunnings are identified in the Strategy as existing bulky goods retailing in east Warrnambool.

The Strategy has identified that there is an adequate supply of bulky goods floorspace in the City, as well as a relatively high level of floorspace vacancy, particularly at the Homemaker Centre. Given this, additional floorspace of this type should not be developed over the next 25 years.

The EAP is recognised as the preferred location for bulky goods retailing in Warrnambool. The Strategy therefore encourages bulky goods retailing currently located in the City Centre, to relocate to the EAP.

Floorspace intended for use as bulky goods retailing should not be converted to other higher order retail uses, as this will undermine the viability of other retail activities in Warrnambool, and affect the ability of existing centres to regenerate and undergo renascent change. A wide range of retail premises could establish across the bulky goods precinct, with exception of 'shop' floorspace (as defined in the Victorian Planning Provisions), to ensure retail shopfront floorspace is concentrated in the designated retail core of the precinct: Gateway Plaza and Environs. Some 'shop' floorspace is appropriate in the bulky goods precinct, however, specifically in the form of 'restricted retail'.

Flying Horse Inn Development

The development of the Flying Horse Inn site at the eastern edge of the EAP provides for a wider range of activities than initially developed in the precinct. In the past, retail development has principally been focused on food groceries and liquor, household goods and bulky goods, delivering a strong retail centre and bulky goods precinct.

The Flying Horse Inn development brings the EAP to a new phase in its evolution, diversifying the range of activities in the precinct, and offering a new entertainment function, with the development of a new licensed hotel. At the time of finalisation of the Retail Strategy (2007), the development of new food and drink premises and the hotel was underway. In order to strengthen the linkages with adjacent sites, and Deakin University, future improvements of the site should deliver comprehensive, integrated pedestrian and cycling links, and extend a uniform landscaping and lighting scheme. These improvements should be consistent with the remainder of the EAP to present a more cohesive character to the City's eastern gateway.

In line with the current provisions of the planning scheme controls, it is not intended that this site has a significant retail component. Within the EAP, the use of land for a 'shop' should be consolidated in the Gateway Plaza and Environs area, to enable the development of a unified and well integrated retail centre, extending its active frontages to more positively contribute towards the public realm.

7.6.3 Neighbourhood Activity Centres

The highest retail attractor that should locate in Neighbourhood Centres is a supermarket, providing an important anchor store that will enhance each centre's viability in the long-term. For integrated neighbourhood centres to provide a range of goods and services in close proximity to residential areas, supermarkets should be accompanied by a range of specialty retail goods and services, community, health, leisure and recreation facilities.

The two neighbourhood centres identified in this Strategy are outlined below.

Dennington/Warrnambool West

The Strategy provides for the development of a neighbourhood activity centre to support short and medium-term residential growth proposed in Dennington, north Dennington and Warrnambool West.

The role and function of the future centre is outlined in Section 7.7. Strategic locational and design principles for the development of the Dennington/Warrnambool West Neighbourhood Centre are outlined in Section 8.1 and 8.3.

Northpoint Village

The expansion of Northpoint Village has elevated the role of the centre from a local convenience to neighbourhood activity centre. Northpoint will provide important retail, social and community functions and provide for the day-to-day convenience needs of communities residing in north Warrnambool.

7.6.4 Convenience and Local Activity Centres

Local and convenience centres play an important role in improving accessibility of a range of goods and services to local communities, by enabling day-to-day needs to be provided in locations closer to home.

The purpose of the convenience centres is to provide for the basic day-to-day needs of residents and employees, as well as encouraging the development of niche and lifestyle retailing in tourism developments.

The role and function of the future convenience centres is outlined in Section 7.7.

Designated Convenience Centres

Several new convenience centres have been identified in the finalisation of the Warrnambool Retail Strategy (2007). Strategic locational and design principles for the development of the each Convenience Centre are outlined in Section 8.1 and 8.2.

- **Allansford:** The Strategy supports the development of a new convenience activity centre in Allansford, to the east of Warrnambool. At this point in time, there have been no sites identified for the development of the new convenience centre.
- **North of Merri River Structure Plan Area:** The Strategy supports the development of a new convenience centre in the new growth area north of Merri River. Structure Planning for the precinct is underway, which will identify a potential location for a new convenience centre.
- **New Convenience Centres in Employment Areas:** The Strategy encourages the development of planned convenience centres to support newly developing industrial and business areas. These should be identified in the early stages of planning new developments, to optimise the integration of the centre with the surrounding activities.

Existing Convenience Nodes and Isolated Developments

- **Isolated stores in residential areas:** The Strategy discourages the expansion of retail provision at these nodes, where they are located in residential precincts on local streets.
- **Isolated retail nodes in industrial areas:** The Strategy recognises that there will be an ongoing need for the provision of basic convenience services to meet the needs of workers and visitors in the City's industrial and business areas.

Retail Developments in Tourism Precincts

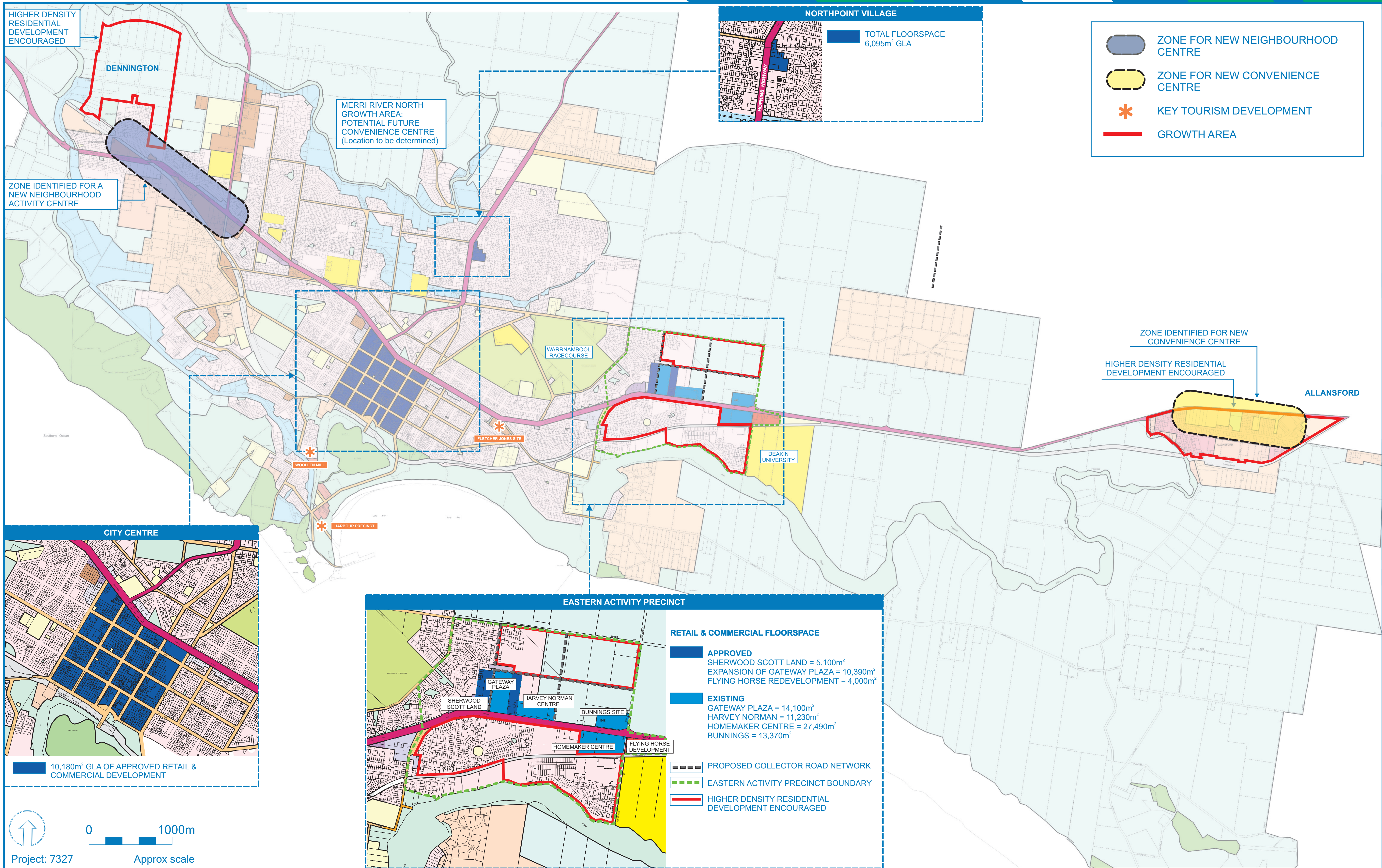
The Strategy supports the development of complementary retail activities in designated or recognised tourism precincts. It is envisaged that retailing activities in these precincts will be confined to niche and lifestyle tenancies, which should be assessed on a case-by-case basis.

The Strategy recognises the need to facilitate a diversity of tourism attractions in the City, in order to maximise appeal to the widest possible range of potential markets. In this context, the Retail Strategy (2007) supports the incorporation of future retail facilities in tourism developments.

Several significant tourism developments have been identified in the preparation of the Strategy, including:

- **The Former Woollen Mill site:** A former industrial site currently being developed as a mixed use site, just south-west of the City Centre. The development will include accommodation and associated tourism facilities, including the provision of some boutique retailing facilities. The site has significant heritage facades that will be retained in the development, and overlooks Lake Pertobe and the foreshore area.
- **Former Fletcher Jones site:** The former industrial site along Raglan Parade, has significant heritage and tourism value, with the Fletcher Jones garden, water tower and parts of the factory being heritage-listed features of the site. It is proposed that the site will be redeveloped into a mixed use precinct, including artists studios, gallery, boutique retail and antique market, with associated hospitality uses.
- **The Harbour Precinct:** The emerging harbour precinct south-east of the City Centre is rapidly developing, with two major hotel developments providing catalyst projects for the expansion of the precinct. While a range of personal services and some hospitality uses have established in the ground floor of each establishment, further development of the precinct could strengthen its tourism role. The provision of niche and lifestyle retailing and hospitality activities, complemented by some convenience retailing, would meet the needs of a wider range of visitors to the precinct.

The specific composition of these developments, and others yet to be identified, should be considered in relation to the principles set out in Section 8.4.8.



WARRNAMBOOL RETAIL STRATEGY

for WARRNAMBOOL CITY COUNCIL NOVEMBER 2007

by RATIO CONSULTANTS

FIGURE 21

EXISTING & APPROVED LAND USE & DEVELOPMENT IN WARRNAMBOOL

7.7 THE ROLES AND FUNCTIONS OF CENTRES

Each centre in Warrnambool's activity centre network should fulfil a range of functions appropriate to their role relative to other centres, and maximise the accessibility of a diversity of services and functions to the residential catchments they serve.

The Retail Strategy outlines a framework for each centre, including general range of roles or functions each centre should fulfil. These roles and functions provide a guide for the planning and development of Warrnambool's activity centres by defining their activities mix, floorspace structure and requirements (refer Table 21).

In order to ensure the development of a strong activity centre network of viable centres with complementary roles, and foster the competitiveness of centres, it is essential that future considerations of floorspace additions to existing centres or the development of new centres is considered within the context of the role of the centre, and the functions it should provide.

TABLE 20: THE ROLE AND FUNCTION OF CENTRES IN WARRNAMBOOL'S ACTIVITY CENTRE HIERARCHY

Activity Centre Classification	Principal Activity Centre	District Centre (Eastern Activity Precinct)		Neighbourhood Activity Centres	Local or Convenience Centres		
Retail Classification	Primary Retail Centre	Secondary or Supporting Retail Centre	Principal Bulky Goods Precinct	Neighbourhood Centre	Convenience Centres	Convenience Nodes	
Centre Location	Warrnambool City Centre	Gateway Plaza and Environs	Bulky Goods development in Eastern Activity Precinct	Northpoint Village and Dennington/Warrnambool West	Allansford, Merri River North growth area, and future centres	Existing Convenience Nodes	Tourism Retail (Including Woollen Mill, Fletcher Jones and Harbour precinct)
Catchment	The centre draws its retail trade from within the Warrnambool LGA and a regional catchment area (RCA) that extends across 9,000 square kilometres from Colac in the east, to Hamilton and Portland in the west.	Gateway Plaza and Environs primarily provides for the needs of the community residing in East Warrnambool.	Bulky goods development in Warrnambool has a regional role and catchment, rivaling the scale and offer of any other bulky goods development in regional Victoria.	Northpoint provides for the needs of the emerging community located in north Warrnambool. Dennington/Warrnambool West will provide for the needs of the growing community in west Warrnambool.	Allansford will provide for the basic needs of the small 'satellite' townships east of Warrnambool. Merri River North, a new convenience centre will provide for the needs of a growth area.	Principally located internally to precincts, these centres have a small catchment, relying on trade from surrounding residential suburbs and industrial employment areas.	Retail developments supporting tourism facilities, to cater for visitors' convenience needs.
Role and Context	The City Centre is the primary retail and commercial centre, forming the most important business and services centre in south-west Victoria. The multi-functional role of the centre encompasses the core retail, commercial, community, entertainment and tourism functions in Warrnambool.	The role of the centre is to provide retail goods and services, in addition to a range of community services, hospitality and leisure activities to meet the day-to-day needs of its catchment. Currently the centre's role is limited to providing retail functions. Recent floorspace approvals for the centre will increase the profile of the centre. By 2016, the Strategy estimates that almost 50 percent of occupied retail goods floorspace will be located in the EAP, undermining the role of the city centre as primary shopping centre in Warrnambool.	New retail development in Warrnambool has largely developed as bulky goods in the Eastern Activity Precinct. Approximately 50,000m^2 of gross leasable area (GLA) has been approved for bulky goods development in the EAP. The EAP provides a competitive environment for large-scale developments that include discretionary household purchases e.g. electrical goods, homewares and furnishings. The Strategy has identified that a there is an oversupply of bulky goods and no demand for additional bulky goods floorspace to meet the needs of the City or its regional catchment.	Neighbourhood centres provide for the day to day and weekly shopping needs of the local community and are an important social focus and provide a range of community services, health and leisure functions. The expansion of Northpoint Village from a local convenience centre, to neighbourhood activity centre is currently underway. Endorsed plans for the development provide for a supermarket-based centre, with a range of entertainment, community services in addition to retail shopfront floorspace.	The role of the proposed convenience centres is to provide for the day to day needs of the local community.	The role of existing convenience nodes is to provide for the needs of the working population in industrial areas, and provide basic goods to residential communities.	The provision of supporting retail shopfront floorspace in tourism developments, is to provide for some convenience retailing for visitors.

Activity Centre Classification	Principal Activity Centre	District Centre (Eastern Activity Precinct)		Neighbourhood Activity Centres	Local or Convenience Centres		
Retail Classification	Primary Retail Centre	Secondary or Supporting Retail Centre	Principal Bulky Goods Precinct	Neighbourhood Centre	Convenience Centres	Convenience Nodes	
Centre Location	Warrnambool City Centre	Gateway Plaza and Environs	Bulky Goods development in Eastern Activity Precinct	Northpoint Village and Dennington/Warrnambool West	Allansford, Merri River North growth area, and future centres	Existing Convenience Nodes	Tourism Retail (Including Woollen Mill, Fletcher Jones and Harbour precinct)
Strategic and Policy Objectives	To provide the highest level of shopping, professional, entertainment and community service functions that serve both the City of Warrnambool and south-west Victoria. To retain the primacy of the City Centre as the core retail, business and service centre by encouraging new development to locate in the centre. To support the role of the City Centre as the preferred location for business and services by providing opportunities for office use. To ensure that the current balance and distribution of retail, business and service floorspace is maintained and the city centre remains the primary shopping centre in Warrnambool.	Ensure that the development of Gateway Plaza does not undermine the current and future role of Warrnambool's City Centre as the primary shopping centre in the region. To provide a high level of convenience and weekly shopping requirements for the East Warrnambool community. To encourage the development of high quality community service development, such as childcare, library, health and medical facilities. The accommodation of theses types of activities at Gateway Plaza and Environs will strengthen its role as a community hub.	To effectively manage the existing supply of bulky goods floorspace in Warrnambool, particularly the EAP. To prevent 'higher order' retail from locating within the areas intended for bulky goods development, particularly within the EAP. To encourage bulky goods, development currently located within the city centre to re-locate to the EAP. This will 'free up' floorspace for new retail development opportunities in the City Centre.	To provide a level of convenience goods and services to meet the needs of existing and emerging communities. Encourage the development of highly accessible neighbourhood activity centres by locating centres on a main road and providing pedestrian and bicycle linkages to the development. Support the development of a neighbourhood activity centre in Dennington/Warrnambool West. Recognise and encourage the centre's function as a social focus by developing community and entertainment services at the centres.	To encourage the development of a viable convenience centre that provides a social focus and provides for the day to day needs of the community. To support new industrial or employment areas, while optimising the number of catchments they serve.	To provide access to basic goods. <u>In the case of residential areas</u>: to consolidate these nodes by directing complementary non-retail activities (discretionary in residential zones) to establish within 400 metres of sites.	To encourage the development of active frontages to the public realm, providing an attractive interface with surrounding uses. To optimise the public use of spaces that have significant heritage, landscape and cultural value.
Accessibility	Located with excellent access by major highway or arterial roads. Highly accessible from a number of entrances for cars, bicycles and pedestrians. Excellent public transport access and modal interchange. Ensure safe pedestrian network within and to the centre. Linked to joint use pathways and linear open space networks. Sufficient car and bicycle parking provided particularly in highly utilised precincts of the city centre.	Located with excellent access to major highways or arterial roads. Accessible from surrounding residential areas by motorists, pedestrians and cyclists through the provision of safe, visible entrances and pedestrian and cycling networks. Ensure safe pedestrian and cyclist networks within the centre layout and design. Linked by joint use pathways to an open space network. Preferably located along public transport network.	Located with retail frontage to major highways or key arterial roads. Ensure safe pedestrian network within and to the centre to avoid conflict with motor vehicles. Sufficient car and bicycle parking should be provided. Car parking should face retail shop fronts to ensure safe access from car parking area to entrances of the retail development. All properties within precinct linked by joint use pathways, where possible providing links between carparks on adjacent sites.	Locate retail frontage to the main road. Accessible from surrounding residential areas by motorists, pedestrians and cyclists through the provision of safe, visible entrances and pedestrian and cycling networks. Good public transport access. Ensure safe pedestrian and cyclist networks within the centre layout and design. Linked by joint use pathways to an open space network.	Locate retail frontage to the main road. Accessible from surrounding residential areas by motorists, pedestrians and cyclists through the provision of safe, visible entrances and pedestrian and cycling networks. Good public transport access. Ensure safe pedestrian and cyclist networks within the centre layout and design. Linked by joint use pathways to an open space network.	Accessible from surrounding industrial or employment areas by motorists, pedestrians and cyclists through the provision of safe, visible entrances and pedestrian and cycling networks. Good public transport access.	Frontages located to optimise significant views and activate street frontages to contribute positively to the public realm. Accessible from surrounding residential areas by motorists, pedestrians and cyclists through the provision of safe, visible entrances and pedestrian and cycling networks. Good public transport access. Ensure integrated, safe pedestrian and cyclist networks within the precinct in terms of layout and design. Linked by joint use pathways to an open space network.
Defining Retail Component	The highest future retail attractor in the Principal Activity Centre is a Department Store.	The highest retail attractor at Gateway Plaza and Environs is a single Discount Department Store (DDS), in line with previous consideration of the role of the centre in amendment processes and Planning Panels.	The principal use of these developments is limited to bulky goods tenancies, generally over 1,000m^2.	Single supermarket-based centres, which anchor a range of specialty retail goods and services.	Small clusters of convenience retail goods and services generally comprised of small tenancies. Defining retail element is the absence of a supermarket.	Often a single, isolated shop, such as a milkbar or take-away shop.	Niche lifestyle, service retail and hospitality clusters to complement significant tourism developments.

Activity Centre Classification	Principal Activity Centre	District Centre (Eastern Activity Precinct)		Neighbourhood Activity Centres	Local or Convenience Centres		
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Centre Location	Warrnambool City Centre	Gateway Plaza and Environs	Bulky Goods development in Eastern Activity Precinct	Northpoint Village and Dennington/Warrnambool West	Allansford, Merri River North growth area, and future centres	Existing Convenience Nodes	Tourism Retail (Including Woollen Mill, Fletcher Jones and Harbour precinct)
Retail and Commercial Role	*Multi-functional role* Opportunity to locate:- ▪ a full-line department store; ▪ multiple discount department stores; ▪ multiple supermarkets; ▪ additional commercial, professional and community services; ▪ cafes, restaurants, entertainment venues and tourist related services.	*Supportive role to the Warrnambool City Centre* Opportunity to locate:- ▪ multiple supermarkets; ▪ single discount department store; ▪ cafes and takeaway premises; ▪ range of household goods and services; ▪ community and health services (childcare centre, Maternal and Child Health Centre); ▪ retail services (eg. drycleaner, video hire outlet)	*Specialised, Sub-Regional Role* Opportunity to locate:- ▪ large bulky goods tenancies, generally over 350m^2 in gross leasable area; ▪ complementary retail goods and services floorspace (e.g. small café/takeway premises).	*Neighbourhood Role* Opportunity to locate:- ▪ 1 supermarket; ▪ 15 to 20 retail and other tenancies; ▪ professional services (e.g. accountant, medical services); ▪ community services (eg. childcare centre, library); ▪ retail services (eg. drycleaner, video hire outlet).	*Convenience Role* Opportunity to locate:- ▪ a convenience or general store; ▪ 5 to 10 retail and other tenancies; ▪ professional services (e.g. medical services); ▪ community services (eg. childcare centre); ▪ retail services (eg. pharmacy, video hire outlet); ▪ automotive services (eg. service station, car wash).	*Convenience Role* Opportunity to locate:- ▪ medical services; ▪ community services (eg. childcare centre); ▪ personal services (eg. beautician or hair salon); ▪ home based businesses.	*Convenience Role* Opportunity to locate:- ▪ hospitality; ▪ personal services; ▪ niche or lifestyle retail.
Floorspace Requirements and Allocations	No upper floorspace limit, to ensure additional major retail anchor stores can establish in the City Centre.	It is recommended that the development of additional sub-regional and regional anchor stores at the site is limited	That the development of floorspace as a shop is limited in this part of the EAP, as Gateway Plaza and Environs provides for the retail goods and services needs of the east Warrnambool community and surrounding outlying districts.	The Dennington/Warrnambool West Neighbourhood Centre should comprise of: ▪ a supermarket of 1,500-2,000m^2 GLA; and ▪ specialty stores and services of up to 1,000m^2 GLA.	Convenience Centres should comprise of: ▪ a convenience store of up to 700m^2 GLA; and ▪ specialty stores and services of up to 500m^2 GLA.	No allocation is made for the expansion of existing isolated retail nodes.	No allocation is made for tourism developments. These should be assessed on a case-by-case basis, in the context of the regional significance of the proposal and site, and the overall activity mix proposed, in line with the principles set out in Section 8.5.8.
Leisure and Entertainment	▪ Major open space area or town square; ▪ Major entertainment and leisure facilities such as cinemas, bowling alley, etc. ▪ Primary focus for late night entertainment venues, hotels and taverns.	▪ Passive open space reserve, town square or village green; ▪ Sports and recreation facilities.	n/a	▪ Open space reserve with playground; ▪ Sports and recreation facilities.	▪ Open space reserve with playground; ▪ Sports and recreation facilities.	n/a	▪ Linkages to passive open space such as parkland or foreshore areas;

*As defined in the Warrnambool Municipal Strategic Statement (Clause 21.01)

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8 IMPLEMENTATION AND MANAGEMENT

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8 Implementation And Management

Implementation and management for the recommended Warrnambool Retail Strategy is focused upon the following:-

- provision of clear location and siting requirements for new centres to enhance their viability;
- structure planning for activity centres to provide long-term direction for their development and management;
- development planning to provide detailed design and land use requirements for centres;
- strategic objectives for Warrnambool's activity centres, including policy objectives and implementation actions;
- impact assessment guidelines for planning and rezoning applications;
- potential statutory planning implementation mechanisms; and
- monitoring and cyclical review.

Recommended processes, objectives and measures are outlined in this section, for the ongoing management of Warrnambool's Activity Centre System, to deliver a strong activity centre network for the City, and maximise community benefits. These mechanisms are set within the State Planning Policy Framework, Local Planning Policy Framework and the Retail Strategy Policy Framework outlined in Section 7.4.

8.1 LOCATIONAL AND SITING REQUIREMENTS FOR NEW CENTRES

The role of neighbourhood and convenience centres in the activity centre hierarchy is to optimise the accessibility of basic day-to-day goods and services to the community. Alongside neighbourhood centres, convenience centres are the most vulnerable centres in the hierarchy, requiring careful planning to maximise their long-term viability and ability to attract investment. This fundamentally affects the ability of convenience centres to respond to change, regenerate and improve - a critical element of successful centres in a quickly evolving retail system.

State Policy outlines a number of locational requirements that are critical to the success of neighbourhood and convenience centres, however these are also applicable to other centres within the activity centre hierarchy. The locational requirements for new centres proposed for Warrnambool include:

- visibility from a primary or secondary arterial road;
- accessibility to multiple residential precincts;
- connection to existing and/or future public transport routes;
- optimally, co-location with leisure, community services and social facilities (including education and religious institutions) and provision of a range of social functions;
- integration with public open space networks; and
- where practicable, co-location with recreation reserves.

New neighbourhood and convenience centres should provide a range of community services and social facilities, to ensure they provide a strong social focus for local communities. To ensure the long-term viability of these centres, their siting and location is critical to their performance, requiring strong anchor stores to compete with larger centres in provision for the day-to-day needs. Subject to meeting these locational requirements, detailed structure and/or development planning of new sites should be undertaken, and provide for the range of uses and functions of neighbourhood and convenience centres outlined in Section 7.7.

8.2 ACTIVITY CENTRE STRUCTURE PLANNING

For each of the centres identified in the Warrnambool Retail Strategy, structure plans should be prepared to guide the development of each centre over a 15 to 20 year period. Structure plans should outline clear physical frameworks for the development of each centre, within a vision that is defined by the community's values and aspirations.

Structure Plans should provide a framework plan that addresses:

- Activities, Precincts and Land Use;
- Access and Circulation;
- Open Space and Landscaping;
- Built Form and Urban Design;
- Social and Amenity Impacts; and
- Social and Community Infrastructure Provision.

In the case of the City Centre, a Structure Plan is likely to also go into a greater level of detail, similar to that of a development plan. Alternatively it may set requirements for further strategic work to be undertaken either at a precinct level, or as part of planning permit applications. The City Centre Structure Plan must show details of built form outcomes and specific activity compositions and relationships. Council should lead this process for the City Centre, to engage with a range of smaller landowners to facilitate redevelopment projects.

In the case of the Eastern Activity Precinct, however, the detailed design of specific sites is likely to be undertaken by individual landowners. The EAP structure plan should outline the broad land use outcomes and functional relationships between sites to create a cohesive centre, in line with the directions of the retail strategy. It is therefore recommended that the EAP Structure Plan (Hansen and Hyder Consulting, 2004) is reviewed, in conjunction with the preparation of development plans by the individual landowners.

A structure plan should be prepared for Northpoint Village to guide the future development of the centre, and in particular, provide a framework to address the extension of commercial uses and services into adjacent residential areas.

It is recommended that a structure plan for the new Dennington/Warrnambool West Neighbourhood Centre be subject to an Expressions of Interest process, whereby prospective developers are asked to prepare submissions to Council that address a set of pre-defined criteria, based on the principles set out below. To select the appropriate site and refine the development proposals, each submission should be subject to a peer review, Council deliberations and a public consultation period to select the most appropriate site and refine the proposed concept to optimise the design, best meet the needs of the community and enable community input into the structure plan.

It is recommended that the Allansford Urban Design Framework is reviewed, to identify a future location for a convenience centre, in consultation with the community. It is also recommended that a suitable location for a convenience centre in the Merri River North growth area is identified through structure planning for the growth area as a whole. The potential for additional new convenience centres should be reviewed as part of the planning of new employment and industrial areas, to provide for the needs of workers in viable locations that are also accessible to residential catchments.

8.2.1 Structure Plan Requirements

Structure plans for new neighbourhood and convenience centres should:

- Define the study area, to generally extend approximately 400 metres from the proposed activity centre;
- Outline a physical framework plan that guides the development of the centre, and identifies the distribution of activities and uses, scale, attractors, pedestrian environment, and built form;
- Provide for a street-based or externally-focused centre, to maximise activity, encourage a sense of 'village life' and provide a community focus through provision of a public square, park or plaza;
- Maximise continuous active frontages to the built form, and show how the development enhances the public realm;
- Acknowledge and respect the existing heritage character of the area;
- Provide a hierarchy of pedestrian and public spaces within the centre, and identify integration with external circulation networks in adjoining neighbourhoods and open space links;
- Indicate connections to existing and/or future public transport routes;
- Provide access to new centres from a primary and secondary arterial road;
- Identify internal or local road circulation systems;
- Identify locations for car parking and site servicing facilities;
- Provide for a diverse range of social functions, including provision of community and social facilities, or be in proximity to existing facilities;
- Outline an urban design and landscaping framework to maximise the amenity of the public realm; and
- Provide for medium and higher-density residential development within 400 metres of proposed centres.

8.3 DEVELOPMENT PLANNING

Projections of future retail and commercial floorspace needs for the City have demonstrated that if current trends continue, the proposed distribution of retail and commercial floorspace (based on assessments to 2016) is unsustainable to the long-term viability of Warrnambool's activity centres.

The Strategy recognises that Warrnambool's activity centre system is undergoing a quantum shift in balance, whereby significant retail development is occurring in the EAP and is consequently undermining the role of the City Centre as primary retail centre for the City. The underlying issue which has given rise to this change is the low floorspace vacancy rate in the City Centre and subsequent low number of redevelopment opportunities in the centre. It is recommended that future retail and commercial developments locate within the City Centre, to ensure the centre's primary retail and services function is retained. In the long term, this will ensure the long-term viability and sustainability of the City Centre.

The purpose of development plans is to guide the detailed planning of new developments and to ensure planning and development outcomes are consistent with the vision, community objectives and intent of local planning policy for the development of activity centres.

8.3.1 Development Plan Requirements

It is recommended that where future developments are being contemplated or proposed, that a development plan is prepared. Development Plans are particularly important for sites where several ownerships are affected or located adjacent to one another, or where strategic planning is required to resolve access, built form, site and contextual planning issues.

It is recommended that each development plan should identify:-

- **the location of the proposed development/s** in relation to the existing activity centre development under assessment;
- **pedestrian and cycling linkages** to and from the activity centre (this is particular relevance to the planning of neighbourhood and local activity centres);
- **the proposed hierarchy of external and internal pedestrian spaces** and their linkages to established and planned activity areas within the centre;
- **the envisaged built form concept of the proposed development,** identifying the scope and scale of the intended development. In developing a plan for the EAP, Council and/or private applicants must ensure that development proposal is consistent with the vision and intent outlined in the *Warrnambool Eastern Activity Precinct Structure Plan (2004)*;

- **landscape and urban design concept plans for the proposed development.** In developing plans for the City Centre, applicants must demonstrate how the plans address the vision and intent of the *Warrnambool City Centre Urban Design Framework (2001).* Similarly, plans for the Eastern Activity Precinct must demonstrate regard for the urban design principles set out in the *Warrnambool Eastern Activity Precinct Structure Plan (Hansen and Hyder Consulting, 2004). The urban design concept must also demonstrate the energy efficiency and water sensitive design features of the proposal, including solar orientation, water saving and recycling measures, and energy saving design attributes*;
- **proposed vision for traffic circulation and car parking access.** The development plans should address car parking layout systems and indicate provisions for disabled parking;
- **provision and access for service vehicles**; and
- **identification of utility services and requirements** for the proposed development and required linkages to existing services in the activity centre under assessment.

Each of the development plans to be prepared will be required to be accompanied by the following assessments:-

- a town planning report indicating land use and policy context and zoning requirements. The town planning report should also include amenity effects assessments and respond to the principles outlined in the Structure Plan for the area;
- a traffic report indicating parking and access requirements, public transport provision and overall traffic effects on the existing and future road system;
- an urban design report indicating existing and future built form, its context (including analysis of the relationship with surrounding uses and specifically address how it relates to the public realm), building heights, orientation, design treatments, energy efficiency and water recycling initiatives, and pedestrian/cyclist access; and
- a landscaping report, outlining the existing landscape context and proposed landscaping concept for the proposed development, including any significant vegetation.

8.4 STRATEGIC OBJECTIVES FOR WARRNAMBOOL'S ACTIVITY CENTRES

The assessments undertaken as part of the Warrnambool Retail Strategy have enabled the identification of strategic objectives for each of the activity centres. It is recommended that they be considered in the framing of development plans for the activity centres and the formulation of management policies for the centres.

8.4.1 Warrnambool City Centre

Policy Objectives

The recommended policy encompasses the following objectives:-

- ensure that the Warrnambool City Centre continues to be the primary retail and services centre in the City of Warrnambool to give effect to its wider role as the principal activity centre for south-west Victoria;
- facilitate the development of new regional-level retail and other attractors in the City Centre;
- encourage a diversity of new investments in the City Centre, encompassing retail, commercial, entertainment, recreation, community, cultural and residential services and facilities;
- support a program of improvements to improve the amenity, quality of the public realm, public transport and car parking access and safety and security;
- support the development of medium density residential development within walking distance of the City Centre;
- ensure that the City Centre provides a high-quality destination for tourists; and
- provide a high-quality urban environment to serve as a central focus for new major City and regional events.

Implementation Actions

The recommended implementation actions encompass the following:-

- review the MSS to give effect to the policy objectives for the City Centre, EAP and local centres;
- ensuring there is no floorspace limit that applies to new retail and commercial development in the City Centre;
- revision of the urban design framework for the City Centre, as part of a structure and development planning process targeted to facilitate the development of new retail attractors and strengthen the City Centre's regional role, presentation and vitality; and
- Council facilitate new major investment in the City Centre by identifying and planning for new retail, commercial and mixed-use investments..

8.4.2 Eastern Activity Precinct

Gateway Plaza and Environs

Policy Objectives

The recommended policy encompasses the following objectives:-

- to promote Gateway Plaza and Environs as the district retail centre for east Warrnambool and surrounds, providing a supporting role to the City Centre (refer Section 7.6.2);
- as the secondary retail centre, Gateway Plaza and Environs is intended to be consolidated as a single discount department store-based centre with a variety of retail, commercial and community facilities and services, appropriate to its role;
- to diversify the range of goods and services offered in the centre, encompassing retail, hospitality and commercial services, community, health and leisure facilities;
- to provide an attractive walkable environment, to link Gateway Plaza and Environs with its neighbouring developments via a new pedestrian-activities spine; and
- new developments should be linked into retail core of the Gateway Plaza and Environs Precinct, via the new pedestrian-activities spine to provide a high-quality, active and diverse externally-faced environment.

Implementation Actions

The recommended implementation actions encompass the following:-

- coordination by Council of a detailed development plan, to provide a framework for the implementation of existing approvals, which provides for:
  - improvements to the amenity and presentation of the centre;
  - public realm enhancements;
  - a diversity of non-retail activities at the centre;
  - pedestrian linkages to adjoining developments, edged with continuous shopfront and other service activities;
  - circulation, car parking, service access, landscaping and lighting plans.

  The development plan must provide for integration of the additional floorspace components of existing developments with undeveloped sites within the precinct. The development should address how the proposed development meets the vision and urban design principles set out in the *Warrnambool Eastern Activity Precinct Structure Plan* (Hansen and Hyder Consulting, 2004).

Bulky Goods Clusters

Policy Objectives

The recommended policy encompasses the following objectives:-

- to be the pre-eminent regional bulky goods precinct in south-west Victoria;
- to consolidate Warrnambool's existing bulky goods establishments in the EAP, as opportunities arise;
- to encourage complementary activities to locate in the precinct, encompassing building, trade and construction supplies, rural and farm machinery supplies, highway sales and showroom developments, including auto-sales, caravan, boat sales;
- to restrict the development of further bulky goods establishments outside the EAP;
- to restrict the amount of shop floorspace, as defined in the Warrnambool Planning Scheme, outside Gateway Plaza and Environs in the EAP.

Implementation Actions

The recommended implementation actions encompass the following:-

- coordination by Council of a detailed development plan, that provides:
  - a framework that best integrates access and circulation systems for existing approvals;
  - urban design, landscape, lighting and traffic management guidelines to deliver a visually and functionally integrated precinct;
  - utilisation of new development sites for complementary activities identified in the policy objectives;
  - pedestrian linkages within individual developments, and where practicable, edged with continuous shopfront and other service activities.

The development plan should demonstrate consistency with the vision and urban design principles set out in the *Warrnambool Eastern Activity Precinct Structure Plan* (Hansen and Hyder Consulting, 2004).

- a review of statutory planning controls over bulky goods precincts across the City, to manage the establishment of other uses in each zone, consistent with the policy objectives outlined above.

8.4.3 Northpoint Village

Policy Objectives

The recommended policy encompasses the following objectives:-

- to maintain Northpoint as a neighbourhood activity centre, anchored by a single supermarket;
- to provide a complement of specialty retail, commercial and community facilities and services to meet the daily and weekly needs of local residents;
- to ensure that complementary services that may be required in the precinct, are located adjacent to the centre or along the Hopkins Highway within walking distance of the Northpoint Village, to minimise amenity impacts on surrounding residential neighbourhoods.

Implementation Actions

The recommended implementation actions encompass the following:-

- a structure plan be prepared to guide long-term management and future improvements to the centre and surrounds, including:-
  - identification of landscaping, pedestrian and vehicle access improvements, together with lighting and safety improvements;
  - identification of potential locations for the establishment of complementary services that may be required by the local community;
  - identification of appropriate locations for non-residential uses on adjacent sites, and the most appropriate zoning for the periphery of the centre; and
  - provision of assessment criteria for the assessment of proposals for non-residential uses in residential zones, including a detailed net community benefit assessment based on the criteria set out in the Retail Strategy (2007).

8.4.4 Dennington/Warrnambool West Neighbourhood Activity Centre

Policy Objectives

The recommended policy encompasses the following objectives:-

- a neighbourhood activity centre is required to meet the needs of the emerging Dennington/Warrnambool West community;
- a single supermarket-based centre be developed with a complement of specialty stores and services to provide for the day-to-day and weekly needs of the local community; and
- in this context, it is recommended that an expressions of interest process be undertaken for the development of a neighbourhood activity centre, consistent with the locational requirements set out in Section 8.1.

Implementation Actions

The recommended implementation actions encompass the following:-

- that Council call for expressions of interest, seeking submissions from development groups and investors for potential candidate sites in the Dennington/Warrnambool West area to provide for a future neighbourhood activity centre, consistent with the locational and activity requirements set out in the Strategy (refer Sections 7.5, 7.6 and 8.1);
- candidate projects for the development of the Dennington/Warrnambool West activity centre should be assessed by Council to select the site that will best provide a sustainable outcome for the local community, deliver the highest net community benefits and best meets the criteria set out in Sections 7.5, 7.6, 8.1, 8.2 and 8.6. It is recommended that consideration of candidate projects encompass a public consultation and review process;

- the selected applicant would be required to prepare a Structure Plan and supporting documentation to meet the net community benefit criteria, consistent with the requirements set out in the Sections identified above.

8.4.5 Allansford Convenience Centre

Policy Objectives

The recommended policy encompasses the following objectives:-

- a local or convenience activity centre is provided to meet the needs of the Allansford community and outlying areas;
- the proposed centre should be anchored by a convenience store, with a complement of specialty stores and services to provide for the day-to-day needs and selected weekly needs of the local community;
- further residential development in Allansford be co-located with the new local centre to provide medium density housing options; and
- local bus routes be revised to provide public transport access to and from the Warrnambool City Centre via the Eastern Activity Precinct.

Implementation Actions

The recommended implementation actions encompass the following:-

- that Council undertake a review of the Allansford Urban Design Framework to identify potential candidate sites in the Allansford area to provide for a future local activity centre, consistent with the locational and activity requirements set out in the Strategy (refer Sections 7.5, 7.6 and 8.1);
- a number of options for the development of the Allansford activity centre should be identified by Council in the review of the Urban Design Framework. These options should be assessed to select the site that will best provide a sustainable outcome for the local community. The preferred option should deliver the highest net community benefits and best meet the criteria set out in Sections 7.5, 7.6, 8.1, 8.2 and 8.6.
- it is recommended that consideration of candidate projects encompass a public consultation and review process;
- the review of the Urban Design Framework should designate the best location for the centre, set contextualised principles for how the site may be developed; and
- a Structure Plan and supporting documentation should then be required as part of an Amendment request to deliver the centre.

8.4.6 Merri River North Convenience Centre

Policy Objectives

The recommended policy encompasses the following objectives:-

- a local or convenience activity centre is provided to meet the needs of the North of Merri River growth area;
- the proposed centre should be anchored by a convenience store, with a complement of specialty stores and services to provide for the day-to-day needs and selected weekly needs of the local community;
- medium density residential development is focused around the edges of the new local centre to provide greater housing diversity; and
- local bus routes be revised to provide public transport access to and from the Warrnambool City Centre, if possible via both the new Dennington/Warrnambool West Neighbourhood Centre and Northpoint Village.

Implementation Actions

The recommended implementation actions encompass the following:-

- that suitable sites consistent with the locational and activity requirements set out in the Strategy (refer Sections 7.5, 7.6 and 8.1) be identified as part of the structure plan for the growth area;
- that the locations of proposed centres are 'industry-tested' through consultation with likely tenants, to select the best location for the centre; and
- rezoning of the designated site is concurrent with the rezoning of the broader structure plan area, in order to deliver the new convenience centre early in the development of the new community.

<u>Note:</u> The Merri River North growth area is relatively isolated from the existing urban area, with the existing access points limited to the north-west and south-east edges of the site. In the Draft North of Merri River Structure Plan (SM Urban 2007), a limited arterial road structure is proposed. At the time of finalisation of the Retail Strategy (2007) the future road structure is still being resolved.

To optimise the viability of a convenience centre to serve the precinct, a more integrated suburb structure must be achieved, including several higher-order roads that provide linkages to existing urban areas both east and south of the precinct. The location of a future convenience centre should, where possible, be at the intersection of these roads. If a more integrated road network, and higher-order road links cannot be achieved due to site and development cost constraints, the potential for a convenience centre in the area should be reassessed.

8.4.7 New Convenience Centres in Employment Areas

It is recognised that there will be a need for a number of new convenience centres required for new employment or industrial areas that have not yet been identified or planned. The intent of this section is to provide sufficient flexibility in the Retail Strategy for these to be identified, and set clear guidelines for the location, activity mix, and integration with surrounding uses.

Policy Objectives

The recommended policy encompasses the following objectives:-

- a local or convenience activity centre is provided to meet the needs of new employment areas or industrial precincts;
- new centres should be anchored by a convenience store, with a complement of specialty stores and services to provide for the day-to-day needs and selected weekly needs of the workers;
- new centres must be located to ensure they serve both residential and employment catchments, to optimise their viability and multiplicity of roles;
- showroom-based uses should be clustered around these new centres, to maximise the level of activity in the centre, provide for a high-quality public realm environment and active frontages around each centre; and
- revise local bus routes to provide public transport access to and from the Warrnambool City Centre, connecting to other centres where possible.

Implementation Actions

The recommended implementation actions encompass the following:-

- locations of new convenience centres are considered in the planning of all new employment areas and industrial precincts;
- design of subdivision plans should optimise pedestrian accessibility, by ‘feeding into’ the centre and providing for well connected, continuous footpaths; and
- that the scale of the site, and potential retail floorspace, should be ‘industry tested’ through consultation with potential tenants.

8.4.8 Existing Convenience Nodes and Isolated Developments

- **Isolated stores in residential areas:** The Strategy discourages the expansion of retail provision at these nodes, where they are located in residential precincts on local streets. The clustering of other uses, such as supporting community and personal services, and home-based businesses around these nodes is encouraged (in line with the discretionary provisions of the relevant zone), subject to amenity assessments on surrounding properties.

- **Isolated retail nodes in industrial areas:** The Strategy recognises that there will be an ongoing need for the provision of basic convenience services to meet the needs of workers and visitors in the City's industrial and business areas. The level of activity in these nodes may be enhanced through the redevelopment of adjacent sites, to improve the interface between sites and provide active frontages to the convenience node. Uses of adjacent sites may include trade sales or showrooms.

8.4.9 Retail Developments in Tourism Precincts

The assessment of proposals should be based on the following principles:

- the type and scale of future retail provision should be broadly consistent with the overall role and scale of the tourism facility proposed;

- the retail component of the proposed development must not unduly compromise the amenity of the surrounding environment;

- plans for the development must demonstrate that the proposed retail facilities are consistent with the overall intent of the tourism project;

- the proposed retail facilities should primarily provide for improvements to the quality of the destination and its potential to add value to the tourism experience and perceived quality of the tourism destination; and

- planning for new tourism developments must ensure that any retail and hospitality elements optimise the heritage, landscape and cultural values of the site and its context, through the architecture, urban design and planning for the proposal.

8.5 IMPACT ASSESSMENT GUIDELINES

There is a long established history in metropolitan Melbourne requiring the assessment of significant retail-based developments and their potential effects on both existing activity centres and established residential precincts.

It is recommended that the following guidelines be applied to assess the contribution, overall effect and relevance of proposed retail developments in terms of net community benefit to existing and future communities and the potential provided by developments to achieve attractive and viable activity centres for communities.

The guidelines require that a range of positive and negative effects of a proposed retail-based development be assessed in relation to the following criteria and overall consideration of the net community benefit to local and district communities. The recommended criteria reflect contemporary issues and considerations in relation to impact assessments and net community benefit.

The criteria encompass:-

- strategic context of the location;
- equitable access;
- public amenity;
- local character and amenity; and
- sustainability.

8.5.1 Strategic Context of the Location

It is recommended that the subject site for the proposed retail and/or commercial development be considered in relation to:-

- **State, metropolitan and local planning policy and planning principles;**
- the local character of the area. Planning for the proposed development should be consistent with the existing and planned character of the local area;
- local and regional accessibility. The proposed development in its location should promote local accessibility through the provision of pedestrian routes, cycle paths and integration with the local road network and public transport system;
- contribution to the activities environment. The proposed development should complement the existing activities mix where relevant and should seek to achieve a diversity of residential, social and community activities, together with the proposed retail and commercial activities.

Out-of-Centre locations

The Warrnambool Retail Strategy seeks to accommodate all future bulky goods development at the Eastern Activity Precinct located in east Warrnambool. It is further recommended that bulky goods retailing currently located in the City Centre seek to relocate to the EAP in order to facilitate new retail and commercial development opportunities in the City Centre.

Notwithstanding these recommendations, in the event that an application is made for an edge-of-centre location not contemplated in this Strategy, identified in an adopted Structure Plan or is in an out-of-centre location, it is recommended that the State Planning Policy Framework guidelines for the establishment of out-of-centre developments are applied.

8.5.2 Equitable Access

The principle of equitable access is a primary component of State planning policy relating to activity centre development. The principle relates to providing access to important community facilities via a range of transport modes, and encouraging a pattern of development that further facilitates ease of access by reinforcing the major transport routes and clustering of key activities.

Key considerations in the preparation of development plans and associated impact assessments should address the following:-

- the proposed development should be within walking access to Warrnambool's existing public transport network or must indicate how access will be facilitated to public transport;
- the proposed development should provide for a safe and attractive car and bicycle parking environment, including pedestrian linkages between shop entrances and between car and bicycle parks. Car parking should be provided either at the statutory rate or at a demand-based rate supported by empirical evidence;
- safe and attractive pedestrian linkages should be provided between the proposed development and nearby public transport interchanges;
- planning for the proposed development should ensure that there is a high level of pedestrian amenity and accessibility from the development to the retail core precinct and to other areas in the activity centre and adjoining residential areas, including the established public transport network;
- planning for the proposed development should ensure and contribute to a safe and efficient traffic circulation system;
- planning for the proposed development should seek to minimise the visual impact of car parks to existing and planned streetscapes.

8.5.3 Public Amenity

The principle of public amenity concerns a high quality public realm and activity centre environment. It encompasses such issues as the street interface, visual quality, public safety, and the provision of public facilities. A focus on public amenity represents a shift away from traditional approaches to net community benefit, by giving greater recognition to the social and recreational roles provided by activity centres.

Key considerations in the preparation of development plans and associated impact assessments should address the following:-

- planning for the proposed development ensures a visually attractive and active street interface and shopfront environment;
- signs and advertising should be appropriately scaled and designed for coherence, legibility, ease of access and to minimise visual clutter;
- planning for the proposed development should provide safe and attractive car parking environments ensuring safe and effective pedestrian and vehicular access;
- provision should be made for appropriate lighting to achieve a safe and accessible environment at night;
- planning for the proposed development should make provision for public toilets and associated amenities subject to likely levels of visitation and demand; and
- planning for the proposed development should seek to optimise interactive street frontages to the principal entry areas of development. Inactive frontages and blank facades should be avoided in the main entry locations and street frontages.

8.5.4 Local Character and Amenity

Key considerations in the preparation of development plans and associated impact assessments should address the following:-

- planning for a proposed development should seek to minimise negative visual impacts from the street and neighbouring properties;
- architectural design should acknowledge and respect the heritage elements of the area, and add value to the streetscape without replicating heritage design;
- planning for new developments should seek to minimise unreasonable overshadowing on the street and on neighbouring properties and should not impact on the privacy of neighbouring properties;
- planning should avoid the design and painting of buildings that form a large, intrusive corporate sign;
- planning may need to consider the application of landscape buffers to reduce impacts on surrounding areas;

- visual bulk should be minimised and the scale, massing and articulation of proposed buildings should be consistent with the character of the activity centre and/or adjoining areas where relevant; and
- planning for the proposed development should seek to minimise visual and noise impacts generated by operational and loading areas on surrounding land uses.

8.5.5 Sustainability

Economic Sustainability

New development should benefit local and regional economies. This benefit can be measured by considering the impact that the development will have on local and regional employment and investment.

Impact assessments should be required to consider the following:-

- the range and diversity of employment offered to the community by the proposed development, and net additional contributions to employment opportunities;
- potentials to attract further public and private investment into the local area and district;
- potentials to create wealth and increase economic efficiency;
- analysis and substantiation that the proposal will not unreasonably undermine the vitality and viability of existing activity centres;
- evidence that the proposal is directed to achieve efficient use and ongoing maintenance of existing infrastructure.

Environmental Sustainability

The principle of environmental sustainability ensures the environmental impacts of out of centre retail developments are minimised. Initiatives designed to reduce environmental impact include recycling of waste material and water, energy efficiency, and mixed-use development and higher densities which encourage efficient use of land and reduce car dependency.

Impact assessments should be required to consider the following:-

- the proposal incorporates environmentally sustainable design in its built form and location, including provision for:
  - the quantity and rate of discharge of stormwater into the off-site stormwater drainage system to be minimised;
  - potential re-use of stormwater and rainwater for landscape irrigation, toilet flushing etc.;
  - efficient methods of heating and cooling (including insulation);
  - use of sustainable building materials with a low embodied energy; and

  - the removal and recycling of garbage.

- the proposal assists in developing an activities environment that will lower reliance on motor vehicle access to shopping, employment and related activities;
- the proposal is directed to encourage the use of sustainable transport modes, particularly walking and cycling, for shopping and related trips;
- the proposal seeks to minimise the amount of land used at ground level for parking and uses opportunities to reduce overall demand and to share parking facilities;
- the proposal has considered building orientation and design to ensure that maximum use can be made of daylight and solar energy for heating and illumination;
- the proposal has made effective provision for the disposal of waste and reasonable provision for recycling of waste where practicable; and
- the proposal is located within walking distance of the public transport network.

Social and Cultural Sustainability

New developments should contribute to the social and cultural sustainability of activity centres and townships.

Impact assessments should be required to consider the following:-

- the proposal where possible should contribute to improved access to social and community facilities;
- contribute towards the diversification of housing choice and affordability;
- the proposal has addressed the incorporation of social and community facilities subject to the scale of the proposed development;
- the proposal will contribute to improvements in:
  - consumer choice in terms of the availability of goods and services;
  - activity centre amenity and a wider diversity of shopping environments;
  - competitive pricing within the local context;
  - wider consumer choice in terms of shopping hours;
- the proposed development contributes to a safe street environment; and
- the proposed development contributes to equity of access to the site, including effective provision for disabled access.

8.6 STATUTORY PLANNING IMPLEMENTATION

The Warrnambool Retail Strategy envisages that additional statutory planning controls may be required to implement development plans. The statutory planning implementation may include:-

- **Review of the Municipal Strategic Statement**

  A review of the Warrnambool Municipal Strategic Statement is required in order to reflect the revised activity centre network, give emphasis to the primacy of the City Centre and the significance of its primary retail role, in addition to clarifying the supporting role of the Eastern Activity Precinct to the City Centre.

- **A Local Planning Policy**

  Potential for a Local Planning Policy to implement the Retail Strategy should be explored within the context of a revised MSS. Local Planning Policies are particularly effective where the provisions of the Victorian Planning Provisions zoning and overlays do not provide sufficient clarity for the future intended land use of an area.

  In the context of Warrnambool, the Local Planning Policy could be used to provide a clear decision-making framework for planning permit applications. A Local Planning Policy would provide greater certainty in the future form and distribution of retail development, by outlining the guiding principles and objectives of the Retail Strategy.

- **Zoning Review and Planning Scheme Amendments**

  A review of the existing zone provisions applying to commercial and retail areas may be required to ensure the core uses of each centre and precinct are reflected in the purpose of each zone.

  Planning Scheme amendments may be necessary following completion of structure plans and development guidelines to give statutory effect to the structure plans and to facilitate a preferred mix of land uses within activity centres.

- **Development Plan Overlays**

  Development Plan Overlays may be utilised to implement structure plans and development plans, requiring that these must be prepared prior to the issuing of permits for the development of sites for specified uses.

  Schedules to the Development Plan Overlay may be utilised to exempt specified uses, to enable minor works or interim uses to establish in the zone.

- **Design and Development Overlays**

  A design and development overlay may be used to ensure particular built form outcomes, and ensure the development of a high-quality public realm. Design and development outcomes should generally be based on performance standards or requirements.

  The design and development overlay would generally be used in the implementation of a structure plan or development plan.

- **Development Contribution Plans Overlays**

  Development Contributions Plans may be required in the implementation of the structure plans and development plans recommended for Warrnambool's Activity Centres in the Retail Strategy.

  Development Contributions Plans may be used to fund infrastructure and other public works, including roads, community facilities and public realm improvements, where there is demonstrable need and nexus. These should be applied to whole precincts, or centres, generally applying across multiple sites.

- **Section 173 Agreements**

  Section 173 Agreements provide an alternative mechanism for negotiating funding for infrastructure items; however offer a less co-ordinated approach than a Development Contributions Plan. Section 173 Agreements are generally undertaken on a site-by site basis, and negotiated with Council at the time of application for subdivision or planning permit.

8.6.1 Recommended Planning Scheme Amendments

In consultation with the Department of Planning and Community Development, the most appropriate combination of statutory implementation mechanisms to implement the Final Retail Strategy (2007) will be assessed. It is recommended that as part of these discussions, consideration be given to the issue of how to best apply the definitions of 'shop' under the Victorian Planning Provisions, and reconcile this with the need to direct particular 'shop' types to different locations in line with the functional retail role of each centre.

Preliminary considerations of the statutory planning mechanisms required to implement the Final Retail Strategy (2007) have identified that the following amendments to the Warrnambool Planning Scheme are required in order to deliver upon the directions of the Strategy. These are as follows:

- **Amend the Municipal Strategic Statement** – to reflect the Warrnambool Retail Strategy (2007) Statement of Intent, and in particular, the Policy Position Statement.

- **Prepare a Local Planning Policy** – that outlines the strategic directions of the Retail Strategy (2007), focusing on the objectives for the development of the activity centre hierarchy (refer Section 7.5), clarifying Warrnambool's activity centre hierarchy (refer Section 7.6), and outlining the roles and functions of centres (refer Section 7.7).

  The new Local Policy should also outline the locational and siting requirements for new centres (refer Sections 8.1), the structure and development planning requirements for all centres (refer Section 8.2 & 8.3), and give statutory weight to the strategic objectives for the development of each centre in the hierarchy (refer Section 8.4).

  The guidelines for the assessment of impacts on other centres (outlined in Section 8.5) should also be given effect through a new Local Policy.

- **Amend list of Reference Documents to the Scheme** – to include the Final Warrnambool Retail Strategy (2007).

- **Prepare Schedules to the Zone** – to manage the development of new retail floorspace across the activity centre network.

  In particular, an ultimate combined leasable floor area should be applied to Gateway Plaza and Environs, allowing for the development of all current approvals across the AMP and Sherwood Scott site (including previous permits issued and floorspace allocated via Amendments C28 & C31). The Schedule to the Business 1 Zone should apply a maximum as of right floorspace of 3,000m² GLA for an individual shop, thus triggering a requirement for a planning permit for a shop greater than 3,000m² GLA.

  For new centres identified in the Final Retail Strategy (2007) floorspace allocations should also be managed through the application of Schedules to the Zone. These centres include Dennington/Warrnambool-West, Allansford, Merri River North and other convenience centres which may be proposed in future to serve new industrial and employment precincts.

  The statutory implementation of the Final Retail Strategy (2007) should not result in amendments for these centres, however, as their precise locations are yet to be determined. Rather, following a structure planning process for each new centre, subsequent planning scheme amendments to facilitate development should apply a schedule to the zone, which defines an appropriate combined leaseable floor area.

8.7 MONITORING AND REVIEW

It is recommended that a monitoring and review program be established for cyclical reviews of the Retail Strategy. Two types of reviews are recommended:-

- **Policy Reviews**

  It is recommended that policy reviews of the Warrnambool Retail Strategy be undertaken concurrently with scheduled reviews of the MSS.

- **Retail and Commercial Floorspace Reviews**

  It is recommended that reviews of retail and commercial floorspace requirements be undertaken on an approximately five-year cycle. It is further recommended that the first review for retail and commercial floorspace demand and supply be undertaken following publication of the 2011 Census of Population and Housing (scheduled for 2012/13). This review should provide for an updated inventory of floorspace in the activity centres (including local and convenience centres), together with in-centre and other surveys to provide contemporary information on visitor behaviour and needs.

8.8 SUMMARY

The proposed Warrnambool Retail Strategy provides a comprehensive framework for the planning and management of activity centres in Warrnambool over the period 2006 to 2031. The Strategy comprises:-

- a context and policy statement that outlines the contribution of State, metropolitan and local policy to establish the scope and emphasis of the Retail Strategy;
- a Strategy Policy Framework that sets out the major policy areas that are the subject of the Retail Strategy, together with the strategic principles and policy objectives for each major policy area and recommended performance indicators for implementation of the Strategic Policy Framework;
- the recommended activity centre hierarchy and objectives for the hierarchy; and
- a number of implementation and management components comprising:-
  - recommendations and guidelines for development and structure planning;
  - retail and commercial floorspace requirements for Warrnambool;
  - guidelines for undertaking impact assessments;
  - consideration of statutory planning controls that may be required in the implementation process; and
  - a recommended process for monitoring and cyclical review.

CONCLUSIONS 9

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9 Conclusions

The Warrnambool Retail Strategy provides a detailed assessment of future retail and commercial floorspace requirements to meet the needs of the City and RCA for the period 2006 to 2031. The Strategy provides a clear strategic and policy framework for the long-term management of Warrnambool's activity centre system, to optimise future investment and development in the City and maximise community benefits.

The preparation of the Strategy has reached a number of findings and recommendations in relation to the management of Warrnambool's activity centres and commercial precincts.

Issues Considered

The Strategy has identified a number of important issues that will shape the evolution of Warrnambool's activity centres and commercial precincts in the foreseeable future. These issues encompass:

- the overall retail and commercial floorspace requirements for Warrnambool, taking into account the potential for the City to consolidate its regional trading and services role;
- the practical and policy implications of giving effect to Council's long-standing position of supporting the primacy of the City Centre for future retail, commercial and other forms of investment;
- the need to provide for the requirements of local communities, through provision of local and neighbourhood centres; and
- the need to provide a clear policy and strategic framework to ensure sustainable and positive investment in the EAP, within the context of maintaining the primacy of the City Centre.

Future Directions

In response to these issues, the Retail Strategy (2007) outlines a framework to guide the development of Warrnambool's retail system over the next 15 to 30 years, and is focused on the delivery of the following outcomes:

- maintain the primacy of the City Centre, through facilitation of new major store developments and main street revitalisation;
- consolidation and development of the Eastern Activity Precinct, with the addition of other roles and services that complement the City Centre;
- ongoing support for the existing neighbourhood centre at Northpoint Village;
- facilitation of the development of a new neighbourhood centre at Dennington/Warrnambool West;
- provision of new convenience centres to support growth areas and small communities, in particular Allansford; and
- adding value to designated tourism precincts and key developments, to provide complementary, niche and lifestyle retail facilities.

The Retail Strategy (2007) sets a clear direction for the next phase development of Warrnambool's retail-commercial system, providing overarching principles for the ongoing management of the system in the public interest and defining clear roles for each of the City's activity centres and precincts.

10 REFERENCES

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APPENDICES

APPENDIX A: RETAIL AND COMMERCIAL CLASSIFICATION SYSTEM

CLASSIFICATION DATABASE

Ratio Code	Ratio Description	Revised Category
A	FOOD, GROCERIES AND LIQUOR STORES	Retail Food
A.1	SUPERMARKETS	Retail Food
A.2	BREAD AND CAKE RETAILING	Retail Food
A.3	CAFES, BARS AND RESTAURANTS	Retail Food
A.4	LIQUOR RETAILING	Retail Food
A.5	FRESH MEAT, FISH AND POULTRY RETAILING	Retail Food
A.6	TAKEAWAY FOOD RETAILING	Retail Food
A.7	SPECIALISED FOOD RETAILING N.E.C.	Retail Food
A.8	FRUIT AND VEGETABLE RETAILING	Retail Food
B	DEPARTMENT AND GENERAL STORES	Retail Non-Food
B.1	DEPARTMENT STORE	Retail Non-Food
B.2	DISCOUNT DEPARTMENT STORE	Retail Non-Food
B.3	MINI MAJOR	Retail Non-Food
C	CLOTHING AND FOOTWEAR STORES	Retail Non-Food
C.1	CLOTHING	Retail Non-Food
C.2	FOOTWEAR	Retail Non-Food
C.3	ACCESSORIES	Retail Non-Food
D	OTHER HOUSEHOLD A STORES	Retail Non-Food
D.1	ANTIQUE AND USED GOOD RETAILING	Retail Non-Food
D.2	COMPUTER RETAILING	Retail Non-Food
D.3	FLORIST	Retail Non-Food
D.4	PHARMACEUTICAL, COSMETIC AND TOILETRY RETAILING	Retail Non-Food
D.5	RECORDED MUSIC RETAILING	Retail Non-Food
D.6	DOMESTIC HARDWARE, HOUSEWARE AND GIFTS	Retail Non-Food
D.7	SMALL STATIONERY STORES	Retail Non-Food
D.9	NEWSPAPER, BOOK AND STATIONERY RETAILING	Retail Non-Food
D.10	TOY AND GAME RETAILING	Retail Non-Food
D.11	WATCH AND JEWELLERY RETAILING	Retail Non-Food
D.12	OTHER HOUSEHOLD RETAILING	Retail Non-Food
F	RETAIL COMMERCIAL SERVICES	Retail Services
F.1	GENERAL COMMERICAL SERVICES	Retail Services
F.2	POST OFFICE AGENCY	Retail Services
F.3	TRAVEL AGENCY	Retail Services
F.4	DRY CLEANERS/LAUNDRY	Retail Services
F.5	HAIRDRESSING AND BEAUTY SALONS	Retail Services
F.6	PHOTOCOPYING AND INSTANT PRINTING	Retail Services
F.7	PHOTOGRAPHIC FILM PROCESSING	Retail Services
F.8	OTHER PERSONAL SERVICES	Retail Services
F.9	PHOTOGRAPHIC STUDIOS	Retail Services
F.10	BANK	Retail Services
F.11	BUILDING SOCIETY	Retail Services
F.12	CREDIT UNION	Retail Services
F.13	OTHER RETAIL BANKING SERVICES	Retail Services
F.14	TAB	Retail Services
F.15	VIDEO HIRE OUTLETS	Retail Services
L	ENTERTAINMENT, RECREATION, SPORTS AND ACCOMODATI(	Commercial, Professional and Community Services
L.1	ACCOMMODATION	Commercial, Professional and Community Services
L.2	CINEMA	Commercial, Professional and Community Services
L.3	CLUBS AND NIGHTCLUBS	Commercial, Professional and Community Services
L.4	FITNESS / SPORTS / RECREATION CENTRES	Commercial, Professional and Community Services
L.5	LIBRARY	Commercial, Professional and Community Services
L.6	OTHER ENTERTAINMENT AND COMMERCIAL RECREATION SE	Commercial, Professional and Community Services
L.7	PUBS, TAVERNS AND BARS	Commercial, Professional and Community Services
L.10	MUSEUMS	Commercial, Professional and Community Services
M	REPAIR SERVICES	Retail Services
M.1	HOUSEHOLD EQUIPMENT REPAIR SERVICES (ELECTRICAL)	Retail Services
M.2	HOUSEHOLD EQUIPMENT REPAIR SERVICES	Retail Services
M.3	COMPUTER MAINTENANCE SERVICES	Retail Services
J	PROPERTY AND BUSINESS SERVICES	Commercial, Professional and Community Services
J.1	ACCOUNTING SERVICES	Commercial, Professional and Community Services
J.2	ARCHITECTURAL AND BUILDING SERVICES	Commercial, Professional and Community Services
J.3	BUSINESS SERVICES N.E.C.	Commercial, Professional and Community Services
J.4	COMPUTER CONSULTANCY SERVICES	Commercial, Professional and Community Services
J.5	DRAFTING SERVICES	Commercial, Professional and Community Services
J.6	EMPLOYMENT AGENCY SERVICES	Commercial, Professional and Community Services
J.7	ENGINEERING SERVICES	Commercial, Professional and Community Services
J.8	FINANCIAL SERVICES	Commercial, Professional and Community Services
J.9	LEGAL SERVICES	Commercial, Professional and Community Services
J.10	MACHINERY AND EQUIPMENT HIRING AND LEASING	Commercial, Professional and Community Services
J.11	MARKETING AND BUSINESS MANAGEMENT SERVICES	Commercial, Professional and Community Services
J.12	OTHER PROFESSIONAL SERVICES	Commercial, Professional and Community Services
J.13	REAL ESTATE AGENTS	Commercial, Professional and Community Services
J.14	SECURITY SERVICES	Commercial, Professional and Community Services
J.15	OFFICES	Commercial, Professional and Community Services
J.16	OFFICES - GOVERNMENT	Commercial, Professional and Community Services
J.17	SURVEYING SERVICES	Commercial, Professional and Community Services
J.18	GRAPHIC DESIGN SERVICES	Commercial, Professional and Community Services
J.19	TELECOMMUNICATION SERVICES	Commercial, Professional and Community Services
J.20	HEALTH INSURANCE AGENCY	Commercial, Professional and Community Services
J.21	SERVICES TO INSURANCE	Commercial, Professional and Community Services
J.22	LIFE INSURANCE	Commercial, Professional and Community Services
J.23	GENERAL INSURANCE	Commercial, Professional and Community Services

CLASSIFICATION DATABASE

Ratio Code	Ratio Description	Revised Category
K	HEALTH AND COMMUNITY SERVICES	Commercial, Professional and Community Services
K.1	CHILD CARE SERVICES	Commercial, Professional and Community Services
K.2	DENTAL SERVICES	Commercial, Professional and Community Services
K.3	GENERAL PRACTICE MEDICAL SERVICES	Commercial, Professional and Community Services
K.4	OPTOMPETRY AND OPTICAL DISPENSING	Commercial, Professional and Community Services
K.5	OTHER HEALTH AND COMMUNITY SERVICES	Commercial, Professional and Community Services
K.6	SPORTS MEDICINE	Commercial, Professional and Community Services
K.7	VETERINARY SERVICES	Commercial, Professional and Community Services
K.8	CHURCHES	Commercial, Professional and Community Services
K.9	SPECIALIST MEDICAL SERVICES	Commercial, Professional and Community Services
K.10	CHIROPRACTIC SERVICES	Commercial, Professional and Community Services
F.9	FUNERAL SERVICES	Commercial, Professional and Community Services
P	BUILDING AND CONSTRUCTION TRADE SERVICES	Trade Services
P.1	PLUMBING	Trade Services
P.2	ELECTRICAL SERVICES	Trade Services
P.3	OTHER BUILDING TRADE SERVICES	Trade Services
P.4	FARM SUPPLIES	Trade Services
Q	TRANSPORT SERVICES	Trade Services
Q.1	TAXI SERVICES	Trade Services
Q.2	COURIER SERVICES	Trade Services
N	MOTOR VEHICLE AND UTILITIES RETAILING AND SERVICES	Trade Services
N.1	AUTOMOTIVE FUEL RETAILING	Trade Services
N.2	CAR RETAILING	Trade Services
N.3	MOTOR CYCLE DEALING	Trade Services
N.4	SMASH REPAIRING	Trade Services
N.6	AUTO SERVICES	Trade Services
N.7	TRAILER AND CARAVAN DEALING	Trade Services
N.8	MOTOR VEHICLE NEW PART DEALING	Trade Services
E	OTHER HOUSEHOLD B STORES	Large Format Retail
E.1	FURNITURE AND FURNISHINGS	Large Format Retail
E.2	LARGE ELECTRICAL GOODS STORES	Large Format Retail
E.3	LARGE HARDWARE STORES	Large Format Retail
E.4	LARGE HOMEWARE STORES	Large Format Retail
E.5	LARGE LIGHTING STORES	Large Format Retail
E.6	LARGE NURSERIES	Large Format Retail
E.7	PAINT STORES	Large Format Retail
E.8	STATIONERY SUPERSTORES	Large Format Retail
E.9	TOY SUPERSTORES	Large Format Retail
C.4	FABRIC STORES	Large Format Retail
E.12	CAR ACCESSORIES	Large Format Retail
E.10	FLOOR COVERING RETAILING	Large Format Retail
D.8	SPORT AND CAMPING EQUIPMENT RETAILING	Large Format Retail
E.11	MARINE EQUIPMENT RETAILING	Large Format Retail
N.5	TYRE RETAILING	Large Format Retail
GVT	GOVERNMENT N.E.C.	EXCLUDED
LGA	LOCAL GOVERNMENT ADMINISTRATION	EXCLUDED
OTH	OTHER SERVICES N.E.C.	EXCLUDED
CP	CAR PARKING	EXCLUDED
DW	DWELLING	EXCLUDED
UN	UNKNOWN	EXCLUDED
V	VACANT	VACANT
VL	VACANT LAND	EXCLUDED
VS	VACANT SHOP	VACANT SHOP

* Ratio Codes.
Where n.e.c. = not elsewhere classified.

APPENDIX B: CAR PARKING SURVEY RESULTS: CITY CENTRE

Table 1: Friday Car Parking Survey Results for City Centre
Warrnambool Retail Strategy

Precinct	Car Park No.	City Centre Block Number*	Supply No. of Spaces (refer Supply Sheet)	Friday							
				Time of Survey	No. of Occupancy	Time of Survey	No. of Occupancy	Time of Survey	No. of Occupancy	Time of Survey	No. of Occupancy
Core Precinct	18.1a	18	9	4.46pm	8	4.56pm	9	5.36pm	7	6.10	8
	18.2	18	34	4.39pm	32	5.25pm	30	6.02pm	28	6.25	30
	18.3a	18	1	4.21pm	1	5.00pm	0	5.41pm	0	6.15	0
	19.1a	19	1	4.16pm	1	4.55pm	1	5.35pm	1	6.10	-1
	19.3a	19	4	4.22pm	4	5.00pm	4	5.41pm	4	6.15	4
	19.4	19	35	4.45pm	34	5.27pm	27	6.04pm	28	6.35	30
	11.1a	11	1	4.24pm	0	5.03pm	1	5.44pm	1	6.15	0
	11.2	11	43	4.48pm	29	5.20pm	34	6.00pm	34	6.25	42
	11.3a	11	7	4.26pm	4	5.05pm	7	5.46pm	4	6.15	7
	10.1a	10	1	4.44pm	1	5.03pm	1	5.44pm	1	6.15	-1
	10.3a	10	3	4.26pm	3	5.06	3	5.47pm	2	6.15	3
	10.4	10	42	5.49pm	35	5.27pm	27	6.05pm	27	6.35	41
Total: Core Precinct			**181**		**152**		**144**		**137**		**163**
Raglan Precinct	24.3	24	36	4.14pm	21	4.51pm	26	5.31pm	17	6.10	15
	24.4	24	19	4.40pm	18	5.25pm	17	6.02pm	18	6.30	10
	25.2	25	15	4.40pm	15	5.25pm	15	6.02pm	11	6.30	13
	25.3	25	31	4.14pm	28	4.50pm	25	5.30pm	25	6.10	18
	26.3	26	39	4.10pm	35	4.50pm	27	5.30pm	17	6.10	13
Total: Raglan Precinct			**140**		**117**		**110**		**88**		**69**
Eastern Precinct	19.1b	19	32	4.15pm	20	4.55pm	19	5.35pm	16	6.10	12
	19.3b	19	25	4.22pm	20	5.00pm	16	5.42pm	17	6.15	25
	19.5 (Parkers car park)	19	146	4.33pm	63	5.12pm	22	4.49pm	50	6.22	14
			circulating		*2*		*3*		*1*	*6.22*	*1*
	19.6 (Koroit car park)	19	91	4.30pm	73	5.09pm	54	5.47pm	28	6.21	11
			circulating		*0*		*2*		*0*	*6.21*	*0*
	10.1b	10	38	4.23pm	31	5.02pm	29	5.43pm	23	6.15	27
	10.3b	10	22	4.27pm	9	5.06pm	8	4.47pm	11	6.20	5
	10.5 (Archie Graham car park)	10	29	4.28pm	10	5.07pm	7	5.44pm	4	6.17	0
			circulating		*0*		*2*		*0*	*6.17*	*0*
	10.6 (Cramond and Dickson car park)	10	108	4.25pm	53	5.05pm	10	5.42pm	28	6.16	11
			circulating		*1*		*1*		*0*	*6.16*	*2*
	5.1a	5	24	4.27pm	9	5.07pm	12	5.48pm	6	6.20	6
Total: Eastern Precinct			**515**		**291**		**185**		**184**		**114**
Western Business Precinct	17.1	17	31	4.19pm	15	4.57pm	21	5.38pm	19		
	17.2	17	38	4.31pm	21	5.11pm	24	5.51pm	25		
	17.3	17	25	4.20pm	19	4.58pm	13	5.40pm	13		
	17.5 (Grace Ave car park)	17	55	4.08pm	33	4.44pm	30	5.23pm	22		
			circulating		*0*		*0*		*0*		
	18.1b	18	21	4.19pm	18	4.57pm	15	5.37pm	18		
	18.3b	18	41	4.20pm	40	4.59pm	40	5.40pm	40		
	18.4	18	21	4.31pm	1	5.15pm	1	5.54pm	0		
	18.5 (Coles/Youngers car park)	18	173	4.12pm	159	4.49pm	150	5.27pm	138		
			circulating		*5*		*6*		*4*		
	Target underground carpark	18	125	4.16pm	90	4.52pm	43	5.30pm	46		
			circulating		*2*		*3*		*0*		
	3.1	3	35	4.30pm	32	5.10pm	28	5.50pm	26		
	3.5 (Co-Op Car Park)	3	33	4.04pm	15	4.41pm	15	5.19pm	9		
			circulating		*1*		*3*		*1*		
	3.5a (Swintons Car Park)	3	120	4.01pm	59	4.38pm	55	5.17pm	38		
			circulating		*2*		*1*		*2*		
	12.1	12	34	4.25pm	20	5.04pm	20	5.45pm	20		
	12.2	12	38	4.30pm	22	5.10pm	24	5.50pm	23		
	12.3	12	35	4.23pm	34	5.05pm	26	5.45pm	30		
	12.5 (Kepler St car park)	12	17	4.05pm	15	4.42pm	10	5.21pm	10		
			circulating		*0*		*0*		*0*		
	11.1b	11	23	4.24pm	19	5.03pm	21	5.45pm	21		
	11.3b	11	25	4.25pm	17	5.05pm	18	5.46pm	13		
	11.4	11	35	4.35pm	23	5.19pm	23	5.55pm	21		
	11.5 (Ozone Car park)	11	275	4.22pm	112	5.01pm	109	5.38pm	62		
			circulating		*4*		*2*		*4*		
Total: Western Business Precinct			**1,200**		**778**		**701**		**605**		
Civic Precinct	4.1	4	17	4.29pm	8	5.10pm	14	5.50pm	6		
	4.2	4	29	4.37pm	20	5.20pm	11	5.55pm	12		
	4.5	4	58	4.36pm	37	5.20pm	11	5.55pm	6		
	5.1b	5	12	5.27pm	7	5.09pm	5	5.49pm	7		
	5.4	5	26	4.50pm	18	5,27pm	10	6.05pm	20		
Total: Civic Precinct			**142**		**90**		**51**		**51**		
Total Occupancy and Circulating: All Precincts			**2,178**		**1,428**		**1,191**		**1,065**		**346**

* Refer to Figure 15

Z:\Strategic\Projects - Active\7327 Warrnambool Retail Strategy\Data\Car Parking\[7327 070115 car parking by precinct.xls]Table 2 Saturday

Table 2: Saturday Car Parking Survey Results for City Centre
Warrnambool Retail Strategy

Precinct	Car Park No.	City Centre Block Number *	Supply No. of Spaces (refer Supply Sheet)	Saturday					
				Time of Survey	No. of Occupancy	Time of Survey	No. of Occupancy	Time of Survey	No. of Occupancy
Core Precinct	18.1a	18	9	10.07am	7	10.59am	9	11.29am	9
	18.2	18	34	10.35am	30	11.19am	30	1148am	30
	18.3a	18	1	10.10am	1	11.02am	0	11.32am	1
	19.1a	19	1	10.07am	1	10.58am	1	11.27am	1
	19.3a	19	4	10.11am	1	11.03am	3	11.32am	4
	19.4	19	35	10.38am	33	11.20am	33	11.50am	33
	11.1a	11	1	10.13am	1	11.04am	0	11.36am	1
	11.2	11	43	10.35am	37	11.17am	39	11.46am	36
	11.3a	11	7	10.16am	1	11.07am	6	11.37am	6
	10.1a	10	1	10.13am	0	11.04am	1	11.35am	0
	10.3a	10	3	10.16am	3	11.07am	1	11.37am	2
	10.4	10	42	10.40am	37	11.21am	40	11.55am	39
Total: Core Precinct			**181**		**152**		**163**		**162**
Raglan Precinct	24.3	24	36	10.06am	9	10.56am	18	11.26am	19
	24.4	24	19	10.36am	18	11.20am	19	11.50am	16
	25.2	25	15	10.35am	12	11.20am	15	11.50am	14
	25.3	25	31	10.05am	24	10.56am	29	11.25am	30
	26.3	26	39	10.05am	16	10.55am	20	11.25am	25
Total: Raglan Precinct			**140**		**79**		**101**		**104**
Eastern Precinct	19.1b	19	32	10.06am	23	10.56am	16	11.26am	21
	19.3b	19	25	10.11am	14	11.03am	19	11.34am	17
	19.5 (Parkers car park)	19	146	10.29am	46	10.58am	54	11.29am	101
			circulating		*3*		*2*		*3*
	19.6 (Koroit car park)	19	91	10.26am	3	10.58am	4	11.26am	7
			circulating		*0*		*0*		*0*
	10.1b	10	38	10.12am	17	11.03am	24	11.35am	27
	10.3b	10	22	10.19am	7	11.08am	12	11.37am	8
	10.5 (Archie Graham car park)	10	29	10.23am	0	10.54am	0	11.24am	2
			circulating		*0*		*0*		*0*
	10.6 (Cramond and Dickson car park)	10	108	10.21am	13	10.51am	7	11.22am	11
			circulating		*1*		*1*		*0*
	5.1a	5	24	10.20am	0	11.08am	5	11.39am	10
Total: Eastern Precinct			**515**		**127**		**144**		**207**
Western Business Precinct	17.1	17	31	10.08am	27	11.00am	25	11.29am	20
	17.2	17	38	10.25am	9	11.10am	14	11.41am	10
	17.3	17	25	10.10am	11	11.00am	16	11.30am	23
	17.5 (Grace Ave car park)	17	55	10.06am	6	10.36am	8	11.07am	9
			circulating		*1*		*0*		*0*
	18.1b	18	21	10.08am	17	10.59am	19	11.29am	20
	18.3b	18	41	10.10am	39	11.01am	41	11.30am	40
	18.4	18	21	10.26am	0	11.02am	8	11.44am	13
	18.5 (Coles/Youngers car park)	18	173	10.10am	134	10.41am	157	11.11am	163
			circulating		*3*		*14*		*18*
	Target underground carpark	18	125	10.12am	50	10.44am	69	11.14am	100
			circulating		*1*		*6*		*25*
	3.1	3	35	10.21am	26	11.10am	33	11.30am	33
	3.5 (Co-Op Car Park)	3	33	10.03am	12	10.33am	20	11.04am	19
			circulating		*0*		*1*		*0*
	3.5a (Swintons Car Park)	3	120	10.00am	20	10.31am	33	11.02am	35
			circulating		*0*		*1*		*2*
	12.1	12	34	10.14am	18	11.05am	28	11.37am	29
	12.2	12	38	10.25am	16	11.10am	18	11.40am	19
	12.3	12	35	10.14am	19	11.05am	30	11.37am	34
	12.5 (Kepler St car park)	12	17	10.04am	12	10.35am	11	11.05am	10
			circulating		*0*		*0*		*0*
	11.1b	11	23	10.14am	22	11.05am	23	11.36am	22
	11.3b	11	25	10.15am	13	11.06am	16	11.38am	14
	11.4	11	35	10.30am	22	11.15am	24	11.45am	22
	11.5 (Ozone Car park)	11	275	10.18am	99	10.49am	126	11.20am	165
			circulating		*3*		*3*		*5*
Total: Western Business Precinct			**1,200**		**580**		**744**		**850**
Civic Precinct	4.1	4	17	10.20am	2	11.09am	9	11.40am	8
	4.2	4	29	10.30am	11	11.16am	12	11.45am	8
	4.5	4	58	10.30am	19	11.15am	41	11.45am	21
	5.1b	5	12	10.20am	5	11.09am	10	11.38am	9
	5.4	5	26	10.40am	22	11.22am	18	11.55am	11
Total: Civic Precinct			**142**		**59**		**90**		**57**
Total: All Precincts			**2,178**		**997**		**1,242**		**1,380**

***Refer to Figure 15**

Z:\Strategic\Projects - Active\7327 Warrnambool Retail Strategy\Data\Car Parking\[7327 070115 car parking by precinct.xls]Table 2 Saturday

APPENDIX C: CITY CENTRE CAR PARKING SUPPLY

WARRNAMBOOL RETAIL STRATEGY

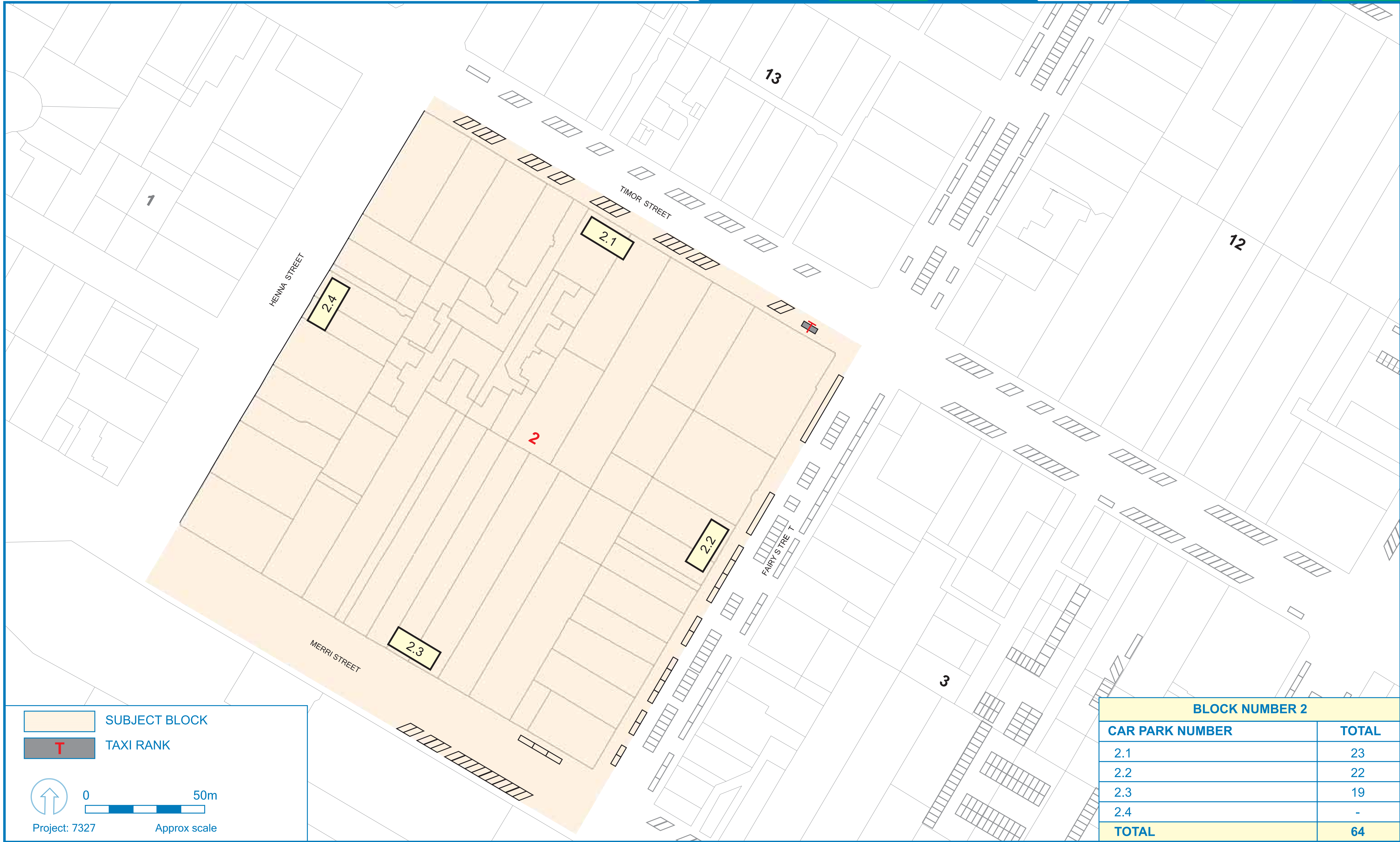
for WARRNAMBOOL CITY COUNCIL

NOVEMBER 2007

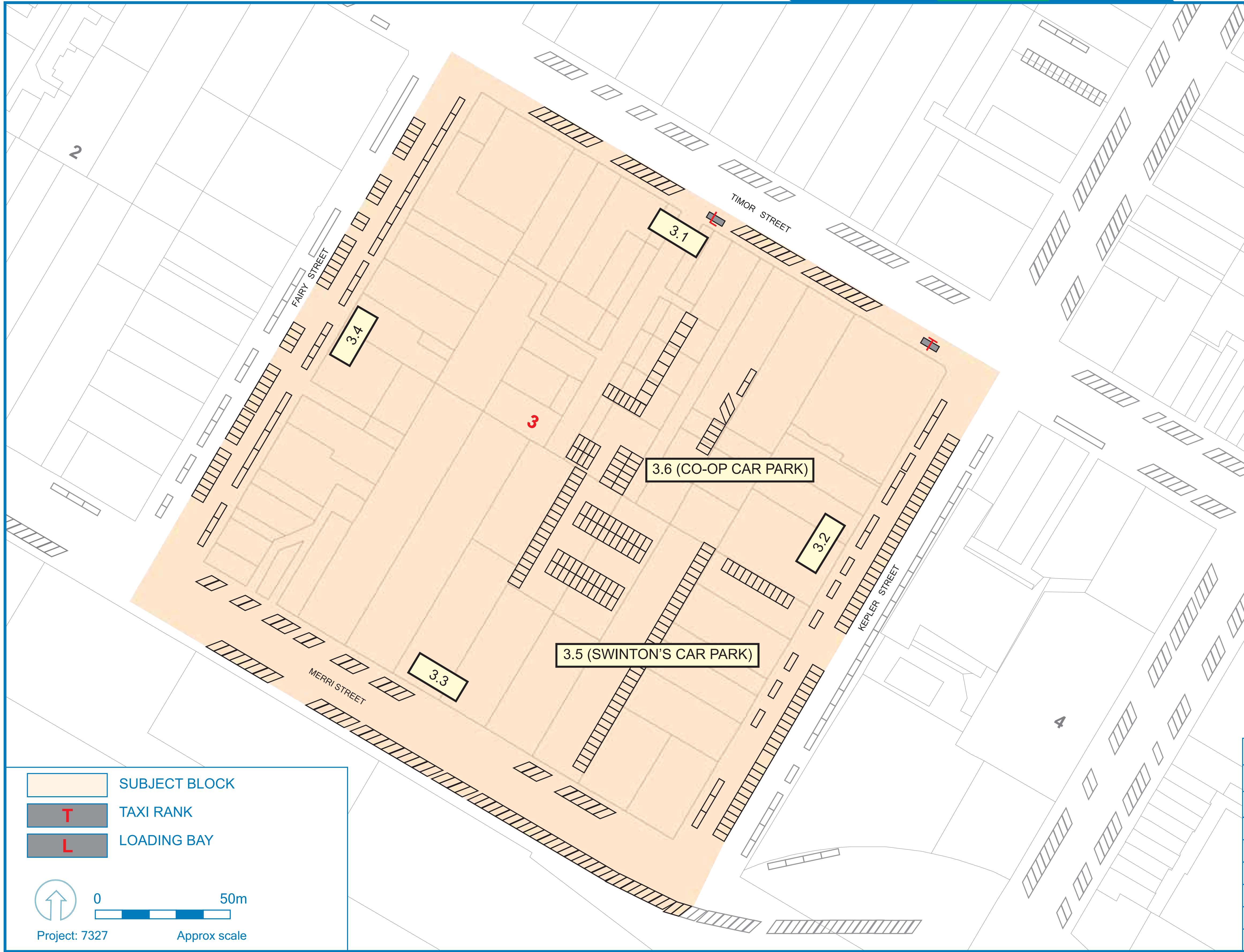
by RATIO CONSULTANTS

FIGURE 1

CITY CENTRE CAR PARKING SUPPLY BY PRECINCT

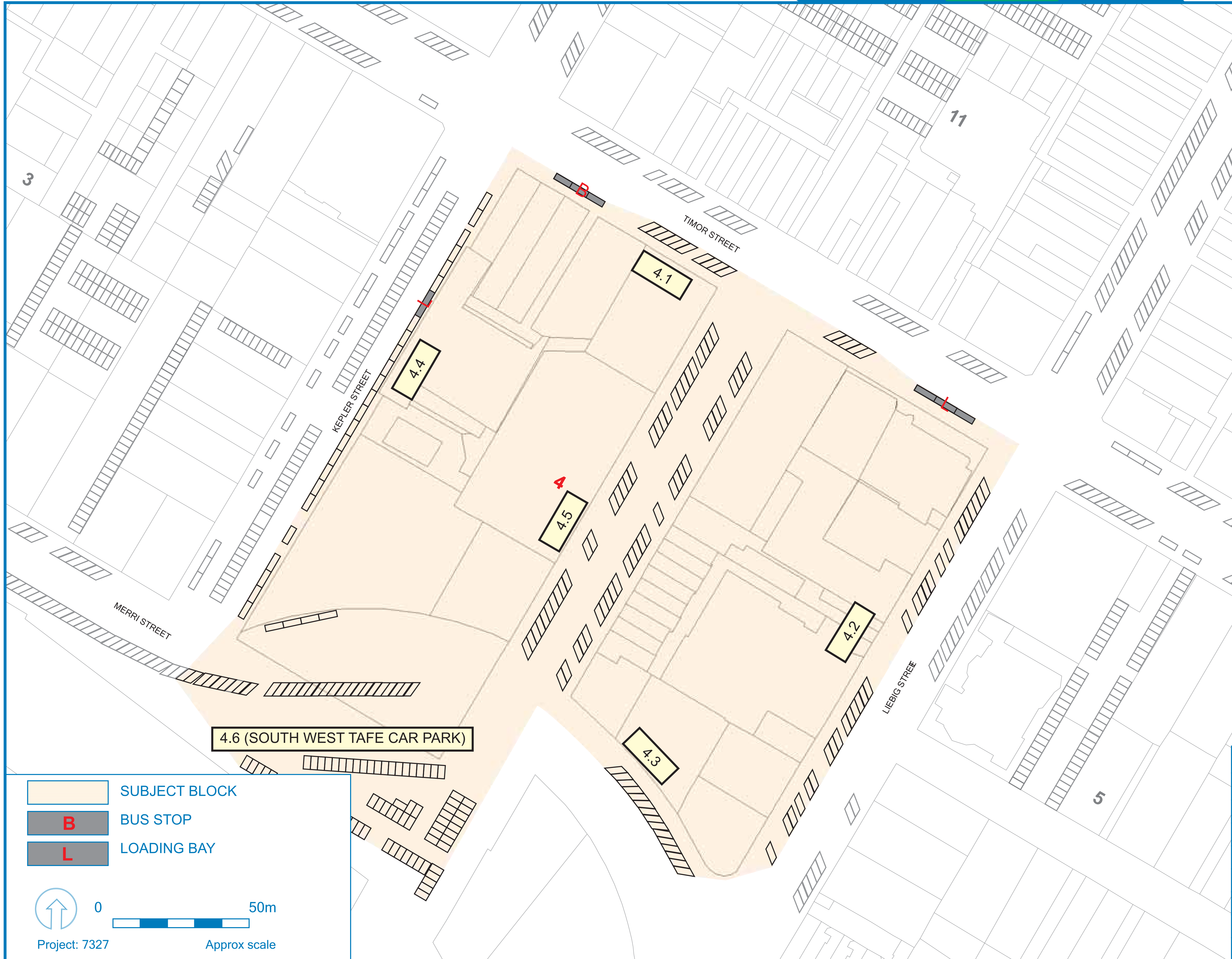


BLOCK NUMBER 2	
CAR PARK NUMBER	TOTAL
2.1	23
2.2	22
2.3	19
2.4	-
TOTAL	**64**



BLOCK NUMBER 3	
CAR PARK NUMBER	TOTAL
3.1	35
3.2	76
3.3	82
3.4	69
3.5 (SWINTON'S CAR PARK)	112
3.6 (CO-OP CAR PARK)	54
TOTAL	428

FIGURE 3
CAR PARKING SUPPLY: BLOCK 3

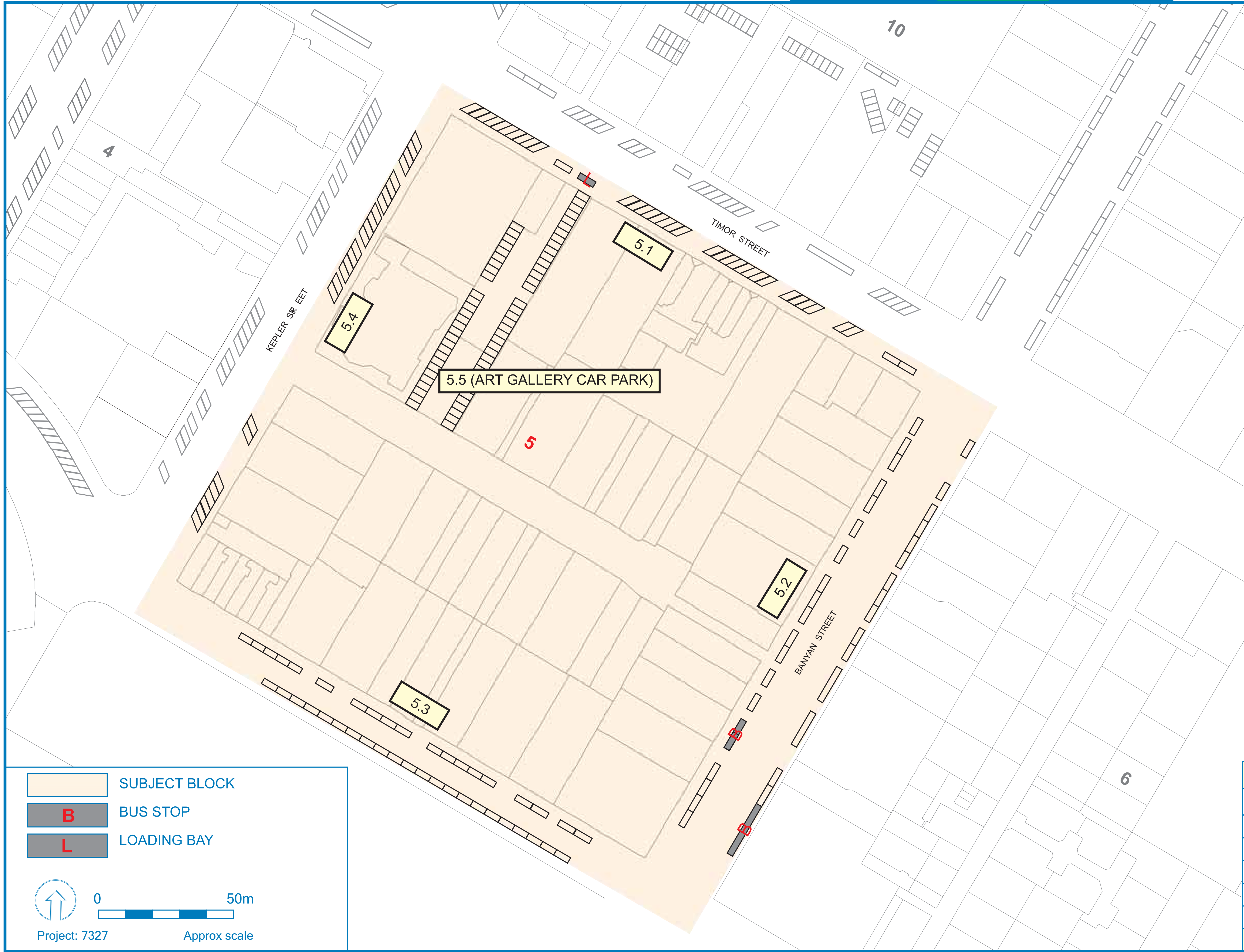


BLOCK NUMBER 4

CAR PARK NUMBER	TOTAL
4.1	15
4.2	29
4.3	46
4.4	24
4.5	58
4.6 (SOUTH WEST TAFE CAR PARK)	74
TOTAL	**247**

FIGURE 4

CAR PARKING SUPPLY: BLOCK 4



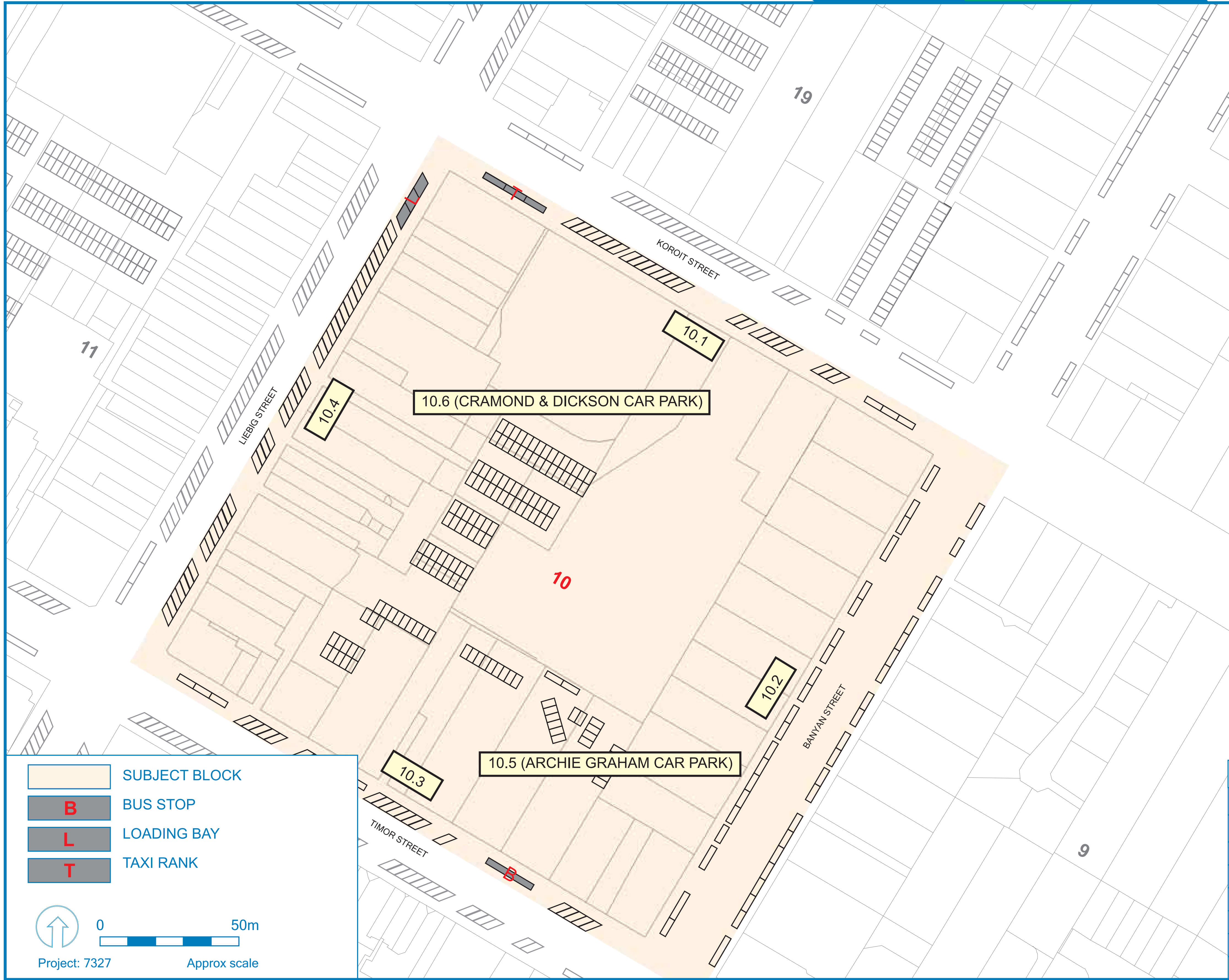
BLOCK NUMBER 5	
CAR PARK NUMBER	TOTAL
5.1	35
5.2	36
5.3	41
5.4	26
5.5 (ART GALLERY CAR PARK)	64
TOTAL	**203**

WARRNAMBOOL RETAIL STRATEGY
for WARRNAMBOOL CITY COUNCIL

NOVEMBER 2007

by RATIO CONSULTANTS

FIGURE 5
CAR PARKING SUPPLY: BLOCK 5

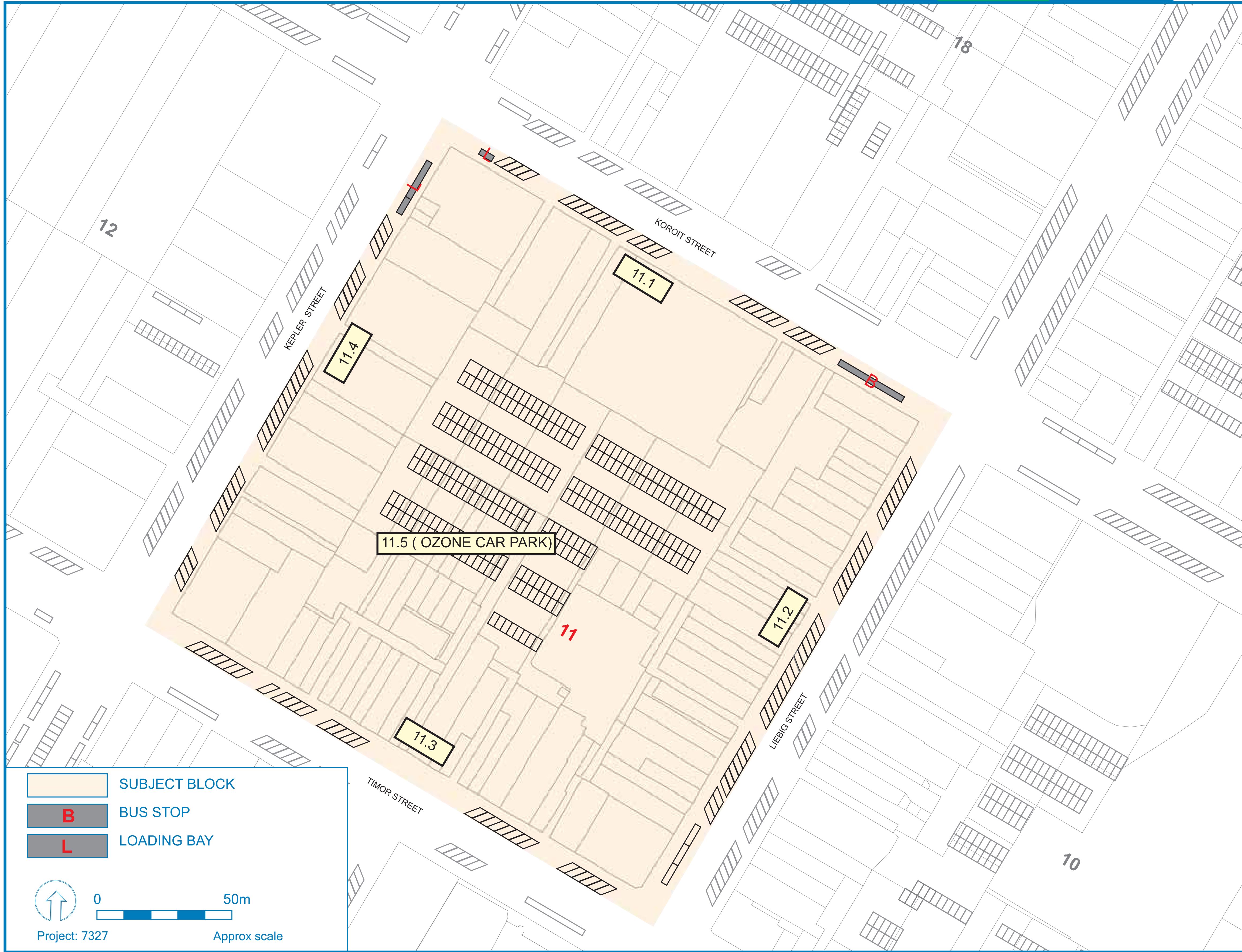


BLOCK NUMBER 10	
CAR PARK NUMBER	**TOTAL**
10.1	28
10.2	44
10.3	28
10.4	42
10.5 (ARCHIE GRAHAM CAR PARK)	23
10.6 (CRAMOND & DICKSON CAR PARK)	108
TOTAL	**273**

WARRNAMBOOL RETAIL STRATEGY
for WARRNAMBOOL CITY COUNCIL
by RATIO CONSULTANTS

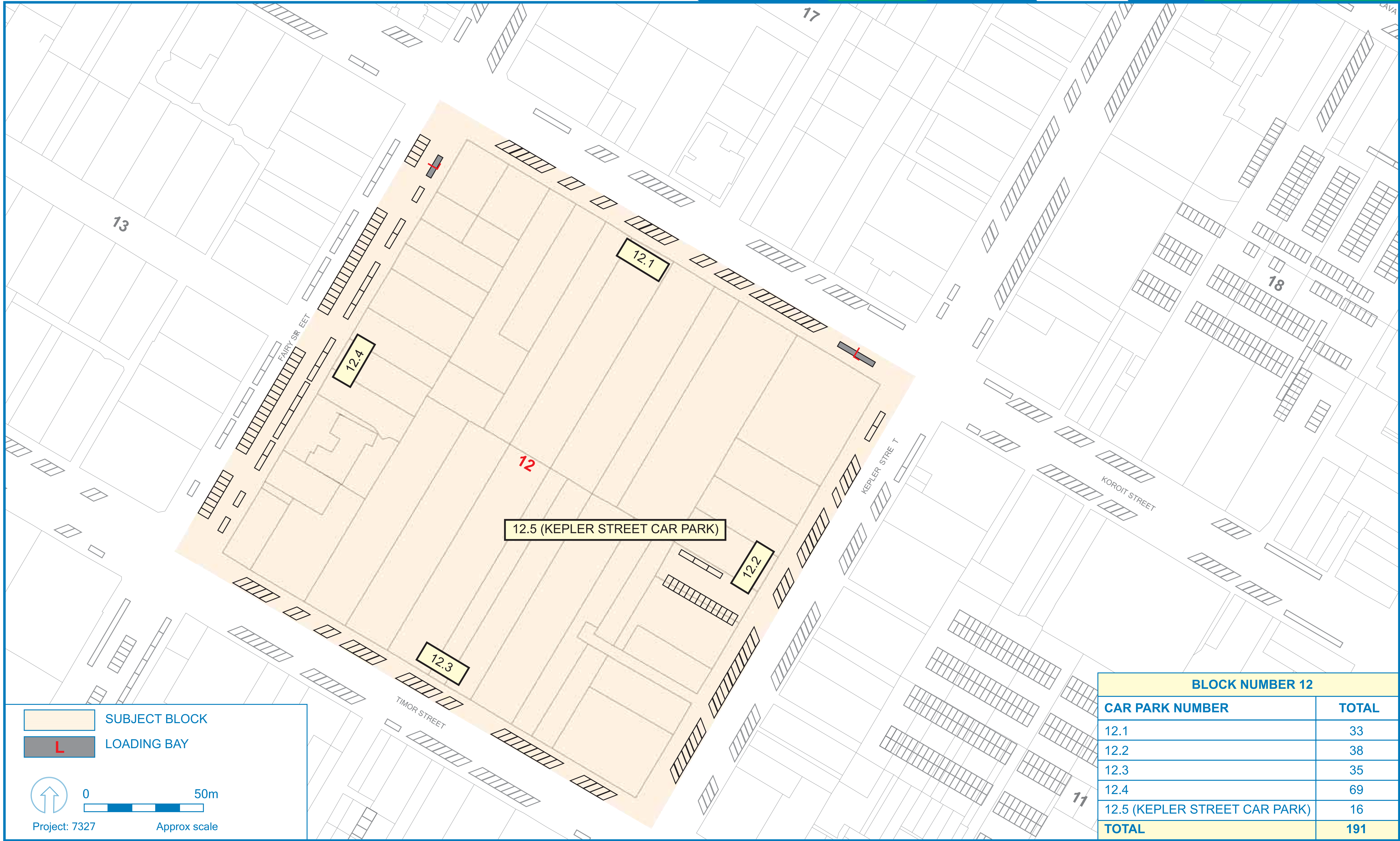
NOVEMBER 2007

FIGURE 6
CAR PARKING SUPPLY: BLOCK 10



BLOCK NUMBER 11	
CAR PARK NUMBER	TOTAL
11.1	27
11.2	42
11.3	31
11.4	34
11.5 (OZONE CAR PARK)	160
TOTAL	408

FIGURE 7
CAR PARKING SUPPLY: BLOCK 11



BLOCK NUMBER 12	
CAR PARK NUMBER	TOTAL
12.1	33
12.2	38
12.3	35
12.4	69
12.5 (KEPLER STREET CAR PARK)	16
TOTAL	191

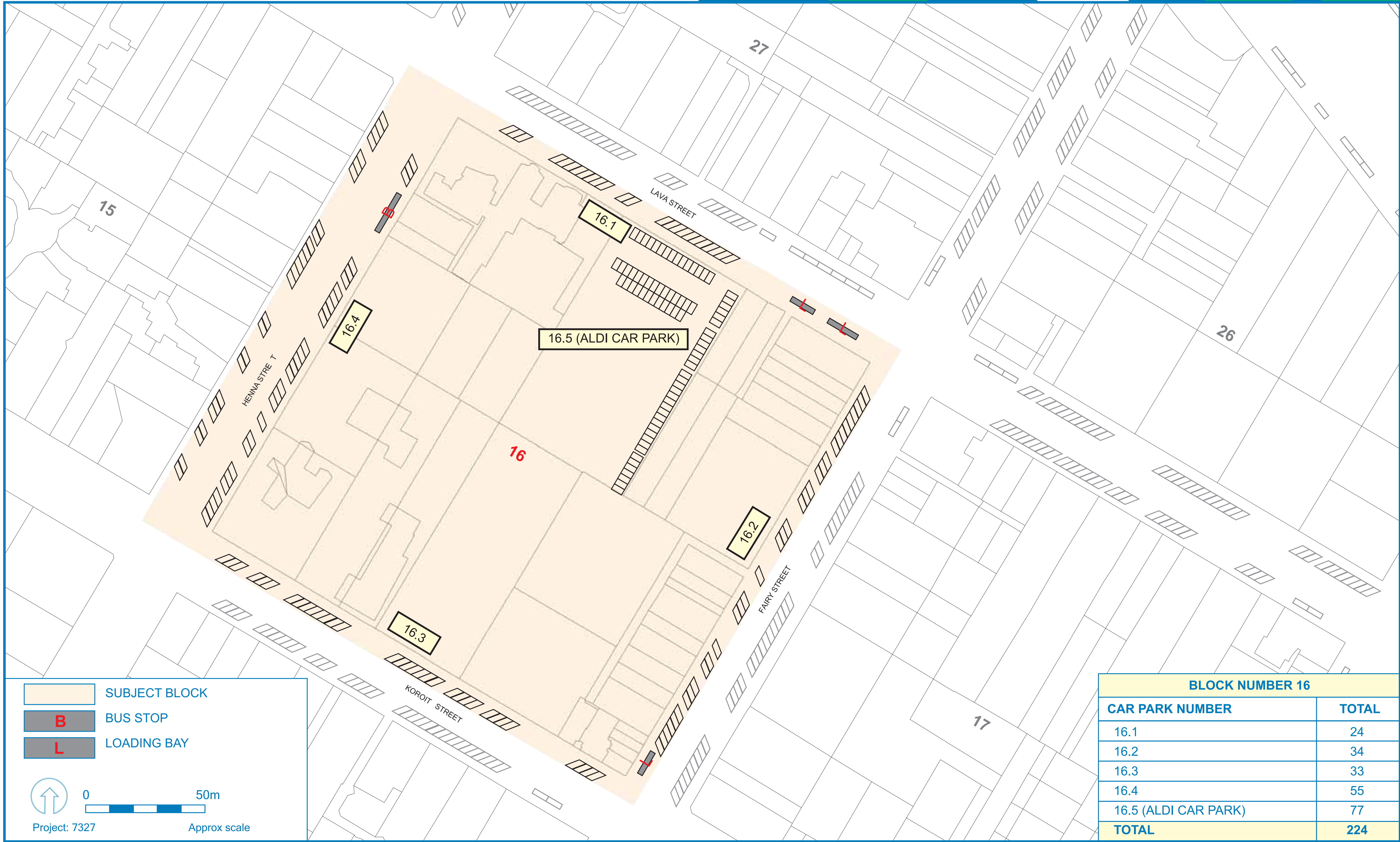
FIGURE 8
CAR PARKING SUPPLY: BLOCK 12

BLOCK NUMBER 13	
CAR PARK NUMBER	TOTAL
13.1	36
13.2	18
13.3	25
13.4	-
TOTAL	**79**

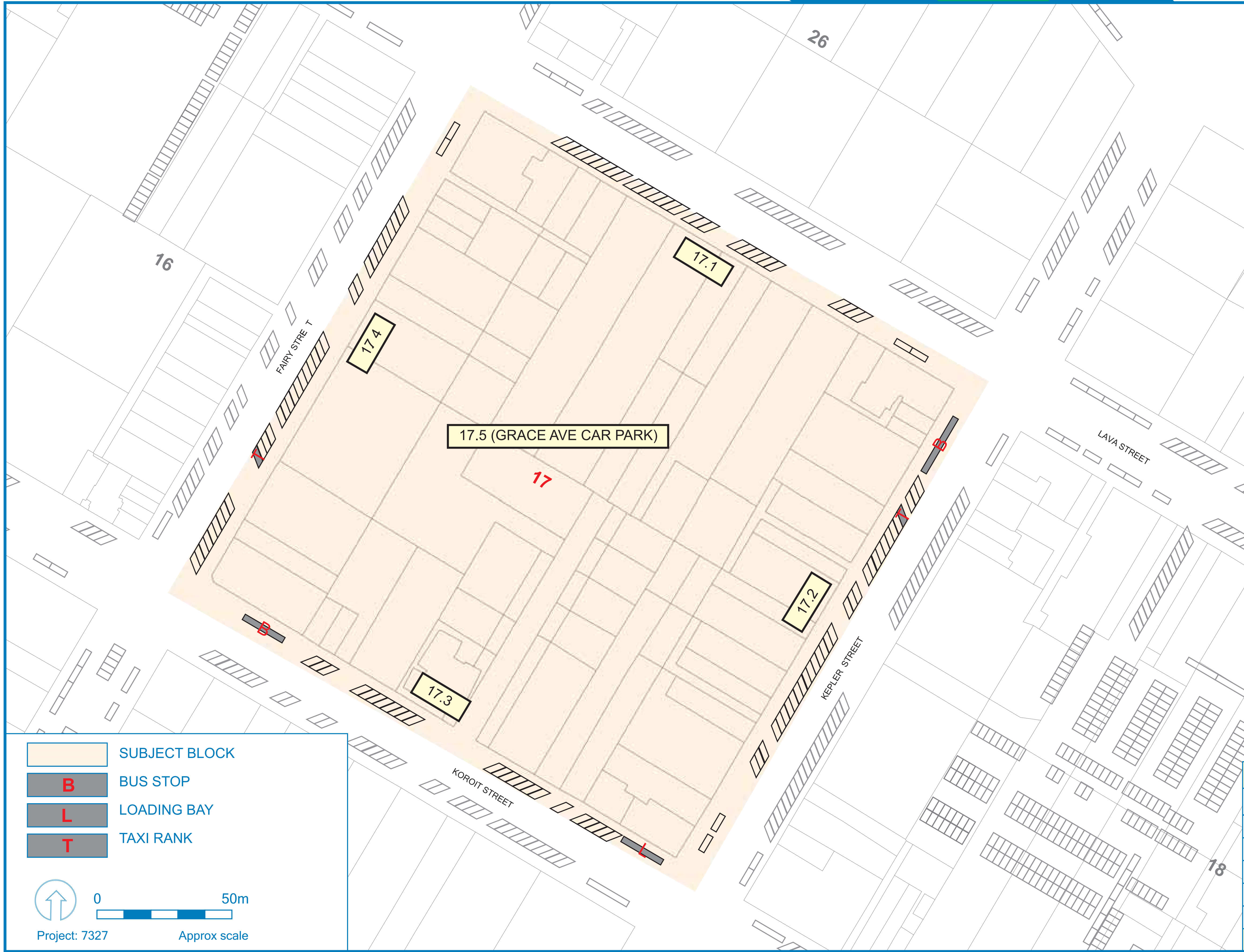
WARRNAMBOOL RETAIL STRATEGY
for WARRNAMBOOL CITY COUNCIL
by RATIO CONSULTANTS

NOVEMBER 2007

FIGURE 9
CAR PARKING SUPPLY: BLOCK 13

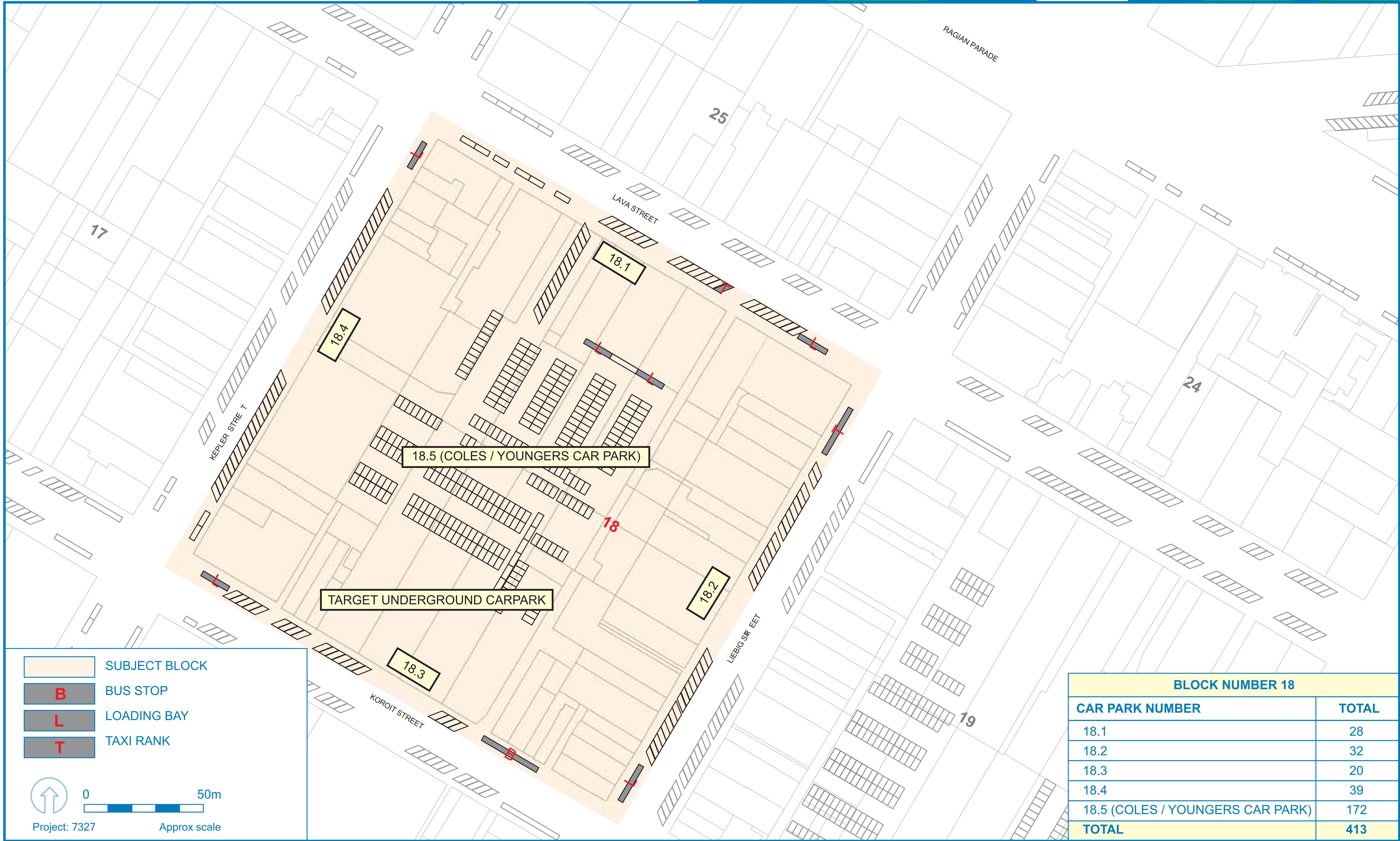


BLOCK NUMBER 16	
CAR PARK NUMBER	**TOTAL**
16.1	24
16.2	34
16.3	33
16.4	55
16.5 (ALDI CAR PARK)	77
TOTAL	**224**

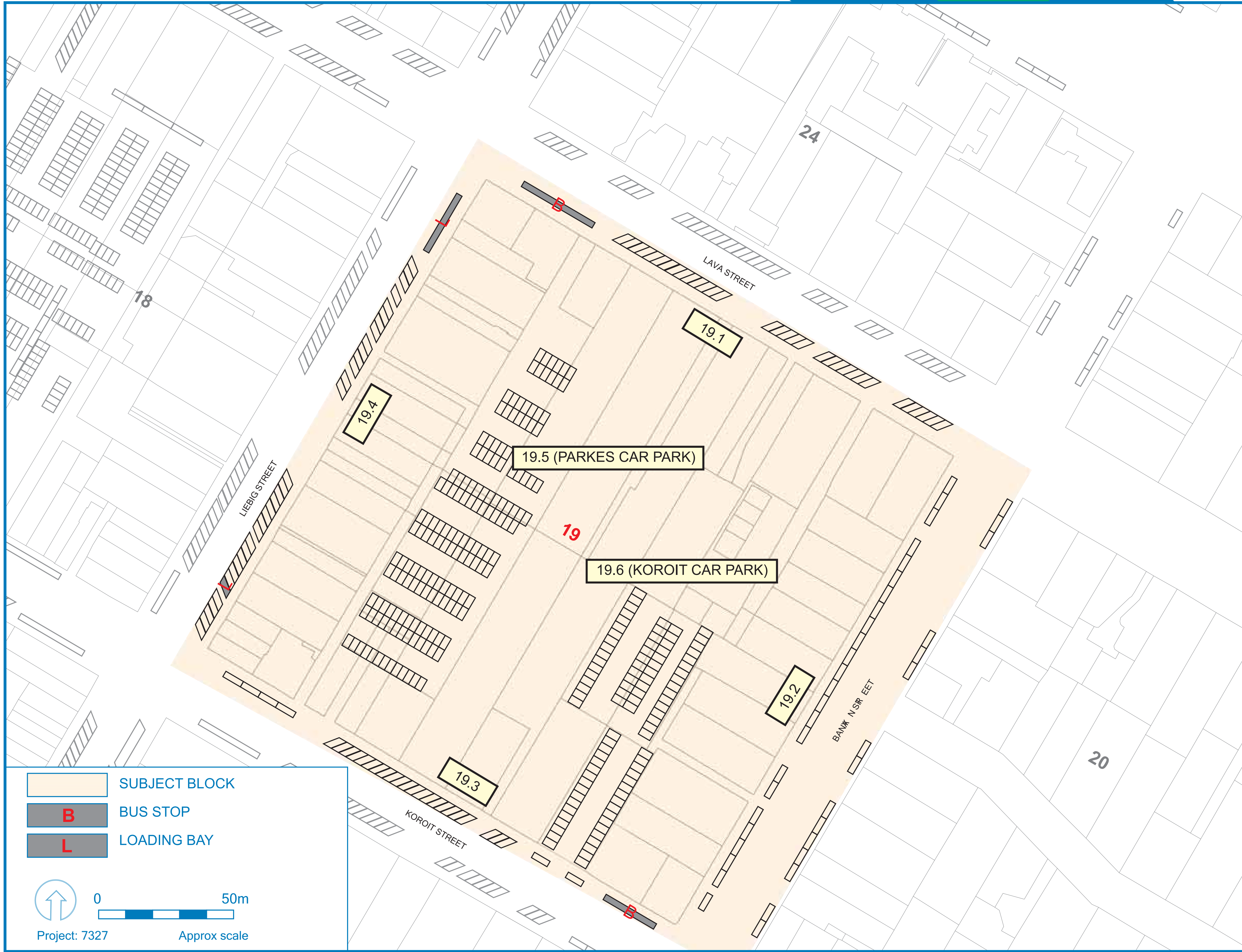


BLOCK NUMBER 17	
CAR PARK NUMBER	TOTAL
17.1	31
17.2	33
17.3	24
17.4	36
17.5 (GRACE AVE CAR PARK)	55
TOTAL	**179**

FIGURE 11
CAR PARKING SUPPLY: BLOCK 17



BLOCK NUMBER 18	
CAR PARK NUMBER	TOTAL
18.1	28
18.2	32
18.3	20
18.4	39
18.5 (COLES / YOUNGERS CAR PARK)	172
TOTAL	**413**



BLOCK NUMBER 19	
CAR PARK NUMBER	**TOTAL**
19.1	32
19.2	39
19.3	28
19.4	34
19.5 (PARKERS CAR PARK)	158
19.6 (KOROIT ST CAR PARK)	91
TOTAL	**382**

FIGURE 13
CAR PARKING SUPPLY: BLOCK 19

BLOCK NUMBER 24	
CAR PARK NUMBER	TOTAL
24.1	14
24.2	11
24.3	35
24.4	18
TOTAL	78

FIGURE 14
CAR PARKING SUPPLY: BLOCK 24

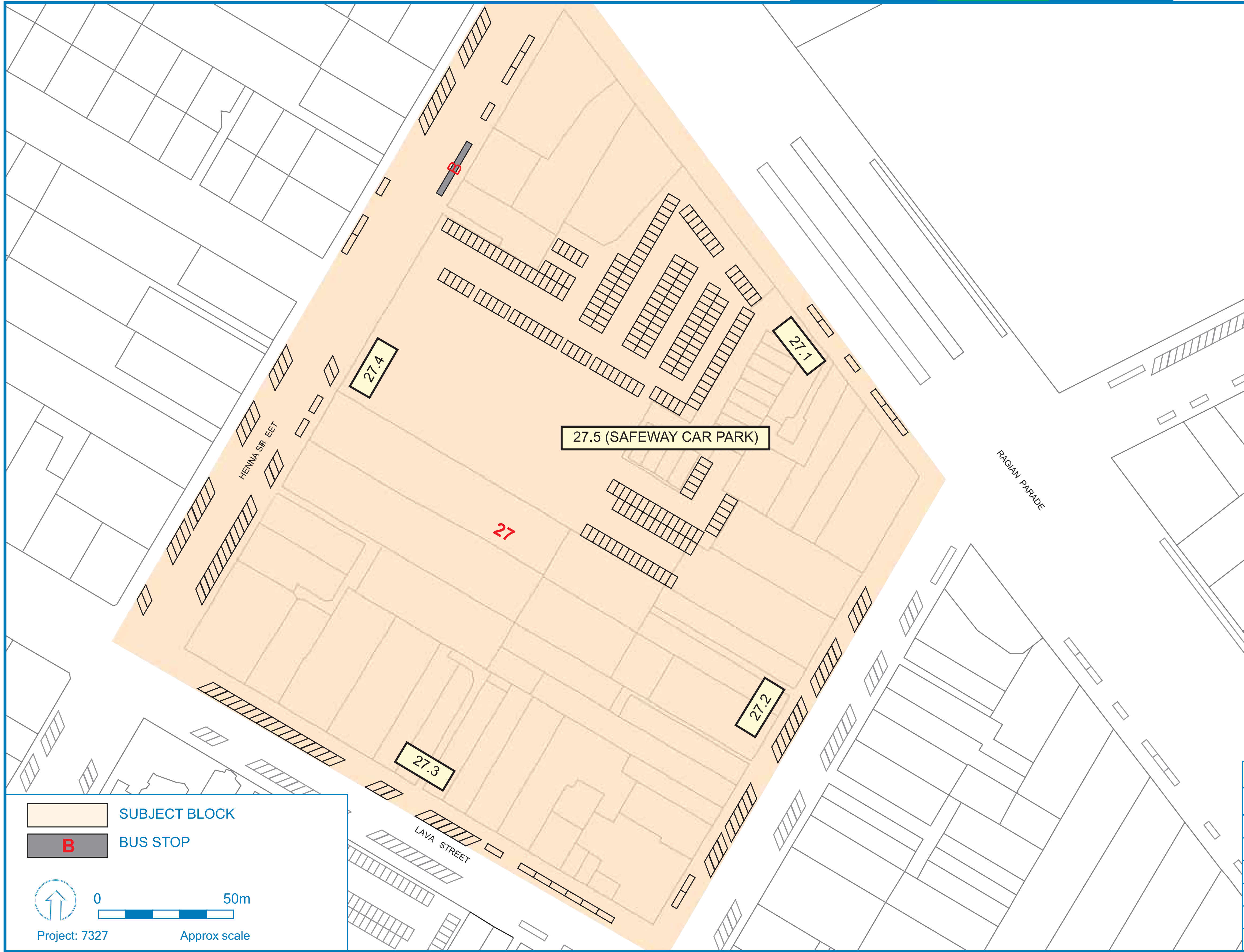
BLOCK NUMBER 25	
CAR PARK NUMBER	TOTAL
25.1	10
25.2	14
25.3	34
25.4	12
TOTAL	**70**

FIGURE 15
CAR PARKING SUPPLY: BLOCK 25

BLOCK NUMBER 26	
CAR PARK NUMBER	TOTAL
26.1	15
26.2	18
26.3	38
26.4	26
TOTAL	**97**

FIGURE 16

CAR PARKING SUPPLY: BLOCK 26



BLOCK NUMBER 27	
CAR PARK NUMBER	TOTAL
27.1	44
27.2	29
27.3	35
27.4	59
27.5	240
TOTAL	**407**

FIGURE 17
CAR PARKING SUPPLY: BLOCK 27

APPENDIX D: FUTURE FLOORSPACE REQUIREMENTS

Table A.1
City of Warrnambool (1991 - 2001)
Historic Trends in Population, Total and Occupied Dwelling Stock
Source: ABS, Census of Population and Housing, 2001

Year	Total Dwelling Stock (No. of Dwellings)	Occupied Dwelling Stock (No. of Dwellings)	Population		ERP Census Population Ratio	Occupied Dwellings (% of Total Dwelling Stock)	Yield Rate (ERP/Occupied dwelling)
			Census Population	Estimated Resident Population (No. of Persons)			
1991	9,831	9,113	25,438	26,283	1.033	92.7	2.884
1996	10,981	10,131	27,201	27,372	1.006	92.3	2.702
2001	11,696	10,897	28,574	29,616	1.036	93.2	2.718

Table A.2a
City of Warrnambool
Trends in Housing Approvals: Analysis by Financial Year (1998/99 - 2005/06)
Source: ABS, Building Approvals, Publication No. 8731.2

Year	No. of New Dwellings Approved
1998/99	190
1999/2000	166
2000/01	113
2001/02	319
2002/03	212
2003/04	255
2004/05	234
2005/06	250

Table A.2b
City of Warrnambool
Trends in Housing Approvals: Analysis by Two Financial Year Periods (1998/99 - 2005/06)
Source: ABS, Building Approvals, Publication No. 87321.2

Period	No. of New Dwellings Approved/Annum
1998/99 - 2000/01	156.3
2001/02 - 2002/03	265.5
2003/04 - 2005/06	246.3

Table A.3
City of Warrnambool
Trends in Housing Approvals: Analysis by 5 Year Period (1996 - 2001 - 2006)
Source: ABS, Building Approvals, Publication No. 8731.2

Period	No. of New Dwellings
1st July 1996 - 30th June 2001	782*
1st July 2001 - 30th June 2006	1,270

* Estimated on the basis of available information for 1998/99 - 2000/01

Table A.4
City of Warrnambool
Reconciliation of Total Dwelling Stock Changes and Dwelling Unit Approvals (1996 - 2001)

Item No.	Item Description	Unit
1	1996 Census Total Dwelling Stock (No. of Dwellings)	10,981
2	2001 Census Total Dwelling Stock (No. of Dwellings)	11,696
3	Net Increase in Total Dwelling Stock 1996 - 2001 (No. of Dwellings) **Item 2 - Item 1**	715
4	Total No. of New Dwellings Approved 1st July 1996 - 30th June 2001 (estimated, refer Table A.3)	782
5	Effective % of Dwelling Approvals resulting in a net increase in total dwelling stock **(Item 3 / tem 4) x 100**	91.4%

Table A.5

City of Warrnambool

Estimated Total and Occupied Dwellling Stock and Estimated Resident Population (June 2006)

Source: ABS, Building Approvals, Publication No. 8731.2

Prepared by Ratio Consultants, December 2006

Item No.	Item Description	Unit
1	2001 Census Total dwelling stock (No. of dwellings)	11,696
2	Total dwelling approvals 1st July 2001 - 30th June 2006 **(Refer Table A.3)**	1,270
3	Effective % of dwelling unit approvals likely to result in a net increase in total dwelling stock (based on 1996 - 2001 analysis) **(Refer Table A.4, Item 5)**	91.4%
4	Estimated effective addition to total dwelling stock (No. of additional dwellings) **(Item 3 x Item 2)**	1,161
5	Estimated Total Dwelling Stock, 2006 (No. of Dwelling Units) **(Item 1 + Item 4)**	12,857
6	Estimated Proportion of Total Dwelling Stock which is occupied, 2006 (%) (based on analysis of Table A.1)	94.0%
7	Estimated Occupied Dwelling Stock (2006) (No. of Dwellings) **(Item 5 x Item 6)**	12,086
8	Estimated Yield Rate (ERP/Occupied dwelling) for 2006 (Refer Table A.7)	2.649
9	Estimated Resident Population 2006 (No. of Persons) **(Item 7 x Item 8)**	32,015

Table A.6
City of Warrnambool
Projected Dwelling Unit Approvals (2001/02 - 2030/31)

Period	Dwellings Approved/Annum	Dwellings Approved per 5 Year Period	Estimated Net Contribution to Total Dwelling Stock
2000/01 - 2005/06	257	1,270	1,161
2006/07 - 2010/11	260	1,300	1,188
2011/12 - 2015/16	270	1,350	1,234
2016/17 - 2020/21	280	1,400	1,280
2021/22 - 2025/26	290	1,450	1,325
2026/27 - 2030/31	300	1,500	1,371

Table A.7

Warrnambool City Council

Projected Total Dwelling Stock, Households and Resident Population (2001 - 2031)

Prepared by Ratio Consultants, December 2006

Year ended 30th June	Total Dwelling Stock (TDS) No. of Dwellings	Occupied Dwellings		Yield Rate	Estimated Resident Population (No. of Persons)
		% of TDS Occupied	No. of Households	ERP/Occupied Dwelling	
2001	11,700	93.2	10,900	2.718	29,620
2006	12,860	94.0	12,090	2.649	32,020
2011	14,050	94.5	13,270	2.580	34,240
2016	15,280	95.0	14,520	2.530	36,720
2021	16,560	95.5	15,810	2.480	39,220
2026	17,880	96.0	17,170	2.440	41,890
2031	19,260	96.0	18,480	2.400	44,360

N.B. Please note that all calculations are based on original figures that were not rounded. These figures have been rounded to the nearest 10 units which would explain for marginal differences when calculated.

Table A.8
Regional Catchment Area : Historic and Preliminary Forecast Estimated Resident Population by SLA (1991-2031)
Prepared by Ratio Consultants, November 2007.
Source: RCA Projections derived from VIF 2004, Warrnambol population projections derived from Ratio Population model : Small Area Analysis

Regional Catchment Area Component (SLA)	Estimated Resident Population (as at June 30) in Regional Catchment Area by component SLA								
	Historic				Forecast				
	1991	1996	2001	2006	2011	2016	2021	2026	2031
Colac-Otway (S) - Colac	10,919	10,374	10,472	10,469	10,462	10,495	10,577	10,702	10,809
Colac-Otway (S) - North	7,169	6,981	7,047	6,953	6,951	6,932	6,917	6,924	6,912
Colac-Otway (S) - South	3,294	3,355	3,486	4,088	4,337	4,484	4,571	4,622	4,653
Corangamite (S) - North	10,688	9,986	9,678	9,328	8,978	8,631	8,302	7,986	7,669
Corangamite (S) - South	8,035	7,826	7,880	7,811	7,812	7,782	7,748	7,714	7,678
Glenelg (S) - Heywood	6,653	6,227	6,129	6,076	6,053	6,008	5,958	5,885	5,790
Glenelg (S) - Portland	11,266	10,774	10,709	10,663	10,680	10,657	10,627	10,620	10,610
Moyne (S) - North-West	3,381	3,110	2,873	2,659	2,394	2,148	1,930	1,734	1,551
Moyne (S) - North-East	2,841	2,667	2,510	2,338	2,124	1,924	1,744	1,582	1,428
Moyne (S) - South	10,378	10,511	10,380	10,737	11,071	11,370	11,630	11,846	12,007
S. Grampians (S) - Hamilton	10,124	9,461	9,413	9,283	9,131	8,934	8,735	8,540	8,341
S. Grampians (S) - Bal	5,629	5,417	5,258	5,067	4,800	4,539	4,297	4,053	3,787
Warrnambool (C)	26,283	27,372	29,629	31,593	34,240	36,720	39,220	41,890	44,360
TOTAL: RCA	**116,660**	**114,061**	**115,464**	**117,066**	**119,034**	**120,624**	**122,256**	**124,098**	**125,594**

Table A.9
Regional Catchment Area : Historic and Preliminary Forecast Estimated Resident Population by SLA (1991-2031)
Prepared by Ratio Consultants, November 2007.
Source: RCA Projections derived from VIF 2004, Warrnambol population projections derived from Ratio Population model : Small Area Analysis

Regional Catchment Area Component (SLA)	**% of SLA in Catchment***	**Estimated Resident Population (as at June 30) in Regional Catchment Area by component SLA**								
		Historic				**Preliminary Forecast****				
		1991	**1996**	**2001**	**2006**	**2011**	**2016**	**2021**	**2026**	**2031**
PRIMARY CATCHMENT										
Warrnambool (C)	100.00	26,283	27,372	29,629	31,593	34,240	36,720	39,220	41,890	44,360
Moyne (S) - South	9.26	961	973	961	994	1,025	1,053	1,077	1,097	1,112
TOTAL: PRIMARY CATCHMENT		27,240	28,350	30,590	32,590	35,270	37,770	40,300	42,990	45,470
SECONDARY CATCHMENT										
Moyne (S) - South	82.39	8,550	8,660	8,552	8,846	9,122	9,368	9,582	9,760	9,892
Moyne (S) - North-East	73.10	2,077	1,950	1,835	1,709	1,553	1,406	1,275	1,156	1,044
Moyne (S) - North-West	19.34	654	601	556	514	463	415	373	335	300
Corangamite (S) - North	70.80	7,567	7,070	6,852	6,604	6,356	6,111	5,878	5,654	5,430
Corangamite (S) - South	38.50	3,093	3,013	3,034	3,007	3,008	2,996	2,983	2,970	2,956
TOTAL: SECONDARY CATCHMENT		21,941	21,294	20,828	20,681	20,501	20,296	20,091	19,875	19,622
TERTIARY CATCHMENT										
Moyne (S) - North-East	7.95	226	212	200	186	169	153	139	126	114
Moyne (S) - North-West	61.50	2,079	1,913	1,767	1,635	1,472	1,321	1,187	1,066	954
Moyne (S) - South	8.35	867	878	867	897	924	949	971	989	1,003
Glenelg (S) - Portland	100.00	11,266	10,774	10,709	10,663	10,680	10,657	10,627	10,620	10,610
Glenelg (S) - Heywood	52.43	3,488	3,265	3,214	3,186	3,174	3,150	3,124	3,086	3,036
Corangamite (S) - North	5.94	635	593	575	554	533	512	493	474	455
Corangamite (S) - South	61.50	4,942	4,813	4,846	4,804	4,805	4,786	4,765	4,744	4,722
S. Grampians (S) - Hamilton	98.24	9,946	9,294	9,247	9,120	8,970	8,777	8,581	8,390	8,194
S. Grampians (S) - Bal	32.44	1,826	1,757	1,706	1,644	1,557	1,472	1,394	1,315	1,228
Colac-Otway (S) - South	15.34	505	515	535	627	665	688	701	709	714
Colac-Otway (S) - Colac	95.09	10,382	9,864	9,957	9,955	9,948	9,979	10,057	10,176	10,278
Colac-Otway (S) - North	23.21	1,664	1,621	1,636	1,614	1,614	1,609	1,606	1,607	1,604
TOTAL: TERTIARY CATCHMENT		47,826	45,498	45,258	44,884	44,512	44,055	43,644	43,302	42,912
TOTAL: RCA		**97,007**	**95,142**	**96,676**	**98,155**	**100,282**	**102,121**	**104,035**	**106,167**	**108,004**

* Revised SLA proportions based on Component Census Collection Districts (2001)
** VIF 2004 Projections

Table A.10

Regional Catchment Area : Historic and Final Forecast Estimated Resident Population by SLA (1991-2031)

Prepared by Ratio Consultants, November 2007.

Source: RCA Projections derived from VIF 2004, Warrnambol population projections derived from Ratio Population model : Small Area Analysis

Regional Catchment Area Component (SLA)	Estimated Resident Population (as at June 30) in Regional Catchment Area by component SLA								
	Historic				Final Forecast *				
	1991	1996	2001	2006	2011	2016	2021	2026	2031
Colac-Otway (S) - Colac	10,919	10,374	10,472	10,469	11,221	11,256	11,344	11,478	11,594
Colac-Otway (S) - North	7,169	6,981	7,047	6,953	6,265	6,247	6,235	6,240	6,229
Colac-Otway (S) - South	3,294	3,355	3,486	4,088	3,749	3,877	3,952	3,996	4,022
Corangamite (S) - North	10,688	9,986	9,678	9,328	9,116	8,764	8,431	8,110	7,788
Corangamite (S) - South	8,035	7,826	7,880	7,811	7,701	7,670	7,637	7,603	7,568
Glenelg (S) - Heywood	6,653	6,227	6,129	6,076	6,221	6,175	6,123	6,048	5,950
Glenelg (S) - Portland	11,266	10,774	10,709	10,663	10,854	10,832	10,801	10,794	10,784
Moyne (S) - North - West	3,381	3,110	2,873	2,659	2,595	2,329	2,092	1,880	1,681
Moyne (S) - North-East	2,841	2,667	2,510	2,338	2,267	2,054	1,862	1,688	1,524
Moyne (S) - South	10,378	10,511	10,380	10,737	10,954	11,250	11,507	11,720	11,879
S. Grampians (S) - Hamilton	10,124	9,461	9,413	9,283	9,264	9,064	8,862	8,664	8,463
S. Grampians (S) - Bal	5,629	5,417	5,258	5,067	5,092	4,815	4,558	4,299	4,017
Warrnambool (C)	26,283	27,372	29,629	31,593	34,240	36,720	39,220	41,890	44,360
TOTAL: RCA	**116,660**	**114,061**	**115,464**	**117,066**	**119,540**	**121,053**	**122,622**	**124,412**	**125,859**

* Recalibrated to 2006 Estimated Resident Population

Table A.11

Regional Catchment Area : Historic and Final Forecast Estimated Resident Population by SLA (1991-2031)

Prepared by Ratio Consultants, November 2007.

Source: RCA Projections derived from VIF 2004, Warrnambol population projections derived from Ratio Population model : Small Area Analysis

Regional Catchment Area Component (SLA)	% of SLA Population in Catchment*	Estimated Resident Population (as at June 30) in Regional Catchment Area by component SLA								
		Historic				Final Forecast**				
		1991	1996	2001	2006	2011	2016	2021	2026	2031
PRIMARY CATCHMENT										
Warrnambool (C)	100.00	26,280	27,370	29,630	31,590	33,780	36,230	38,690	41,330	43,764
Moyne (S) - South	9.26	960	970	960	990	1,010	1,040	1,070	1,090	1,100
TOTAL: PRIMARY CATCHMENT		27,240	28,340	30,590	32,580	34,790	37,270	39,760	42,420	44,860
SECONDARY CATCHMENT										
Moyne (S) - South	82.39	8,550	8,660	8,550	8,850	9,020	9,270	9,480	9,660	9,790
Moyne (S) - North-East	73.10	2,080	1,950	1,830	1,710	1,660	1,500	1,360	1,230	1,110
Moyne (S) - North - West	19.34	650	600	560	510	500	450	400	360	330
Corangamite (S) - North	70.80	7,570	7,070	6,850	6,600	6,450	6,210	5,970	5,740	5,510
Corangamite (S) - South	38.50	3,090	3,010	3,030	3,010	2,960	2,950	2,940	2,930	2,910
TOTAL: SECONDARY CATCHMENT		21,940	21,290	20,820	20,680	20,590	20,380	20,150	19,920	19,650
TERTIARY CATCHMENT										
Moyne (S) - North-East	7.95	230	210	200	190	180	160	150	130	120
Moyne (S) - North-West	61.50	2,080	1,910	1,770	1,640	1,600	1,430	1,290	1,160	1,030
Moyne (S) - South	8.35	870	880	870	900	910	940	960	980	990
Glenelg (S) - Portland	100.00	11,270	10,770	10,710	10,660	10,850	10,830	10,800	10,790	10,780
Glenelg (S) - Heywood	52.43	3,490	3,270	3,210	3,190	3,260	3,240	3,210	3,170	3,120
Corangamite (S) - North	5.94	630	590	570	550	540	520	500	480	460
Corangamite (S) - South	61.50	4,940	4,810	4,850	4,800	4,740	4,720	4,700	4,680	4,650
S. Grampians (S) - Hamilton	98.24	9,950	9,290	9,250	9,120	9,100	8,900	8,710	8,510	8,310
S. Grampians (S) - Bal	32.44	1,830	1,760	1,710	1,640	1,650	1,560	1,480	1,390	1,300
Colac-Otway (S) - South	15.34	510	510	530	630	580	590	610	610	620
Colac-Otway (S) - Colac	95.09	10,380	9,860	9,960	9,950	10,670	10,700	10,790	10,910	11,020
Colac-Otway (S) - North	23.21	1,660	1,620	1,640	1,610	1,450	1,450	1,450	1,450	1,450
TOTAL: TERTIARY CATCHMENT		47,840	45,480	45,270	44,880	45,530	45,040	44,650	44,260	43,850
TOTAL: RCA		**97,020**	**95,110**	**96,680**	**98,140**	**100,910**	**102,690**	**104,560**	**106,600**	**108,360**

* Revised SLA Proportions based on Components of Census Collection Districts (2001)

** Calibrated to 2006 Estimated Resident Population

Table B.1
Warrnambool and Regional Catchment Area
Personal Expenditure Profiles (2003/04 at current prices)
Source: Marketinfo, 2004

LGA / SLA Name	Estimated Resident Population		Expenditure per Annum (Total $/Year) by Commodity for 2003/2004						
	2003/2004		Household Expenditure per Annum ($)			Per Capita Expenditure per Annum ($)			
	Number of Households	Number of Persons	Food, Groceries & Liquor	Other Household Goods	Bulky Goods	Food, Groceries & Liquor	Other Household Goods	Bulky Goods	Total Retail Goods
Colac-Otway (S)									
Colac-Otway (S) - Colac	4,439	10,474	58,058,990	24,762,978	16,992,719	5,543	2,364	1,622	9,530
Colac-Otway (S) - North	2,516	6,951	35,906,091	13,734,086	9,192,663	5,166	1,976	1,322	8,464
Colac-Otway (S) - South	1,713	3,967	23,245,297	9,265,603	6,459,324	5,860	2,336	1,628	9,824
Total: Colac-Otway (S)	**8,668**	**21,392**	**117,210,378**	**47,762,667**	**32,644,706**	**5,479**	**2,233**	**1,526**	**9,238**
Corangamite (S)									
Corangamite (S) - North	3,967	9,496	51,695,529	21,296,088	14,716,401	5,444	2,243	1,550	9,236
Corangamite (S) - South	2,906	7,811	42,172,577	16,881,255	11,440,939	5,399	2,161	1,465	9,025
Total: Glenelg (S)	**6,873**	**17,307**	**93,868,106**	**38,177,343**	**26,157,340**	**5,424**	**2,206**	**1,511**	**9,141**
Glenelg (S)									
Glenelg (S) - Heywood	2,355	6,073	32,785,755	12,913,271	8,845,054	5,399	2,126	1,456	8,981
Glenelg (S) - North	1,472	3,455	18,600,010	7,563,765	5,346,826	5,384	2,189	1,548	9,120
Glenelg (S) - Portland	4,525	10,654	59,938,881	24,831,165	17,926,867	5,626	2,331	1,683	9,639
Total: Glenelg (S)	**8,352**	**20,182**	**111,324,646**	**45,308,201**	**32,118,747**	**5,516**	**2,245**	**1,591**	**9,352**
Moyne (S)									
Moyne (S) - North-East	1,007	2,456	13,281,218	5,289,352	3,630,766	5,408	2,154	1,478	9,040
Moyne (S) - North-West	1,084	2,813	15,030,237	5,650,254	3,755,053	5,343	2,009	1,335	8,687
Moyne (S) - South	4,005	10,550	56,773,967	22,871,654	15,400,918	5,381	2,168	1,460	9,009
Total: Moyne (S)	**6,096**	**15,819**	**85,085,422**	**33,811,260**	**22,786,737**	**5,379**	**2,137**	**1,440**	**8,957**
Southern Grampians (S)									
S. Grampians (S) - Hamilton	4,094	9,335	53,579,409	23,183,325	16,140,438	5,740	2,483	1,729	9,952
S. Grampians (S) - Wannon	1,007	2,378	12,820,982	5,178,611	3,560,628	5,391	2,178	1,497	9,067
S. Grampians (S) - Balance	2,030	5,205	28,378,701	11,407,676	7,697,963	5,452	2,192	1,479	9,123
Total: Southern Grampians (S)	**7,131**	**16,918**	**94,779,092**	**39,769,612**	**27,399,029**	**5,602**	**2,351**	**1,620**	**9,573**
Warrnambool (C)	**12,236**	**30,512**	**172,548,136**	**76,259,855**	**51,984,162**	**5,655**	**2,499**	**1,704**	**9,858**

Table B.2
Consumer Price Index Growth Assumptions (2003/04 - June 2006) and Real Growth Assumptions (2006 - 2031) for the Retail Analysis
Prepared by Ratio Consultants, June 2007

Major Commodity Group	Annual CPI Change, Melbourne (June 2004 - June 2006) % / annum*	Victoria: Retail Expenditure Growth/Capita % Real Growth/annum in per Capita Expenditure			
		Actual		Projected	
		2003/04 - 2005/06	1984/85 - 2005/06	2006 - 2016	2016 - 2031
Food, Groceries, Liquor and Tobacco	4.3	1.2	1.3	1.3	1.3
Household Goods	0.8	3.5	3.5	3.2	3.0
Bulky Goods	1.1	2.7	3.7	3.2	2.8

*Source: Consumer Price Index, June Quarter

Table B.3
Updating Personal Expenditure Profiles to June 2006 prices
Analysis by Ratio Consultants, June 2007

Major Commodity Group	**Conversion Retail Expenditure/Capita at 2003/04 prices (Victoria) to June 2006 constant prices** Calibration Factors (2003/04 prices = 1.000)	**Adjustment Retail Expenditure/Capita at June 2006 constant prices to future years** Calibration factors June 2006 prices at June 2006 = 1.000	
		June 2016	June 2031
Food, groceries and liquor	1.145	1.138	1.381
Household goods	1.112	1.370	2.135
Bulky goods	1.099	1.370	2.073

Table B.4
Warrnambool and Regional Catchment Area: Personal Expenditure Profiles at June 2006 constant prices
Analysis by Ratio Consultants, June 2007

LGA / SLA	Expenditure per capita / annum at June 2006 constant prices											
	at June 2006				at June 2016				at June 2031			
	FGL	Household Goods	Bulky Goods	Total	FGL	Household Goods	Bulky Goods	Total	FGL	Household Goods	Bulky Goods	Total
Colac-Otway (S)												
Colac-Otway (S) - Colac	6,347	2,629	1,783	10,759	7,222	3,602	2,443	13,268	8,766	5,612	3,697	18,075
Colac-Otway (S) - North	5,915	2,197	1,453	9,565	6,730	3,011	1,992	11,732	8,169	4,690	3,014	15,873
Colac-Otway (S) - South	6,709	2,597	1,789	11,096	7,634	3,559	2,452	13,645	9,266	5,545	3,710	18,521
Total: Colac-Otway (S)	**6,274**	**2,483**	**1,677**	**10,434**	**7,139**	**3,402**	**2,298**	**12,839**	**8,665**	**5,300**	**3,477**	**17,442**
Corangamite (S)												
Corangamite (S) - North	6,233	2,494	2,465	11,192	7,093	3,417	3,377	13,887	8,609	5,324	5,110	19,043
Corangamite (S) - South	6,182	2,403	2,375	10,960	7,034	3,293	3,255	13,582	8,538	5,130	4,925	18,593
Total: Corangamite (S)	**6,210**	**2,453**	**2,424**	**11,087**	**7,066**	**3,361**	**3,322**	**13,749**	**8,577**	**5,237**	**5,027**	**18,840**
Glenelg (S)												
Glenelg (S) - Heywood	6,181	2,364	1,601	10,147	7,034	3,240	2,193	12,467	8,537	5,048	3,319	16,904
Glenelg (S) - North	6,164	2,434	1,701	10,299	7,014	3,336	2,330	12,680	8,513	5,197	3,526	17,237
Glenelg (S) - Portland	6,442	2,592	1,849	10,883	7,330	3,551	2,534	13,415	8,897	5,533	3,834	18,264
Total: Glenelg (S)	**6,316**	**2,496**	**1,749**	**10,561**	**7,187**	**3,421**	**2,397**	**13,004**	**8,723**	**5,329**	**3,626**	**17,679**
Moyne (S)												
Moyne (S) - North-East	6,192	2,395	1,601	10,187	7,045	3,282	2,193	12,520	8,552	5,113	3,319	16,983
Moyne (S) - North-West	6,118	2,234	1,701	10,052	6,961	3,061	2,330	12,352	8,450	4,768	3,526	16,744
Moyne (S) - South	6,162	2,411	1,849	10,422	7,011	3,303	2,534	12,848	8,510	5,146	3,834	17,491
Total: Moyne (S)	**6,159**	**2,377**	**1,749**	**10,284**	**7,008**	**3,257**	**2,397**	**12,661**	**8,506**	**5,074**	**3,626**	**17,206**
Southern Grampians (S)												
S. Grampians (S) - Hamilton	6,572	2,762	1,900	11,234	7,478	3,784	2,604	13,866	9,077	5,896	3,940	18,912
S. Grampians (S) - Wannon	6,173	2,422	1,646	10,240	7,024	3,318	2,255	12,597	8,526	5,170	3,412	17,108
S. Grampians (S) - Bal	6,243	2,437	1,625	10,305	7,103	3,339	2,227	12,670	8,622	5,203	3,370	17,195
Total: Southern Grampians (S)	**6,415**	**2,614**	**1,780**	**10,808**	**7,299**	**3,582**	**2,439**	**13,320**	**8,859**	**5,580**	**3,690**	**18,130**
Warrnambool (C)	**6,475**	**2,779**	**1,872**	**11,127**	**7,368**	**3,808**	**2,566**	**13,742**	**8,943**	**5,933**	**3,882**	**18,758**

Table C

Warrnambool and Regional Catchment Area: Estimated and Projected Retail Goods Expenditures (June 2006 constant prices)

Analysis by Ratio Consultants, June 2007

Calculation: Table A.8 x Table B.4

Regional Catchment Area Component (SLA)	Retail Goods Expenditures of Residents (at June 2006 constant prices) in $ million											
	Estimated				Projected							
	2006				2016				2031			
	FGL	Household Goods	Bulky Goods	Total	FGL	Household Goods	Bulky Goods	Total	FGL	Household Goods	Bulky Goods	Total
PRIMARY CATCHMENT												
Warrnambool (C)	204.5	87.8	59.1	351.5	266.9	138.0	93.0	497.9	391.4	259.7	169.9	820.9
Moyne (S) - South	6.1	2.4	1.8	10.3	7.3	3.4	2.6	13.4	9.4	5.7	4.2	19.2
TOTAL: PRIMARY CATCHMENT	210.6	90.2	61.0	361.8	274.2	141.4	95.6	511.2	400.7	265.3	174.1	840.2
SECONDARY CATCHMENT												
Moyne (S) - South	54.5	21.3	16.4	92.2	65.0	30.6	23.5	119.1	83.3	50.4	37.5	171.2
Moyne (S) - North-East	10.6	4.1	2.7	17.4	10.6	4.9	3.3	18.8	9.5	5.7	3.7	18.9
Moyne (S) - North-West	3.1	1.1	0.9	5.1	3.1	1.4	1.0	5.6	2.8	1.6	1.2	5.5
Corangamite (S) - North	41.1	16.5	16.3	73.9	44.0	21.2	21.0	86.2	47.4	29.3	28.2	104.9
Corangamite (S) - South	18.6	7.2	7.1	33.0	20.8	9.7	9.6	40.1	24.8	14.9	14.3	54.1
TOTAL: SECONDARY CATCHMENT	128.0	50.3	43.4	221.6	143.5	67.9	58.4	269.7	167.9	101.9	84.9	354.6
TERTIARY CATCHMENT												
Moyne (S) - North-East	1.2	0.5	0.3	1.9	1.1	0.5	0.4	2.0	1.0	0.6	0.4	2.0
Moyne (S) - North-West	10.0	3.7	2.8	16.5	10.0	4.4	3.3	17.7	8.7	4.9	3.6	17.2
Moyne (S) - South	5.5	2.2	1.7	9.4	6.6	3.1	2.4	12.1	8.4	5.1	3.8	17.3
Glenelg (S) - Portland	68.7	27.6	19.7	116.0	79.4	38.5	27.4	145.3	95.9	59.6	41.3	196.9
Glenelg (S) - Heywood	19.7	7.5	5.1	32.4	22.8	10.5	7.1	40.4	26.6	15.7	10.4	52.7
Corangamite (S) - North	3.4	1.4	1.4	6.2	3.7	1.8	1.8	7.2	4.0	2.4	2.4	8.8
Corangamite (S) - South	29.7	11.5	11.4	52.6	33.2	15.5	15.4	64.1	39.7	23.9	22.9	86.5
S. Grampians (S) - Hamilton	56.2	22.0	16.9	95.0	62.4	29.4	22.6	114.4	70.7	42.8	31.9	145.3
S. Grampians (S) - Bal	10.1	4.0	3.0	17.1	10.9	5.2	4.0	20.0	11.1	6.7	5.0	22.7
Colac-Otway (S) - South	4.2	1.6	1.1	7.0	4.5	2.1	1.4	8.1	5.7	3.4	2.3	11.5
Colac-Otway (S) - Colac	63.2	26.2	17.7	107.1	77.3	38.5	26.1	142.0	96.6	61.8	40.7	199.2
Colac-Otway (S) - North	9.5	3.5	2.3	15.4	9.8	4.4	2.9	17.0	11.8	6.8	4.4	23.0
TOTAL: TERTIARY CATCHMENT	281.4	111.6	83.4	476.5	321.6	153.8	114.7	590.2	380.3	233.9	169.0	783.2
TOTAL: RCA	**620.1**	**252.1**	**187.8**	**1,060.0**	**739.3**	**363.1**	**268.7**	**1,371.1**	**949.0**	**601.1**	**428.0**	**1,978.1**

Table D
City of Warrnambool
Estimated Current and Projected Market Share by Regional Catchment Area (2006, 2016, 2031)
Prepared by Ratio Consultants, June 2007

Regional Catchment Area Component (SLA)	Estimated Warrnambool Market Share % Retail Expenditure by Resident Households bound to Warrnambool								
	Estimated Current Market Share			Projected Future Market Share					
				Scenario 1: Single additional Discount Department Store establishes in Warrnambool			Scenario 2: Additional Discount Department Store and Department Store establishes in Warrnambool		
	November 2006			2016 & 2031			2016 & 2031		
	Food, Groceries & Liquor (%)	Household Goods (%)	Bulky Goods (%)	Food, Groceries & Liquor (%)	Household Goods* (%)	Bulky Goods** (%)	Food, Groceries & Liquor ^ (%)	Household Goods^^ (%)	Bulky Goods^^ (%)
PRIMARY CATCHMENT AREA									
Warrnambool (C)	95.0	87.0	87.0	95.0	93.0	93.0	96.0	95.0	95.0
Moyne (S) - South	95.0	87.0	87.0	95.0	93.0	93.0	96.0	95.0	95.0
SECONDARY CATCHMENT AREA									
Moyne (S) - South	80.0	80.0	82.0	80.0	89.3	93.8	81.0	92.0	94.0
Moyne (S) - North-East	30.0	40.0	65.0	30.0	44.7	74.3	30.4	46.0	74.5
Moyne (S) - North-West	78.0	60.0	76.0	78.0	67.0	86.9	79.0	69.0	87.1
Corangamite (S) - North	20.0	38.0	58.0	20.0	42.4	66.3	20.3	43.7	66.5
Corangamite (S) - South	35.0	60.0	71.0	35.0	67.0	81.2	35.4	69.0	81.4
TERTIARY CATCHMENT AREA									
Moyne (S) - North-East	15.0	35.0	54.0	15.0	39.1	61.7	15.0	40.8	64.0
Moyne (S) - North-West	25.0	55.0	45.0	25.0	61.4	51.5	25.0	64.2	53.3
Moyne (S) - South	25.0	60.0	52.0	25.0	67.0	59.5	25.0	70.0	61.6
Glenelg (S) - Portland	6.0	46.0	26.0	6.0	51.3	29.7	6.0	53.7	30.8
Glenelg (S) - Heywood	7.0	45.0	26.0	7.0	50.2	29.7	7.0	52.5	30.8
Corangamite (S) - North	5.0	35.0	35.0	5.0	39.1	40.0	5.0	40.8	41.5
Corangamite (S) - South	15.0	40.0	45.0	15.0	44.7	51.5	15.0	46.7	53.3
S. Grampians (S) - Hamilton	2.0	38.0	22.0	2.0	42.4	25.2	2.0	44.3	26.1
S. Grampians (S) Balance	2.0	38.0	22.0	2.0	42.4	25.2	2.0	44.3	26.1
Colac-Otway (S) - South	2.0	30.0	25.0	2.0	33.5	28.6	2.0	35.0	29.6
Colac-Otway (S) - Colac	1.0	10.0	3.0	1.0	11.2	3.4	1.0	11.7	3.6
Colac-Otway (S) - North	2.0	25.0	15.0	2.0	27.9	17.2	2.0	29.2	17.8

* Includes 6 % points for potential (global) market share for new major stores.
** Includes 7 % points for bulky goods attractors yet to come on-line.

^ Assumes a maximum increase of 1% in market share from 2006 due to impact of new major stores.
^^ Assumes a maximum increase of 12% in market share from 2006 due to impact of new major stores.

Table E.1

Warrnambool: Estimated Retail Sales by Commodity Group (2006) (as June 2006 constant prices)

Analysis by Ratio Consultants, June 2007

Table C x Table D: Columns 1-3

Regional Catchment Area	Estimated Retail Sales by Source Area by Major Commodity Group 2005/06 $million at June 2006 constant prices			
	FGL	Household Goods	Bulky Goods	Total Retail Goods
PRIMARY CATCHMENT AREA				
Warrnambool (C)	194.3	76.4	51.5	322.2
Moyne (S) - South	5.8	2.1	1.6	9.5
Total: Primary Catchment	**200.1**	**78.5**	**53.1**	**331.6**
SECONDARY CATCHMENT AREA				
Moyne (S) - South	43.6	17.1	13.4	74.1
Moyne (S) - North-East	3.2	1.6	1.8	6.6
Moyne (S) - North-West	2.4	0.7	0.7	3.8
Corangamite (S) - North	8.2	6.3	9.4	23.9
Corangamite (S) - South	6.5	4.3	5.1	15.9
Total: Secondary Catchment	**64.0**	**30.0**	**30.4**	**124.3**
TERTIARY CATCHMENT AREA				
Moyne (S) - North-East	0.2	0.2	0.2	0.5
Moyne (S) - North-West	2.5	2.0	1.3	5.8
Moyne (S) - South	1.4	1.3	0.9	3.6
Glenelg (S) - Portland	4.1	12.7	5.1	22.0
Glenelg (S) - Heywood	1.4	3.4	1.3	6.1
Corangamite (S) - North	0.2	0.5	0.5	1.1
Corangamite (S) - South	4.5	4.6	5.1	14.2
S. Grampians (S) - Hamilton	1.1	8.4	3.7	13.2
S. Grampians (S) - Balance	0.2	1.5	0.7	2.4
Colac-Otway (S) - South	0.1	0.5	0.3	0.9
Colac-Otway (S) - Colac	0.6	2.6	0.5	3.8
Colac-Otway (S) - North	0.2	0.9	0.4	1.4
Total: Tertiary Catchment	**16.4**	**38.5**	**19.9**	**74.8**
Trade from Beyond the Tertiary Catchment	2.8	4.5	3.2	10.6
City of Warrnambool: Total Retail Sales	**283.4**	**151.5**	**106.5**	**541.4**

Proportions of trade captured from beyond the RCA are; 1% (FGL), 3% (Household Goods) and 3% (Bulky Goods)

Table E.2

SCENARIO 1: Warrnambool: Projected Retail Sales (2016) (as June 2006 constant prices)

Analysis by Ratio Consultants, June 2007

Table C x Table D: Columns 4-6

Regional Catchment Area	Projected Retail Sales by Source Areas by Major Commodity Group 2015/16 $million at June 2006 constant prices			
	FGL	Household Goods	Bulky Goods	Total Retail Goods
PRIMARY CATCHMENT AREA				
Warrnambool (C)	253.6	128.3	86.4	468.4
Moyne (S) - South	6.9	3.2	2.5	12.6
Total: Primary Catchment	**260.5**	**131.5**	**88.9**	**480.9**
SECONDARY CATCHMENT AREA				
Moyne (S) - South	52.0	27.3	22.0	101.4
Moyne (S) - North-East	3.2	2.2	2.4	7.8
Moyne (S) - North-West	2.4	0.9	0.9	4.3
Corangamite (S) - North	8.8	9.0	13.9	31.7
Corangamite (S) - South	7.3	6.5	7.8	21.6
Total: Secondary Catchment	**73.7**	**46.0**	**47.1**	**166.7**
TERTIARY CATCHMENT AREA				
Moyne (S) - North-East	0.2	0.2	0.2	0.5
Moyne (S) - North-West	2.5	2.2	1.4	6.2
Moyne (S) - South	1.4	1.5	1.0	3.8
Glenelg (S) - Portland	4.1	14.2	5.9	24.2
Glenelg (S) - Heywood	1.4	3.8	1.5	6.7
Corangamite (S) - North	0.2	0.5	0.5	1.2
Corangamite (S) - South	4.5	5.2	5.9	15.5
S. Grampians (S) - Hamilton	1.1	9.3	4.2	14.7
S. Grampians (S) - Balance	0.2	1.7	0.8	2.6
Colac-Otway (S) - South	0.1	0.5	0.3	1.0
Colac-Otway (S) - Colac	0.6	2.9	0.6	4.2
Colac-Otway (S) - North	0.2	1.0	0.4	1.6
Total: Tertiary Catchment	**16.4**	**43.0**	**22.7**	**82.2**
Trade from Beyond the Tertiary Catchment	3.5	6.8	4.9	15.3
City of Warrnambool: Total Retail Sales	**354.2**	**227.3**	**163.6**	**745.1**

Proportions of trade captured from beyond the RCA are; 1% (FGL), 3% (Household Goods) and 3% (Bulky Goods)

Table E.3

SCENARIO 2: Warrnambool: Projected Retail Sales (2016) (as June 2006 constant prices)

Analysis by Ratio Consultants, June 2007

Table C x Table D: Columns 7-9

Regional Catchment Area	Projected Retail Sales by Source Areas by Major Commodity Group 2015/16 $million at June 2006 constant prices			
	FGL	Household Goods	Bulky Goods	Total Retail Goods
PRIMARY CATCHMENT AREA				
Warrnambool (C)	256.3	131.1	88.3	475.6
Moyne (S) - South	7.0	3.3	2.5	12.8
Total: Primary Catchment	**263.3**	**134.3**	**90.8**	**488.4**
SECONDARY CATCHMENT AREA				
Moyne (S) - South	52.6	28.2	22.1	102.9
Moyne (S) - North-East	3.2	2.3	2.5	7.9
Moyne (S) - North-West	2.5	1.0	0.9	4.3
Corangamite (S) - North	8.9	9.3	13.9	32.1
Corangamite (S) - South	7.4	6.7	7.8	21.9
Total: Secondary Catchment	**74.6**	**47.4**	**47.2**	**169.2**
TERTIARY CATCHMENT AREA				
Moyne (S) - North-East	0.2	0.2	0.2	0.6
Moyne (S) - North-West	2.5	2.8	1.8	7.1
Moyne (S) - South	1.6	2.2	1.5	5.3
Glenelg (S) - Portland	4.8	20.6	8.5	33.9
Glenelg (S) - Heywood	1.6	5.5	2.2	9.3
Corangamite (S) - North	0.2	0.7	0.7	1.6
Corangamite (S) - South	5.0	7.3	8.2	20.4
S. Grampians (S) - Hamilton	1.2	13.0	5.9	20.2
S. Grampians (S) - Balance	0.2	2.3	1.0	3.5
Colac-Otway (S) - South	0.1	0.7	0.4	1.3
Colac-Otway (S) - Colac	0.8	4.5	0.9	6.2
Colac-Otway (S) - North	0.2	1.3	0.5	2.0
Total: Tertiary Catchment	**18.4**	**61.2**	**31.8**	**111.3**
Trade from Beyond the Tertiary Catchment	3.6	12.8	8.9	25.3
City of Warrnambool: Total Retail Sales	**359.8**	**255.6**	**178.8**	**794.2**

Proportions of trade captured from beyond the RCA are; 1% (FGL), 5% (Household Goods) and 5% (Bulky Goods)

Table E.4

SCENARIO 1: Warrnambool: Projected Retail Sales (2031) (as June 2006 constant prices)

Analysis by Ratio Consultants

Table C x Table D: Columns 4-6

Regional Catchment Area	**Projected Retail Sales by Source Areas by Major Commodity Group 2030/31 $million at June 2006 constant prices**			
	FGL	Household Goods	Bulky Goods	Total Retail Goods
PRIMARY CATCHMENT AREA				
Warrnambool (C)	371.8	241.5	158.0	771.3
Moyne (S) - South	8.9	5.3	3.9	18.1
Total: Primary Catchment	**380.7**	**246.7**	**161.9**	**789.4**
SECONDARY CATCHMENT AREA				
Moyne (S) - South	66.7	45.0	35.2	146.8
Moyne (S) - North-East	2.8	2.5	2.7	8.1
Moyne (S) - North-West	2.2	1.1	1.0	4.2
Corangamite (S) - North	9.5	12.4	18.7	40.6
Corangamite (S) - South	8.7	10.0	11.6	30.3
Total: Secondary Catchment	**89.9**	**71.0**	**69.3**	**230.1**
TERTIARY CATCHMENT AREA				
Moyne (S) - North-East	0.2	0.2	0.2	0.6
Moyne (S) - North-West	2.2	3.0	1.9	7.1
Moyne (S) - South	2.1	3.4	2.3	7.8
Glenelg (S) - Portland	5.8	30.6	12.3	48.7
Glenelg (S) - Heywood	1.9	7.9	3.1	12.9
Corangamite (S) - North	0.2	1.0	0.9	2.1
Corangamite (S) - South	6.0	10.7	11.8	28.4
S. Grampians (S) - Hamilton	1.4	18.1	8.0	27.6
S. Grampians (S) - Balance	0.2	2.8	1.3	4.3
Colac-Otway (S) - South	0.1	1.2	0.7	1.9
Colac-Otway (S) - Colac	1.0	6.9	1.4	9.3
Colac-Otway (S) - North	0.2	1.9	0.7	2.9
Total: Tertiary Catchment	**21.2**	**87.7**	**44.5**	**153.4**
Trade from Beyond the Tertiary Catchment	5.0	12.5	8.5	26.0
City of Warrnambool: Total Retail Sales	**496.7**	**418.1**	**284.3**	**1,199.0**

Proportions of trade captured from beyond the RCA are; 1% (FGL), 3% (Household Goods) and 3% (Bulky Goods)

Table E.5

SCENARIO 2: Warrnambool: Projected Retail Sales (2031) (as June 2006 constant prices)

Analysis by Ratio Consultants

Table C x Table D: Columns 7-9

Regional Catchment Area	Projected Retail Sales by Source Areas by Major Commodity Group 2030/31 $million at June 2006 constant prices			
	FGL	Household Goods	Bulky Goods	Total Retail Goods
PRIMARY CATCHMENT AREA				
Warrnambool (C)	375.7	246.7	161.4	783.8
Moyne (S) - South	9.0	5.4	4.0	18.4
Total: Primary Catchment	**384.7**	**252.1**	**165.4**	**802.2**
SECONDARY CATCHMENT AREA				
Moyne (S) - South	67.5	46.4	35.3	149.1
Moyne (S) - North-East	2.9	2.6	2.7	8.2
Moyne (S) - North-West	2.2	1.1	1.0	4.3
Corangamite (S) - North	9.6	12.8	18.7	41.1
Corangamite (S) - South	8.8	10.3	11.7	30.8
Total: Secondary Catchment	**91.0**	**73.2**	**69.4**	**233.6**
TERTIARY CATCHMENT AREA				
Moyne (S) - North-East	0.2	0.3	0.3	0.7
Moyne (S) - North-West	2.2	3.2	1.9	7.3
Moyne (S) - South	2.1	3.6	2.3	8.0
Glenelg (S) - Portland	5.8	32.0	12.7	50.5
Glenelg (S) - Heywood	1.9	8.3	3.2	13.3
Corangamite (S) - North	0.2	1.0	1.0	2.2
Corangamite (S) - South	6.0	11.1	12.2	29.3
S. Grampians (S) - Hamilton	1.4	19.0	8.3	28.7
S. Grampians (S) - Balance	0.2	3.0	1.3	4.5
Colac-Otway (S) - South	0.1	1.2	0.7	2.0
Colac-Otway (S) - Colac	1.0	7.2	1.4	9.6
Colac-Otway (S) - North	0.2	2.0	0.8	3.0
Total: Tertiary Catchment	**21.2**	**91.7**	**46.2**	**159.0**
Trade from Beyond the Tertiary Catchment	5.0	21.9	14.8	41.8
City of Warrnambool: Total Retail Sales	**501.9**	**438.9**	**295.8**	**1,236.6**

Proportions of trade captured from beyond the RCA are; 1% (FGL), 5% (Household Goods) and 5% (Bulky Goods)

Table F.1 A
City of Warrnambool: Summary of Occupied Retail Goods Floorspace (2006) (GLA)
Prepared by Ratio Consultants
Source: Floorspace Survey, July 2006

Continued F.1 B →

Centre	Floorspace by Retail-Commercial Activity Category (GLA m2)												
	Food Groceries and Liquor					Retail Non-Food				Bulky Goods	TOTAL OCCUPIED RETAIL GOODS FLOORSPACE	Retail Services	TOTAL SHOPFRONT FLOORSPACE
	Supermarket & Liquor	Specialty Food & Takeaway	Cafes, Bars & Restaurants	Fresh Food Retailing	Total Food, Groceries & Liquor	Department Stores	Other Clothing & Footwear Stores	Other Household A Stores	Total Retail Non-Food				
Warrnambool City Centre													
Core Precinct													
Block 18	1,800	162	411	59	2,432	6,640	1,814	3,180	11,634	147	14,212	997	15,210
Block 19			449	182	631		986	1,901	2,887		3,519	753	4,272
Block 11		559	1,709		2,269		530	2,142	2,672	365	5,306	519	5,825
Block 10		528	1,379	140	2,047		196	54	250		2,297	378	2,675
Sub-Total: Core Precinct	**1,800**	**1,250**	**3,949**	**380**	**7,379**	**6,640**	**3,526**	**7,277**	**17,444**	**512**	**25,334**	**2,647**	**27,982**
Raglan Precinct													
Block 27	4,006	364	50	116	4,535		414	721	1,135	2,031	7,701	430	8,131
Block 26								1,346	1,346	341	1,687	222	1,909
Block 25		456	137		593		1,378	393	1,771	3,189	5,552	305	5,857
Block 24	96	398	529		1,023		603	492	1,095	1,801	3,918	155	4,073
Sub-Total: Raglan Precinct	**4,102**	**1,217**	**716**	**116**	**6,151**		**2,394**	**2,952**	**5,346**	**7,362**	**18,858**	**1,111**	**19,969**
Professional Services Precinct													
Block 16	1,398	126	435		1,958		135	786	921		2,879	252	3,131
Block 13								305	305		305		305
Block 2								424	424	1,067	1,491		1,491
Sub-Total: Professional Services Precinct	**1,398**	**126**	**435**		**1,958**		**135**	**1,515**	**1,650**	**1,067**	**4,676**	**252**	**4,928**
Western Business District													
Block 17	473	253	311		1,037		626	2,642	3,268	239	4,544	3,406	7,950
Block 18		161	829		990			397	397	504	1,890	213	2,103
Block 3	4,509		182		4,691	2,923			2,923	248	7,862		7,862
Block 12	468				468		315	781	1,096	4,419	5,983	1,735	7,718
Block 11		264	963		1,227		36	2,051	2,087		3,314	426	3,740
Sub-Total: Western Business District	**5,450**	**677**	**2,284**		**8,412**	**2,923**	**978**	**5,870**	**9,771**	**5,410**	**23,593**	**5,780**	**29,373**
Eastern Precinct													
Block 19				73	73			360	360		433	108	541
Block 10			84		84			82	82		166	149	314
Block 5		234	205		439						439		439
Sub-Total: Eastern Precinct		**234**	**288**	**73**	**595**			**443**	**443**		**1,037**	**257**	**1,294**
Civic Precinct													
Block 4												2,187	2,187
Block 5			311		311						311		311
Sub-Total: Civic Precinct			**311**		**311**						**311**	**2,187**	**2,497**
Total: City Centre	**12,570**	**3,505**	**7,672**	**569**	**24,315**	**8,899**	**7,033**	**18,056**	**33,989**	**14,351**	**72,655**	**10,047**	**82,702**
Eastern Activity Precinct													
Gateway Plaza	3,447	328	153	181	4,109	6,800	2,670	674	10,144		14,254	232	14,486
Harvey Norman										10,011	10,011	524	10,535
Homemaker Centre										10,797	10,797		10,797
Bunnings													
Total: Eastern Activity Precinct	**3,447**	**328**	**153**	**181**	**4,109**	**6,800**	**2,670**	**674**	**10,144**	**20,808**	**35,062**	**756**	**35,818**
Local Centres													
Northpoint Village	1,012				1,012			110	110		1,122	150	1,272
Other**	338				338						338	200	538
Sub-Total: Local Centres	**1,350**				**1,350**			**110**	**110**		**1,460**	**350**	**1,810**
Total: Existing Provision	**17,367**	**3,833**	**7,825**	**750**	**29,775**	**15,699**	**9,704**	**18,840**	**44,243**	**35,159**	**109,176**	**11,153**	**120,329**

****Floorspace for Other centres taken from Northpoint Village Shopping Centre and Tavern EIA, May 2004**

Table F.1 B
City of Warrnambool: Summary of Occupied Retail Goods Floorspace (2006) (GLA)
Prepared by Ratio Consultants
Source: Floorspace Survey, July 2006

Centre	Floorspace by Retail-Commercial Activity Category (GLA m2)							
	Commercial, Professional & Community Services				Trade Services	Vacant	Unknown Tenant	TOTAL FLOORSPACE
	Commerical Services	Health & Community Services	Entertainment & Recreation Services	Total CPC Services				
Warrnambool City Centre								
Core Precinct								
Block 18	458	342		800		15		16,025
Block 19	950	278		1,227				5,499
Block 11	506	142	271	919				6,744
Block 10	2,241		211	2,452				5,127
Sub-Total: Core Precinct	**4,154**	**762**	**482**	**5,398**		**15**		**33,395**
Raglan Precinct								
Block 27	1,977	442	1,737	4,156	1,470	1,336		15,092
Block 26	582	1,054		1,636	2,302	275	500	6,622
Block 25	774	60	1,264	2,097	1,319	47	81	9,401
Block 24	397		5,617	6,014	838	83		11,008
Sub-Total: Raglan Precinct	**3,731**	**1,556**	**8,618**	**13,904**	**5,929**	**1,741**	**581**	**42,124**
Professional Services Precinct								
Block 16	224	2,743	225	3,192	3,041			9,365
Block 13	1,571			1,571	331			2,207
Block 2	756	215	705	1,676	583			3,750
Sub-Total: Professional Services Precinct	**2,551**	**2,958**	**930**	**6,439**	**3,956**			**15,322**
Western Business District								
Block 17	4,973	1,958	1,996	8,927	464	234	376	17,951
Block 18	1,068	338		1,405	139	356		4,003
Block 3	443	208	2,106	2,757	1,364			11,982
Block 12	2,804	2,097		4,900	295	457		13,371
Block 11	2,758	410	1,900	5,068	71	146		9,025
Sub-Total: Western Business District	**12,044**	**5,010**	**6,003**	**23,057**	**2,333**	**1,193**	**376**	**56,332**
Eastern Precinct								
Block 19	2,060			2,060				2,601
Block 10	389	784		1,174		166		1,654
Block 5	622	110	1,985	2,717				3,156
Sub-Total: Eastern Precinct	**3,072**	**894**	**1,985**	**5,951**		**166**		**7,411**
Civic Precinct								
Block 4	1,634		2,576	4,211				6,398
Block 5			1,152	1,152				1,463
Sub-Total: Civic Precinct	**1,634**		**3,728**	**5,363**				**7,860**
Total: City Centre	**25,551**	**11,179**	**18,017**	**54,748**	**12,217**	**3,116**	**957**	**153,739**
Eastern Activity Precinct								
Gateway Plaza		122	72	194		64		14,743
Harvey Norman					697			11,232
Homemaker Centre						16,694		27,491
Bunnings						13,380		13,380
Total: Eastern Activity Precinct		**122**	**72**	**194**	**697**	**30,138**		**66,846**
Local Centres								
Northpoint Village								1,272
Other**								538
Sub-Total: Local Centres								**1,810**
Total: Existing Provision	**25,551**	**11,301**	**18,089**	**54,942**	**12,914**	**33,253**	**957**	**222,396**

****Floorspace for Other centres taken from Northpoint Village Shopping Centre and Tavern EIA, May 2004**

Table F.2

City of Warrnambool: Estimated Indicative Allocation of Approved Floorspace by Major Commodity Group (January 2007) m^2 GLA

Source: Table F.1, Stakeholder Consultations and City of Warrnambool

Centre	Floorspace by Retail-Commercial Activity Category (GLA m2)								
	Food, Groceries & Liquor	Household Goods	Bulky Goods	Total Shopfront	Retail Services	Commercial, Professional and Community Services	Trade Services	Total Retail and Commercial Floorspace	Net Additional Floorspace (m²)
Warrnambool City Centre									
Raglan Precinct									
Redevelopment of Betta Electrical site						1,350		1,350	
Expansion of Market Arcade		1,000		1,000				1,000	688
Sub-Total: Raglan Precinct		1,000		1,000		1,350		2,350	688
Western Business District									
Warrnambool Co-op redevelopment	965	2,336		3,301		1,130	3,000	7,431	3,743
Coles Expansion	400			500				500	400
Sub-Total: Western Business District	1,365	2,336		3,801		1,130	3,000	7,931	4,143
Total: City Centre	**1,365**	**3,336**		**4,801**		**2,480**	**3,000**	**10,281**	**4,831**
Eastern Activity Precinct									
Gateway Plaza	4,800	5,590		10,390				10,390	10,390
Sherwood Scott Land	1,000	1,000	1,075	3,075		2,025		5,100	5,100
Flying Horse redevelopment	1,000			1,000		3,000		4,000	4,000
Total: Eastern Activity Precinct	**6,800**	**6,590**	**1,075**	**14,465**		**5,025**		**19,490**	**19,490**
Local Centres									
Northpoint Village	2,938	1,665		4,603	220			4,823	4,823
Sub-Total: Local Centres	**2,938**	**1,665**		**4,603**	**220**			**4,823**	**4,823**
Total: Estimated Approved Floorspace	**11,103**	**11,591**	**1,075**	**23,869**	**220**	**7,505**	**3,000**	**34,594**	**29,144**

Table F.3
City of Warrnambool : Minimal Estimated Developed Floorspace (year ended 30 June 2016)
(Basis of calculation : Vacancy adjustments to Table F.1 and Table F.4)

Centre	Potentially Occupied Floorspace by Retail-Commercial Activity Category (GLA m2) Based on Existing Approvals (at January 2007)									
	Food, groceries and liquor	Household Goods	Bulky Goods	Total Occupied Retail Goods Floorspace	Retail Services	Total Occupied Shopfront Floorspace	Commercial, Professional Services and Community Floorspace	Trade Services	Vacant	Total Retail and Commercial Floorspace
Warrnambool City Centre	24,696	32,755	13,806	71,258	14,695	85,953	56,812	14,338	3,161	160,264
Eastern Activity Precinct	11,096	16,093	50,680	77,869	756	78,625	5,219	1,777	64	85,684
Local Centres	4,288	1,775		6,063	570	6,633				6,633
Total City of Warrnambool	40,081	50,622	64,486	155,189	16,021	171,210	62,031	16,115	3,225	252,581

Table F.4

City of Warrnambool : Minimal Estimated Developed Floorspace (year ended 30 June 2016) *

Allows for 4% vacant floorspace

(Based on Table F.3)

Centre	Potentially Occupied Floorspace by Retail-Commercial Activity Category (GLA m2) Based on Existing Approvals and Allows for 4% Vacancy Rate									
	Food, groceries and liquor	Household Goods	Bulky Goods	Total Occupied Retail Goods Floorspace	Retail Services	Total Occupied Shopfront Floorspace	Commercial, Professional Services and Community Floorspace	Trade Services	Vacant	Total Retail and Commercial Floorspace
Warrnambool City Centre	24,180	32,070	13,520	69,780	14,390	84,170	55,630	14,040	6,410	160,250
Eastern Activity Precinct	10,660	15,460	48,690	74,810	740	75,550	5,010	1,710	3,430	85,700
Local Centres	4,120	1,700		5,820	560	6,380			270	6,650
Total City of Warrnambool	**38,960**	**49,230**	**62,210**	**150,410**	**15,690**	**166,100**	**60,640**	**15,750**	**10,110**	**252,600**

N.B. Please note that all calculations are based on original figures that were not rounded. These figures have been rounded to the nearest 10 units which would explain for marginal differences when calculated.

Table G

City of Warrnambool: Retail Turnover Densities and Projected Requirements

(2006, 2016, 2031 at June 2006 constant prices)

Prepared by Ratio Consultants, June 2007

Major Commodity Group	City of Warrnambool Retail Turnover Density $ turnover/ m^2 Gross Leasable Area/ Annum at June 2006 constant prices			
	Estimated Actual	Required**	Projected Requirements^	
	2005/06	2005/06	2015/16	2030/31
Food, groceries and liquor	8,662	8,500	9,000	9,500
Household Goods	3,237	3,700	4,336	5,422
Bulky Goods	2,622	3,700	4,336	5,033
Column (1)	(2)	(3)	(4)	(5)

* Estimated by Ratio Consultants

Column (3) = Table E.1 / Table F.1

^ Assuming RTD Growth of 1.5% per annum

Table H.1
City of Warrnambool: Total Retail Goods Floorspace Requirements (2006, 2016, 2031)
Prepared by Ratio Consultants, June 2007

	SUPPLY		DEMAND			
	Retail Goods Floorspace Provision Gross Leasable Area (m^2)		City of Warrnambool: Total Retail Goods Floorspace Requirements Gross Leasable Area (m^2)			
Major Commodity Group	**Occupied Floorspace**	**Estimated Future Floorspace Provision ***	**Scenario 1: Single additional Discount Department Store establishes in Warrnambool**		**Scenario 2: Additional Discount Department Store and Department Store establishes in Warrnambool**	
	2005/06	**2016**	**2015/16**	**2030/31**	**2015/16**	**2030/31**
Food, Groceries and Liquor	29,770	38,960	39,350	52,280	39,980	52,830
Household Goods	44,240	49,230	52,420	77,110	58,950	80,950
Bulky Goods	35,160	62,210	37,730	56,480	41,220	58,780
Total: Occupied Retail Goods Floorspace Required	**109,170**	**150,400**	**129,500**	**185,870**	**140,150**	**192,560**
Calculations made from Tables:	Table F.1	Table F.4	Table E.2 Table G.1 (Column 4)	Table E.4 Table G.1 (Column 5)	Table E.3 Table G.1 (Column 4)	Table E.5 Table G.1 (Column 5)

N.B. Please note that all calculations are based on original figures that were not rounded. These figures have been rounded to the nearest 10 units which accounts for marginal differences when calculated.

* Based on current approvals and floorspace under development.

Table H.2
Warrnambool and Regional Catchment: Calculation of Net Effective Supporting Population (2006, 2016, 2031)
Prepared by Ratio Consultants, June 2007
Basis of Calculation: Table A.8 X Table D.4

Regional Catchment Area Component (SLA)	Year ended 30 June 2006			Year ended 30 June 2016 ^			Year ended 30 June 2031 ^		
	Net Effective Supporting Population (No. of Persons)			Net Effective Supporting Population (No. of Persons)			Net Effective Supporting Population (No. of Persons)		
	Food, groceries and liquor	Household Goods	Bulky Goods	Food, groceries and liquor	Household Goods	Bulky Goods	Food, groceries and liquor	Household Goods	Bulky Goods
PRIMARY CATCHMENT									
Warrnambool (C)	30,010	27,480	27,480	34,780	34,420	34,420	42,010	41,580	41,580
Moyne (S) - South	940	860	860	1,000	990	990	1,060	1,050	1,050
TOTAL: PRIMARY CATCHMENT	30,950	28,340	28,340	35,780	35,410	35,410	43,070	42,630	42,630
SECONDARY CATCHMENT									
Moyne (S) - South	7,080	7,080	7,260	7,510	8,530	8,710	7,930	9,010	9,200
Moyne (S) - North-East	510	680	1,110	460	690	1,120	340	510	830
Moyne (S) - North - West	400	310	390	360	310	390	260	230	290
Corangamite (S) - North	1,320	2,510	3,830	1,260	2,710	4,130	1,120	2,410	3,660
Corangamite (S) - South	1,050	1,810	2,140	1,050	2,040	2,400	1,030	2,010	2,370
TOTAL: SECONDARY CATCHMENT	10,360	12,390	14,730	10,640	14,280	16,750	10,680	14,170	16,350
TERTIARY CATCHMENT									
Moyne (S) - North-East	30	70	100	20	70	100	20	50	80
Moyne (S) - North-West	410	900	740	360	920	760	260	660	550
Moyne (S) - South	230	540	470	240	660	580	250	690	610
Glenelg (S) - Portland	640	4,900	2,770	650	5,810	3,340	650	5,790	3,320
Glenelg (S) - Heywood	220	1,440	830	230	1,700	1,000	220	1,640	960
Corangamite (S) - North	30	190	190	30	210	220	20	190	190
Corangamite (S) - South	720	1,920	2,160	710	2,200	2,520	700	2,170	2,480
S. Grampians (S) - Hamilton	180	3,470	2,010	180	3,950	2,320	170	3,680	2,170
S. Grampians (S) Bal	30	620	360	30	690	410	30	580	340
Colac-Otway (S) - South	10	190	160	10	210	170	10	220	180
Colac-Otway (S) - Colac	100	1,000	300	110	1,250	380	110	1,290	390
Colac-Otway (S) - North	30	400	240	30	420	260	30	420	260
TOTAL: TERTIARY CATCHMENT	2,630	15,640	10,330	2,600	18,090	12,060	2,470	17,380	11,530
Total: Areas beyond the RCA*	440	1,740	1,650	500	2,100	1,990	570	2,290	2,180
TOTAL: RCA	**44,380**	**58,110**	**55,050**	**49,520**	**69,880**	**66,210**	**56,790**	**76,470**	**72,690**

*Proportions of trade captured from beyond the RCA are; 1% (FGL), 3% (Household Goods) and 3% (Bulky Goods)
Note: Variation in totals may be due to rounding

^ Based on Scenario 2: Where Warrnambool attracts both an additional Discount Department Store and Department Store.

Table H.3
City of Warrnambool and Regional Catchment Area
Existing and Projected Sustainable Floorspace Provision Per Capita (2006 - 2031)
Prepared by Ratio Consultants (January 2007)

Major Commodity Group	**Sustainable Provision of Floorspace Per Capita for Warrnambool's Effective Supporting Population (refer Table H.2) m^2 GLA / capita**		
	Existing[1]	**Projected[2]**	
	2005/06*	**2015/16**	**2030/31***
Major Commodity/ Service Group			
Retail Goods			
Food, groceries and liquor	0.67	0.72	0.92
Household Goods	0.76	0.80	1.01
Bulky Goods	0.64	0.58	0.78
Total Occupied Retail Goods	2.07	2.10	2.71
Retail Services	0.25	0.25	0.33
Shopfront Floorspace	2.32	2.35	3.03
Commercial, Professional and Community Services	1.00	1.01	1.30
Trade Services	0.25	0.25	0.33
Total Occupied Retail Commercial Floorspace	3.57	3.62	4.67

*Market based sustainable provision of floorspace per capita
[1] Calculation for FGL, Household Goods and Bulky Goods: Table H.1 / Table H.2
[2] Calculation for FGL, Household Goods and Bulky Goods: Table F.1 / Table H.2

Table H.4
City of Warrnambool and Regional Catchment Area
Estimated Total Services Floorspace Requirements (2006 - 2031)
Provision Method
(Table H.3 x Table H.2)

Major Service Group	Total Services Floorspace Requirements m^2 GLA		
	2006	2016	2031
Retail Services	11,150	12,620	18,650
Commercial, Professional and Community Services	54,940	67,010	94,800
Trade Services	12,910	16,780	23,750
Total Occupied Services Floorspace	**79,000**	**96,410**	**137,200**

N.B. These figures are based on un-rounded figures, which accounts for marginal differences in totals.

Table H.5
City of Warrnambool
Warrnambool CBD: Development Applications for Office Space Use (2000 - 2006)*
Source: Warrnambool City Council

Year ended 30 June	Redevelopment and Conversion to Office Floorspace (Approved in Period)		Additional Office Floorspace (Approved in Period)		Total		Estimated proportion of occupied floorspace	
	No. of Establishments	GLA m^2	No. of Establishments	GLA m^2	No. of Establishments	GLA m^2	No. of Establishments	GLA m^2
2001	1	110	1	52	2	162	2	162
2002	1	1,800	4	2,971	5	4,771	4	2971
2003 *	-	-	1	420	1	420	1	420
2004	2	1,200	2	394	4	1,594	4	1,594
2005	1	300	5	1,063	6	1,363	6	1,363
2006	3	1,428	3	1,744	6	3,172	1	90
Total	**8**	**4,838**	**16**	**6,644**	**24**	**11,482**	**18**	**6,600**
Column (1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)

*No record of planning applications

Table H.6
City of Warrnambool : Commercial, Professional and Community Services Floorspace Requirements (2006 - 2031)
Source: Office Approvals data, Warrnambool City Council

Assessment Method	Commercial, Professional and Community Services Net Additional Floorspace Required m^2 GLA					
	2006 - 2016		2016 - 2031		2006 - 2031	
	m^2 GLA / annum	m^2 GLA for period	m^2 GLA / annum	m^2 GLA for period	m^2 GLA / annum	m^2 GLA for period
Provision Method	1,210 *	12,070 *	1,850 *	27,790 *	1,590 *	39,850 *
Take-up Method	1,100 **	11,000 **	1500	22500	1340	33,500 **

* Calculated from Table H.4
** Calculated from Table H.5, Column 9
*** Estimated average take-up through the period.

N.B. These figures are based on un-rounded figures, which accounts for marginal differences in totals.

Table H.7
City of Warrnambool: Assessed Total Retail and Commercial Floorspace Requirements (2006, 2016, 2031)
Prepared by Ratio Consultants, January 2007

Major Commodity Group	Total Floorspace Required m^2 GLA Year ended 30 June		
	2006	**2016**	**2031**
Retail Goods Floorspace			
Food, Groceries and Liquor	29,770	39,980	52,830
Household Goods	44,240	58,950	80,950
Bulky Goods	35,160	41,220	58,780
Total Occupied Retail Goods Floorspace	**109,180**	**140,150**	**192,550**
Retail Services Floorspace	11,150	12,620	18,650
Total Occupied Shopfront Floorspace	**120,330**	**152,770**	**211,200**
Commercial, Professional and Community Services	54,940	77,440	99,940
Trade Services	12,910	16,780	23,750
Total Services Floorspace	**67,860**	**94,230**	**123,690**
Total Occupied Retail and Commercial Floorspace	**188,190**	**247,000**	**334,890**
Allowance for vacant floorspace *	7,840	10,290	13,950
Total Retail, Commercial and Services Floorspace Requirement	**196,030**	**257,290**	**348,840**

N.B. These figures are based on un-rounded figures, which accounts for marginal differences in totals.
* 4% of Total Retail, Commercial and Services Floorspace requirement.

Table H.8
City of Warrnambool: Net Additional Retail and Commercial Floorspace Requirements
Calculation: Table H.7-Table F.4)

Major Commodity/Service Group	**Net Additional Floorspace Required m^2 GLA ***		
	2006 - 2016	**2016 - 2031**	**2006 - 2031**
Retail Goods Floorspace			
Food, groceries and liquor	1,020	12,850	13,870
Household goods	9,710	22,000	31,710
Bulky goods	-20,990	17,550	-3,430
Total: Occupied Retail Goods Floorspace	***-10,260***	***52,400***	***42,150***
Retail Services Floorspace	-3,069	6,030	2,960
Total Occupied Shopfront	***-13,329***	***58,430***	***45,110***
Commercial, Professional and Community Services	16,800	22,500	39,300
Trade Services	1,040	6,960	8,000
Total: Services Floorspace	***17,840***	***29,460***	***47,300***

totals.

* Scenario 2 - Based on establishment of a Discount Department Store and Department Store in Warrnambool.

Table J.1
City of Warrnambool: Summary Table
Current and Forecast Retail Goods Sales (2006-2031)
Analysis by Ratio Consultants, November 2007
Summary of Table Set E

Major Commodity Group	City of Warrnambool Retail Goods Sales $ million at June 2006 constant prices				
	2006	2016		2031	
		Scenario 1	Scenario 2	Scenario 1	Scenario 2
Food, groceries and liquor	283.4	354.2	359.8	496.7	501.9
Household goods	151.5	227.3	255.6	418.1	438.9
Bulky goods	106.5	163.6	178.8	284.3	295.8
Total Retail Goods Expenditures	**541.4**	**745.1**	**794.2**	**1,199.0**	**1,236.6**
	Refer Table E.1	Refer Table E.2	Refer Table E.3	Refer Table E.4	Refer Table E.5

Table J.2
City of Warrnambool: Department Store Trade Merchandise (DSTM)
Forecast Sales and Supportable Floorspace
Analysis by Ratio Consultants, November 2007

Department Store Trade Merchandise (DSTM)		2006	2016		2031	
			Scenario 1 (a)	Scenario 2 (b)	Scenario 1 (a)	Scenario 2 (b)
1	Current and Forecast DSTM expenditures bound to Warrnambool ($ milion at June 2006 constant prices)	206.4	312.7	347.5	561.9	587.7
2	Maximum potential DSTM sales at Warrnambool * ($ milion at June 2006 constant prices)	41.3	68.8	83.4	123.6	141.1
3	Sustainable DSTM Floorspace in Warrnambool ^ ** m² GLA	13,760	19,570	23,720	29,160	33,280
4	Warrnambool: Existing and projected DSTM supply ** m² GLA	15,700	21,200	33,200	21,200	33,200
5	Warrnambool: DSTM Demand-Supply floorspace balance (Item 3 - Item 4) ** Supply Requirements (m² GLA)	-1,940	-1,630	-9,480	7,960	80

NOTES:
(a) Assumes an additional Discount Department Store of 5,500 m² GLA establishes in Warrnambool
(b) Assumes an additional Discount Department Store of 5,500 m² GLA and Department Store of 12,000 m² GLA establishes in Warrnambool
* Based on the conjoint market shares for discount and department stores as follows:
Current conditions - 20%
Scenario 1: One additional Discount Department Store or Department Store - 22%
Scenario 2: Two additional Discount Department Stores or Department Stores - 24%
^ Based on estimated Retail Turnover Density (RTD) requirements of:
$3,000 per m² per annum at 2005/06
$3,516 per m² per annum at 2015/16
$4,239 per m² per annum at 2030/31
** All floorspace requirements rounded to the nearest 10 units