ATTACHMENT TO AGENDA ITEM

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Agenda Item 9.2 **Draft Commercial Activity Centres Strategy**

ESSENTIAL ECONOMICS

City of Greater Shepparton

Commercial Activity Centres Strategy

Prepared for

City of Greater Shepparton

by

Essential Economics Pty Ltd

In association with

Spiire

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Authorship

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Preface

The Greater Shepparton Commercial Activity Centres Strategy 2015 has been prepared by **Essential Economics**, in association with **Spiire**. In preparing the Strategy, a detailed consultation program has been undertaken, including a general call for submissions, workshops, face-to-face meetings, a business survey, 'phone survey and stakeholder briefings.

The role of an activity centres strategy is to provide a sensible policy framework that ensures the commercial areas within a municipality function in a manner that supports business growth, employment and community well-being. In Greater Shepparton, no comprehensive activity centre policy framework has previously been implemented, although numerous strategic policies individually deal with activity centre planning issues.

This Strategy emphasises the importance of ensuring that Shepparton remains a key service centre for a broad region of north-central Victoria and southern New South Wales. For this reason, a focus is placed on ensuring that the Shepparton CBD undergoes an ongoing process of investment and renewal that confirms its role as a 'Central Activities District'. The CBD will continue to meet the higher-order retail, commercial, cultural, administrative and other needs of a wide geographic area that extends well beyond municipal boundaries. Likewise, the importance of Shepparton Marketplace as a complementary retail-focussed centre is recognised.

A policy framework is also applied in the Strategy that emphasises the application of the activity centre hierarchy as a tool to guide investment and determine the role and function of individual centres.

Ultimately, it is envisaged that this Strategy will be an overarching document that informs – but does not prescribe – future-decision making by Council and relevant stakeholders.

Contents

EXECUTIVE SUMMARY

Context for Commercial Activity Centres

1 An activity centres strategy is a policy tool that highlights where private sector investment and new business activity is encouraged, identifies the priority locations for new public infrastructure, supports the productive and efficient use of land, and supports liveability for the community.

2 In Greater Shepparton, activity centres are particularly important locations for economic activity and employment. This importance is enhanced by the role that centres have in meeting the needs of a wide geographic area extending across north-central Victoria and southern New South Wales.

3 At present, Greater Shepparton does not have an integrated activity centres policy. Nonetheless, significant direction is provided in the planning scheme and other location-specific policies such as the Shepparton CBD Strategy.

Activity Centres in Greater Shepparton

4 A revised activity centre hierarchy has been prepared for Greater Shepparton and is summarised in the following Table. This hierarchy reflects the role of the Shepparton CBD as a higher-order Central Activities District for a wide geographic area, and the role of Shepparton Marketplace as an important retailing destination for the surrounding region also.

Activity Centre Hierarchy Description

Level in Hierarchy	No. of Centres in Shepparton	Centre
Shepparton Central Activities District	1	Shepparton CBD
Regional Retail Centre	1	Shepparton Marketplace
Sub-Regional Centre	3	Riverside, Mooroopna CBD, Shepparton North
Neighbourhood Centre or Town Centre	3	Echuca Road (Mooroopna North), Rowe Street East (Shepparton Plaza), Tatura
Local Centre or Township Centre	21	Branditt Ave, Graham St, Parkside Drv, King St, Dunkirk Ave, Conifer St, Parker St, Macintosh St, Swallow St, Michel St, Poplar Ave, Archer St, Colliver Rd, Guthrie St, Longstaff St, Kialla, Joseph St, MacIsaac Rd, Murchison, Dookie, Toolamba
Enterprise Corridor	3	Benalla Road, Gateway North (Numurkah Road), Gateway South (Melbourne Road)

Source: Essential Economics

Economic Analysis

5 Activity centres in Shepparton are operating in an environment where population growth is expected to occur for the foreseeable future, primarily due to population growth on the urban fringe of Shepparton and Mooroopna. Areas north of Shepparton – including Echuca, Cobram and southern New South Wales – are also experiencing population growth and will be increasingly important markets for centres, including the Shepparton CBD and Shepparton Marketplace.

6 At present, approximately 19% of spending by residents of Greater Shepparton is directed to retail facilities located outside the region. This is a moderate degree of escape spending from the City of Greater Shepparton, and is within reasonable expectations for a regional area.

7 Total retail floorspace in Greater Shepparton is forecast to increase by between approximately 35,000m^2 and 55,000m^2 between 2015 and 2036. This is up from 218,210m^2 of retail floorspace at present. In indicative terms, an additional 15,000m^2 to 20,000m^2 of commercial office space is also forecast for Greater Shepparton over the same period to 2036.

Vision Statement

8 A vision statement has been developed for the Commercial Activity Centres Strategy as follows:

> *Greater Shepparton is a dynamic regional city with a network of activity centres serving both local residents and people from across north-central Victoria and southern New South Wales, as well as serving tourists and other visitors from further afield.*
>
> *In the future, Greater Shepparton will consolidate and enhance its role as a sophisticated regional City, with a hierarchy of activity centres that provide the full range of modern, well-designed and well-integrated retail, commercial, administrative and cultural facilities in high-quality physical environments at easily accessible locations.*

Objectives and Actions for Activity Centres

9 A set of objectives and actions have been identified to guide the overall application of activity centres policy in Greater Shepparton. These are summarised as follows:

- Support the activity centres hierarchy
- Maximise the regional service role of Shepparton through provision of a dynamic and efficient activity centre hierarchy
- Consolidate a diverse range of activities in centres (noting a specific retail-focus for Shepparton Marketplace)
- Confirm the primacy of the Shepparton CBD

- Support the Regional Retail Role of Shepparton Marketplace in a manner complementary to the Shepparton CBD
- Support the growth of existing centres and the development of new centres to meet urban growth
- Support retail and commercial businesses in smaller towns so that they continue to serve as important focal points for their communities
- Closely monitor out-of-centre development and only allow such development at appropriate locations
- Apply appropriate planning and development criteria for relevant proposals.

10 A specific Shepparton CBD action plan has also been developed, with the following objectives:

- Consider options for the Maude Street Mall to include shared pedestrian-vehicle space
- Encourage investment in community infrastructure, and with a focus on education
- Promote ‘cycle-friendly’ infrastructure and encourage ‘convenience-oriented’ car parking
- Support Shepparton Show Me and other practical measures reinforcing the regional service role
- Encourage re-development and re-use of vacant sites and shops
- Promote the CBD as clean, safe and friendly.

11 Directions have also been applied to individual activity centres, reflecting the overall directions outlined for the Strategy.

INTRODUCTION

Background

Greater Shepparton Council commissioned Essential Economics Pty Ltd, in association with Spiire, to prepare the *Greater Shepparton Commercial Activity Centres Strategy 2015*.The Strategy comprises a detailed assessment of the demand and supply for retail and commercial development in the municipality, and presents recommendations to guide the future development of Greater Shepparton's commercial activity centres.

The *Greater Shepparton Commercial Activity Centres Strategy 2015* provides a policy basis that considers all activity centres in the municipality, and combines existing strategic policies and strategies related to individual centres.

The **Part A Background Report** provides the analysis and discussion upon which the *Greater Shepparton Activity Centres Strategy 2015* is being developed.

The **Part B Activity Centres Strategy** is to be read in conjunction with the Background Report that informs the actions and directions contained in the Strategy.

Study Objective

The objective for the *Greater Shepparton Commercial Activity Centres Strategy 2015* is to prepare a municipal-wide strategy that:

1 Provides a clear understanding of the role and function of urban and rural activity centres in Greater Shepparton

2 Identifies future retail/commercial floorspace requirements for activity centres

3 Identifies the relationship between economic activity, population levels, demographics, and social sustainability of activity centres.

The strategy is accompanied by a set of readily implementable actions designed to achieve a sustainable hierarchy of well-performing commercial activity centres in Greater Shepparton.

Terms and Definitions

Retail Activities

Retail activity is defined according to the Australian Bureau of Statistics (ABS) classification adopted for the 1991/92 Retail and Services Census but excludes garden supplies, marine equipment, and motor vehicle and related traders. This definition of retail is consistent with the normal practice for undertaking retail-economic analysis in Australia.

A range of non-retail uses often operate in conjunction with, or adjacent to, many retail traders. These uses include cinemas, offices, travel agencies, lotto and gaming outlets, banks and other financial institutions, equipment hire and garden supplies, and so on.

In addition, a range of other activities is excluded from the definition of retail because they mainly serve the trade, or non-household, sector. These activities include building supplies, garden supplies, timber yards and so on.

Retail Categories

For the purpose of this Strategy, estimates of retail floorspace and expenditure are divided into the following product categories:

- **Food, Liquor and Groceries (FLG)**: Comprises household spending and floorspace involved in the selling of take-home food, groceries and liquor.
- **Food Catering**: Comprises household spending and floorspace associated with cafes, restaurants and take-away food stores.
- **Non-Food**: Comprises spending on non-food retail products such as apparel, homewares, bulky merchandise, leisure goods and other general merchandise.
- **Retail Services**: Comprises spending on services such as hairdressers, video hire, dry cleaning, photo processing and optical dispensing which typically operate from shopfront locations.

Homemaker Retail

Homemaker retail refers to large format retail stores (usually tenancies of 500m^2 and larger) which typically sell merchandise in bulky goods and homewares product categories, including:

- Furniture and floorcoverings,
- Large appliances,
- Hardware,
- Camping equipment,
- Household electrical products, and
- Manchester.

Homemaker retailing is generally considered as “Restricted Retail Premises” under the Victoria Planning Provisions (VPP). Homemaker retailing often operates in association with traders in non-retail product categories such as automotive and trade supplies, especially where large sites with main road frontage are required.

GST

All spending and turnover figures expressed in this report are inclusive of GST.

Shopfront Office

This term refers to offices located in shopfront tenancies that could otherwise be used as retail tenancies.

Dedicated Office

This term refers to purpose-built office buildings and offices located above ground floor shopfront tenancies.

Consultation

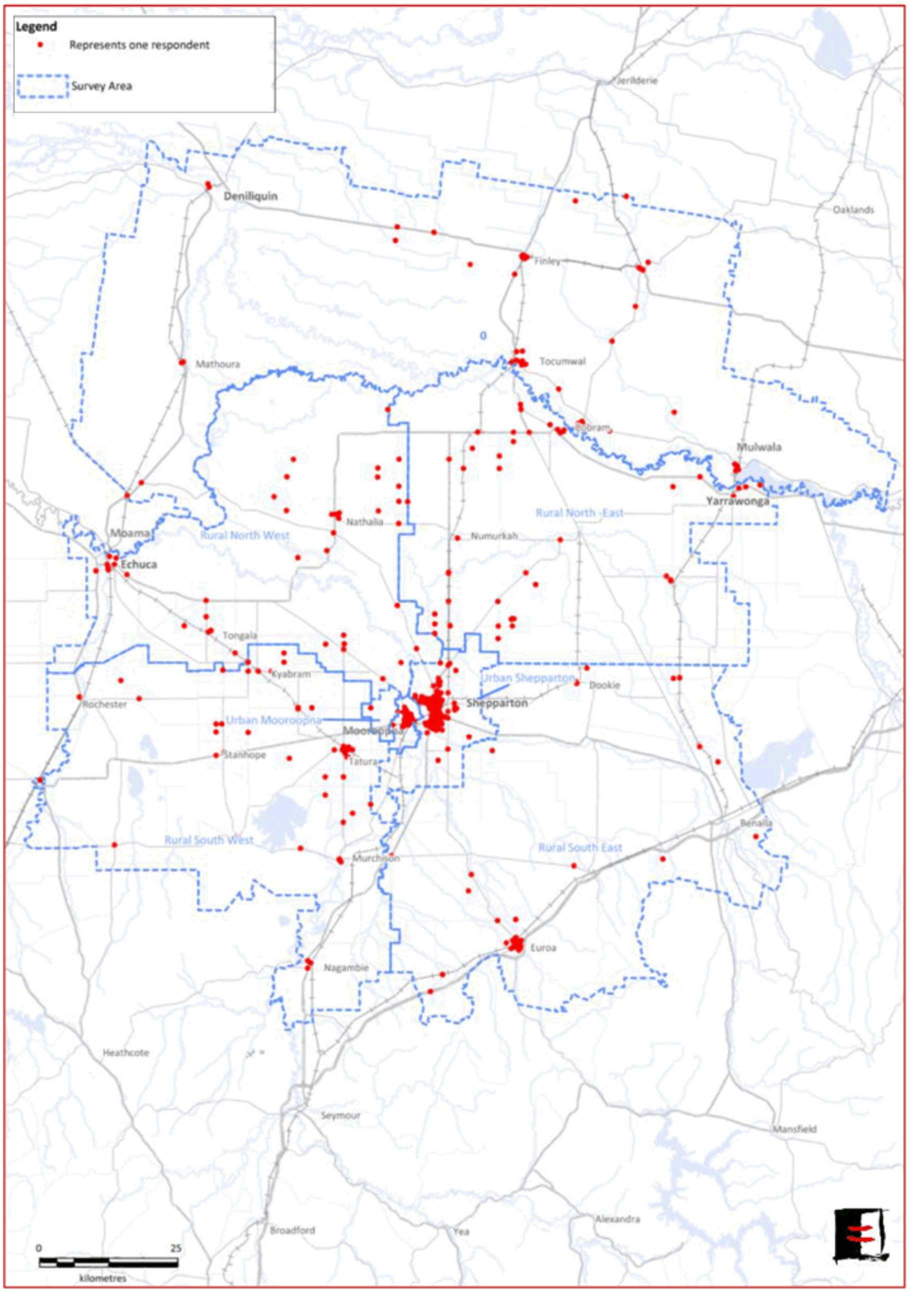
In developing this Strategy a comprehensive consultation program was undertaken, including the following:

- A call for submissions from the general public
- Face-to-face meetings with private stakeholders, including retailers, developers, shopping centre owners and trader group representatives
- Telephone conversations with a range of stakeholders through the course of the study
- Three project briefings to representatives of The Committee for Greater Shepparton, Shepparton Show Me and the Shepparton Chamber of Commerce
- Two community workshops
- A briefing to Councillors
- An online Business Survey.

In October 2014, a household telephone survey was undertaken as a key source of information for use in the preparation of the Strategy. A total of 500 surveys were undertaken across a wide survey area that included the City of Greater Shepparton and across a large rural hinterland. These surveys provided important information on current shopping and visitation patterns, and the views of the community on other issues relevant to activity centres in the City of Greater Shepparton. The survey area and location of respondents is shown in Map A.

More detail on the survey is provided in Appendix C to this report.

Map A: Household Telephone Survey Area and Response Locations



Source: Essential Economics with MapInfo and Street Pro

PART A: BACKGROUND REPORT

1 CONTEXT FOR COMMERCIAL ACTIVITY CENTRES

This Chapter considers the context for development of the *Greater Shepparton Commercial Activity Centres Strategy 2015.*

1.1 What are Activity Centres?

People have always congregated at convenient meeting points to undertake business and meet with friends and family. Historically, 'centres' developed around produce markets and, over time, these locations evolved into town centres and in what the planning system calls 'activity centres' that we know today.

As focal points for the surrounding community, it is important that activity centres serve their communities in an effective way. This means ensuring an appropriate mix of activities (retail, commercial, community, etc) are available in convenient locations, and with opportunities for these centres to further develop their roles and functions where appropriate.

Increasingly, activity centres are also regarded as suitable places for higher-density residential development, thus expanding the residential role of centres well beyond the traditional shop-top housing.

A further characteristic of activity centres is that they typically form part of a 'hierarchy' of centres. Different levels of the hierarchy perform different roles and functions – larger centres perform higher-order functions in the delivery of regional and sub-regional services, while smaller centres further down the hierarchy perform functions that are typically focused at the neighbourhood or local level.

The application of a hierarchy plays an important role for Councils, developers, investors and the wider community in guiding the location of investment, economic activity and employment.

1.2 Why Have an Activity Centres Strategy?

It is important to have an Activity Centres Strategy which can be used as a tool to guide the ongoing performance of centres. An Activity Centres Strategy can:

- Highlight locations where private sector investment and new business activity is encouraged,
- Identify where new and expanded public infrastructure is required,
- Implement a policy framework that supports economic development and efficient use of land, and

- Expand the level and quality of service to the surrounding community where opportunities can be identified and developed.

For Greater Shepparton, the importance of activity centres is emphasised by the important role of the City as a major service centre for a wide region of north-central Victoria and southern New South Wales. It is important that activity centres in Greater Shepparton continue to evolve to meet the needs of the wider region, thus ensuring the significant economic benefits to local businesses and the community are maintained.

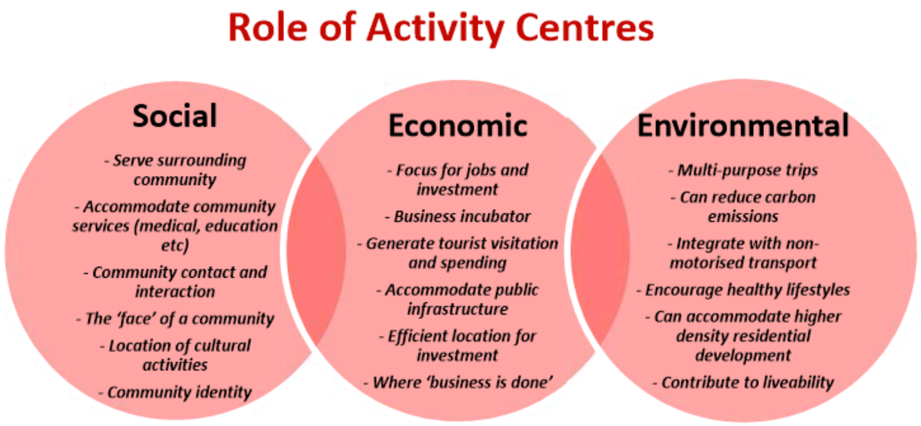
Furthermore, the population of Greater Shepparton continues to expand and this is reflected in increased demand for a range of retail, commercial and community functions. An Activity Centres Strategy provides policy guidance that ensures an appropriate hierarchy of centres develops to meet current and future community need.

1.3 Activity Centres in the Greater Shepparton Economy

Activity centres in Greater Shepparton are a major source of employment, investment and economic activity. In addition, activity centres contribute to the provision of goods and services to the community and are a focus for interaction between individuals and businesses.

For many people, activity centres such as the Shepparton CBD represent the 'face of a community'. The success or otherwise of activity centres is important in influencing perceptions of a community to the outside world. This has implications for cities (such as Greater Shepparton) seeking to attract investment and new residents.

For this reason, activity centres are a particularly important part of the economy in terms of their direct contribution to employment and activity, and through indirect influences on a wide range of economic and social outcomes.



Employment

Activity centres are an important location for employment. In general terms, most sectors of the economy can have a presence in activity centres.

The three sectors that tend to be almost exclusively located in activity centres are:

- Retail Trade
- Accommodation and Food Services
- Financial and Insurance Services.

As shown in Table 1.1, these three sectors account for a total of approximately 4,900 jobs or 20% of jobs located in the City of Greater Shepparton. Other sectors also have a relatively strong propensity to locate in activity centres, including real estate services, postal services, professional and administrative services, public administration, and the like.

Table 1.1: City of Greater Shepparton – Employment by Industry, 2011

Industry	City of Greater Shepparton	
	Employment No.	Share
Agriculture, forestry and fishing	1,874	7%
Mining	33	0%
Manufacturing	3,155	13%
Electricity, gas, water and waste services	702	3%
Construction	1,624	6%
Wholesale trade	905	4%
Retail trade	**3,245**	**13%**
Accommodation and food services	**1,168**	**5%**
Transport, postal and warehousing	973	4%
Information media and telecommunications	297	1%
Financial and insurance services	**484**	**2%**
Rental, hiring and real estate services	218	1%
Professional, scientific and technical services	1,032	4%
Administrative and support services	541	2%
Public administration and safety	1,162	5%
Education and training	2,160	9%
Health care and social assistance	4,034	16%
Arts and recreation services	165	1%
Other services	1,021	4%
Inadequately described/Not stated	241	1%
Total	**25,034**	**100%**

Source: ABS Census of Population and Housing, 2011

In addition, notable examples of other employment generators within activity centres in Greater Shepparton include:

- The CBD-based education precinct comprising La Trobe University (Shepparton Campus) and GOTAFE Centre
- Greater Shepparton City Council Offices
- Healthcare functions (specialist consulting rooms etc)
- Selected light industrial uses.

This highlights the broader role that activity centres in Shepparton have across the wider economy.

1.4 Activity Centres in the Regional Context

For Greater Shepparton, it is important that the regional location of the City – and the influence that this locational context has in driving retail and commercial activity – is reflected in activity centres policy. In particular, the following three factors are important considerations for the Commercial Activity Centres Strategy:

1 **Regional Service Role for Shepparton**: Shepparton has an important role as a major regional service for a broad geographic region that includes the Goulburn Valley and Murray Valley, central and northern parts of Victoria, and southern New South Wales. Retaining and enhancing this role for Shepparton is an important policy objective from an economic and social perspective.

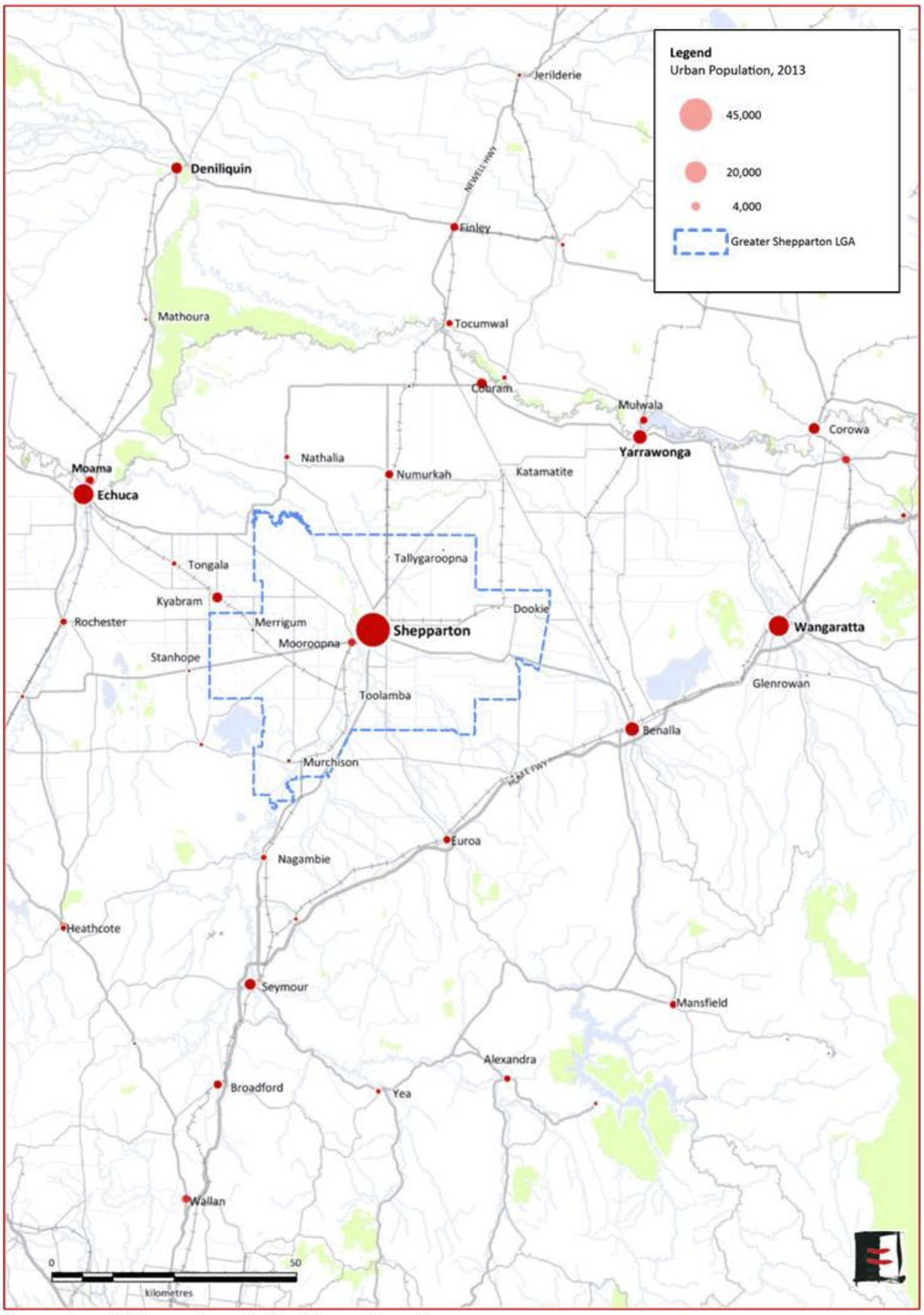
2 **Small Town Activity Centres**: In addition to the larger activity centres in urban Shepparton and Mooroopna, Greater Shepparton includes a number of smaller centres that have their own important role to play in supporting economic development and meeting the needs of residents and businesses. The importance of these smaller regional towns and centres to Greater Shepparton must be reflected in policy.

3 **Competition from other Regional Centres**: The regional role of Shepparton means that competition for visitation and spending is generated by other large regional service centres such as Bendigo and Wangaratta. Furthermore, some towns historically served by Shepparton are developing their own expanding retail and commercial sectors, thus reducing the need to travel to other locations (such as Shepparton) in order to meet these needs.

These factors mean that planning for activity centres in Greater Shepparton must at all times take into account factors relevant to regional shopping patterns and business activity, even where this is outside the boundaries of the municipality.

An overview of the regional locational context for Greater Shepparton, and the dominance of the Shepparton-Mooroopna urban area in the wider region, is shown in Map 1.1.

Map 1.1: Shepparton Regional Context



Source: Essential Economics with MapInfo and StreetPro

1.5 Key Trends for Activity Centres

A number of key trends need to be considered in assessing the future prospects for activity centres in the City of Greater Shepparton.

Continued Importance of Retailing

The retail sector continues to be the land use that generates the greatest amount of activity and visitation in most activity centres in Australia. Retail typically accounts for over 60% of businesses and over 75% of shopfront floorspace in activity centres.

Retail is a key determinant of how people use a centre, and where people come from to visit that centre. That is, activity centres with a broad and successful range of retail traders will generate more visitation from a wider geographic area than an activity centre with a non-retail focus.

Dynamic Nature of Retail Sector

Retail is one of the most diverse industries, with individual retailers ranging from single owner-operators to family businesses, medium-scale operations, national chains, large supermarket and department store corporations, big-box/bulky goods retailers, and the like.

It is this variety of retail offering that makes retailing a dynamic and exciting industry, and a profitable one for those who offer the right mix of goods and services to a market that demands them. A well-functioning and efficient retail sector which meets the needs of consumers can make a substantial contribution to an area's economic strength, in addition to enhancing the general lifestyle, interests and well-being of a community.

Changing Consumer Behaviour and Demographics

The public are continually redefining their demands for goods and services (in terms of types of goods and services demanded and the total level of expenditure on retail items), and their expectations of the way in which these are sold and delivered to them. New considerations are being applied to shopping 'decisions': for example, competition for people's disposable income from an increasing range of activities and products in addition to retail (including travel, dining-out, gambling, mobile phones, internet access and a whole range of other activities), and higher levels of personal debt which can make shoppers more price-conscious.

The types of retail goods and services purchased by shoppers are also constantly evolving. For example, since the mid-1990s a general shift has occurred in retailing which places increased focus on entertainment and leisure merchandise and services, rather than traditional household items, clothing and the like. Consumers are also being attracted to places where retail purchases can be made in a time-efficient manner, such as fast food outlets and convenience retail at service stations.

New Forms of Retail and Commercial Activity

New forms of retailing have become evident in Australia over the past decade, and these activities are of relevance in planning for retail development in Shepparton. Examples include the success of ALDI in the Australian market and the increased popularity of large-format retail models in sectors such as hardware (Bunnings, Masters), liquor (Dan Murphy's and 1st Choice Liquor) and bulky goods (Harvey Norman etc).

Likewise, evolution in work practices and economic shifts are changing the nature of commercial activities, such as the popularity of home-based businesses, rationalisation of regional Government offices, and the shift in the commercial accommodation sector towards 'serviced apartments'.

For this reason, activity centre policy needs to both reflect those changes that are already occurring, and be flexible enough to adapt to other changes that are anticipated to emerge in the future.

Local Convenience Centres

Small local centres which traditionally provided a limited range of day-to-day convenience retailing to a local catchment have come under increased competition, and have been in decline over at least the past two decades. Consumer preference for convenient multi-purpose trips and greater reliance on the motor vehicle has increased the popularity of modern convenience stores attached to service stations. These stores continue to increase the breadth of in-store product, with chains such as Coles Express and BP introducing new store formats, sometimes including café and bakery sections. Customer loyalty programs with affiliated supermarkets and incentives of cheaper petrol contribute to the popularity of these stores.

On the other hand, the level of convenience experienced at supermarkets has also increased, with the advent of express lanes, self-service check-out, convenient parking and extended hours of operation. Supermarkets are the dominant retail format for attracting a share of spending on convenience groceries, with industry data (ABS Retail Industry Survey) showing that up to 75% of all spending on food, liquor and groceries is captured by supermarkets.

Online Retailing

The nature of retailing has changed substantially in some sectors due to the growth of online retailing that does not require a 'bricks and mortar' presence. The embrace of internet and e-commerce is seen as a significant challenge to existing retail operations, and has potential to significantly affect the retail landscape.

The total size of the online shopping market is inherently difficult to calculate, and is made even more so by the popularity of purchases for consumer goods on sites such as eBay where sellers are not necessarily commercial enterprises.

A range of estimates have been prepared by various private sector analysts in recent times. A best estimate is that at present approximately 6% of total retail sales are undertaken online in Australia, with a higher share of sales in the following categories:

- Computers and electrical goods
- Published media, including books, magazines, music, video and ringtones
- Jewellery and fashion accessories
- Software and apps
- Cosmetics, fragrances and personal care products
- Clothing, sporting equipment and toys.

The overall implication is that online retailing will continue to account for a sizeable proportion of total consumer spending on retail goods and services.

Mix of Uses

Activity centres are the location for a wide range of activities in addition to retail. Examples include:

- **Commercial services** – such as travel, insurance and real estate agents
- **Professional services** – such as legal and accounting practises
- **Health care** – such as doctors, dentists, podiatrists and physiotherapists
- **Community services** – including Centrelink, employment agencies and social support services
- **Hospitality** – in the form of bars, cafes and restaurants
- **Entertainment facilities** – cinemas, gaming, etc.

Housing

Activity centres are becoming increasingly popular as locations for higher-density residential development, including in regional areas of Australia. This trend is supported by the ongoing decline in household sizes (and the consequent increase in flats and apartments with, for example, a single resident) and changes in lifestyle.

These factors are also relevant to Shepparton and need to be considered in the context of future planning for activity centres, notwithstanding the current lack of realised demand for higher-density housing in the municipality.

1.6 Policy Context

A summary of state, regional and local planning policies as they relate to activity centres and industrial land development is presented in the following paragraphs.

Greater Shepparton 2030 Strategic Plan (2006)

Greater Shepparton 2030 was completed in 2006 and provides input to the policies and provisions of the Greater Shepparton Planning Scheme, as well as direct leadership, decision-making and expectations within the Greater Shepparton community.

The Strategic Plan outlines a vision for the municipality as follows:

> *"Greater Shepparton 2030 – the regional centre distinguished by the range of its sustainable achievements."*

The following are key objectives and strategies relevant to activity centres:

1 **To provide increased opportunities for local job creation**

2 **To develop the Shepparton CBD as a regional centre for commerce and entertainment**, including to "*provide for the continued growth of the Shepparton CBD as a multi-purpose retail, business, commercial, community, entertainment and tourism centre"* (Page 35)

3 **To revitalise the CBD of Shepparton and improve the urban design and architectural standards of retail/commercial areas**, including encouraging "*the renewal of the mall and the main commercial heart of the Shepparton CBD"* and facilitating *"the creation of a dynamic entertainment centre that is attractive to a mix of patrons"* while ensuring "*personal safety is addressed in the urban design of the public areas and linkages, to attract a range of users …*" (Page 36)

   Additionally, this objective is intended to "*encourage the redevelopment of peripheral areas of the Shepparton CBD",* including a dining and entertainment precinct in Fryers Street (Page 36).

4 **To have a hierarchy of viable commercial/retail centres by retaining local and visitor spending within the municipality**, including supporting "*… a hierarchy of retail centre"* with careful consideration of "*… any proposed expansion of the Shepparton Marketplace relative to the role of this centre and the CBD"* (Page 37).

   Additionally, this objective is intended to facilitate planned local centres in growth areas that are easily accessible to the local community, while "*encouraging a suitable mix of businesses within each centre to ensure viability"* (Page 37).

5 **To agglomerate peripheral sales and highway services nodes in accessible and appropriately serviced** locations, including encouraging and promoting *"the location of peripheral sales, bulky goods and restricted retail"* (Page 38).

Greater Shepparton Planning Scheme

The Greater Shepparton Planning Scheme is the planning policy framework for Greater Shepparton, and consists of strategic directions and policies contained in the State Planning Policy Framework (SPPF) and Local Planning Policy Framework (LPPF).

State Planning Policy Framework

Planning policies, including those arising from an Activity Centres Strategy, are described in Clause 17 (Economic Development) of the SPPF as needing:

> "*... to provide for a strong and innovative economy, where all sectors of the economy are critical to economic prosperity*".
>
> *"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 17.01-01 relates specifically to commercial and business development and seeks to:

> *"... encourage development which meet the community's needs for retail, entertainment, office and other commercial services and provides net community benefit in relation to accessibility, efficient infrastructure use and the aggregation and sustainability of commercial facilities".*

Local Planning Policy Framework

The strategies relevant to Greater Shepparton Activity Centres are identified in *Clause 21.04-1* and *Clause 21.06-5* of the LPPF.

Clause 21.04-1 – Urban Consolidation and Growth identifies how urban consolidation and growth will be managed within Greater Shepparton. A total of 14 objectives and 19 strategies are designed to guide urban growth within Greater Shepparton.

Clause 21.06-5 – Commercial/Activity Centres identifies an *Activity Centre Hierarchy* to support forecast demand of 40,570sqm of additional retail floor space by 2030.

- The **Shepparton CBD** is nominated as the Regional Centre.
- **Shepparton Marketplace**, **Mooroopna CBD** and **Shepparton Plaza** are designated Sub-Regional Centres.
- **Shepparton South**, **Fairleys (Numurkah Road)**, **Tatura**, **BiLo Echuca Road** (**Mooroopna**) are identified as Neighbourhood / Townships Centres.
- **Murchison**, **Merrigum**, **Dookie** and local shops in Shepparton are Local / Town Centres.

- **Benalla Road**, **Melbourne Road** and **Numurkah Road** have concentrations of Bulky Goods retailing.

Shepparton CBD Strategy (2008)

Planisphere prepared a strategy for the Shepparton CBD in 2008 with the purpose of guiding the centre's future development in an economically, environmentally and socially sustainable way.

A total of 11 priorities form the basis for the strategy and are summarised as follows:

1. **Develop and promote Shepparton as a leader in sustainability** through building design, transport modes, resource management, its natural riverine environment and strong community
2. **Consolidate the CBD as the principal retail centre in the region** and creating an active, vibrant and safe CBD
3. **Support a robust economy and local employment** through appropriate land use mix and activities in the CBD
4. **Create residential opportunities** and expanding housing choice in the CBD
5. **Support development of the tertiary precinct** and attracting students to live and study in Shepparton CBD
6. **Define a forward-looking image for the Shepparton CBD**, taking into consideration its strong indigenous and post-settlement migrant history, riverine location and local agricultural industry
7. **Improve the design, function and safety of key sites and precincts in the CBD**, including the Vaughan Street precinct, Maude Street Mall, Stewart Street and Shepparton Plaza
8. **Create a pedestrian and cycling-friendly environment**
9. **Improve movement and access** by reducing traffic in the CBD, improving public transport services, and improving cycling links and facilities
10. **Improve access to, and provision of, car parking** in the CBD
11. **Improve access to, and an awareness of, the riverine area** on the periphery of the CBD.

Reformed Commercial and Industrial Zones – State Government Response (2013) and Amendment VC100

The Reformed Commercial and Industrial Zones Report was prepared by the State Government in response to the recommendations provided by the Reformed Zones Ministerial Advisory Committee.

The following recommendations, to which the Minister agreed or agreed in part, have significant implications for activity centre planning in urban, rural and regional Victoria:

- *"The ability for rural and regional councils to introduce schedules to allow for floor space caps for shop and office in the Commercial 1 Zone is supported.*
- *"Existing floorspace caps for shop and office in regional and rural councils will undergo a neutral translation to the new Commercial Zone on July 1 2013"* (response to committee recommendation No.1)
- *"Reduce restrictions on supermarkets and convenience shopping in most commercial locations to encourage a wide range of supermarket formats"* (committee recommendation No.5 agreed upon by the Minister)
- *"A maximum size of 1800sqm* (full-line supermarkets) *will be specified in regional Victoria (subject to permit). The as-of-right 1800sqm supermarket in the commercial 2 Zone will only be applied to metropolitan planning schemes"* (response to committee recommendation No.6)
- *"That the condition against supermarket in section 1 of the Industrial Zone 3 be varied to specify that a supermarket must adjoin or have access to a road in a Road Zone"* (committee recommendation No.8 agreed upon by the Minister)

Amendment VC100 was then gazetted into the Victoria Planning Provisions on 15 July 2013 and consolidated the five former Business zones into two 'Commercial' zones.

This amendment affected all planning schemes throughout the state and streamlined the planning requirements for a range of commercial land uses.

Commercial 1 Zone: comprises the former Business 1 Zone, Business 2 Zone and Business 5 Zone

The Commercial 1 Zone allows for a wide range of retail, residential and education facilities and land uses without a permit, however retains permit requirements for buildings and works and subdivision applications. As per the above, the zone contains a schedule which allows rural and regional Councils to impose limitations on the combined leasable floor areas for shops and offices. Existing limitations (as well as some added more recently) were included in the Schedule 1 to the Commercial 1 Zone in the Greater Shepparton Planning Scheme.

Commercial 2 Zone: comprises the former Business 3 and Business 4 Zones.

The Commercial 2 Zone allows for office, industry and restricted retail land uses in appropriate locations. The introduction of the Commercial 2 Zone through VC100 allows for the streamlining of the assessment of a number of different land uses including cinemas, cinema-based entertainment, food and drink premises, restricted retail, office and warehouse. These uses no longer require planning approval, subject to conditions. The use of land for accommodation (other than a caretaker's residence) remains prohibited in these areas. The introduction of the Commercial 2 Zone also allows for the use of land for smaller-scale supermarkets (subject to a permit in Regional Victoria).

Under the Commercial 2 Zone, all land previously within the Business 3 Zone and Business 4 Zone is able to accommodate Office, Cinema and Cinema-based entertainment facilities as an as-of-right use, without the need for a permit.

Analysis by Greater Shepparton has calculated that the municipality contained the largest quantum of Business 4 zoned land of any rural municipality in the state. Council has expressed concern that this has the potential to undermine the activity centres hierarchy. In particular, development of Cinema and Cinema-based entertainment facilities outside the Shepparton CBD may impact on that centre's status as the higher-order location in the region for entertainment and cultural facilities.

Furthermore, Office uses can now locate on land formerly within the Business 4 zone, including sites along Benalla Road and Goulburn Valley Highway. This has implications for policy objectives seeking to encourage office development within the Shepparton CBD and the balance of the activity centres hierarchy.

Planning Scheme Amendment C92 proposes to introduce the Activity Centre Zone (ACZ) to land in the Shepparton CBD in accordance with the findings and recommendations of the Shepparton CBD Strategy (2008). The amendment will provide direction for future land use and development within the CBD area.

A key objective of the Amendment is to create eight precincts that provide for a more structured approach to development across the Shepparton CBD, including encouraging major retail, office and entertainment uses into a compact CBD 'core'.

Land in urban Shepparton and Mooroopna that is located in either the Commercial 1 Zone or Commercial 2 Zone is shown in Map 1.2.

1.7 Shepparton Show Me

Shepparton Show Me is a promotional committee set up under Section 86 of the Local Government Act, and promotes the growth and development of the business sector in the city. Shepparton Show Me is primarily aimed at marketing Shepparton to consumers, and controls the 'Shepparton Show Me' brand, as well as providing support for events, festivals and other promotional activities.

Revenue for the Show Me program is generated from a special rate on businesses in a designated area of Shepparton that includes the CBD and some adjacent business areas.

The Shepparton Show Me Committee comprises twelve voting members, including nine representatives of the Shepparton business community, two Councillors and a representative from Council's Executive. A Retail Coordinator is employed to implement and manage the program's initiatives.

The Vision Statement for Shepparton Show Me is:

To position Shepparton as the premier place in northern Victoria to do business, shop, dine, play and stay.

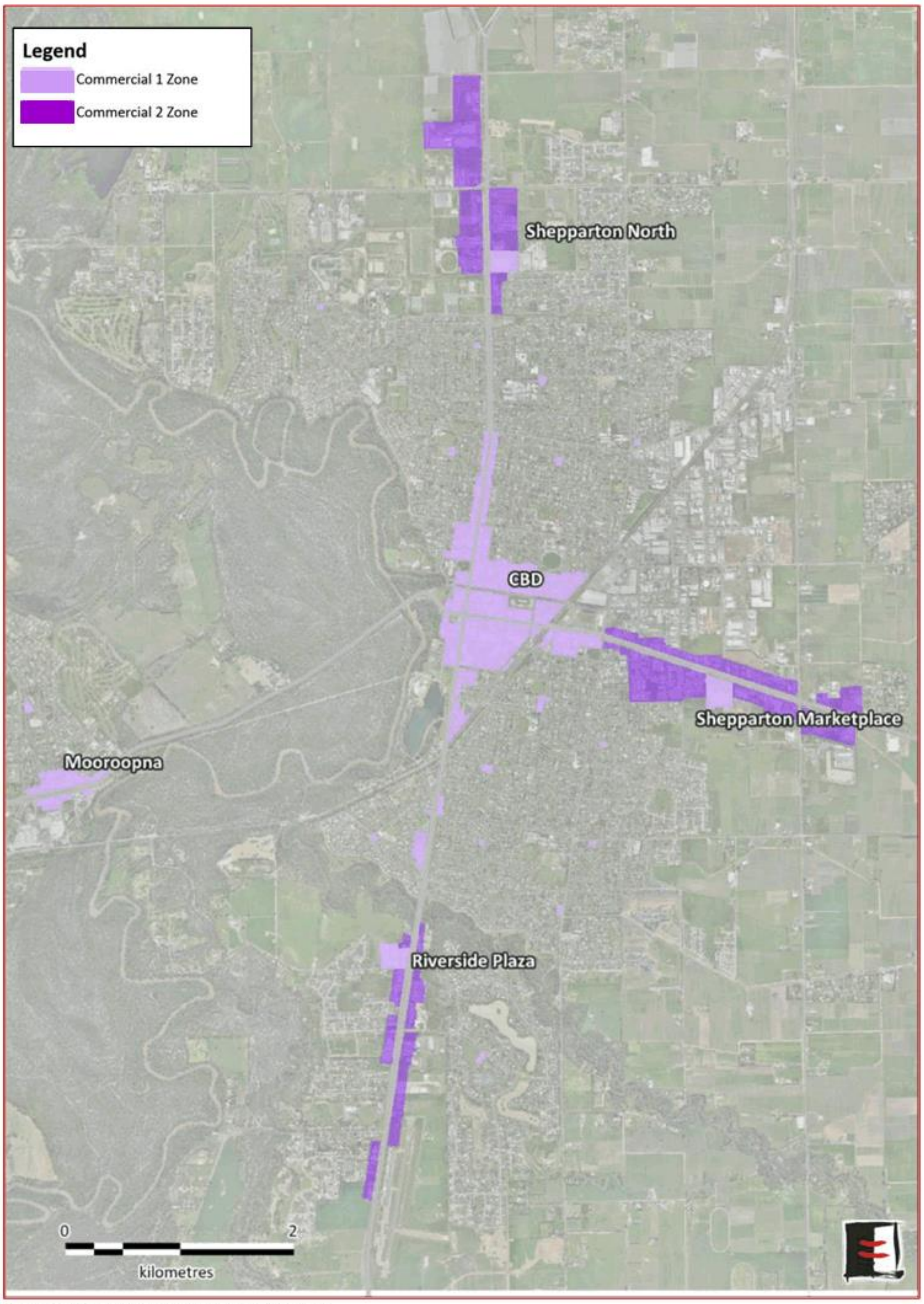
In 2013-14 the program spent approximately $673,700 on a range of marketing, sponsorship and promotional activities, as well as administrative costs.

1.8 Implications for Strategy

Key Implications for the Commercial Activity Centres Strategy identified in this Chapter include the following:

- Activity centres are an important aspect of land use planning due to the significant influence they have on a wide range of economic, social and environmental outcomes.
- In Greater Shepparton, the importance of activity centres is significant due to the role these centres perform in meeting the needs of residents and businesses located in a broad geographic area that includes much of north-central Victoria and parts of southern New South Wales.
- Activity centre policy needs to reflect the dynamic nature of the economy and the continuing shifts in consumer tastes, business practices and property market trends.
- Greater Shepparton has a significant policy background relating to activity centres, although no comprehensive 'Activity Centres Strategy' is currently applied.
- Recent changes by the State Government to planning zones and other aspects of planning policy mean that a renewed focus on activity centres policy in Greater Shepparton is required.

Map 1.2: Commercial 1 Zone and Commercial 2 Zone in Urban Shepparton-Mooroopna



Source: Essential Economics with MapInfo

2 ACTIVITY CENTRES IN GREATER SHEPPARTON

This Chapter presents a description of the network of activity centres in Greater Shepparton, and indicates how these centres provide a variety of retail, commercial, community, entertainment and civic facilities and services to the surrounding region.

2.1 Application of a New Activity Centres Hierarchy

In planning policy it is useful to categorise centres according to their place in the *activity centre hierarchy*.

The activity centre hierarchy is a conceptual tool which recognises that centres have differing roles in their provision of retail and other goods and services.

For example, in a retail sense, large centres that offer a wide range of higher-order shopping facilities with the opportunity to browse and compare goods among a range of different shops tend to attract people from a larger catchment in geographic and population terms. Smaller centres with a limited role in selling convenience and grocery merchandise tend to trade more locally from a smaller catchment.

At present, the hierarchy that applies to Greater Shepparton is defined by *Clause 21.06-5* of the planning scheme. This hierarchy is described on Pages 15 and 16 in Chapter 1 of this report.

A review of the activity centres hierarchy serving Greater Shepparton has been undertaken for the purposes of the Commercial Activity Centres Strategy 2015, with a new six-level hierarchy adopted.

This new hierarchy is described below.

Central Activities District (CAD)

The Central Activities District is the higher-order activity centre that is the dominant retail, commercial, administrative and cultural location serving the region.

The ***Shepparton CBD*** is the CAD for Greater Shepparton and extends its trading influence over the north-central Victoria and southern New South Wales in terms of providing higher-order retailing, commercial, administrative and community facilities.

As the nominated CAD in the revised activity centres hierarchy, the Shepparton CBD is the primary focus for public and private investment in retail, commercial and community infrastructure. In order to for this outcome to be achieved, planning policy needs to ensure that the balance of the activity centres hierarchy complements the operation of the Shepparton CBD, rather than competing with it.

No specific controls on the scale and nature of retail and commercial development apply in the Shepparton CBD, other than those relating to the fundamental principles of proper and orderly planning (such as traffic and urban design). All forms of development consistent with the operation of the Commercial 1 Zone and relevant local strategic policies are specifically encouraged in the CBD.

Regional Retail Centre

The Regional Retail Centre is an important activity centre with a particular focus on retailing that is relevant to the surrounding region, and which complements the more diverse range of retail, commercial and community uses located in the CAD. A regional retail centre includes a mix of major traders such as supermarket(s) and discount department store(s), supported by a range of retail shops.

The ***Shepparton Marketplace*** shopping centre is identified as a Regional Retail Centre for Greater Shepparton, with this classification reflecting the unique historical and other functional factors that give the centre this role in the hierarchy.

Currently, Shepparton Marketplace is identified as a sub-regional centre in the planning scheme (see also Page 15). The revised classification as a Regional Retail Centre better reflects the role and function of the Marketplace, both currently and in terms of future objectives.

At present, a cap of 15,000m^2 applies to shop floorspace at the Shepparton Marketplace. Operation of this cap is intended to ensure that retail development is of a scale that does not undermine the primacy of the Shepparton CBD.

Over time, it is appropriate that this cap is reviewed to ensure it continues to reflect an appropriate balance between the Regional Retail Centre role of the Shepparton Marketplace, and the operation of the Shepparton CBD as the Central Activities District for the wider region.

Sub-Regional Centre

Sub-Regional Centres are important locations for retail and commercial activity that serve an immediate residential catchment in the surrounding urban area, as well as a broader rural and regional hinterland that is highly accessible via regional road networks.

The ***Mooroopna CBD, Riverside*** and ***Shepparton North*** have been identified in the revised hierarchy as the sub-regional centres serving Greater Shepparton.

Both the Riverside and Mooroopna CBD centres serve an urban catchment and rural hinterland with a sufficient diversity of uses (both retail and non-retail) to justify sub-regional status in the hierarchy.

The scale and nature of retailing in these centres does not directly compete with the higher-order retail role served by the Shepparton CBD and Shepparton Marketplace.

Riverside's role as a sub-regional centre in the hierarchy is supported by the application of a shop floorspace cap in the Greater Shepparton Planning Scheme. This cap ensures that retail development is of a scale which is consistent with the role of the Riverside centre in the hierarchy.

As a street-based centre under multiple ownerships, no floorspace cap is appropriate or required for the Mooroopna CBD.

Although Shepparton North has been identified as a sub-regional centre in the hierarchy, in reality the centre currently serves a more limited role that is dominated by a single use (supermarket) and a lack of diversity in retail and commercial activities. This is in contrast to the greater scale, range and diversity of uses present in the Riverside and Mooroopna CBD centres.

A shop floorspace cap of 8,000m^2 is applied to the Shepparton North activity centre in the Greater Shepparton Planning Scheme, along with a 900m^2 cap on office uses. Both caps have not been reached by current on-site uses. The application of this cap is appropriate in ensuring any development is consistent with the role of this centre in the activity centre hierarchy.

Neighbourhood/Town Centre

A neighbourhood activity centre (urban Shepparton) or town centre (balance of Greater Shepparton) is typically distinguished by a mix of retail and commercial uses that is sufficiently large, diverse or popular enough so as to meet both localised convenience needs, as well people from a surrounding urban or rural hinterland. These centres primarily incorporate a basic range of convenience-oriented goods and services.

Neighbourhood and town centres have been identified at ***Echuca Road*** (Mooroopna North), ***Rowe Street East*** (including Shepparton Plaza) and the ***Tatura*** town centre.

No floorspace caps apply to centres in this level of the hierarchy.

Local/Township Centre

The Local/Township Centre is a small activity centre that serves a localised convenience role to a surrounding urban (Local centre) or rural (Township Centre) locality. In some instances, such centres may only include one or two stores; alternatively, some larger centres may include a number of retail, commercial and community services serving the immediately surrounding locality.

A total of 21 local and township centres have been identified across Greater Shepparton.

Enterprise Corridor

The Enterprise Corridor is not a formal activity centre, but rather a mixed-business area that includes a mix of homemaker retail, showroom and other commercial businesses relying on significant exposure to passing traffic and is accessible to the regional road network.

Shops, major entertainment and commercial uses that are more appropriately located in activity centres are not supported in Enterprise Corridors.

A total of three Enterprise Corridors have been identified for Greater Shepparton at ***Benalla Road***, ***Gateway North*** (Numurkah Road) and ***Gateway South (Melbourne Road)***.

Activity Centres by Classification

Using the revised definitions, Table 2.1 shows the activity centres hierarchy for Greater Shepparton.

Table 2.1 Proposed Activity Centre Hierarchy Description

Level in Hierarchy	No. of Centres in Shepparton	Centre
Shepparton Central Activities District	1	Shepparton CBD
Regional Retail Centre	1	Shepparton Marketplace
Sub-Regional Centre	3	Riverside, Mooroopna CBD, Shepparton North
Neighbourhood Centre or Town Centre	3	Echuca Road (Mooroopna North), Rowe Street East, Tatura
Local Centre or Township Centre	21	Branditt Ave, Graham St, Parkside Drv, King St, Dunkirk Ave, Conifer St, Parker St, Macintosh St, Swallow St, Michel St, Poplar Ave, Archer St, Colliver Rd, Guthrie St, Longstaff St, Kialla, Joseph St, MacIsaac Rd, Murchison, Dookie, Toolamba
Enterprise Corridor	3	Benalla Road, Gateway North, Gateway South

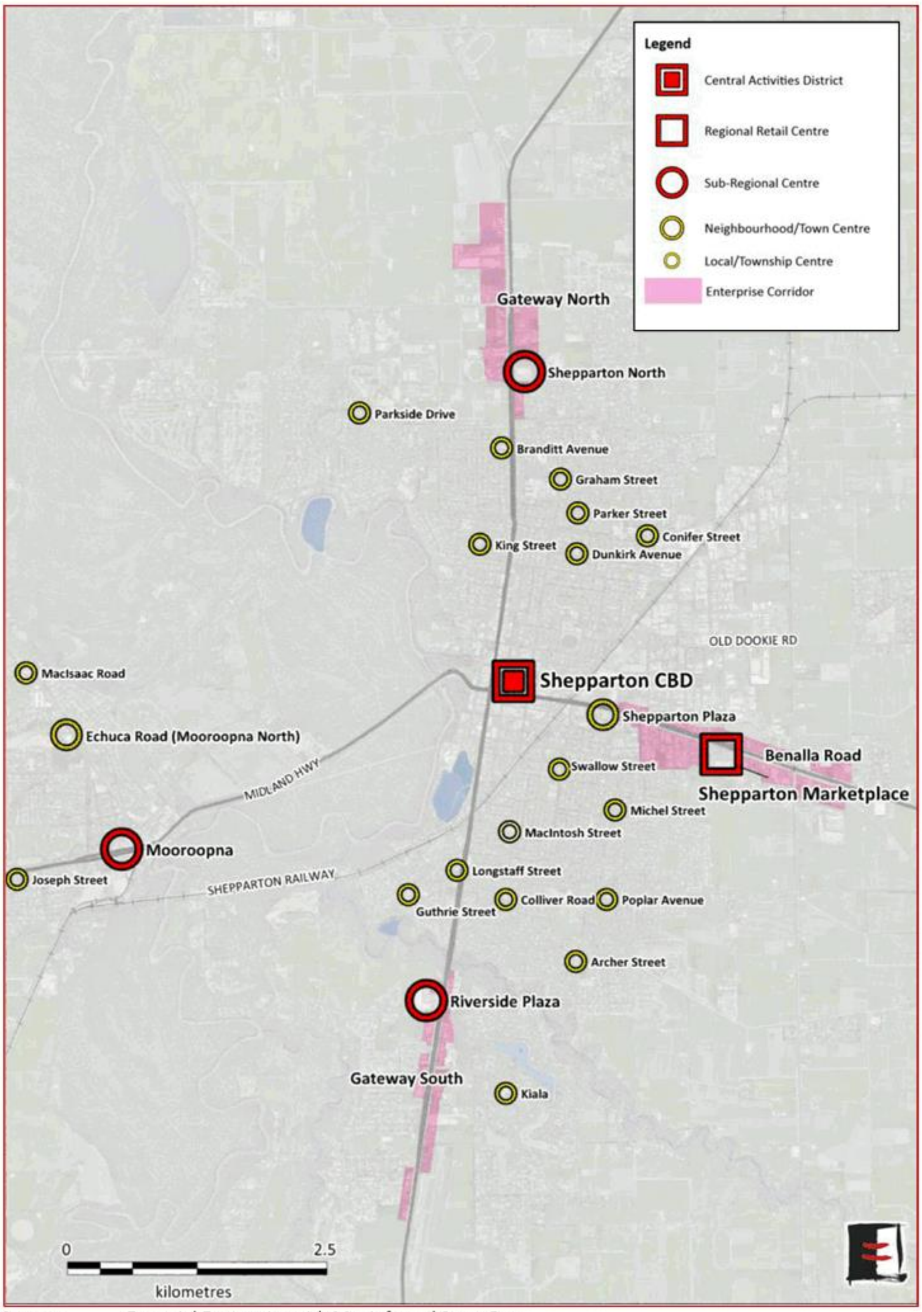
Source: Essential Economics

It is important to acknowledge that although centres may perform the same role in the hierarchy as described above, all centres are unique and provide varying levels of services and facilities.

Encouraging individual centres to exhibit their own unique 'local' characteristics will provide a network of centres that provides the full range of essential services, as well as providing a range of experiences for residents and visitors.

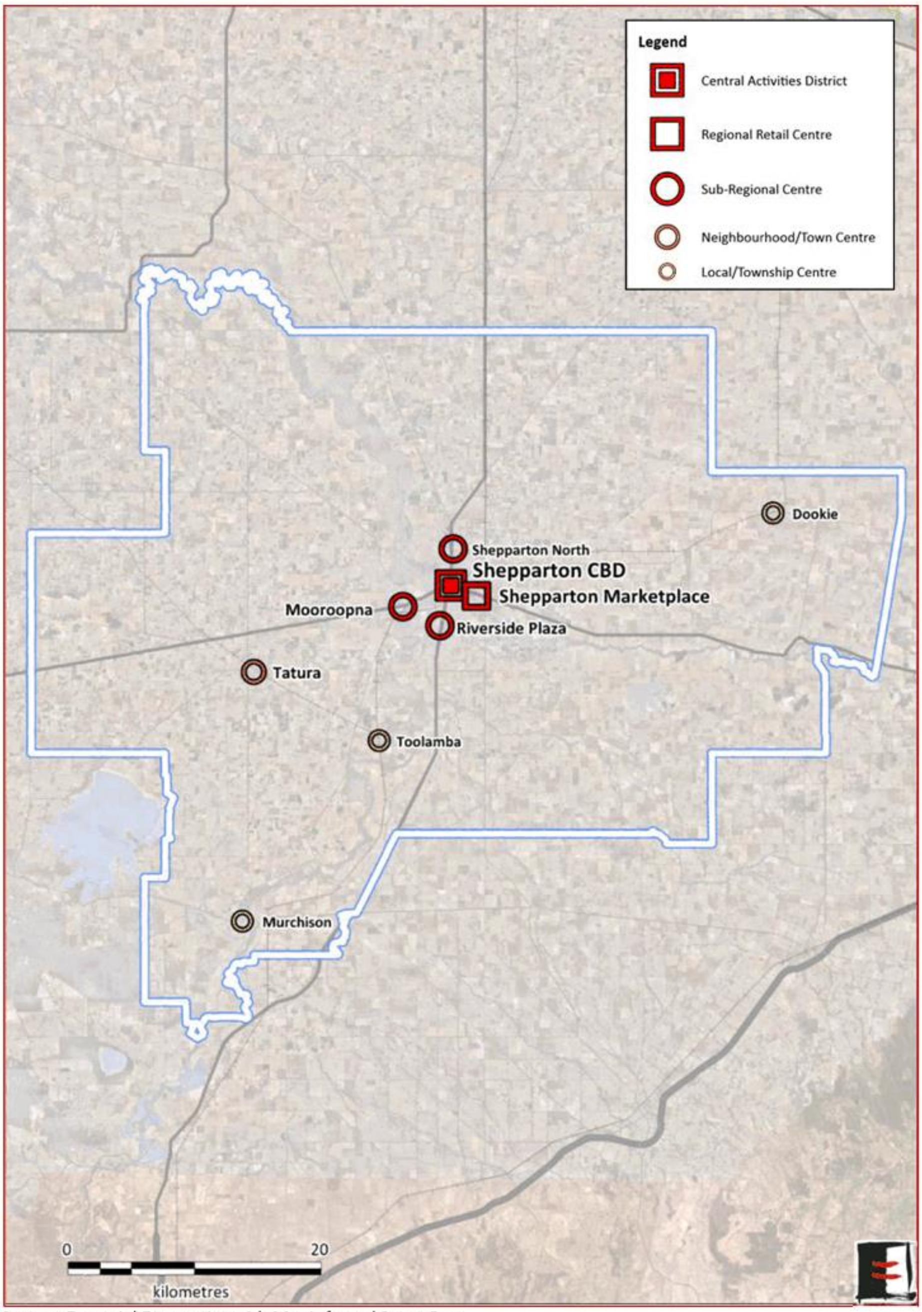
The location of activity centres in Greater Shepparton is shown in Map 2.1 and Map 2.2.

Map 2.1: Proposed Hierarchy Map, Greater Shepparton



Source: Essential Economics with MapInfo and StreetPro
Note: Shepparton North a future sub-regional centre

Map 2.2: Proposed Hierarchy Map, Greater Shepparton LGA



Source: Essential Economics with MapInfo and StreetPro

2.2 Central Activities District

Shepparton CBD

The Central Activities District serving the City of Greater Shepparton and the wider Goulburn Valley region and southern New South Wales is the ***Shepparton CBD***.

As the highest-order centre in the region, the Shepparton CBD has a wide trading influence for retail goods and services, and is also the main service centre for a wide range of commercial, administrative and community functions not found elsewhere in the region.

Location and Description

The Shepparton CBD is located centrally to urban Shepparton and is bounded by the Shepparton railway in the east and the Goulburn River in the west.

Shepparton CBD is highly accessible to the surrounding regional transport networks, including:

- The Goulburn Valley Highway which runs north-south through the centre and links with the Hume Highway to the south and the Murray Valley Highway to the north
- The Midland Highway which runs east-west through the Shepparton CBD and is the primary link to Mooroopna and Tatura
- Regional connections – such as the Mooroopna-Echuca Road, Shepparton-Barmah Road, Katamatite-Shepparton Road and New Dookie Road – that join the Goulburn Valley Highway or Midland Highway in proximity to Shepparton
- The Shepparton railway station that is located on the eastern edge of the Shepparton CBD
- Local bus, cycle and walking networks.

These transport connections are an important competitive advantage for the Shepparton CBD and help the centre retain its role as an important regional attractor for retail and other services.

Floorspace Survey

At present, the Shepparton CBD contains a total of approximately 111,250m^2 of shopfront floorspace and 58,600m^2 of dedicated commercial office floorspace, according to a detailed floorspace survey undertaken by the consultant team in July 2014.

Note that the floorspace estimates for the Shepparton CBD include only those areas west of the railway line, and excludes areas east of the railway line considered in the Shepparton CBD Strategy. This includes the Shepparton Plaza shopping centre that is now part of the Rowe Street East neighbourhood centre identified in this Strategy.

Shopfront

A total of 493 shopfront tenancies are identified in the survey, comprising 346 retail tenancies, 79 other commercial tenancies, and 68 vacant premises.

Total retail floorspace is estimated at approximately 85,310m^2, including a total of 22,600m^2 of food retail and 62,710m^2 of non-food and service retail categories. This level of retail floorspace provision means that the Shepparton CBD is the fourth-largest retail centre in regional Victoria.

Comparison of Retail Floorspace Provision

Bendigo CBD (excludes Marketplace)	115,000m^2
Ballarat CBD	110,000m^2
Central Geelong	105,000m^2
Shepparton CBD	**85,000m^2**
Warrnambool	80,000m^2
Mildura	65,000m^2
Colac	50,000m^2

The 68 vacant shopfront tenancies account for approximately 11% of total shopfronts.

This vacancy rate represents a relatively poor outcome for the Shepparton CBD. The typical range of vacancies for a well-performing street-based activity centre of between 4% and 6% has been identified across Australia.

Vacant shopfront tenancies are distributed across the Shepparton CBD and include areas considered 'core retailing' such as in the Maude Street Mall, Vaughan Street (opposite Kmart), and areas on the fringe of the centre.

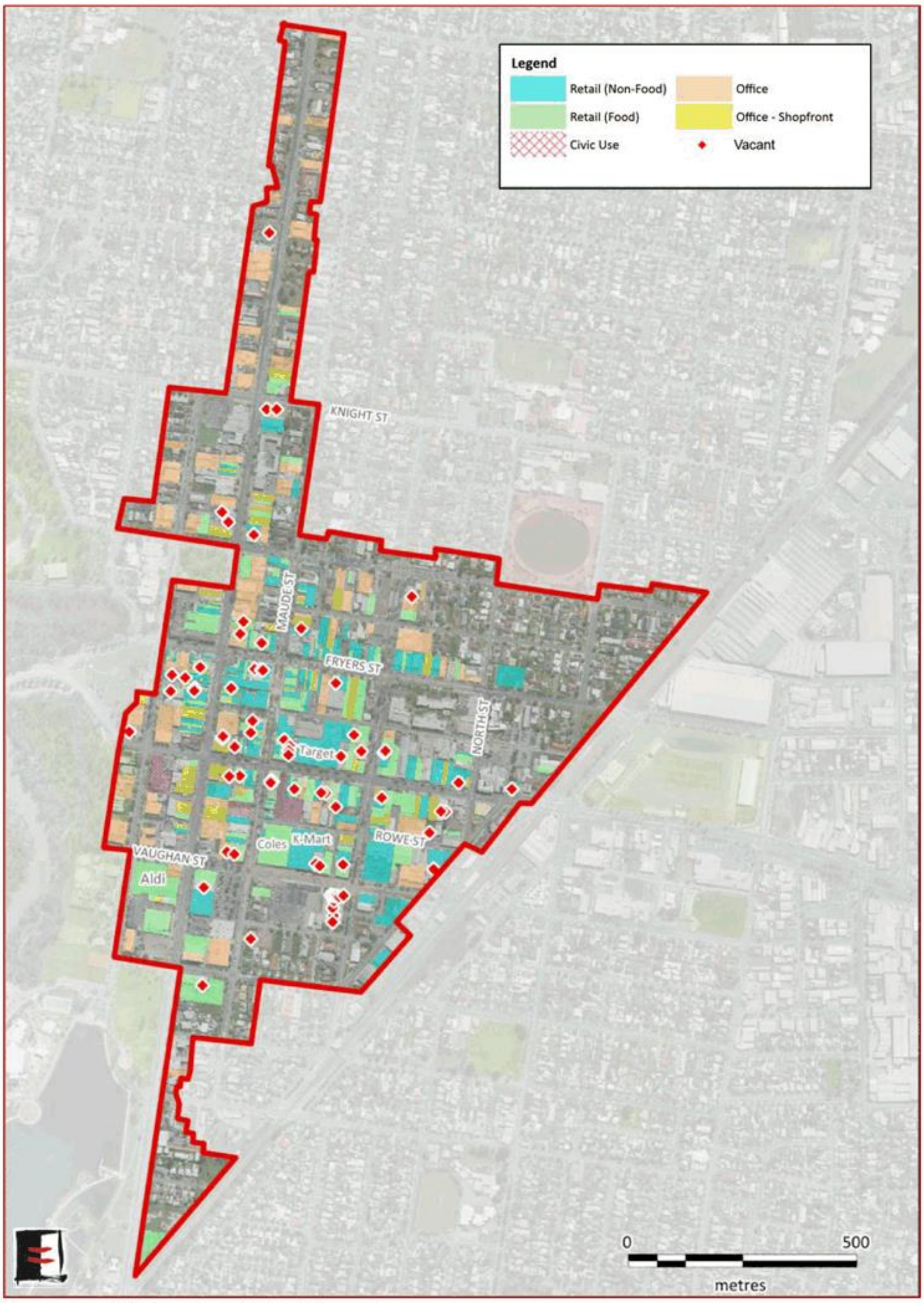
The commercial shopfront businesses (ie, non-retail) comprise 12% of the total shopfront floorspace in Shepparton CBD. This is lower than the benchmark of approximately 20% to 30% of shopfront floorspace which is typically identified in similar street-based activity centres in Australia. This low share reflects the availability of a significant number of dedicated office-tenancies in the centre, and also indicates that a number of shopfront tenancies are either of a type, or in a location, that is not well-suited to commercial office users.

Typically, the commercial uses found in shopfront tenancies are businesses seeking to meet the professional and other needs of shoppers, residents and businesses. Commercial shopfront businesses in the Shepparton CBD include:

- 44 medical and para-medical tenancies
- 11 real estate agents
- 42 banking and finance tenants
- 3 travel agents.

An overview of the Shepparton CBD key land uses is shown in Maps 2.3 and 2.4.

Map 2.3: Shepparton CBD Tenancy Mix



Source: Essential Economics with MapInfo and Nearmap

Map 2.4: Shepparton CBD Tenancy Mix in Core Areas

Produced By: Essential Economics with MapInfo and Nearmap

Non-Shopfront

Non-Shopfront floorspace in the Shepparton CBD includes:

- Light industrial and trade-related uses, particularly those located at the eastern end of the centre in proximity to the railway line
- Administrative and Civic functions concentrated at the western end of the centre, typically fronting Welsford Street and including the Greater Shepparton Council offices, Shepparton Art Gallery, Shepparton Police Station etc
- Purpose-built commercial office space that includes a number of buildings fronting Wyndham Street in proximity to High Street
- Commercial office uses located in converted residential dwellings, with a particular concentration in the north of the centre fronting Wyndham Street
- Major community functions, including the La Trobe University campus, GOTAFE campus, Telstra communication tower, Shepparton RSL club etc.
- Residential dwellings located on the fringe of the centre.

The wide diversity of uses in the Shepparton CBD reflects its primacy as a location for a range of administrative, community and cultural activities above and beyond its strong retail and commercial role.

Office space in the Shepparton CBD accounts for approximately 58,600m^2 of floorspace, including both dedicated office buildings and office uses using former residential dwellings.

Key office tenants in the Shepparton CBD include:

- The Department of Human Services
- Goulburn Valley Health
- State Government Offices
- Goulburn Valley Water.

These key office tenants are important to the Shepparton CBD in terms of consolidating the centre's role as a genuine higher-order commercial and service centre to the wider region, and in generating visitation and activity which benefits other CBD uses.

The northern end of the Shepparton CBD fronting Wyndham Street and north of Knight Street is characterised by a large number of smaller office tenancies occupying a mix of purpose built tenancies and converted residential dwellings. This area of the CBD has not been included in the Amendment C92 process, and will thus remain in the Commercial 1 Zone unless a rezoning process is specifically applied to this area.

Main Features and Issues

As input to the Activity Centres Strategy, comment was sought from a wide range of stakeholders in order to improve the understanding of how the Shepparton CBD operates as a destination for shoppers and other centre users, and as a location for business and other activity.

Key insights in relation to the role and function of the Shepparton CBD are as follows:

- **High Profile** – The Shepparton CBD has a relatively high profile throughout the region. This profile is supported by initiatives such as the Shepparton Show Me marketing program, and the important role that the centre continues to have in meeting a wide range of higher-order retail, commercial and community needs.

- **Broad geographic draw** – although Shepparton CBD attracts shoppers and patronage from a wide geographic area, some traders believe that the frequency with which these customers visit has declined over time.

> Trader Comment
>
> "Our customers still come from across the region, but I get the sense that some of them aren't coming here as much they used to".

- **Weekends** – the CBD lacks vibrancy and activity on weekends. Inconsistent trading hours between traders and low overall levels of customer activity mean that weekends are not a strong trading time for the CBD, despite the increasing popularity of weekend shopping (particularly recreational shopping) in CBDs located elsewhere in Australia.

- **National Brand Tenants –** the Shepparton CBD includes a number of key national brand tenants that drive customer traffic and ensure that the centre continues to operate as a regional-level retail destination.

> Key National brands in Shepparton CBD
>
> - Kmart
> - Coles
> - ALDI
> - Target
> - Harris Scarfe
> - Dan Murphy's
> - 1st Choice Liquor
> - Kathmandu

- **Maude Street Mall** – despite ongoing investment, the Maude Street Mall continues to lack the levels of activity that are consistent with its role as the 'heart' of the retail core of the CBD. Although the mall retains a number of national brand tenants and is busy during peak periods and events, in an overall sense traders continue to trade at modest levels outside these times. The lack of food and dining options in the Maude Street Mall is a notable gap in the trader mix.

- **Multiple Roles** – although the diversity of the Shepparton CBD is a strength, this does mean that at times it is difficult to find an integrated strategy for planning and development of the CBD that meets the needs of all stakeholders. For example, the Shepparton CBD Strategy identified 10 distinct precincts within the centre. The area of Wyndham Street north of Knight Street, which is primarily an office precinct, has been excluded from the Activity Centre Zone to be applied to the balance of the Shepparton CBD through Amendment C92.

- **Parking and Access –** parking and accessibility issues are typically always at the forefront of opinions in relation to activity centre policy. For the Shepparton CBD, the primary parking and transport issue raised from stakeholders was paid parking and a view that its presence in the centre was a dis-incentive to potential shoppers and visitors. Other feedback also related to the need to support access to the centre by non-motorised forms of transport, and in particular cycling.

> Paid Parking in CBD
>
> Wangaratta - Yes
> Wodonga - No
> Albury - No
> Bendigo – Yes
> Ballarat – Yes
> Geelong - Yes

- **Competition** – Shepparton CBD faces increased competition from other major regional destinations such as the Bendigo CBD and Wangaratta and even Melbourne. Furthermore, smaller towns such as Echuca and Benalla have experienced growth in their retail and commercial sectors that reduce the need for residents to travel to larger centres such as Shepparton. Competition to the Shepparton CBD is also localised, with centres such as Shepparton Marketplace competing for a share of local spending.

- **Rents** – discussions with real estate agents in Shepparton confirm that rents for retail and commercial property in the Shepparton CBD have declined by approximately 30% in the past five years. This reflects a general downturn in trading conditions and a high vacancy rate in the CBD.

- **High Vacancy Rate –** the relatively high vacancy rate in the Shepparton CBD (11%) reduces the sense of vibrancy and activity for shoppers, and is a disincentive to potential developers and investors. In some instances, vacant tenancies are located in areas that have relatively poor exposure or accessibility and/or are in buildings that are ill-suited to meet modern trader and consumer expectations. However, in many instances the vacancies simply reflect a lack of sufficient demand and customer activity in the CBD.

- **Active Business Community –** businesses in the Shepparton CBD have generally expressed a satisfaction with the sense of camaraderie and shared purpose between stakeholders. Organisations such as the Chamber of Commerce, Shepparton Show Me and Committee for Greater Shepparton were regularly mentioned as 'having a go', even where there were individual points of disagreement.

> Trader Comment
>
> "I have to say that although over the years I have at times been critical of Shepparton Show Me, it is a pro-active organisation that is doing its best to bring customers to the CBD".

- **Night Economy –** a vibrant night-time economy in the Shepparton CBD is lacking, despite the growing success of areas such as Fryers Street for dining and entertainment. This represents a 'time lag' relative to changes being experienced elsewhere in regional cities in Australia where casual night-time dining and entertainment, including attractions for families, is increasingly popular.

- **Shopfronts and Streetscape Quality –** with a number of notable exceptions, the overall quality of shopfronts and the street-level shopping environment in the Shepparton CBD is often below reasonable expectations.

- **Crime and Perceptions of Safety –** considerable recognition is given to Council and authorities on recent improvements to the level of security in the CBD and an overall decrease in anti-social behaviour. Nonetheless, further scope for improvement remains in creating an enhanced reputation for the Shepparton CBD as a safe and friendly location for shopping and other activities across all parts of the community.

- **Events –** the Shepparton CBD benefits from a range of events and programs that assist in generating customer visitation and sales to local businesses. Examples include the winter and summer markets held primarily in the Maude Street Mall, as well as various 'CBD activation events' supported by Shepparton Show Me.

- **Market Gaps –** key market gaps (and potential opportunities) identified for the Shepparton CBD include:
  - A lack of food and dining in the Maude Street Mall
  - Limited general night-time economy, excluding licenced venues
  - Quality footwear shops (male and female) and male-oriented fashion stores
  - Despite recent growth, a general under-provision of quality cafes and restaurants
  - An under-representation of ethnic food and grocery stores
  - No representation of international retailers which have recently entered the Australian market (e.g. Uniqlo, Apple, Daiso, Top Shop)
  - No signature cultural events of national profile (e.g. Princess Grace Kelly clothing exhibition in Bendigo was a major boost to local retail in that city)
  - No permanent fresh food market or precinct which otherwise creates opportunities to support and engage with local primary producers.

2.3 Regional Retail Centre

Shepparton Marketplace

In order to reflect its specialist role as primarily a retail and shopping destination serving Shepparton and the wider region, ***Shepparton Marketplace*** has been provided with a specific classification as a 'Regional Retail Centre'.

The role of a Regional Retail Centre in the hierarchy of centres serving Greater Shepparton has been developed with specific reference to the Shepparton Marketplace and is not intended to be a classification that:

- Can be emulated by any other activity centre in Greater Shepparton, either now or in the future; and

- Is not directly transferrable to the hierarchy of centres serving other municipalities in regional Victoria.

The role of the Regional Retail Centre in the activity centres hierarchy serving Greater Shepparton can be described in detail as:

- A centre with a primary focus on the sale of retail goods and services to a regional catchment that includes all of Greater Shepparton and the wider region (as subsequently described in Chapter 3 of this Background Report)
- The retail focus of the Regional Retail Centre is complementary to the operation of retailing in the Shepparton CBD which is the highest-order retail destination in the hierarchy
- Ancillary commercial and community uses are appropriate for the Regional Retail Centre, although these would be generally limited in nature and not include uses more appropriately located in the Shepparton CBD.

Shepparton Marketplace currently operates in a manner that is consistent with this description, and this ongoing role is supported by the Commercial Activity Centres Strategy 2015.

Location and Description

Shepparton Marketplace is located on the south side of Benalla Road, approximately 1.5km east of the edge of the Shepparton CBD and 2km east of the Maude Street Mall.

The centre was developed in the late 1980s and expanded in 1998 and 2005. Shepparton Marketplace is effectively a standalone shopping centre with dedicated customer parking. An internalised mall contains a Big W discount department store, a Woolworths supermarket and supporting specialty shops.

Centre Role and Function

Shepparton Marketplace is a successful shopping centre with effectively no vacant tenancies and relatively high levels of sales and visitation from across the surrounding region.

Stakeholder Comment

"The Marketplace might be a little boring, but the trading hours are consistent, I'm protected from the weather and I can do my shopping in one location".

The centre contains a total of approximately 15,600m^2 of shopfront floorspace, of which approximately 15,250m^2 or 98% is in retail categories. The only non-retail uses tenants are a medical centre and a Commonwealth Bank branch.

The centre provides a comprehensive range of grocery and 'weekly' shopping options supported by the Woolworths and Big W. The centre also includes a range of specialty shops, including:

- 13 apparel and fashion accessories stores
- 10 food outlets, including those within the internalised food court

- A range of general merchandise, homewares and leisure-oriented retailers including primarily national brand chains and franchises.

Important differences for the Shepparton Marketplace relative to the Shepparton CBD are the mall's internal all-weather protection and its free parking.

Nonetheless, the Shepparton CBD contains a significantly broader and more diverse range of retailers than Shepparton Marketplace. It is the expectation of this Strategy that the overall dominance of the CBD as a regional retailing destination will continue into the future.

Main Features and Issues

The key issues for Shepparton Marketplace relevant to the Activity Centres Strategy are as follows:

- **Role and Function Relative to Shepparton CBD** – the most important issue for Shepparton Marketplace is ensuring that the centre continues to serve a role and function that is complementary to, and not competitive with, the Shepparton CBD.
- **Regional Retail Role** – Shepparton Marketplace is a popular and important retail destination for shoppers from across a wide region. The centre makes a significant contribution to the higher-order service role of Shepparton and this creates benefits in terms of supporting local jobs and investment.
- **Future South-East Growth Corridor –** immediately south of Shepparton Marketplace is the future south-east urban growth corridor for Shepparton that is expected to accommodate approximately 8,880 residents at completion. Shepparton Marketplace will be an important retail destination for these future residents.
- **Potential for Expansion** – Shepparton Marketplace has identified the potential for future expansion that reflects increased demand and the opportunity to attract new retailers to Shepparton. Any such expansion should be undertaken in a manner that does not undermine the role and function of the Shepparton CBD as the highest-order location for retail, commercial, cultural and community functions in the region.

2.4 Sub-Regional Centres

Sub-regional activity centres are identified at the **Mooroopna CBD, Riverside** and **Shepparton North**.

> Note that the classification of sub-regional centres in this Strategy relates to a description of the role and function of the relevant centres in the hierarchy serving Greater Shepparton for the purposes of land use and development policy.
>
> It is not intended to imply a desire or otherwise for retail uses (such as discount department stores) that are often considered as a sub-regional type of use in general property industry terminology.

Mooroopna CBD

Location and Description

The Mooroopna CBD is located approximately 4km south-west of the Shepparton CBD and has been identified as the sub-regional centre serving Mooroopna and relevant rural and regional areas located primarily to the west.

Mooroopna CBD is a main street style centre located along both sides of the Midland Highway, although the majority of specialty shop tenancies are located on the north side. A Woolworths and ALDI have been developed on the site of the former SPC factory outlet located on the south side of the Midland Highway. Both stores are considered to be trading successfully.

Centre Role and Function

The Mooroopna CBD contains a total of approximately 12,750m^2 of shopfront floorspace, including approximately 11,270m^2 of retail tenants.

The three supermarkets located in the Mooroopna CBD (Woolworths, ALDI, Fishers IGA) account for approximately 60% of the total retail floorspace in the centre. This emphasises the focus of the centre on meeting the food and grocery and general convenience shopping needs of local residents and people living in the rural hinterland, including Murchison and Tatura.

In contrast to the Shepparton CBD, the Mooroopna CBD has a limited role in providing higher-order commercial functions.

Main Features and Issues

Important considerations for the Activity Centres Strategy include:

- **Vacancy Rate** – although Mooroopna CBD has a vacancy rate of approximately 5%, this reflects in part some tenancies that are out-dated in terms of their ability to meet modern shopper needs, and thus require a re-fit or replacement. Nonetheless, the current vacancy rate is within normal expectations.

- **North-South –** the northern and southern sides of the Mooroopna CBD are separated by a large median. This means that the Woolworths and ALDI stores on the south side create customer traffic that does not directly benefit those specialty shops which are concentrated to the north of the median strip.

> Stakeholder Comment
>
> "ALDI and Woolworths have been great for this town. Unfortunately, we don't see their customers cross the road too much."

- **Relationship with Shepparton –** discussions with traders indicate that the Mooroopna CBD is not considered a direct competitor with other centres in Shepparton. When centres are performing well in Shepparton this tends to also reflect a relatively strong trading period for the Mooroopna CBD.

- **Main Street Environment** – the Mooroopna CBD has a pleasant street-based shopping environment that benefits from plentiful on-street parking and the amenity provided by the large median strip on the Midland Highway. Opportunities for improvement to the streetscape and shopping exist, although in an overall sense the changes would likely be only incremental.

- **Supermarket** – it is understood that the existing Fishers IGA has experienced a significant negative trading impact associated with the introduction of the Woolworths and ALDI. In the past, an additional supermarket on land north of the Midland Highway was also proposed. Determining the appropriate size and location of anchor tenants in the Mooroopna CBD is an important future consideration.

Riverside

Location and Description

The Riverside activity centre is located south of the Goulburn River on the western side of the Goulburn Valley Highway. Adjacent uses include the Goulburn Valley Motor Village. The centre is located approximately 3km south of the Shepparton CBD.

Previously identified in the Shepparton Planning Scheme as Shepparton South, the Riverside centre is dominated by the Riverside Plaza shopping centre, and it is appropriate that this is reflected in the activity centre name.

Although at present the Riverside Plaza shopping centre is effectively equivalent to the activity centre, this is not necessarily the case into the future. Future planning and development of the activity centre could conceivably include expansion to include areas outside the existing shopping centre boundary (subject to application of relevant planning and policy processes).

Centre Role and Function

The Riverside Plaza Shopping Centre opened in 2009 with an enclosed shopping mall anchored by a Coles supermarket and comprising approximately 15 shops. A number of large tenancies located at the rear of the centre fronting onto the shared carpark were originally built for homemaker/bulky goods retailing, but have been largely vacant. A KFC outlet is located on a car park pad site.

A relatively new complex (opened early 2015) is located immediately north of the existing shopping centre and includes a Harvey Norman, Harvey Norman Big Buys and a Fun City amusement centre. This complex shares parking with the existing shopping centre and was enabled through Amendment C155 to the Greater Shepparton Planning Scheme which extended the Commercial 1 Zone to the north.

Main Features and Issues

The key issues for the Riverside activity centre that are of relevance to the Strategy are as follows:

- **Role and Function** – the Riverside Plaza shopping centre currently serves a strong convenience shopping role that is supported by the supermarket and adjacent specialty shops. The rear of the centre has been vacant for some time and it is understood that these tenancies are likely to be filled in the near future by homemaker retailing. Although such an outcome is strongly supported, it is important the Strategy provides guidance on the relative role and function of Riverside Plaza relative to the adjacent Enterprise Corridor that also incorporates a range of showroom and bulky goods type uses.

- **Floorspace Cap** – at present the amount of 'shop' floorspace at Riverside Plaza is limited in the planning scheme (supermarket: 4,300m^2, and other shop: 2,300m^2) and it is appropriate for the Strategy to review this provision.

- **Mix of Uses –** Riverside Plaza contains a number of community uses that are important for residents living in surrounding suburbs and other visitors, including a medical clinic and community centre. In the future, it is important that an appropriate mix of community and commercial uses complement the overall retail focus of the Riverside Plaza centre.

- **Centre Boundary –** it may be appropriate to consider the creation of a broader 'Riverside' activity centre. This could include an expansion of the centre beyond the existing Riverside Plaza shopping centre boundary into adjacent areas (in particular to the north) to facilitate a genuine mixed-use activity centre west of the Goulburn Valley Highway between the Broken River and Riverview Drive.

Shepparton North

Location and Description

The Shepparton North activity centre effectively comprises the Fairleys IGA and a small number of shops located immediately adjacent to the front of the store. At present, the centre contains approximately 4,000m^{2}of retail floorspace, which is well-below the allowable shop floorspace cap of 8,000m^2 in the planning scheme.

Located on the eastern side of the Goulburn Valley Highway, the centre occupies a prominent position at a 'gateway' location to the northern edge of the Shepparton urban area. The northern edge of the Shepparton CBD is located approximately 1.5km to the south and Maude Street Mall is 3km to the south.

Previously identified in the Shepparton Planning Scheme as Fairleys (Numurkah Road), the activity centre is now more appropriately known simply as Shepparton North.

Role and Function

Patronage is primarily generated from then northern areas of urban Shepparton and from rural and regional areas to the north and north-west.

Fairleys IGA is a popular grocery shopping destination and is one of the best-performing independent supermarkets in Victoria.

However, the role of the centre in meeting community need is limited by the lack of supporting speciality shops and other non-retail uses that would typically characterise a centre of this type. This has been reflected in previous planning policy considerations relevant to the centre (for example Amendment C119).

Main Features and Issues

Considerations for the Strategy relevant to the Shepparton North activity centre include:

- **Potential Expansion** – the opportunity exists for the Shepparton North activity centre to expand within the existing planning framework for the centre that includes a shop floorspace cap of 8,000m^2 and significant land in the Commercial 1 Zone that is currently vacant. This opportunity for expansion has not been realised.
- **Growing Demand** – the northern parts of the Shepparton urban area continue to experience population growth, and this is expected to continue for the foreseeable future. Development of the north-east growth area that has been identified by Greater Shepparton and is located a short distance to the east will further increase demand for additional facilities required to meet the needs of this expanding population.
- **Mix of Uses –** at present, the limited mix of uses in the Shepparton North activity centre is not consistent with the expectations of both planning policy and the general community.
- **Future Role** – as the Shepparton North centre expands to meet the needs of surrounding residents and a large regional hinterland, an enhanced role for the activity centre hierarchy as a sub-regional centre is anticipated. For this to occur, the centre must contain a broader range of retail and commercial functions consistent with this definition within the hierarchy.

2.5 Neighbourhood/Town Centres

The classification of Neighbourhood Centre (urban Shepparton) and Town Centre (rural and regional) activity centres reflects those centres that have a focus on meeting most of the basic day-to-day grocery and convenience shopping needs of local residents, and which also may contain a basic range of commercial and community functions (particularly town centres).

Tatura

Location and Description

The Tatura Town Centre is located centrally to the town, with a focus on Hogan Street west of the railway line, although also including parts of Hogan Street to the east of the railway line and Casey Street to the south. Shepparton CBD is located approximately 17km (direct distance) to the north-east.

A traditional main street style town centre, Tatura town centre has a pleasant streetscape that provides a high degree of pedestrian amenity.

Centre Role and Function

A total of approximately 12,000m^2 of shopfront floospace is located in the Tatura town centre, including 9,100m^2 of retail tenants. The vacancy rate is currently 9%, which is above normal expectations for a centre of this type (4% to 6% is considered to be an acceptable vanacy rate for traditional strip-type activity centres).

Key retail tenants include Foodworks and IGA supermarkets, although they lack the full range of products at larger supermarkets located in urban Shepparton; nevertheless, they have a comprehensive range of basic convenience grocery items.

A wide range of non-retail commercial and community functions are located in the Tatura town centre, including professional services, medical offices and Goulburn Murray Water offices.

Main Features and Issues

The key considerations for the Strategy which are relevant to Tatura include:

- **Retaining Spending –** the most important factor relevant to trading performance for town centres in regional locations such as Tatura is the degree to which the spending by residents can be retained locally. Ensuring that the Tatura town centre continues to meet the needs of local residents and the need to travel to more distant centres is minimised will be an important policy objective.

- **Major Employers –** Tatura town centre benefits from the proximity of major employers which include Tatura Milk Industries (dairy processor), Department of Primary Industries and Unilever. These provide a sense of economic stability to Tatura which is important in the context of the future operation of the town centre.

- **Supporting Reinvestment –** although the Tatura town centre is generally well-presented, some individual tenancies would benefit from reinvestment and refurbishment. Ensuring that building stock is kept to a high standard is an ongoing issue for small town retailing across Australia.

Rowe Street East

Location and Description

Rowe Street East has been defined in this Strategy as a Neighbourhood activity centre. This includes the Shepparton Plaza shopping centre located on the south-west corner of the Midland Highway and Archer Street, as well as those areas in the Commercial 1 Zone extending as far as the railway line in the west.

Rowe Street East was previously considered a part of the Shepparton CBD in some planning policies (e.g. Shepparton CBD Strategy). The centre has been given neighbourhood activity centre status in this proposed strategy to reflect:

- The physical barrier of the railway line that reduces functional links to the CBD
- The very different role and function of Rowe Street East (including Shepparton Plaza) relative to the higher-order retail and commercial role of the CBD.

The centre includes the shopping centre component at the eastern end, as well as a range of mixed businesses fronting the Midland Highway to the west. Maude Street Mall is located approximately 1km west of the shopping centre.

Amendment C92 to the Greater Shepparton Planning Scheme proposes the centre for inclusion in the Activity Centres Zone.

Role and Function

The Shepparton Plaza shopping centre is the major activity generator, comprising a Woolworths supermarket and an internal mall with specialty shops. Other businesses located to the west of the shopping centre include Officeworks, Red Rooster, Liquorworks and a range of showroom and other non-retail businesses.

According to the results of the telephone survey, Shepparton Plaza tends to be used primarily by residents of urban Shepparton. Although the key focus of the centre is on food and grocery and convenience retailing associated with the Woolworths and specialty shops, the presence of Officeworks and other mixed businesses means that the centre is used by a wide range of household and business customers.

Main Features and Issues

For the Strategy, important aspects relevant to Shepparton Plaza include:

- **Split Ownership –** Shepparton Plaza shopping centre is owned under strata title and therefore lacks the central ownership and management of most comparable shopping centres. This is reflected in a relatively run-down appearance for the specialty shop mall, which also includes a number of vacant tenancies.
- **Centre Identity –** at present the activity centre lacks a sense of shared identity between the shopping centre in the east and the general business area to the west. In part, this reflects the previous *ad hoc* nature of development in the precinct, although over time it

is appropriate to consider ways in which a more integrated activity centre could develop.

- **Role and Function** – the role and function of Rowe Street East in the future will need to reflect its positioning in a physically very large and continuous retail and commercial area that also comprises the Shepparton CBD (to the west), Benalla Road Enterprise Corridor (to the east) and Shepparton Marketplace (to the east). Future development in the Rowe Street East activity centre will need to be sensitive to policy objectives for these adjacent centres.

Echuca Road (Mooroopna North)

Location and Description

The Echuca Road (Mooroopna North) activity centre is located approximately 1km north of the Mooroopna CBD and is effectively a standalone Coles supermarket with a service station on a carpark pad site.

Role and Function

Classification of Echuca Road as a neighbourhood activity centre is as a result of the role and function of the Coles supermarket which is accessed regularly by many residents in urban Mooroopna for top-up and convenience grocery shopping.

Main Features and Issues

Issues to consider in the Strategy for Echuca Road include:

- **Reliance on Key Tenant –** at present the activity centre effectively represents a single use, namely a Coles supermarket. In the future, consideration may be given to either some additional retail, commercial or community uses at the site if Coles commits to the centre long-term or, alternatively, the business decision-making of the key tenant (Coles) may mean a reduction in the importance of the centre.

2.6 Local/Township Centre

The City of Greater Shepparton is served by a network of small local centres (in urban Shepparton or township centres (in regional areas) that provide for the basic daily shopping requirements of the local communities which they serve.

These facilities are in a number of formats, ranging from a single convenience store, to collections of 4-5 shops supported by a general store or mini-mart. In some cases, the role of the local convenience centre or facility is undertaken by a 24-hour convenience store associated with petrol filling stations.

These centres play an important local role, particularly for those members of the community who do not have ready access to car transport or public transport to larger centres.

Some local centres also have a role in serving the needs of tourists, passing trade and other visitors.

Main Features and Issues

Important considerations in relation to Local and Township centres include:

- **Recognition of Importance** – local and township centres or facilities are recognised in the Strategy as important contributors to retail services at the local level, particularly in terms of providing convenient access to a localised catchment.

- **Challenges –** in some cases, established local centres are losing their retail role, and this is reflected in vacant premises. In these cases, proposals for non-retail activities (eg, small office, or residential where appropriate) may be considered in place of the redundant retail activities.

2.7 Enterprise Corridor

Three Enterprise Corridors are identified in this Strategy for the City of Greater Shepparton that include a wide range of both retail and non-retail employment-related uses, including:

- Homemaker and bulky goods retailing
- Light industry
- Trade supplies
- Automotive sales and repairs
- Trade showrooms
- Warehousing and storage.

Some limited convenience retailing primarily focused on meeting the needs of local residents, workers and visitors is also located in Enterprise Corridors, often associated with service stations.

Enterprise Corridors, located at prominent locations at key entry points to urban Shepparton, rely on the significant exposure and accessibility to large volumes of passing trade from across the surrounding region.

Benalla Road

The Benalla Road enterprise area extends approximately 2.5km from east to west along the Midland Highway at the eastern edge of the Shepparton urban area. Large volumes of traffic pass through the corridor each day, making this locality attractive to businesses seeking high exposure to potential customers.

Located immediately north of the Benalla Road enterprise corridor is the very large Shepparton East employment area that is a key location for industry in the region, including the SPC Cannery.

Benalla Road is one of the major locations for homemaker (bulky goods) retailing in regional Victoria, with an extensive range of traders comprising a total of approximately 42,000m^2 of floorspace. This includes major national brands such as:

- Bunnings
- Forty Winks
- The Good Guys
- Rays Outdoors
- Pillow Talk
- Lincraft
- Snooze
- BCF
- Spotlight.
- Fantastic Furniture.

According to the telephone survey, Benalla Road is the 2nd most visited destination in Shepparton for household goods, after the Shepparton CBD.

Other significant non-retail uses on Benalla Road include car sales, automotive repairs, trade supplies, petrol stations, hotel and fast food retailing.

Shepparton Marketplace is located midway along the length of the Benalla Road enterprise corridor. Although Shepparton Marketplace serves a very different role and function from the adjacent enterprise corridor, in a general sense both localities create customer activity that benefits the other.

The existing Bunnings in Benalla Road is approved for relocation to an expanded store immediately to the west of the Shepparton Marketplace. A Masters hardware store is also approved for a site opposite the Shepparton Marketplace. In combination, both stores will be significant regional attractors for Shepparton and important drivers of customer activity in the wider Benalla Road enterprise area.

Shepparton North Gateway

An enterprise corridor has been defined as Shepparton North Gateway that includes those parts of Numurkah Road (Goulburn Valley Highway) generally located between Pine Road in the south and extending north for approximately 900 metres to include those areas within the Commercial 2 Zone.

The Shepparton North neighbourhood activity centre is located within, but does not comprise part of, the enterprise corridor.

Located at the northern gateway to urban Shepparton, the enterprise corridor has a particular focus on rural and trade supplies, with only a limited number of homemaker (bulky goods) type uses. For this reason, the level of activity and overall influence of the Shepparton North

Gateway is currently lower than that of the other enterprise corridors in Greater Shepparton that have a significantly larger presence of retail uses. Homemaker retail tends to generate significantly higher levels of visitation than other non-retail functions in highway-based commercial areas.

A number of fast food outlets are concentrated at the southern end of the gateway, including McDonald's and Subway.

Shepparton South Gateway

The Shepparton South Gateway enterprise corridor is centred on the Goulburn Valley Highway at the southern entrance to urban Shepparton. The corridor includes land within the Commercial 2 Zone between the Goulburn River in the north and the former service station located at the southern extent of the service lane on the western side of the Goulburn Valley Highway approximately 2.5km to the south.

A wide range of businesses are located in the Shepparton South Gateway, with the southern end comprising mainly mixed businesses and trade supplies, and with the northern end including a higher provision of homemaker retail and automotive uses.

The total retail provision of retail floorspace in the Shepparton South Gateway is estimated at approximately 12,000m^2, or less than half that in the Benalla Road enterprise corridor. Nonetheless, in a broad sense both Shepparton South Gateway and Benalla Road are important locations for both retail and non-retail businesses in the context of Greater Shepparton.

Main Features and Issues for Enterprise Corridors

Issues specifically to consider in the Strategy for the enterprise corridors include:

- **Role and Function** – the nominated enterprise corridors have an important role in accommodating a range of retail and general business uses that benefit from exposure to passing traffic and which benefit from the availability of large and relatively low cost sites. It is important that the appropriate development of the enterprise corridors is encouraged by the Strategy, but that this does not include uses which are more appropriately located in activity centres. At present, cinemas are an as-of-right use in Enterprise Corridors.

> Stakeholder Comment
>
> "Losing the cinema out of the CBD would be a great shame and impact on a lot of other businesses."

- **Integrated Land Use Planning –** at present, the enterprise corridors in Greater Shepparton do not have the same integrated planning and development framework that applies to activity centres. Although in reality the level of Council investment and planning for enterprise corridors will be relatively lower than for activity centres, a role exists in ensuring that planning and infrastructure is provided which supports the role and function of these corridors.

- **Relationship with Adjacent Activity Centres –** all three enterprise corridors are located adjacent to, or surround, nominated activity centres. Over time, the ongoing planning and development of these activity centres should at least recognise the adjacent enterprise corridors and respond to the activities and uses in these precincts. Furthermore, it may be appropriate in the future for parts of the enterprise corridors to be formally incorporated into the activity centres, if and when required to meet future community need.

2.8 Existing Retail and Commercial Floorspace Provision

Estimates of current retail provision across the activity centres hierarchy have been prepared for the purposes of this Strategy, and are based on information obtained from a land use survey undertaken by the consultant staff in July 2014 and updated in June 2015.

Retail, Shopfront and Dedicated Commercial Office Floorspace by Centre Type

The proposed Activity centres hierarchy in Greater Shepparton accommodates a total of approximately 218,210m^2 of occupied retail floorspace, as summarised in Table 2.2.

A further 23,630m^2 of shopfront office floorspace and 61,530m^2 of dedicated office floorspace has also been identified. For this Strategy, dedicated office floorspace includes occupied first floor office tenancies and purpose-built office buildings (refer *Terms and Definitions*, Introduction). The Central Activities District (Shepparton CBD) accounts for approximately 42% of the total shopfront floorspace in Greater Shepparton and 95% of the dedicated office space. This reflects the continued importance of the Shepparton CBD in the regional economy.

As the Regional Retail Centre, Shepparton Marketplace has an important role in the retail sector accounting for approximately 7% of total retail floorspace. However, the non-retail role of the centre is limited.

Table 2.3 shows the vacancy rates for centre types in Greater Shepparton. Relatively high vacancy rates are evident in the Shepparton CBD (11%), the sub-regional centre category (12%) and in the local centre / township centre (11%). Overall for the municipality, a 9% vacancy rate prevails. As noted, a 4% to 6% vacancy rate is considered acceptable for a healthy strip-type activity centre. In a free-standing mall, the vacancy rate is typically zero due to centre management of the retail tenancy mix.

Table 2.2: Retail, Shopfront and Dedicated Office Floorspace by Centre Type, Greater Shepparton, 2015

Centre Type	Retail		Total Shopfront		Dedicated Office	
	Floorspace	Share	Floorspace	Share	Floorspace	Share
Central Activities District	85,310m²	39%	111,250m²	42%	58,600m²	95%
Regional Retail Centre	15,250m²	7%	15,600m²	6%	0m²	0%
Sub-Regional Centre	34,170m²	16%	46,520m²	17%	180m²	0%
N'hood Centre/Town Centre	24,280m²	11%	27,830m²	10%	1,850m²	3%
Local Centres/Township Centre	6,980m²	3%	9,250m²	3%	50m²	0%
Enterprise Corridors	52,220m²	24%	55,410m²	21%	850m²	1%
Total Greater Shepparton	218,210m²	100%	265,860m²	100%	61,530m²	100%

Source: Essential Economics Floorspace Survey July 2014 adjusted in June 2015
Note: Total Shopfront Floorspace includes retail, non-retail and vacant shopfront tenancies.

Table 2.3: Shopfront Vacancy Rates by Centre Type, Greater Shepparton, 2015

Centre Type	Vacant Shopfront	Total Shopfront	Vacancy Rate
Central Activities District	12,520m²	111,250m²	11%
Regional Retail Centre	0m²	15,600m²	0%
Sub-Regional Centre	5,770m²	46,520m²	12%
Neighbourhood Centre/Town Centre	1,690m²	27,830m²	6%
Local Centre/Township Centre	1,000m²	9,250m²	11%
Enterprise Corridors	3,040m²	55,410m²	5%
Total Greater Shepparton	**24,020m²**	**265,860m²**	**9%**

Source: Essential Economics Floorspace Survey July 2014 adjusted in June 2015
Note: Total Shopfront Floorspace includes retail, non-retail and vacant shopfront tenancies.

2.9 Implications for Strategy

Important implications for the Commercial Activity Centres Strategy identified in this Chapter include the following:

- A revised activity centres hierarchy is required for Greater Shepparton that reflects the unique roles and functions of the Shepparton CBD (as the higher-order retail, commercial and community centre in the region) and the Shepparton Marketplace (as an important regional retailing destination).
- The definition of the Shepparton CBD has been refined to exclude what is now termed the Rowe Street East activity centre.
- A further change to the activity centres hierarchy includes identifying three 'enterprise corridors' located at key entry points to Shepparton and which include a mix of homemaker/bulky goods retailing, showrooms and general businesses that rely on exposure to high levels of passing trade.
- Across all level of the hierarchy, a range of issues have been identified that require a response in the Commercial Activity Centres Strategy. Although many of these issues are common across centres, other issues are centre or location-specific.

- A total of 265,860m^2 of shopfront floorspace is identified in Greater Shepparton, of which 111,250m^2 or 42% is located in the Shepparton CBD. Approximately 95% of dedicated commercial office space is located in the Shepparton CBD.
- Overall, vacancy rates are considered to be well-above the average for strip-type activity centres, with an average vacancy rate of 9% for the overall municipality.

3 POPULATION AND SOCIO-ECONOMIC TRENDS

This Chapter provides a review and analysis of population and socio-economic trends relevant to the activity centres in Greater Shepparton, and includes:

- Analysis of current population levels and recent tends
- Preparation of population forecasts for each of the identified sectors in the wider Study Area
- Presentation of key socio-economic characteristics for each of the sectors, including age structure, household income and labour force status.

The regional service role served by activity centres in Greater Shepparton means that the area considered in this analysis extends well outside the physical boundaries of the municipality to include a substantial rural and regional hinterland.

3.1 Study Area

For the purposes of analysing the role and operation of centres in Greater Shepparton, a Study Area has been identified that reflects the wider region of relevance to activity centres. That is, the Study Area reflects the wider patronage and 'trading draw' generated by activity centres including the Shepparton CBD, Shepparton Marketplace etc.

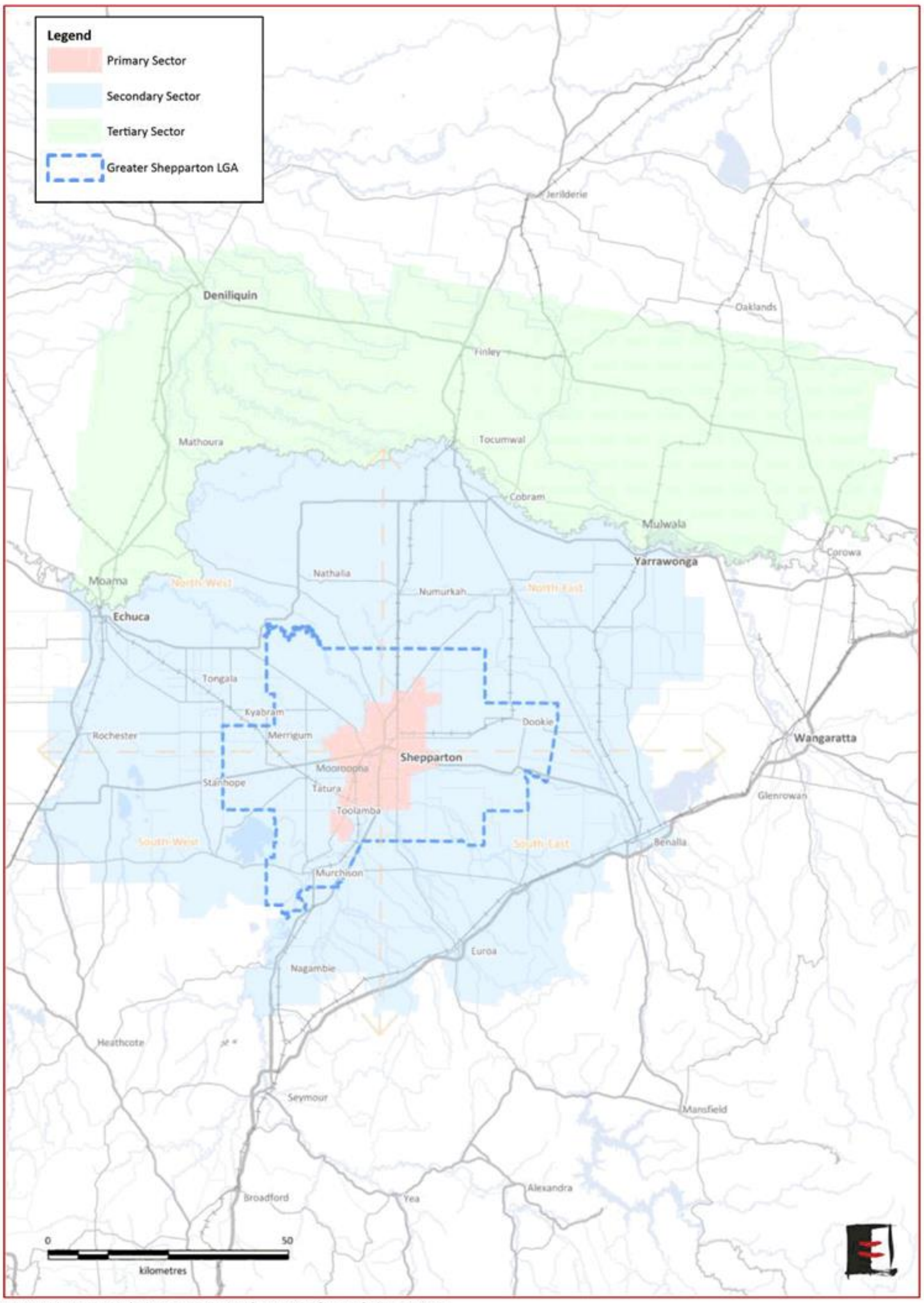
The Study Area has been divided into three sectors that reflect the relative level of sales and patronage generated by activity centres in Greater Shepparton from each sector. These are as follows:

- **Primary –** includes urban Shepparton and Mooroopna, as well as immediately adjacent rural areas on the urban fringe.
- **Secondary –** includes the rural areas and regional towns surrounding urban Shepparton and Mooroopna, extending approximately 70km north to the Murray River and 50km to the south including Nagambie and Euroa. The Secondary sector extends in the east as far as Benalla, and in the west to include Rochester and Elmore.
- **Tertiary –** the Tertiary sector includes areas of southern New South Wales, including Deniliquin, Finley and Berrigan, and for these residents the activity centres in Greater Shepparton are relevant in terms of larger occasional shopping trips, and for selected personal, professional and other services not provided locally in the smaller towns.

In addition to the Study Region, the analysis in this Strategy also specifically considers the City of Greater Shepparton which includes all of the Primary Sector, as well as parts of the Secondary sector.

The Study Area and City of Greater Shepparton are shown in Map 3.1.

Map 3.1: Study Area for Retailing in Greater Shepparton



Source: Essential Economics with MapInfo and StreetPro

3.2 Population Levels

The Study Area is estimated to have a total population of 171,160 persons in 2015, including 52,180 persons in the Primary sector, 92,670 persons in the Secondary sector and 26,310 persons in the Tertiary sector.

As shown in Table 3.1, the total population of the Study Area has increased from 159,130 persons in 2001, representing a net increase of 12,030 persons over the period. Approximately 62% of this growth has occurred in the Primary sector, mainly reflecting ongoing development on the urban fringe of Shepparton and Mooroopna.

Table 3.1: Population Trends for Study Area and Greater Shepparton, 2001 to 2015

	2001	2006	2011	2015
Population (No.)				
Primary Sector	44,740	46,020	49,830	52,180
Secondary Sector	89,070	90,620	91,780	92,670
Tertiary Sector	25,320	25,280	25,890	26,310
Total Study Area	**159,130**	**161,920**	**167,500**	**171,160**
Greater Shepparton	*58,150*	*58,690*	*61,740*	*64,060*
Average Annual Growth (No.)				
Primary Sector	-	+260	+760	+590
Secondary Sector	-	+320	+240	+230
Tertiary Sector	-	-10	+120	+110
Total Study Area	**-**	**+570**	**+1,120**	**+930**
Greater Shepparton	-	*+110*	*+610*	+580
Average Annual Growth (%)				
Primary Sector	-	+0.6%	+1.6%	+1.2%
Secondary Sector	-	0.3%	+0.3%	+0.2%
Tertiary Sector	-	0.0%	+0.5%	+0.4%
Total Study Area	**-**	**+0.3%**	**+0.7%**	**+0.5%**
Greater Shepparton	-	*+0.2%*	*+1.0%*	*+0.9%*

Source: ABS, Regional Population Growth, Cat No: 3218.0 and customised data; Essential Economics
Note: Totals Subject to Rounding

The City of Greater Shepparton has experienced ongoing population growth over the period 2001 to 2015, particularly in the period since 2006.

Note on Secondary Sector

Although the Secondary sector experienced total population growth over the period 2001 to 2015, in reality this growth was not evenly distributed. For this reason, the Secondary sector has been analysed on the basis of four quadrants (north-east, south-east, south-west and north-west) in order to better understand these patterns (see also Map 3.1).

As shown in Table 3.2, the northern quadrants of the Secondary sector experienced population growth over the relevant period, primarily associated with the popularity of towns including Echuca, Cobram and Yarrawonga. In contrast, the southern quadrants of the Secondary sector experienced a population decline over the same period.

Table 3.2: Breakdown of Population Trends within Secondary Sector, 2001 to 2015

Quadrant	2001 No. Persons	2015 No. Persons	Change No. Persons
North			
North-East	23,130	25,790	**+2,660**
North-West	21,570	23,620	**+2,050**
South			
South-East	18,470	17,820	**-650**
South-West	25,900	25,440	**-460**
Total Secondary Sector	**89,070**	**92,670**	**+3,600**

Source: ABS, Regional Population Growth, Cat No: 3218.0 and customised data; Essential Economics
Note: Totals Subject to Rounding

The analysis indicates that an increased opportunity exists for activity centres in Greater Shepparton to attract patronage from the population growth occurring to the north, rather than the areas experiencing population decline primarily located to the south of Shepparton.

3.3 Population Forecasts

Population Growth Patterns

Over coming years, population growth in the Study Area is expected to come from a number of sources. It is important for the Strategy to reflect the nature of this potential growth and the implications for activity centres in Greater Shepparton.

Shepparton Growth Areas

A number of urban growth areas have been identified on the fringe of urban Shepparton and Mooroopna that are expected to accommodate ongoing population growth for the foreseeable future.

Opportunities for urban growth include:

- The northern corridor of Shepparton east of the Goulburn Valley Highway and which includes the 'Shepparton North East Growth Corridor' that is currently undergoing a Precinct Structure Planning process
- The south-east corridor of Shepparton which includes existing residential estates along Poplar Avenue and which will include the extensive 'Shepparton South East Growth Corridor' which is also undergoing a Precinct Structure Plan process

- A southern growth corridor that includes the extension of existing housing estates at Kialla
- Future urban growth identified on the western edge of Mooroopna.

Opportunities for urban growth have also been identified at Tatura, Merrigum and Murchison, although the rate of development in these rural towns is expected to be incremental in nature.

In-Fill Development

According to the Greater Shepparton Housing Strategy (2011) it is anticipated that in-fill development in existing urban areas (including the CBD) will accommodate approximately 10% of housing growth, with the balance occurring in urban growth areas.

Nonetheless, over the past decade the well-established trend in Melbourne for substantial population growth occurring in established suburbs as a result of in-fill and multi-unit development has been increasingly occurring in regional cities. For this reason, it is appropriate for strategic land use policy to consider the long-term opportunities for increased residential densities in relevant parts of Greater Shepparton.

In particular, the Shepparton CBD includes, and is located in proximity to, areas identified for 'substantial change' in the Shepparton Housing Strategy. If the trend towards increased infill residential density does occur in Greater Shepparton, it is expected to generate significant benefits for traders and other businesses in the CBD.

Population Projections

The population of the Study Area is forecast to increase from 171,600 persons in 2015 to 199,690 persons in 2036 according to projections prepared using the latest available data sources. This represents a total increase of approximately +28,530 persons over the forecast period, or a total increase of +17% relative to the current population of the Study Area.

Population growth in the Primary sector (which includes urban Shepparton and Mooroopna) is also forecast to expand, with the current population of 52,180 persons expected to increase to 70,150 persons 2036. That is, approximately two-thirds of the population growth across the Study Area is forecast to occur in the Primary Sector which is of most importance to activity centres in the City of Greater Shepparton.

The population of the Secondary Sector is forecast to reach 103,200 persons in 2036, an increase of 10,530 persons on the current 2015 population of 92,670 persons. In contrast, population in the Tertiary Sector is forecast to be relatively stable over the same period.

On an overall basis, activity centres in Greater Shepparton will be trading in an environment of ongoing population growth for the foreseeable future.

Table 3.3: Population Forecasts for Study Area and Greater Shepparton, 2015 to 2036

	2015	2019	2026	2036
Population (No.)				
Primary Sector	52,180	55,360	61,430	70,150
Secondary Sector	92,670	94,360	97,820	103,200
Tertiary Sector	26,310	26,430	26,540	26,340
Total Study Area	**171,160**	**176,150**	**185,790**	**199,690**
Greater Shepparton	*64,060*	*67,250*	*73,310*	*82,010*
Average Annual Growth (No.)				
Primary Sector	-	+800	+870	+870
Secondary Sector	-	+420	+490	+540
Tertiary Sector	-	+30	+20	-20
Total Study Area	**-**	**+1,250**	**+1,380**	**+1,390**
Greater Shepparton	-	+800	*+870*	*+870*
Average Annual Growth (%)				
Primary Sector	-	+1.5%	+1.5%	+1.3%
Secondary Sector	-	+0.5%	+0.5%	+0.5%
Tertiary Sector	-	+0.1%	+0.1%	-0.1%
Total Study Area	**-**	**+0.7%**	**+0.8%**	**+0.7%**
Greater Shepparton	-	*+1.2%*	*+1.2%*	*+1.1%*

Source: DTPLI Victoria in Future, 2014; NSW Department of Planning and Infrastructure, NSW Local Government Area Population Projections, 2014; ABS, Regional Population Growth, Cat No: 3218.0; Essential Economics

Note: Totals Subject to Rounding

Note on Secondary Sector

Of the total forecast population growth in the Secondary sector of 10,530 persons over the period to 2036, approximately 9,620 persons or 91% is forecast to be generated from those areas located north of urban Shepparton.

This growth pattern further highlights the increasing importance of locations located north of Shepparton, such as Echuca and Yarrawonga, to supporting the regional service role of activity centres in the municipality.

3.4 Socio-Economic and Demographic Characteristics

A summary of socio-economic and demographic characteristics for the Study Area and Greater Shepparton is shown in Table 3.4 and is based on data available from the ABS 2011 Census of Population and Housing. Comparisons are also made against the Regional Victoria benchmark.

The main features from Table 3.4 of relevance to the Strategy include the following:

- Median individual income levels across the Study Area ($24,630) are marginally below the Regional Victoria average ($25,740). In contrast, income levels in the Primary Sector are notably higher ($26,760) and this pattern reflects the typical income differential between urban and rural areas.

- The age profile of people living in the Primary sector (a median age of 37 yrs) is significantly younger than that in the balance of the Study Area (a median age of 43 yrs in Secondary and 46 yrs in Tertiary sectors).

- A relatively high share of the population in the Primary sector (11.6%) and Greater Shepparton (10.5%) is overseas-born relative to the Regional Victoria average (5.9%).

3.5 Implications for Strategy

The Commercial Activity Centres Strategy will need to consider the following aspects:

- Considering future activity centre outcomes in Greater Shepparton requires analysis of a Study Area that reflects shopping and visitation patterns. A three-sector Study Area is identified including a Primary sector (urban Shepparton and Mooroopna), Secondary Sector (towns and rural areas surrounding urban Shepparton), and a Tertiary sector (southern New South Wales).

- The population of the Study Area has increased from 159,130 persons in 2001 to 171,160 persons in 2015. Although approximately 62% of this growth has occurred in the Primary sector, population growth has also occurred in parts of the Secondary sector north of Shepparton, including at Echuca and Yarrawonga.

- Population growth is forecast for the Study Area into the future, with growth again concentrated in the Primary sector and the northern parts of the Secondary sector. In general terms, the areas north of urban Shepparton will be an increasingly important market for the activity centres hierarchy over coming years due to the population growth occurring in this direction.

Table 3.4 Socio-Economic Characteristics, Greater Shepparton Study Area, 2011

Category	Primary Sector	Secondary Sector	Tertiary Sector	Total Study Area	Greater Shepparton	*Regional Victoria*
Income						
Median individual income (annual)	$26,760	$23,820	$23,840	**$24,630**	$26,590	*$25,740*
Variation from Regional Victoria median	*4.0%*	*-7.5%*	*-7.4%*	***-4.3%***	*3.3%*	*0.0%*
Median Age (years)	37	43	46	**42**	38	*41*
Country of Birth						
Australia	85.1%	91.5%	93.0%	**89.8%**	86.1%	*88.8%*
Other Major English Speaking Countries	3.3%	4.2%	4.4%	**4.0%**	3.4%	*5.4%*
Other Overseas Born	11.6%	4.3%	2.5%	**6.2%**	10.5%	*5.9%*
Dwelling Structure (Occupied Private Dwellings)						
Separate house	84.9%	88.7%	88.1%	**87.6%**	86.8%	*88.9%*
Semi-detached	3.9%	3.2%	3.7%	**3.5%**	3.3%	*4.0%*
Flat, unit or apartment	9.4%	6.5%	6.0%	**7.3%**	8.2%	*6.1%*
Average household size	2.5	2.4	2.3	**2.4**	2.6	*2.4*
Tenure Type (Occupied Private Dwellings)						
Owned outright	32.1%	41.6%	44.3%	**39.3%**	33.7%	*39.6%*
Owned with a mortgage	35.1%	32.8%	29.3%	**32.9%**	35.7%	*34.3%*
Rented	31.7%	24.5%	25.1%	**26.6%**	29.4%	*25.2%*
Housing Costs						
Median monthly mortgage repayment	$1,370	$1,240	$1,200	**$1,280**	$1,350	*$1,320*
Variation from Regional Victoria median	*3.8%*	*-6.1%*	*-9.1%*	***-3.0%***	*2.3%*	*0.0%*
Median weekly rents	$190	$170	$160	**$180**	$190	*$190*
Variation from Regional Victoria median	*0.0%*	*-10.5%*	*-15.8%*	***-5.3%***	*0.0%*	*0.0%*
Share dwellings connected to the internet	72.0%	68.8%	67.8%	**69.5%**	72.3%	*73.2%*
Car Ownership per Dwelling						
None	8.6%	6.5%	6.7%	**7.1%**	7.7%	*6.7%*
One	35.3%	34.4%	38.4%	**35.3%**	33.6%	*34.8%*
Two	38.4%	37.9%	39.0%	**38.3%**	38.8%	*38.7%*
Three of more	17.7%	21.2%	15.8%	**19.4%**	20.0%	*19.8%*
Occupation						
Managers & professionals	30.5%	32.5%	33.6%	**32.1%**	32.2%	*32.6%*
Clerical & sales workers	33.7%	29.4%	30.8%	**30.9%**	32.0%	*32.2%*
Technicians & trades workers	14.7%	14.8%	15.1%	**14.8%**	14.6%	*15.7%*
Machinery operators & drivers	6.7%	7.8%	8.0%	**7.5%**	6.7%	*7.0%*
Labourers & related workers	14.4%	15.5%	12.6%	**14.7%**	14.5%	*12.5%*

Source: 2011 ABS Census of Population and Housing

4 ECONOMIC ANALYSIS

This Chapter presents an economic analysis identifying factors relevant to the future development and evolution of activity centres in Greater Shepparton, and includes the following components:

- Estimates of existing available retail spending
- Summary of existing retail, shopfront and dedicated office space provision in Greater Shepparton
- Estimates of current (2015) retail sales in Greater Shepparton
- Preparation of estimates of sales attributable to residents in the Study Area
- Analysis of escape spending
- Analysis of future retail potential in Greater Shepparton, based on future increases in available retail spending due to growth in population and per capita retail spending, and opportunities to retain this spending growth locally
- Discussion of the potential for the future development of activity centres
- Conclusions and implications for the Strategy.

4.1 Existing and Forecast Retail Spending

Per Capita Spending

Estimates of average per capita retail spending by residents in the Study Area and Greater Shepparton have been prepared with reference to the *MarketInfo* micro-simulation model; this model uses data from the ABS Household Expenditure Survey, ABS Population and Housing Census, ABS National Accounts and a range of other socio-economic indicators, and provides estimates of retail spending on a small area basis.

As shown in Table 4.1, average per capita retail spending by residents of the Study Area is approximately -3.5% below the Regional Victoria average. Per capita spending levels show only minor variations across the Study Area.

For 2015 the average per capita retail spending in the Study Area as a whole is estimated to be approximately $13,340 and comprises:

- $6,970 on food merchandise
- $5,930 on non-food merchandise
- $440 on retail services.

In comparison, the average per capita spending in Regional Victoria is estimated at $13,830 or 3.7% higher than that for the Study Area and 3.4% higher than Greater Shepparton.

Table 4.1: Per Capita Retail Spending Study Area and Greater Shepparton, 2015 ($2015)

Area	Food	Non-Food	Services	Total
Average Per Capita Retail Spending, 2014				
Primary Sector	$6,870	$6,030	$420	$13,320
Secondary Sector	$6,970	$5,950	$420	$13,340
Tertiary Sector	$7,170	$5,650	$540	$13,360
Study Area	**$6,970**	**$5,930**	**$440**	**$13,340**
Greater Shepparton	*$6,900*	*$6,050*	*$420*	*$13,370*
Regional Victoria	*$7,080*	*$6,300*	*$450*	*$13,830*
Variation from Regional Victoria				
Primary Sector	-3.0%	-4.3%	-6.7%	-3.7%
Secondary Sector	-1.6%	-5.6%	-6.7%	-3.5%
Tertiary Sector	+1.3%	-10.3%	+20.0%	-3.4%
Study Area	-1.6%	-5.9%	-2.2%	-3.5%
Greater Shepparton	-2.5%	-4.0%	-6.7%	-3.3%

Source: Essential Economics with MarketInfo

Total Spending

Current Spending

Estimates of total spending by residents of the Study Area and Greater Shepparton have been prepared by combining current population estimates (Table 3.1) with current estimates of per capita retail spending (Table 4.1).

Residents of the Study Area are estimated to spend (in round terms) $2,283 million on retail merchandise in 2015 (expressed in constant 2015 dollars) and this includes $1,193 million on food merchandise, $1,015 million on non-food merchandise, and $75 million on retail services.

The Primary sector accounts for $695 million or 30% of total spending by Study Area residents.

Total retail spending by residents of Greater Shepparton is estimated at $857 million in 2015, as shown in Table 4.2.

Table 4.2: Total Retail Spending Study Area and Greater Shepparton, 2015 ($2015)

Area	Food	Non-Food	Services	Total
Total Retail Spending by Category, 2014				
Primary Sector	$358m	$315m	$22m	$695m
Secondary Sector	$646m	$551m	$39m	$1,236m
Tertiary Sector	$189m	$149m	$14m	$351m
Study Area	**$1,193m**	**$1,015m**	**$75m**	**$2,283m**
Greater Shepparton	**$442m**	**$388m**	**$27m**	**$857m**

Source: Essential Economics with MarketInfo

Forecast Spending

Total annual retail spending by residents of the Study Area is forecast to increase over the period 2015 to 2036 due to the combination of population growth and ongoing real growth in average per capita retail spending.

By 2019, total available retail spending is forecast to be in the order of $2,475 million per annum, and this is forecast to increase to $3,541 million per annum by 2036.

This forecast growth in total retail spending will support an increase in turnover performance for existing traders who continue to meet market demand, as well as providing opportunities for new retail development within the Greater Shepparton region.

Table 4.3 summarises this forecast growth in retail spending, taking into account the population projections presented in Table 3.3 and average per capita retail spending estimates as shown in Table 4.1. An allowance has been made for real growth in per capita spending that reflects long-term historical trends in Australia and current economic conditions.

Table 4.3: Retail Spending Study Area and Greater Shepparton, 2015 to 2036 ($2015)

Area	2015	2019	2026	2036	Av. Growth pa 2015-2036
Total Retail Spending					
Primary Sector	$695m	$777m	$948m	$1,245m	+2.8%
Secondary Sector	$1,236m	$1,326m	$1,509m	$1,830m	+1.9%
Tertiary Sector	$351m	$371m	$409m	$465m	+1.3%
Total Study Area	**$2,283m**	**$2,475m**	**$2,866m**	**$3,541m**	**+2.1%**
Greater Shepparton	**$857m**	**$947m**	**$1,135m**	**$1,460m**	**+2.6%**

Source: Essential Economics

4.2 Retail Performance

Sales

Retail facilities in the City of Greater Shepparton achieved total sales in the order of $999 million in 2015, as shown in Table 4.4. This (rounded) figure includes:

- $446 million in food turnover,
- $521 million in non-food turnover, and
- $32 million in services turnover.

In this context, total retail turnover comprises sales that are attributable to residents of the Study Area and to non-residents, including tourists.

These estimates have been prepared by applying appropriate estimates of average turnover productivity (i.e. dollar sales per sq. metre) to the retail floorspace estimates shown in Table 2.2.

Where possible, the turnover estimates are based on published sales data from the Property Council of Australia, and other industry media sources including SCN and Inside Retailing magazines, and from an assessment of turnover performance gathered from floorspace surveys conducted by Essential Economics.

The figures presented in Table 4.4 (over page) should be regarded as a fair and reasonable approximation of existing trading conditions in the City of Greater Shepparton.

Table 4.4: City of Greater Shepparton Retail Turnover, 2015 ($2015)

Centre	Food	Non Food	Services	Total
Central Activities District				
Shepparton CBD	**$153m**	**$237m**	**$18m**	**$408m**
Regional Retail Centre				
Shepparton Marketplace	**$59m**	**$52m**	**$2m**	**$112m**
Sub-Regional Centres				
Riverside	$42m	$39m	$0m	$81m
Mooroopna CBD	$47m	$11m	$4m	$62m
Shepparton North	$37m	$0m	$0m	$37m
Total Sub Regional	**$126m**	**$50m**	**$4m**	**$179m**
Neighbourhood / Town Centres				
Echuca Road (Mooroopna North)	$15m	$0m	$0m	$15m
Shepparton Plaza	$33m	$16m	$1m	$49m
Tatura	$27m	$12m	$2m	$40m
Total Neighbourhood/Town Centre	**$74m**	**$28m**	**$2m**	**$104m**
Local Centre/Township Centre				
Various	**$23m**	**$2m**	**$5m**	**$30m**
Enterprise Corridor				
Benalla Road	$2m	$128m	$0m	$131m
Gateway North	$5m	$2m	$0m	$7m
Gateway South	$4m	$23m	$0m	$28m
Total Enterprise Corridor	**$12m**	**$153m**	**$0m**	**$165m**
Total City of Greater Shepparton	**$445.9m**	**$520.8m**	**$32.3m**	**$999.0m**

Source: Essential Economics

Market Share

A measure of the relative trading performance of the retail sector in Greater Shepparton is the 'market share' of total retail spending by residents that is directed to activity centres.

Of the $999 million of total retail sales in the City of Greater Shepparton, an estimated $914 million or 91% is derived from residents of the Study Area. This represents 40% of total spending by residents of the Study area, or alternatively, 40 cents in every dollar spent on retail goods and services by all residents of the Study area is spent in Greater Shepparton.

By individual sector, the market shares are as follows, as shown in Table 4.5:

- Primary sector: 81%
- Secondary sector: 25%
- Tertiary sector: 13%.

A key objective for the Strategy is to ensure that in the future these market shares are maximised to ensure that the economic opportunities for activity centres and the business sector in Greater Shepparton are realised.

Table 4.5: Study Area and Greater Shepparton Retail Market Share, 2015 ($2015)

Area	Sales	Share of Sales	Retail Spending	Market Share
Primary Sector	$563m	56%	$695m	81%
Secondary Sector	$306m	31%	$1,236m	25%
Tertiary Sector	$45m	5%	$351m	13%
Study Area	**$914m**	**91%**	**$2,283m**	40%
Beyond	$85m	9%	-	-
Total	**$999m**	**100%**	**-**	**-**
City of Greater Shepparton	**$690m**	**69%**	**$857m**	**81%**

Source: Essential Economics

4.3 Escape Spending

'Escape spending' refers to the extent to which retail spending by residents within a particular region is directed to retail locations outside that region. A high level of escape spending identifies a relative lack of conveniently-located retail facilities in the area, and may indicate latent demand for additional retail development. Alternatively, escape spending may also indicate that the range and type of retail facilities in a region are not meeting the needs of local residents, and that residents are therefore shopping outside the region.

An important point is that by reducing escape spending (by increasing local retail sales activity), opportunities are created to increase locally-generated jobs, particularly for young people (who make up the majority of retail staff), leading to increased wages and salaries and a stimulus to the local economy.

The broad analysis of escape spending presented here is based on estimates of available spending by City of Greater Shepparton residents (refer Table 4.3), and estimates of existing retail sales at shops in the City of Greater Shepparton that are attributable to local residents (refer Table 4.5).

The escape spending analysis is presented in Table 4.6 showing that in 2015 a total of approximately $167 million in retail spending by residents in the City of Greater Shepparton 'escapes' to retail facilities located outside the municipality. This represents approximately 19% of total available retail spending by the City's residents.

This level of escape spending – i.e., 19% of all retail spending by residents directed to retail facilities located outside the region – would be higher except for the location of major shopping facilities in the municipality that serve regional and sub-regional markets.

Table 4.6: Escape Spending in the City of Greater Shepparton, 2015 ($2015m)

Factor	Total
Total Sales	$999m
Sales to City of Greater Shepparton Residents	$690m
Available Spending by Residents	$857m
Escape Spending	$167m
Escape Spending as Share of Available Spending	**19%**

Source: Essential Economics

The analysis indicates a moderate degree of spending escapes from the City of Greater Shepparton, although within reasonable expectations for a regional area, noting that some spending will always be directed to metropolitan Melbourne and other major regional cities.

For example, 8% of telephone survey respondents in urban Shepparton identified Melbourne as one of their main destinations for apparel shopping. Furthermore, internet sales that do not have a local 'bricks and mortar' component, such as books purchased from an overseas website, will also comprise part of this escape spending. These are called 'internet-only' sales.

Overall, escape spending is <u>not</u> considered to be an issue that is resulting in a significant foregone economic opportunity for Greater Shepparton. In the future, escape spending levels at or marginally below the current level of 19% should be considered a successful policy outcome.

4.4 Potential for Additional Retail Development

Opportunities for new retail development in the proposed activity centre hierarchy serving Greater Shepparton will occur as a result of the following factors:

- Population growth, which generates additional demand for retail goods and services
- Real growth in per capita retail spending, which is ongoing in an environment of economic growth, and which generates retail demand by existing and future residents
- Opportunities for additional 'market share' of the available spending by residents of the City of Greater Shepparton and the wider Study Area, and from tourists and other visitors
- Opportunities to increase the share of resident spending that is captured by retail facilities in the region (i.e., a reduction in escape spending).

These factors form the basis for this assessment of opportunities for new retail development in the City of Greater Shepparton over the period 2015 to 2036.

<u>***In view of the degree of uncertainty associated with longer-term spending forecasts (i.e. over a 20-year period), the following analysis should be seen as an indicative forecast, and should not form the basis of prescriptive policies limiting further retail development.***</u>

Forecast Retail Turnover

Market Share

Based on current market share patterns, an estimated 40% of spending by Study Area residents is directed to activity centres in Greater Shepparton.

It is the objective of activity centres policy to ensure that in the future, this market share of spending is maximised through the provision of retail facilities that continue to meet the needs of consumers across the Study Area. This will be associated with:

- Continued improvements to existing centres, and
- The provision of new retail facilities and centres associated with urban growth areas.

However, factors that will serve to *reduce* the achievable market share of activity centres in Greater Shepparton include:

- Improvements to other centres in the Study Area, such as Echuca and Benalla, that reduce the need of nearby residents to visit Greater Shepparton
- Continued escape spending to higher-order centres located in metropolitan Melbourne that provide a scale and range of retail goods and services unable to be provided in Shepparton
- Competition from other key regional cities, such as Bendigo and Wangaratta, with these regional centres attracting sales and visitation that might otherwise have been directed to Greater Shepparton
- Growth in internet-only spending.

Under the analysis shown in Table 4.7, two scenarios are applied in which it is assumed that the market share of additional spending generated by Study Area residents is either 30% (Low Scenario) or 45% (High Scenario).

The outcomes for the High scenario will be associated with the development of retail centres and facilities which meet the needs of new residents living in the developing urban areas of the City of Greater Shepparton, as well as the higher-order needs of residents across the wider Study Area.

In contrast, the Low Scenario represents an outcome where a decline in the market share of activity centres in Greater Shepparton is occurring due to the factors identified previously.

Table 4.7: Increase in Study Area Spending to Greater Shepparton, 2015 to 2036 ($2015)

Item	Low Scenario	High Scenario
Retail Spending ($m)		
2014-2019	+$192 m	+$192 m
2019-2026	+$391 m	+$391 m
2026-2036	+$675 m	+$675 m
Total Spending Growth	**+$1,258 m**	**+$1,258 m**
Market Share of Retail Spending Growth	***30%***	***45%***
Retained Spending (Sales $m)		
2014-2019	+$58 m	+$86 m
2019-2026	+$117 m	+$176 m
2026-2036	+$202 m	+$304 m
Total Spending Growth Retained	**+$377 m**	**+$566 m**

Source: Essential Economics

Captured Spending

An opportunity to support additional retail facilities will also arise from "captured" spending by visitors and tourists to the City of Greater Shepparton. Approximately 9% of current retail turnover in the City of Greater Shepparton is derived from captured spending from people living outside the Study Area.

A higher allowance of 12% captured spending has been applied in the High scenario, with this additional captured spending potentially generated by outcomes which include:

- Improvements to the Shepparton CBD and Shepparton Marketplace that increase the level of visitation from non-Study Area residents (e.g. from Wangaratta and Seymour)
- Forecast increases to tourism visitation levels over coming years
- Continued growth in the homemaker/bulky goods sector that typically draws patronage from a wide geographic area.

Based on the analysis shown in Table 4.8, the increase in total retail sales in the City of Greater Shepparton over the period 2015 to 2036 is estimated to be approximately $415 million under the Low Scenario, and approximately $643 million under the High Scenario.

In view of the forecast growth in retail, the opportunity for new retail floorspace has been calculated by applying average sales levels that reflect the requirement for new retail development – typically, these sales levels are higher than that achieved by established retailers, which recognises the additional costs borne by new retail shops (in building costs, fit-out stock, etc).

It is also important to note that not all new retail sales will necessarily be reflected in new retail development.

Table 4.8: City of Greater Shepparton Forecast Retail Sales Growth, 2015 to 2036 ($2015m)

Item	Low Scenario	High Scenario
Retained Spending - Table 4.7		
2015-2019	+$58 m	+$86 m
2019-2026	+$117 m	+$176 m
2026-2036	+$202 m	+$304 m
Total Retained Spending Growth	**+$377 m**	**+$566 m**
Plus Sales from beyond Study Area		
Share of Sales from Beyond Study Area	*9%*	*12%*
2015-2019	+$6 m	+$12 m
2019-2026	+$12 m	+$24 m
2026-2036	+$20 m	+$41 m
Total Sales Growth From Beyond Study Area	**+$37 m**	**+$77 m**
Retail Sales Growth in the City of Greater Shepparton		
2015-2019	+$63 m	+$98 m
2019-2026	+$129 m	+$200 m
2026-2036	+$222 m	+$345 m
Total Sales Growth (Study Area and Beyond)	**+$415 m**	**+$643 m**

Source: Essential Economics

In this instance, an estimated 40% share of the growth in total sales shown in Table 4.8 is expected to be directed to existing retail facilities, thus supporting continuing improvements in retail performance for these existing retailers. This is particularly important in view of the relatively moderate trading performance of some existing components of the activity centres hierarchy.

Total sales to support new retail development over the period 2015 to 2036 is therefore estimated at approximately $248 million under the Low Scenario, and approximately $385 million under the High Scenario.

These calculations are presented in Table 4.9, showing that potential will exist for between 35,700m^2 and 55,300m^2 of additional retail floorspace in the City of Greater Shepparton over the period 2015 to 2036.

Table 4.9: City of Greater Shepparton Indicative Retail Floorspace Growth, 2015 to 2036

Item	Low Scenario	High Scenario
Sale Available to New Retail Facilities, $million (@60% of total growth)		
2015-2019	$38 m	$59 m
2019-2026	$77 m	$120 m
2026-2036	$133 m	$207 m
Total Retail Sales	**$249 m**	**$386 m**
Additional Supportable Retail Floorspace, m^2		
2015-2019	+6,100m2	+9,400m2
2019-2026	+11,600m2	+17,900m2
2026-2036	+18,000m2	+28,000m2
Total Floorspace Growth	**+35,700m2**	**+55,300m2**

Source: Essential Economics
Note: Threshold for new floorspace is sales of $6,250/$m^2$ from 2015 to 2019 and increasing by 1% per annum thereafter.

Distribution of Floorspace Growth Across Hierarchy

Of importance to land use planning in Greater Shepparton is the extent to which this expected increase in retail floorspace can be distributed across the hierarchy of centres. A useful indication of how this might occur is reflected in the current distribution of retail floorspace across the hierarchy as shown in Chapter 2 (Table 2.2).

However, it is realistic to expect that the distribution of space across the hierarchy will vary over time. In particular, the share of retail floorspace growth in Greater Shepparton directed to the CBD over the next 20 years will be lower than the current 40% share of floorspace. This reflects:

- A maturing of the hierarchy in Shepparton and the critical mass of residents able to support growth in non-CBD retailing
- An expectation that sales growth in the CBD will be reflected in large part by increased sales of existing retailers, as well as the provision of new floorspace
- Expected opportunities for growth in other levels of the hierarchy.

In indicative terms only, a summary of how additional retail floorspace might be distributed across the hierarchy is shown in Table 4.10. This is based on the application of Low and High scenarios representing the general range in which future floorspace growth is expected to apply to each level of the hierarchy.

This retail floorspace forecast is useful in guiding retail and activity centre policy in the City of Greater Shepparton and provides an understanding of the likely magnitude of change in the retail sector which planning policies will need to accommodate in the future.

Table 4.10: Indicative Retail Floorspace Growth Across Greater Shepparton Centres Hierarchy, 2015 to 2036

Centre Type	*Current*	Expected Share of Growth	
	Share	Low	High
Central Activities District	*39%*	30%	40%
Regional Retail Centre	*7%*	10%	15%
Sub-Regional Centre	*16%*	15%	25%
N'hood Centre/Town Centre	*11%*	5%	10%
Local Centres/Township Centre	*3%*	1%	3%
Enterprise Corridors	*24%*	30%	40%

Source: Essential Economics
Note: Estimate of potential range for individual levels of the hierarchy. Will not total 100%.

However, this forecast should not be used as a prescriptive policy tool in making planning decisions about new retail facilities, as the forecast is presented as a scenario for future retail development and, as such, it is dependent on the underlying available data and the assumptions which have been described.

Importantly, the potential to accommodate new retail facilities may change if general shifts occur in the retail environment, or if changes are made to the stated assumptions.

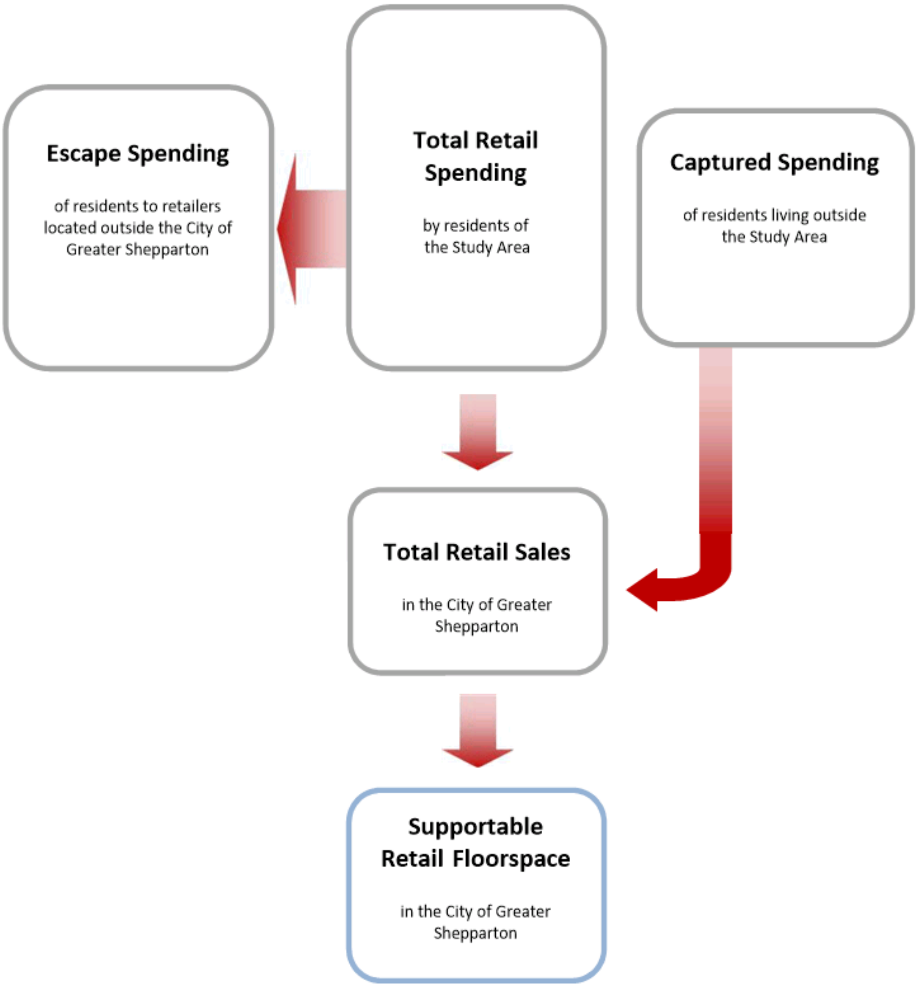
Some potential changes to circumstance which need to be recognised in the retail forecasts include the following:

- Changes may occur in respect to population growth in the City of Greater Shepparton and the Study Area, such as an increase or a slow-down in the growth of population numbers
- Unforeseen changes may occur in the way shoppers undertake their retail spending (e.g., a significant increase in the use of internet retailing may eventuate)
- Changes may occur in government policy or the wider economic environment (e.g., increased interest rates) that may lead to unexpected impacts on the retail sector, leading to different expectations in terms of spending levels and sales achieved by retailers
- New retail facilities may or may not effectively meet the needs of residents in terms of filling retail gaps, or in providing expected levels of service, or in retail design and presentation, and so on, with the likely result of pent-up spending or an increase in escape spending
- Proposed retail developments may have different expectations for average sales. For example, large-format homemaker retail development may require average sales levels below that required to support specialist retail stores. While this analysis adopts an average sales level which is intended to reflect this situation, cases may arise where a greater amount of retail is supportable if a retail format with a relatively low average sales requirement is introduced.

Summary of Retail Spending Flows

In order to assist in understanding the analysis in this Chapter, the following diagram shows a summary of the spending flows that are relevant to the retail sector in the City of Greater Shepparton and which are the basis for this forecast of retail demand.

Figure 4.1: Summary of Retail Spending Flows



4.5 Other Development Opportunities for Activity Centres

Commercial Office

Regional Office Markets

In regional areas of Australia, the establishment of a dedicated commercial office market is typically limited to only the largest regional cities, or locations that have significant Government and administrative functions. Shepparton's commercial office market reflects both the presence of Government functions serving the wider region (e.g. Department of Human Services regional office, Goulburn Valley Health offices), and some higher-order professional services (accountants, lawyers, medical specialists etc).

An assessment of Shepparton against a range of key factors that drive demand for commercial office floorspace in regional cities is provided below:

- **Proximity to an appropriately skilled local labour force**: Shepparton has a low proportion of managers and professionals when compared against the regional Victoria average.
- **Accessible to a wide regional catchment**: Shepparton is well-established as a higher-order regional service centre and is highly accessible from surrounding road networks.
- **Presence of supporting industries**: The demand for commercial office space is supported by the economic activity generated by the strong agricultural sector in the surrounding region, as well as the key Government and administrative functions in the municipality.
- **Significant wealth in the surrounding area**: High levels of wealth and income are a key driver of demand for a wide range of professional services. In this context, incomes in Greater Shepparton and the wider Study Area are either at, or marginally below, the Regional Victoria average.
- **Prestigious address**: Compared with the Bendigo CBD, Central Geelong and other regional office markets, the reality is that Shepparton CBD is not considered a high-quality location for professional businesses. Attracting large-office tenants for regional headquarters or back-office functions (such as call centres) will be difficult.

It will be important for activity centre policy to respond appropriately to changes in market conditions for the office sector in Greater Shepparton.

Future Commercial Floorspace Requirements

The ability to accurately forecast the magnitude of commercial office floorspace development that may occur in the future is made difficult by the range of factors that influence demand. In particular, the locational decisions made by individual businesses are subject to a wide range of factors for which accurate forecasts cannot be made.

As a result, it is inappropriate to prepare specific forecasts of commercial office floorspace requirements for centres in Greater Shepparton as input to policy, and to then determine how this floorspace should be distributed across the hierarchy. However, it is important to ensure that policy reflects overall trends and influences on the commercial office market, and provides a framework to support appropriate commercial development over time.

While specific forecasts of commercial office floorspace requirements are difficult to prepare, it is nevertheless prudent to plan for commercial office development. On this basis, an analysis has been prepared to provide a broad indication of potential demand for commercial office development over the period to 2036. The analysis is based on an expectation that the current ratio of commercial office floorspace to total available floorspace in activity centres will at least be maintained over the forecast period.

In 2015, commercial office floorspace, including both shopfront and dedicated office uses, accounts for approximately 85,000m^2 of floorspace. Over time this floorspace is expected to increase in response to population growth and business development in Shepparton and the wider Study Area. The degree to which this occurs will be influenced by:

- The availability of sites able to be developed, or re-developed for office use
- The rental costs for office space in Shepparton relative to other regional markets
- The decisions of key Government tenants in relation to their office needs
- The relative attractiveness of Shepparton, and in particular the CBD, as a place to 'do business'.

In indicative terms an increase of between 15,000m^2 and 20,000m^2 in commercial floorspace would occur if the rate of growth is the same as that for retail (see Table 4.9).

The commercial floorspace growth should be focused in CBD and not into enterprise corridors or activity centres out of CBD.

Residential

Infill residential development has not occurred to any significant extent in Greater Shepparton. The dominant resident demand continues to be 'greenfield' urban development on the fringe of existing urban areas, as is recognised in the Greater Shepparton Housing Strategy (2011).

Despite the lack of demand for infill housing development at the present time, it is appropriate that the Commercial Activity Centres Strategy continues to provide a framework that supports this outcome if such demand occurs in the future.

Experience elsewhere in regional Victoria indicates that some change in housing preferences is likely in Shepparton over the next decade, and that such change could be reflected in:

- Demand for shop-top housing in currently under-utilised spaces above ground floor shopfront tenancies (noting this is often a popular housing choice for students)

- Creation of dedicated student housing
- Some unit/apartment development within and on the fringe of activity centres (subject to demand) that involves either the conversion of an existing commercial building or a full re-development of a vacant or under-utilised site.

This type of development provides support to nearby shops and other businesses, encourages activity within centres, and also assists in achieving Council's housing objective to provide diverse housing located close to facilities, services and public transport.

Visitor Accommodation

Although activity centres in Greater Shepparton are generally not a major tourism attraction, they do contain many of the major components of tourism support infrastructure. This includes visitor information services, visitor accommodation, art and cultural facilities, and retail goods and services.

Shepparton CBD contains a total of 11 commercial accommodation providers, including a mix of hotel/motel and serviced apartments.

Opportunities for additional visitor accommodation and/or conference facilities located within or in close proximity to activity centres should be encouraged, particularly where they contribute to the desired role and function of the centre.

Community, Entertainment and Cultural Facilities

Other community-related development opportunities in activity centres may arise which would contribute to the overall role, function and range of activities. These may include improved community facilities such as libraries, community centres and youth centres; additional recreation or leisure activities; entertainment facilities; and education, including tertiary education.

Providing that demand for these facilities can be demonstrated and that the facility would contribute to the particular role and function of any specific centre, then these development opportunities should encouraged in order to create genuine mixed-use centres.

4.6 Implications for Strategy

This Economic Analysis identifies the following factors of relevance to the Commercial Activity Centres Strategy:

- In 2015, activity centres in Greater Shepparton generated total retail sales of $999 million, reflecting a 40% share of total retail spending generated by residents of the Study Area.
- For residents of Greater Shepparton, approximately 81% of retail spending is directed locally. The balance of 19% represents 'escape spending' directed to metropolitan Melbourne and other major regional cities, as well as internet-only sales. This level of

escape spending is within reasonable expectations for a regional city, although it should always be an objective of activity centres policy to ensure escape spending remains at minimal levels (thus supporting local business and jobs).

- Future growth in retail floorspace in Greater Shepparton is forecast to be between 35,000m^2 and 55,000m^2 between 2015 and 2036, reflecting demand associated with population growth and visitor spending.
- In indicative terms, growth in commercial floorspace (both shopfront and dedicated office) is estimated at between 15,000m^2 and 20,000m^2 over the same period. Some of this increased demand will be reflected in the take-up of existing vacant premises.
- Other opportunities for activity centre development in Greater Shepparton are associated with higher-density residential development, visitor accommodation and community, cultural and entertainment facilities.

5 SUMMARY OF ISSUES AND OPPORTUNITIES

This Chapter identifies the issues and opportunities for activity centres in Greater Shepparton that have arisen through the preceding economic analysis and through consultation with stakeholders.

The consultation program comprised the following components:

- Responses to a general call for submissions to the Strategy
- A total of three Industry Briefings to the Committee for Greater Shepparton, Shepparton Show Me and Shepparton Chamber of Commerce
- Interviews with a variety of individual stakeholders
- An online business survey
- Telephone survey program
- Discussions with Councillors and Council officers.

A summary of some of the key issues and opportunities for the Activity Centres Strategy to consider is shown below.

5.1 Issues

Planning Framework

Issue 1: ***The planning system in Victoria is undergoing a significant process of reform. It is important that a policy framework is implemented in Shepparton that reflects these changes.***

Response: The Shepparton Commercial Activity Centres Strategy needs to provide an up-to-date policy framework that reflects recent changes in planning zones and a renewed policy focus on activity centres as a driver for employment and investment. State Government policy objectives for activity centres, such as accommodating a share of residential growth, will be incorporated into Strategy directions. It is also important that the Strategy responds to the planning changes in order to ensure that the integrity of the activity centres hierarchy is retained through the prevention of inappropriate development outcomes.

Issue 2: ***A coherent hierarchy of activity centres in Greater Shepparton is required to inform planning policy and ensure that development occurs in a manner consistent with objectives relating to economic, social and environmental outcomes.***

Response: In the past, some retail and commercial development in Greater Shepparton has occurred on an *ad hoc* basis, with negative long-term consequences. The implementation of a new activity centres hierarchy will reflect current circumstances and policy objectives, while creating a framework that supports the appropriate development of all activity centres across the municipality.

Shepparton CBD

Issue 3: ***The Shepparton CBD is the traditional higher-order focus for the entire region, yet is currently experiencing difficulties associated with a high vacancy rate and moderate levels of customer activity.***

Response: The Commercial Activity Centres Strategy 2015 needs to build on existing policy guidance provided through the Shepparton CBD Strategy and other initiatives (including those of the local business community) to implement a specific set of initiatives designed to increase visitation, spending and investment in the Shepparton CBD.

Issue 4 ***The Maude Street Mall has traditionally been seen as the high intensity 'core' of the CBD, yet is now characterised by a high share of vacancies and a loss of the vitality that once characterised the precinct.***

Response: It is important for the overall success of the Shepparton CBD that the Maude Street Mall traders re-establish their pre-eminence as the high intensity 'core' of the CBD. This includes a review of the performance of the mall, and a re-examination of what can be undertaken to activate the precinct with higher levels of customer activity and retail sales. At all times, such a review must acknowledge the history of the mall and the need to leverage off previous investment in a cost-effective manner.

Issue 5: ***Parking and accessibility to the CBD at times has a poor perception among local shoppers and visitors.***

Response: Parking and accessibility are important considerations for both shoppers and businesses in the Shepparton CBD. Where appropriate, the Strategy will consider these issues in the context of identifying potential areas of improvement, and considering actions and solutions that have been applied in comparable regional cities.

Issue 6: ***The Shepparton CBD covers an extremely large geographic area and it is difficult to implement programs and policies that influence all parts of the centre.***

Response: The Shepparton CBD will benefit from a highly-integrated planning framework arising from the Shepparton CBD Strategy (Amendment C92) that recognises the differences between the various precincts, yet seeks to ensure that they operate in a manner that benefits the wider CBD. An important consideration for the Strategy will be to build on the Shepparton CBD Strategy and identify how development outcomes in one part of the centre can benefit other areas. In this regard, the Rowe Street East neighbourhood activity centre has been identified as separate from the CBD within the new activity centres hierarchy identified in this Strategy. The potential policy outcomes for that part of the CBD fronting Wyndham Street between Knight Road and Balaclava Road will also be required.

Issue 7: ***The attractiveness of the Shepparton CBD as a place to shop is undermined by a range of factors, including perceptions of anti-social behaviour, areas of low quality urban form, and a lack of integration of the various precincts within the centre.***

Response: Ensuring that the Shepparton CBD is a high-quality location for people to visit, shop and do business, will be a particular focus for the Strategy. The future success of the CBD relies heavily on quality of its built environment, and the safety and enjoyment of the general public who visit the centre. For this reason, the Strategy will provide actions and ideas that are aimed at improving the amenity for shoppers, workers, visitors and residents.

Shepparton Marketplace

Issue 8: ***The appropriate role and function of Shepparton Marketplace needs to be defined so as to ensure that it continues to operate in a manner that is complementary to the balance of the activity centres hierarchy, including the Shepparton CBD.***

Response: Shepparton Marketplace has an important role to play in the activity centres hierarchy as a key regional retailing destination. Through the careful application of appropriate planning policy, the Strategy will ensure that this role and function is maintained and enhanced without undermining the role and function of the Shepparton CBD.

Enterprise Corridors

Issue 9: ***The three Enterprise Corridors located at key gateway points to Shepparton need to experience ongoing growth and development that recreates a high quality 'entry statement' to urban Shepparton and a focus on activities otherwise not well-suited to a traditional activity centre setting.***

Response: A more structured approach will be applied to planning and development in the Enterprise Corridors. This includes actions and strategies intended to support both jobs and investment, and the quality of the built environment.

Urban Growth

Issue 10: ***Urban growth areas have been identified at Shepparton North East and Shepparton South East that will require the provision of appropriate new activity centres and a response from existing activity centres to the additional demand for retail and other services.***

Response: The Strategy must provide guidance on the appropriate location, scale and nature of activity centre development required to meet the needs of the urban growth areas located on the urban fringe of Shepparton.

5.2 Opportunities

Regional Service Role

Opportunity 1: Despite increased competition from other regional centres, Shepparton remains well-placed to continue to be the higher-order destination for retail and other services for the Goulburn Valley region and southern New South Wales.

Response: The Strategy will ensure that, as a priority, the regional service role of Shepparton is maintained and enhanced through the continued growth and improvement in the range and quality of facilities and services available in activity centres.

Events and Marketing

Opportunity 2: Shepparton has strong brand recognition and an effective range of events that represent a solid basis for increasing visitation from tourists and other visitors in the future.

Response: The Strategy will identify opportunities to build on the existing success of branding and events in driving visitation and spending in Greater Shepparton.

Market Trends

Opportunity 3: The property industry is one of the most dynamic sectors of the Australian economy and opportunities will exist for activity centres in Shepparton to evolve quickly to meet changing tastes and needs.

Response: Although a strong policy framework is critically important for the success of the Commercial Activity Centres Strategy, it is also true that a degree of flexibility is necessary to ensure that activity centres can evolve and develop in ways that may not be envisaged directly by policy, but which nonetheless meet all of the relevant policy goals. For example, over the past 15 years new retail formats such as ALDI and large-format liquor stores such as Dan Murphy's and First Choice Liquor have emerged to meet changing consumer demands.

E-Commerce

Opportunity 4: Although the growth of e-commerce and internet retailing has created significant challenges for the retail industry, opportunities also exist for Shepparton in terms of digital marketing and creation of new sales channels for existing retailers.

Response: As technology develops and as the ease of purchasing online goods and services becomes more user-friendly and seamless, it can be expected that the demand for these online goods and services will continue to increase. Retailers and other businesses in Greater Shepparton need to adjust to the new realities of the internet and maximise their ability to use the internet to increase sales volumes.

Economic Development

Opportunity 5: A range of initiatives are being applied in Greater Shepparton to increase the diversity of the economy and secure future jobs and investment.

Response: Activity centres in Greater Shepparton will leverage off other economic development initiatives in order to maximise the local economic benefits.

Growing Market Demand

Opportunity 6: Unlike many parts of rural and regional Australia that are experiencing a static or even declining population, the Study Area relevant to the Commercial Activity Centres Strategy is forecast to experience ongoing population growth for the foreseeable future.

Response: Activity centres in Greater Shepparton will be trading in an environment of population growth in the surrounding region that provides significant opportunities for high-quality businesses to increase their sales and profitability over time. Strategies will be developed to ensure that this growing market demand is met by the Greater Shepparton activity centres hierarchy.

+Dining and Leisure

Opportunity 7: ***Lifestyle changes in Australia mean that activity centres are increasingly a focus for socialisation and a range of leisure activities. Centres are where people will increasingly meet and interact in a social setting, often outside of traditional business and shopping hours. Typically, this will include dining or 'catching up with friends for a coffee'.***

Response: Activity centres will become places that move beyond being locations for retail and business activity, to being locations where communities come to meet and interact safely and comfortably outside normal business hours. This will be built on a high-quality food and dining offer, supported by a range of leisure activities including those relating to fitness activities, such as gyms and dance studios.

PART B: COMMERCIAL ACTIVITY CENTRES STRATEGY

6 VISION

A Vision Statement has been prepared to guide the ongoing planning and development of activity centres in Greater Shepparton, and is intended to be the basis for the subsequent recommendations in the Strategy.

The Vision Statement is as follows:

Greater Shepparton is a dynamic regional city with a network of activity centres serving both local residents and people from across north-central Victoria and southern New South Wales, as well as serving tourists and other visitors from further afield.

In the future, Greater Shepparton will consolidate and enhance its role as a sophisticated regional City, with a hierarchy of activity centres that provide the full range of modern, well-designed and well-integrated retail, commercial, administrative and cultural facilities in high-quality physical environments at easily accessible locations.

7 OBJECTIVES AND ACTIONS FOR ACTIVITY CENTRES

The following strategic objectives and actions are intended to guide the overall application of activity centres policy in Greater Shepparton.

Objective 1: To support the activity centres hierarchy

The activity centre hierarchy will be supported so that the specific roles, functions and themes of centres in each level in the hierarchy are easily identifiable.

The hierarchy (described in Chapter 2) is an important tool in defining the appropriate role and function of activity centres in Greater Shepparton. Application of an activity centres hierarchy provides a sense of certainty for all stakeholders and assists in creating a coherent and effective policy framework.

Importantly, the hierarchy adopted in this Strategy reflects the unique patterns of urban development and land use in the municipality. Outcomes achieved in other municipalities and regions of Victoria are not necessarily directly transferrable to the Greater Shepparton experience.

The hierarchy is an important reference point in assessing applications for retail, commercial and other development in activity centres.

Actions:

1.1 Adopt the activity centre hierarchy as a beneficial planning tool to guide the location, type and volume of new and/or expanded retail, commercial and other development. Ensure this hierarchy is referenced when considering development applications and determining Council land use policies.

Timeframe	Responsibility	Indicative Cost
Short-term	Council: Planning	n/a

1.2 Incorporate the revised hierarchy identified in this Strategy in the Greater Shepparton Planning Scheme, and subsequently update as required.

Timeframe	Responsibility	Indicative Cost
Short-term	Council: Planning	n/a

Objective 2: To maximise the regional service role of Shepparton through the provision of a dynamic and efficient activity centre hierarchy

Council will work with stakeholders to both retain the spending of local residents in Shepparton and to promote the continued role of Shepparton in serving a large hinterland extending across north-central Victoria and southern New South Wales. This will be achieved by creating a hierarchy of activity centres that meets the needs of residents and visitors and which is a focus for private and public investment.

An appropriate provision of retail, commercial and community infrastructure for residents and other visitors directly contributes to achieving the key goals of economic development and small business development, and creates economic benefits in the form of jobs, incomes and ongoing investment.

Maximising spending and visitation in the activity centres hierarchy requires the creation of attractive physical environments, supporting appropriate new development, and maximising the uplift in sales generated by population and spending growth.

Actions:

2.1 Support proposals for development of new retail, commercial and other facilities that are consistent with the regional service role of Shepparton, where this is consistent with the activity centre hierarchy and other relevant strategic policy objectives.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council: Planning	n/a

2.2 Continue to implement a pro-active and whole-of-Council approach to ensure that activity centres provide a range and scale of facilities that support Shepparton's role as the 'service centre of choice' for people living in north-central Victoria and southern New South Wales. Implement all relevant Council policies and resources in a manner that ensures the regional service role of Shepparton is retained and enhanced.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council: Investment Attraction and Planning (primary responsibility)	n/a

2.3 Develop a simple and coherent set of dining and entertainment guidelines for activity centres in Greater Shepparton. This will provide traders with an easily understood set of guidelines in relation to street and outdoor dining, signage, health and safety, equitable access, night time dining, noise management etc. Distribute to relevant traders, as required.

Timeframe	Responsibility	Indicative Cost
Short-term	Council: Investment Attraction and Planning	$1,500 (printing and distribution)

2.4 Direct public sector facilities and activities to locations which support the activity centre hierarchy (as appropriate). Council will actively engage with State and Federal Government to seek the location of key cultural, community and administrative infrastructure within the relevant activity centres in Greater Shepparton.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council, State and Federal Government	n/a

2.5 Continue to support Council initiatives seeking to attract private sector investment to activity centres in Greater Shepparton. This includes efforts to attract national brand retailers and other new businesses. Provide a concise and up-to-date retail investment prospectus to retailers and other relevant business considering establishing a presence in Greater Shepparton's activity centres. Opportunities include the market gaps for the CBD identified in Chapter 2.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council	$5,000 (investment prospectus)

Objective 3: To consolidate a diverse range of activities in centres

Shepparton has a well-established hierarchy of activity centres that are the focus for ongoing business development, and these are the locations where ongoing private and public investment will continue to be directed and consolidated.

Consolidation of retail and other business activities, and consolidation of community and leisure facilities and medium-density housing at existing activity centres, will provide an important contribution to the achievement of vibrancy and sustainability in these centres.

An emphasis of Council on encouraging the consolidation of activity centres will support the efficient use of infrastructure, and add to the sense of these centres as 'destinations' for a wide range of activities. Substantial economic, social and environmental benefits (see Section 1.3) result from ensuring activity centres are an important consideration in land use planning.

Actions:

3.1 Consolidate retail and other business development at activity centres in accordance with the hierarchy of activity centres contained in this Strategy. Ensure all relevant Council polices have due regard to the activity centres hierarchy. Discourage out-of-centre development (see also Objective 8). As a general priority, direct appropriate public sector facilities and activities to locations which support the activity centre hierarchy.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council: Planning	n/a

3.2 Establish a wide variety of non-retail uses at identified activity centres (noting the need to maintain the retail-focus specific to Shepparton Marketplace), including medium-density residential development, where this is also supported by other Council policies.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council, private sector	n/a

Objective 4: To confirm the primacy of the Shepparton CBD

Support and enhance the role of the Shepparton CBD as the symbolic and functional "heart" of the community. Ensure that the Shepparton CBD retains and strengthens its role as a Central Activities District for the wider region including north-central Victoria and southern New South Wales.

Shepparton CBD plays a vital role in serving the needs of the surrounding regional catchment in terms of providing shopping, business, tourism, entertainment, community, civic and other facilities and services. This regional service role generates significant benefits to the local economy through additional visitation and spending that would otherwise not occur.

The primacy of the Shepparton CBD needs to be maintained through appropriate development outcomes, and recognition of the need to create an overall environment that is attractive and user-friendly for shoppers, businesses and others who visit the centre.

A key issue for the Shepparton CBD is its large physical size. Creating an integrated and coherent mix of uses across such a large area is a significant challenge that has been at the forefront of CBD planning for the past 20 years. However, this also has an advantage in that the CBD has the capacity to experience significant growth, intensification and investment within its existing centre boundary.

Furthermore, the Shepparton CBD has a mix of retail, commercial, administrative and community functions that have significant opportunities for growth in the future, subject to an appropriate policy framework being in place.

For this reason, despite some current challenges, the overall future of the Shepparton CBD is considered to be strong. It is the intent of this Strategy to explicitly support the primacy of the CBD within the activity centres hierarchy, and to advocate for continued public and private sector investment.

Actions:

4.1 Re-affirm the primacy of the Shepparton CBD in the activity centres hierarchy and as the regional focus for a wide range of activities, including retail, commercial, community, cultural, residential and other facilities and services. Reflect this direction when developing future policies and actions which are relevant to activity centres, and encourage development that consolidates the primacy of the CBD.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (All)	n/a

4.2 Retain and enhance a major cinema complex as a key Shepparton CBD anchor and activity generator. Discourage the location of cinemas and other directly-associated entertainment functions outside of the CBD. A range of planning provisions could be implemented to achieve this intended outcome, including the application of schedules to relevant zones (e.g. Activity Centre Zone, Special Use Zone and Comprehensive Development Zone). Council to seek legal advice on ways in which these zones and schedules may be applied in a manner able to be best enforced by Council.

Timeframe	Responsibility	Indicative Cost
Short-term	Council: Planning	$10,000

4.3 Ensure the continued role of the Shepparton CBD in providing higher-order retailing including discount department stores, supermarkets and wide range of supporting shops in an attractive and convenient 'street-based' shopping environment. Implement those elements of the Shepparton CBD Strategy consistent with this outcome. Discourage the re-location of major traders outside of the CBD through measures including the appropriate use of floorspace caps in zone schedules at other activity centres in the hierarchy.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council: Planning	n/a

4.4 Ensure that development in the Shepparton CBD creates a positive urban environment. Encourage the redevelopment of poor-quality building stock, actively enforce appropriate minimum standards of presentation for vacant tenancies and buildings, and engage with owners of vacant buildings to provide assistance in identifying alternative uses or attracting tenants.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (Planning and Investment Attraction) and Property Owners	n/a

4.5 Create a policy framework that supports the potential for future development of higher-density residential living in Shepparton CBD. While little demand currently exists for this housing type in Shepparton, trends elsewhere in Australia indicate that over time increasingly more people in the community will seek to live within the CBD – and this outcome is strongly supported. Implement the directions contained in the Shepparton CBD Strategy in relation to higher-density housing.

Timeframe	Responsibility	Indicative Cost
Short-term	Council: Planning	n/a

4.6 Create a pedestrian-friendly environment which promotes the cross-use of facilities. Support street-based activities – including street dining, markets and other initiatives – that make full use of the outdoor street-based shopping environment that characterises the CBD and which differentiates it from other centres in Shepparton. Implement the Shepparton CBD Strategy, including streetworks, in relation to these aspects.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council: Planning, Infrastructure	n/a

4.7 Recognise the creation of Rowe Street East as a separate activity centre from the Shepparton CBD with its own neighbourhood activity centre role and function. Continue to implement the Activity Centre Zone in Rowe Street East as identified in Amendment C92, as well as the general directions contained in the Shepparton CBD Strategy. Ensure that any future development in the Rowe Street East centre is complementary to, and does not undermine, the adjacent Shepparton CBD.

Timeframe	Responsibility	Indicative Cost
Short-term	Council: Planning	n/a

4.8 Ensure that the office precinct located at the northern end of the Shepparton CBD fronting Wyndham Street between Knights Street and Balaclava retains its current primary role and function as an office precinct. Consider application of the Activity Centre Zone to this area in a way that encourages continued office and business development, with only limited retail floorspace growth (to prevent core retail areas of the CBD being undermined). This would require preparation of an urban design framework or similar by an appropriate planning consultant, with these guidelines then implemented through the Activity Centre Zone.

Timeframe	Responsibility	Indicative Cost
Short-term	Council: Planning	$15,000

Objective 5: To support the Regional Retail Role of Shepparton Marketplace in a manner complementary to the Shepparton CBD

Shepparton Marketplace performs the role of a retail-focused activity centre that includes a range of national brand retail tenants in an internalised shopping centre environment. Although the centre has a smaller overall retail provision than the CBD, it trades relatively strongly and provides an alternative higher-order shopping environment that also attracts spending and visitors from across the broader region.

In the future, the Shepparton Marketplace will have an important role in complementing the Shepparton CBD in providing the wider region with an enhanced range of retail facilities. This is expected to include additional speciality shops and potentially other large retail tenants (as appropriate). Importantly, the focus of this growth will be retail-focused, with the CBD to continue to be a focus for other commercial (including retail), community, entertainment (including cinemas) and administrative functions.

Importantly, Shepparton Marketplace is a high-quality shopping centre serving (alongside the Shepparton CBD) as a regional-level destination has a number of attributes. Shepparton Marketplace:

- Enhances the range of facilities in Shepparton available to both residents and visitors.
- Means that Shepparton has major retail destinations providing either a shopping centre (Marketplace) or street-based (CBD) shopping environment.
- Reduces escape spending to major shopping destinations in Melbourne or elsewhere in regional Victoria (e.g. Bendigo).
- Creates an additional focus for retail employment and local business development (noting many 'national brand' or 'chain' shops in shopping centres are owned by a local franchisee).

The growth of both the Shepparton CBD and Shepparton Marketplace is not 'mutually exclusive'. With an appropriate policy framework in place, both centres can develop in a complementary manner that is to the benefit of both and to Greater Shepparton overall.

Actions:

5.1 Council and the property owner to recognise the role of Shepparton Marketplace as a Regional Retail Centre in the hierarchy with a retail-specific role. This regional retail function for Shepparton Marketplace will complement the operation of the Shepparton CBD as the highest-order centre serving Shepparton and the surrounding region. Re-location of large 'anchor' retailers from the Shepparton CBD to Shepparton Marketplace will be discouraged.

Timeframe	Responsibility	Indicative Cost
Short-Term	Council (Planning) and Property Owners	n/a

5.2 Support the appropriate growth of retail facilities at Shepparton Marketplace that reflects growth in population and spending across the region, rather than simply a redirection of sales away from the Shepparton CBD. Provide some limited non-retail uses (such as personal and professional services) at Shepparton Marketplace only where these are directly ancillary to retail operations at the centre, and where such uses would not be more appropriately located in the Shepparton CBD or elsewhere in the activity centres hierarchy.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (Planning) and Property Owners	n/a

5.3 Consider placing a cap on office floorspace at Shepparton Marketplace in the Greater Shepparton Planning Scheme to achieve Action 5.2. An office floorspace cap in the order of 1,500m^2 would allow for ancillary office uses equivalent to 10% of the current shop floorspace cap (15,000m^2). This could potentially be increased on a pro-rata basis with any subsequent increase in the shop floorspace cap. Measures to prohibit cinema and cinema-based entertainment uses at Shepparton Marketplace may also be considered (see also Chapter 9) to ensure that the CBD retains primacy as an entertainment destination.

Timeframe	Responsibility	Indicative Cost
Short-Term	Council: Planning	n/a

5.4 Ensure any application for expansion of the Shepparton Marketplace is supported by suitably detailed retail-economic analysis (at the proponent's expense) that includes a detailed assessment of potential trading impacts on the Shepparton CBD and any other relevant centres. Council should seek information and analysis from the proponent, as required, in order to make an informed planning decision (see also Objective 9).

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (Planning) and Property Owners	$50,000

5.5 Continue to apply a shop floorspace cap at Shepparton Marketplace in the Greater Shepparton Planning Scheme that will increase only with Council discretion (see also Chapter 9).

Timeframe	Responsibility	Indicative Cost
Ongoing	Council: Planning	n/a

Objective 6: To support the growth of existing centres and the development of new centres to meet urban growth

Opportunities for future urban growth in Greater Shepparton have been identified through previous land use planning and development studies. It is expected that the needs of these new urban growth areas will be met by a combination of existing centres and, where appropriate, new centres.

As urban development occurs in Greater Shepparton, demand will be generated for a wide range of retail, commercial and community activities. In some instances, these needs can be adequately met by the existing hierarchy of activity centres in Greater Shepparton (including through the growth and expansion of these existing centres), although in other cases new centres will be required in order to ensure that new residents of these areas are served with an appropriate range of local facilities and services.

Actions

6.1 A balanced approach to the planning of activity centres will be implemented that recognises the role of both existing and new centres in meeting the needs of new urban growth areas. Apply appropriate planning and development assessment criteria (see Objective 9) for new developments, and ensure that the opportunities for an appropriate share of growth in retail demand to be accommodated by currently vacant tenancies, or currently under-performing traders, are reflected in relevant strategic planning studies (noting that all retailers must continue to meet the needs of consumers).

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (Planning) and Developers	n/a

6.2 Support the creation of new local activity centres at the Shepparton North-East and South-East growth areas to meet the basic convenience needs of new residents. Allow for approximately 0.8 hectares of land in the Commercial 1 Zone at each location in order to accommodate centres with a total floorspace in the order of 2,000m^2 to 3,000m^2 (including all retail and non-retail components). Recognise the role of other existing centres in meeting additional demand generated by population growth in these locations.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (Planning) and Developers	n/a

Objective 7: To support retail and commercial businesses in smaller towns so that they continue to serve as important focal points for their communities

Centres in smaller towns (described in the hierarchy as small town centres and township centres) in Greater Shepparton will continue to face challenges associated with limited catchment populations, limited or declining population growth, declining employment prospects, and competition from larger centres. However, businesses in these centres provide important services to local communities and are a valued community focal point.

Council has only limited influence on the factors that are challenging centres in smaller towns. Nonetheless, some practical steps can be taken to ensure that retailing in small town centres and in rural areas are able to continue trading successfully.

Actions

7.1 Encourage participation of rural retailers and businesses in appropriate public forums and consultation processes to ensure that their unique challenges and issues are taken into account by Council. This could include Council engaging periodically with traders and trader representatives in small centres (say, one town or township centre per year) to obtain comprehensive feedback on relevant issues and identifying opportunities.

Timeframe	Responsibility	Indicative Cost
Short-Term	Council (Investment Attraction) and Retailers	$2,000 for stakeholder engagement and feedback process in a town or township centre

7.2 Make available base-level retail and professional development on a subsidised basis that assists businesses in small towns to meet challenges in the marketplace. For example, Council could host an annual retail development forum that is open to all traders in Greater Shepparton and which provides guidance on a particular business issue.

Timeframe	Responsibility	Indicative Cost
Short-Term	Council (Investment Attraction) and Retailers	$4,000 for retail forum, including speaker/educator

7.3 Ensure that town centres and township centres are recognised and included in relevant tourism and marketing material to ensure that opportunities to generate additional trade from visitors are realised. That is, ensure that centres located outside urban Shepparton, such as Tatura and the Mooroopna CBD, receive appropriate support from marketing and promotions activities.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (Investment Attraction) and Tourism Industry	n/a

7.4 Continue to ensure that the physical environment in town centres and township centres continues to be attractive and user-friendly for shoppers and visitors. This could include a physical audit of the quality of the streetscape by relevant Council officers (traffic, infrastructure, investment attraction etc) in association with the stakeholder engagement process considered in Action 7.1.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council	n/a

Objective 8: To closely monitor out-of-centre development, and only allow such development at appropriate locations

Ensure that retail, commercial and other relevant development occurring away from activity centres identified in the hierarchy contributes to the achievement of a net community benefit and does not undermine activity centre policy.

While the activity centre hierarchy is the focus for developing retail, commercial and other functions, in some individual circumstances it may be appropriate for these to operate at locations outside the hierarchy for a particular purpose.

For illustrative purposes only, a commercial medical use might want to locate adjacent to a hospital for very practical reasons. In this particular instance such a use might be consistent with a net community benefit despite being located outside a nominated commercial activity centre.

Council must ensure that the integrity of the activity centre hierarchy is maintained, while nonetheless accommodating out-of-centre development of an appropriate scale and nature.

Actions:

8.1 Assess proposals for out-of-centre developments carefully to ensure that such development occurs in a manner consistent with the achievement of a net community benefit without undermining the activity centres hierarchy. This assessment should include consideration of:

Locational Framework – The applicant must demonstrate why the proposed out-of-centre location is being considered for retail or commercial development, including identifying why an in-centre or edge-of-centre location is not appropriate.

Accessibility Framework – The proposal should demonstrate equitable access by ensuring the provision of convenient pedestrian links, access to public transport (as relevant), bicycle access and convenient motor vehicle access and parking.

Urban Design Framework – The proposal must demonstrate a high-quality urban design that is attractive and provides a high degree of amenity for users of the facility and the general community.

Economic Justification – The proposal must be supported by a suitably detailed economic or commercial assessment of the reasons for, and implications of, approval of the out-of-centre development.

Net community benefit – The planning application must provide an indication of the development proposal's contribution to Net Community Benefit in terms of relevant aspects such as employment generation, impact on overall levels of vibrancy and sustainability of the locality, and contribution to liveability, social interaction, and other community-related goals.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (Planning) and Developers	Cost of supporting information borne by proponent

Objective 9: To apply Appropriate Planning and Development Assessment Criteria for Relevant Proposals

Support development applications involving the rezoning of land for retail and commercial purposes where the proponent clearly establishes economic demand, strategic policy merit (as relevant) and no adverse impacts on the operation of the activity centres hierarchy.

When assessing proposals for new or expanded retail and commercial facilities requiring a change to the planning scheme, it is important that Council is provided with suitably detailed evidence that the operation of the existing hierarchy of activity centres will not be adversely impacted and that a net community benefit will be achieved.

Planning and Development Assessment Criteria have been prepared as a reference point for Council officers when assessing development proposals for new or expanded provision of retail (typically shop) floorspace. The criteria can also be used by developers for guidance in terms of information they should provide to Council in order to facilitate the planning approvals process.

The criteria consist of two components:

- A listing of information which an Applicant should provide to Council in order to facilitate the planning approvals process, and
- A listing of issues to be considered by Council in assessing the need for a retail development.

These criteria are not intended to slow down or impede development that is appropriate in the context of the Strategy. On the contrary, they should foster investor confidence by increasing certainty about the permitted scope of development and the hierarchical context of planned centres. However, it is important that Council has accurate and regularly updated access to relevant information in terms of activity centre development in the municipality, and these assessment criteria are expected to also assist that process.

The criteria that may be applied by Council are outlined in full at Appendix A to this Strategy.

Actions:

9.1 Ensure that, as required, any proposals for new or expanded activity centres are accompanied by a suitably-detailed economic analysis showing market justification for the development. Evidence is also required that the existing activity centre hierarchy will not be adversely affected and that the proposed development will generate a net community benefit. The Planning and Development Assessment Criteria identified at Appendix A to this Strategy indicate the type of information that can be sought by Council.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council/Developers	Cost of supporting information borne by proponent

9.2 Recognise that the level of detail and justification required from proponents is at the discretion of Council. Where a proposal already has strategic policy support, the level of detail required is likely to be lower than for a proposal outside existing policy objectives. Council reserves the right to request additional information on economic impact from the applicant, if required. The information sought by Council can include:

- Specific detail on the scale and type of retail and commercial uses proposed
- An economic analysis that provides supporting evidence of demand, identifies potential economic or trading impacts on existing activity centres, and identifies economic aspects relevant to the contribution of the proposal to net community benefit
- A planning assessment that considers the proposal in the context of the directions contained in this Strategy and other relevant strategic land use and development policies and the Planning Scheme
- The proposal must also consider (as appropriate) traffic circulation and parking demand/supply, environmental effects on adjoining activities, local character and amenity impacts, and so on.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council/Developers	Cost of supporting information borne by proponent

8 SHEPPARTON CBD ACTION PLAN

A specific set action plan has been developed for the Shepparton CBD that reflects the centre's importance to the activity centres hierarchy and to the overall economic performance of Greater Shepparton.

This action plan is not intended to replace or over-ride other strategic directions established for the CBD (such as through the CBD Strategy), but rather reflects a set of objectives and actions determined specifically through the development of the Commercial Activity Centres Strategy.

Objective 1: Consider Options for the Maude Street Mall to include shared pedestrian-vehicle space (potentially north of Stewart Street)

Rationale

The Maude Street Mall is a public space that can successfully accommodate major public events such as the Summer/Winter City Market. These events have a positive role in generating sales and visitation to the CBD. Given this success, it is vital that the ability of the Mall to accommodate major events in the CBD is retained.

The Mall also functions as the symbolic heart of retailing in the CBD and this is reflected in the continued presence of national brand retailers. Furthermore, the large geographic size of the CBD means that the Maude Street Mall is a highly- effective anchor point around which other land uses can locate and visitors can navigate.

However, it is also apparent that the role of the Mall as a major attractor to the Shepparton CBD has lost its influence in the last decade or so. Outside of peak periods (such as Christmas and New Year) and major events, the levels of customer activity and vibrancy are often well-below optimal levels. This is reflected in a relatively high vacancy rate for shops and the re-location of some retailers away from the Mall to other parts of the CBD.

At approximately 215 metres in length, the Maude Street Mall is identical in size to the Bourke Street Mall in the Melbourne CBD. Likewise, the Mall is comparable in length to other malls located in much larger cities across Australia.

On this basis, the Maude Street Mall is considered simply too large a space to be a vibrant pedestrian shopping area outside of peak seasonal periods and major events.

The basic rationale for a mall is to increase the amenity of shoppers and to act as an attractor which generates additional levels of customer activity and spending for businesses in the environs.

Outside of peak seasonal periods and major events, this is no longer the case for the Mall. The vacancy rate for shops is unacceptably high, and it appears the general reputation of the Mall as a shopping destination has declined over time.

Without a critical mass of shoppers and activity, the Maude Street Mall often presents as a relatively sparse and quiet space, rather than a vibrant and inviting shopping destination (outside of peak seasonal periods and during events). Particularly telling is the lack of food and beverage retailers in the Mall, a tenant category that should be well-suited to a pedestrian-friendly retail area.

Importantly, this trend is not unique to Shepparton. Pedestrian malls, nationally, have struggled to remain relevant in the face of changing consumer tastes and shifts in how people undertake their shopping.

For the above reasons, a revised approach to the Mall is required and is specifically advocated by this Commercial Activity Centres Strategy.

A New Approach

An approach is required that keeps the positive aspects of the existing Mall during peak seasonal periods and events (such as Christmas), while also activating the area outside of those peak times.

It is **not** the role of this Strategy to advocate a specific outcome for the Maude Street Mall. However, the Mall is not achieving the outcomes originally intended, and it is appropriate for the Strategy to advocate for refinement and change which considers the needs of all future Mall users.

A concept regularly advocated by the community during the consultation phase of the Strategy can be generally paraphrased as:

> *"Adjust the northern part of the mall between Fryers Street and Stewart Street and/or Fraser Street so that it can accommodate low volumes of one-way vehicular traffic in shared space with pedestrians."*

This option is considered to have merit on the basis that it:

- Creates additional activity at the northern end of the mall that will also increase passive surveillance and generate positive impressions of increased user activity in the southern end of the mall
- Retains the entire length of the existing mall for use during event times as a dedicated pedestrian space (by temporarily restricting vehicle traffic as required)
- Creates opportunities for some limited short-term parking in the northern end of the mall that directly benefits traders
- Uses a shared-space model that has been applied elsewhere, nationally (examples include Ballarat-Armstrong Street South, Newcastle Mall, Sydney Olympic Park) and internationally, from which relevant lessons can be drawn
- Retains the integrity of the Maude Street Mall as primarily a pedestrian area, yet makes a positive contribution in respect to the operation of the Mall outside of peak event times

- Allows the retention of the existing shade trees, and can be the catalyst for improvements to the southern parts of the mall. This could include enhancements to the playground, addition of public art, new water elements and other public realm improvements.

It is emphasised that changes to the Maude Street Mall should not be considered a 'magic bullet' policy outcome. Changes to the Mall are just part of a broader set of strategic policy objectives contained in this Strategy and other strategic documents (such as the Shepparton CBD Strategy).

Actions

CBD Action 1.1 Implement a design process that identifies options for the creation of a shared pedestrian-vehicular space in the Maude Street Mall (potentially including only that area north of Stewart or Fraser Street). Ensure that best-practice examples of similar shared space areas nationally and internationally are considered. This process could involve a specific project brief to appropriately qualified consultants, or an alternative process such as a design competition.

Timeframe	Responsibility	Indicative Cost
Short-term	Council: Planning	$50,000

CBD Action 1.2 Present a set (2 or 3) of design options for Council (potentially represented by an independent panel of experts) and the community to consider, including estimated costings. If a preferred option is identified by Council and the community, introduce an appropriate implementation program (to be determined by Council).

Timeframe	Responsibility	Indicative Cost
Ongoing from CBD Action 1.1	Council (All) and Community	n/a

CBD Action 1.3 If the shared space model determined by CBD Action 1.2 is adopted by Council and supported by the community, ensure that the lessons (as identified during consultation for the Strategy) from other malls that have adopted the shared pedestrian-vehicle model in Australia are considered.

These insights from consultation are as follows:

- 'Ensure that procedures to temporarily close the mall to vehicular traffic during peak times and events are swift and efficient'

- 'Don't just open an area to slow traffic and think that is all that is needed. Ensure the creation of a shared space is delivered carefully and with the required level of investment to make it a true revitalisation of the space'
- 'Some limited very short-term parking within the shared area is well-received by traders and gives shoppers the chance to get a 'dream park''
- 'The design means that with limited change it is a pedestrian-only mall again during festivals, peak shopping periods and other events'
- 'Changes to the mall are not the solution to creating a revitalised centre, only a part of it.'

Timeframe	Responsibility	Indicative Cost
Ongoing from CBD Action 1.2	Council (All) and Community	n/a

Objective 2: Encourage Investment in Community Infrastructure with a Focus on Education

Rationale

Delivering community infrastructure that is closely integrated into the Shepparton CBD represents an opportunity to:

- Deliver facilities in a highly accessible location to the community and which generates synergies with other existing infrastructure, and
- Create visitation and activity that benefits traders and other commercial businesses in the CBD.

Community infrastructure has a key role in ensuring that people living across north-central Victoria and southern New South Wales continue to visit the Shepparton CBD regularly, and that the centre continues to operate as a 'Central Activities District' for the region. The recently-announced redevelopment of the Shepparton Courthouse in High Street represents an excellent example of where investment in community infrastructure can occur in a manner that supports the Shepparton CBD, as well as meeting broader social needs.

A major opportunity exists for the La Trobe University campus and GOTAFE campus to expand and evolve in a manner that is complementary to each of these organisations and the Shepparton CBD. Students and staff from both campuses were identified as important sources of trade and activity for a range of businesses in the Shepparton CBD during the consultation phase of the Strategy. Furthermore, the north-east the CBD – in which both campuses are located – is well-suited to the future expansion of both facilities.

For this reason, it is a specific objective of this Strategy to ensure that Council works pro-actively with La Trobe University and GOTAFE to maximise the future growth and development of these important entities in the Shepparton CBD.

In the past, Greater Shepparton has shown a capacity to influence key stakeholders for outcomes of benefit to the Shepparton CBD (such as the new courthouse). In the future, Council will work together with La Trobe University and GOTAFE to the overall benefit of the Shepparton CBD.

Furthermore, Council will continue to advocate for other key social and community infrastructure that benefits both the Shepparton CBD and residents of those areas that the CBD serves.

Actions

CBD Action 2.1 Create a working group or other similar collaboration between Council, La Trobe University and GOTAFE that ensures the synergies between the operation of these entities and the Shepparton CBD are maximised. Meet annually, or as required, to respond to specific issues related to current outcomes, and to plan for the future growth of these education facilities. Use the collaboration as a tool for Council to have a positive influence on the growth of these facilities and the benefits this growth brings to shops, businesses and investment in the Shepparton CBD.

Timeframe	Responsibility	Indicative Cost
Short-term	Council/La Trobe Uni/GOTAFE	n/a

CBD Action 2.2 Develop a long-term process of co-ordination of planning and development that integrates the future growth and expansion of La Trobe University and GOTAFE into the Shepparton CBD. This will be informed by the dialogue developed in CBD Action 2.1.

Timeframe	Responsibility	Indicative Cost
Ongoing from CBD Action 2.1	Council/La Trobe Uni/GOTAFE	n/a

CBD Action 2.3 Council will build on its existing experience to ensure that lobbying continues for the location and expansion of major public infrastructure in the Shepparton CBD. This potentially includes proactive engagement with State and Commonwealth Government agencies to demonstrate why investment in the Shepparton CBD represents sound public policy and efficient use of taxpayers' money.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (led by Investment Attraction)	n/a

Objective 3: Promote 'Cycle-Friendly' Infrastructure and Encourage 'Convenience-Oriented' Car Parking

Rationale

Cycling

Nationally, significant growth in the use of cycling as a form of transport is occurring. This includes both recreational cycling and the use of bicycles for travel to/from work and for other special-purpose trips. In response to this trend, activity centres are adjusting to ensure that cycle-friendly infrastructure is being provided, including aspects such as:

- Dedicated cycle lanes on key road links and at major intersections
- Dedicated signage for cyclists
- Bike parking spaces
- Shared cycle/pedestrian areas.

At present, the Shepparton CBD does not provide an appropriately high standard of accessibility and utility for cycling. This is despite the rapid growth in popularity of cycling in Greater Shepparton as identified by the community during the consultation program and reflected in Council's Cycling Strategy 2013-2017.

Council has made progress in improving cycling facilities in recent years, although continued investment and improvement in the CBD is required. The objectives of the Greater Shepparton Cycling Strategy 2013-2017 are supported in this regard.

A range of benefits can be generated for traders and other businesses in the Shepparton CBD associated with the application of a more cycle-friendly framework. Recreational cycling is closely associated with spending at cafes and restaurants, as well as small convenience trips (both retail and non-retail). Likewise, workers in the CBD who cycle to and from work will also benefit from enhanced cycling facilities.

Car Parking

This Strategy makes no specific commentary on the overall issue of paid parking in the Shepparton CBD, other than to note:

- Car parking fees form an important part of the revenue stream to Council that, in turn, supports services and investment
- Car parking fees are common to most major CBDs in Australia
- Car parking fees allow Council to 'value-capture' from visitors to the CBD who live outside Greater Shepparton and who are using facilities supported primarily by Greater Shepparton ratepayers

- Scope may exist for Council to consider introducing paid parking as part of permit conditions for an expansion in floorspace in other shopping centres so as to reduce the un-competitive impact of paid parking on the CBD.

Beyond the broad issue of the merits or otherwise of paid parking in the Shepparton CBD, it appears that present carparking arrangements in the CBD are sub-optimal in terms of short 'convenience' trips. Current parking arrangements often make it difficult customers to undertake quick single-purpose visits to the CBD (such as to make a payment or pick up goods). This was previously noted in the "Shepparton Central Business District Parking Precinct Plan" (adopted by Council 2006, para 6.4.1).

It is important that all shops and other businesses in the CBD have the ability for customers or visitors to perform quick single-purpose trips of 15 minutes or less without the need to necessarily pay for parking or having to walk an excessive distance from their vehicle. If these convenience trips are unnecessarily discouraged, this is at the direct expense of traders and other businesses in the CBD.

Note that Council is in the process of undertaking more detailed analysis of transport and parking requirements in the Shepparton CBD.

Actions

CBD Action 3.1 Ensure that future transport planning for the Shepparton CBD takes into account cycling access and facilities. Recognise the ability of high-quality cycling infrastructure to create additional visitation associated with recreational visits, as has been identified in main street style centres elsewhere in Australia. Implement those aspects of the Cycling Strategy 2013-2017 that are relevant to the Shepparton CBD.

Timeframe	**Responsibility**	**Indicative Cost**
Long-term	Council: Planning and Infrastructure	n/a

CBD Action 3.2 Review the location and availability of very short-term convenience parking in the CBD (up to 15 minutes) as per the "Shepparton Central Business District Parking Precinct Plan". Ensure that the Shepparton CBD remains attractive to convenience shoppers, as well as those undertaking more complex or lengthy visits. If required, engage a traffic/parking consultant to assist Council in identifying the appropriate location and number of short-term spaces.

Timeframe	**Responsibility**	**Indicative Cost**
Short-term	Council: Infrastructure	$10,000 for traffic consultant

Objective 4: Support Shepparton Show Me and Other Practical Measures Reinforcing the Regional Service Role

Rationale

As the higher-order retail, commercial and community centre serving north-central Victoria and southern New South Wales, it is vital that marketing and promotions for the Shepparton CBD reach this broad geographic area rather than just local residents.

Shepparton Show Me has an important role to play in ensuring that residents and those visitors from beyond the boundary of the City of Greater Shepparton visit and spend money in the CBD (and other areas within the special rate area) as regularly as possible. Furthermore, Shepparton Show Me can create a greater sense of awareness and pride in the local retail sector that is reflected in lower levels of escape spending to other regional cities and to Melbourne.

Therefore, the rationale for Shepparton Show Me as a major marketing, branding and events program remains strong in view of the objectives for the Shepparton CBD in retaining its higher-order role.

Any Shepparton Show Me activity (Event, Promotion or Branding) should meet at least one of the following criteria:

- The activity will increase the amount of consumer spending in Shepparton (particularly from non-residents of Greater Shepparton)
- The activity will benefit the business sector of Shepparton
- The activity will benefit the retail sector of Shepparton
- The activity is closely aligned to the goal of generating visitation and spending which benefits businesses in the levy-paying area.

It is emphasised that the focus of any marketing or promotions activity is to generate sales and visitation that otherwise would <u>not</u> occur. That is, the focus is on creating new customers, or ensuring that existing customers visit and spend more money at businesses located within the special rate area.

Outside of Shepparton Show Me, Council and other stakeholders (such as the Committee for Greater Shepparton, Chamber of Commerce etc) can also undertake their own activities that refer to the above considerations.

Actions

CBD Action 4.1 Council to publicly re-confirm (possibly through a formal public statement) the value to the community of having a centralised event, promotions and branding program (Shepparton Show Me) which supports Shepparton CBD as the Central Activities District for north-central Victoria and southern New South Wales.

Timeframe	Responsibility	Indicative Cost
Short-term	Council	n/a

CBD Action 4.2 Council to ensure that the focus of Shepparton Show Me remains on creating ***'visitation and sales to businesses in the special rate area that otherwise would not occur'***. This is particularly true for people living outside of the City of Greater Shepparton. Support this through the application of appropriate performance monitoring measures such as event attendance estimates and visitor surveys (see also Shepparton Show Me – Assessment of Economic Benefits Report, April 2008) and ensuring committee members accept and respond to this core focus.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council	n/a

CBD Action 4.3 Implement a bias towards marketing and promotional activities in areas to the **north** of Shepparton, having regard for the population growth that is occurring in this direction. Ensure that new residents of towns such as Yarrawonga and Echuca are quickly informed of the range and scale of facilities and services available in Shepparton. This could potentially include special sales or discounts, or other promotions, specific to residents living in these areas.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council: Investment Attraction and Shepparton Show Me	n/a

Objective 5: Encourage Re-development and Re-use of Vacant Sites and Buildings

Rationale

Shepparton CBD has experienced significant development and re-development of its building stock over past decades as the centre responds to evolving consumer demands and business requirements.

Examples include:

- The recently-completed Vaughan Street redevelopment

- The growth of office uses along Wyndham Street, including the adaptation of former residential dwellings, at the northern edge of the CBD
- Redevelopment of the former mill site in Shepparton to include ALDI, retail shops and Quest apartments.

In the future, innovative development that involves the re-use or re-development of current vacant or under-utilised land in the CBD will be actively encouraged. In particular, opportunities are expected to include:

- The attraction of new retail anchors or retail formats to the Shepparton CBD
- Mixed use development, including ground floor retail and commercial uses with above-ground residential or commercial accommodation
- Additional hotel and serviced apartment development
- Re-use of existing buildings for another purpose (e.g. Friars Café).

Council will ensure that these opportunities are encouraged (where consistent with other policy objectives) and that settings are in place which encourage clear communication of Council expectations and which support developers in achieving the required commercial thresholds.

Actions

CBD Action 5.1 Support the innovative use of vacant buildings or sites, including consideration of proposals that may not strictly meet existing development guidelines or expectations. That is, support a flexible merit-based approach to the re-development or refurbishment of vacant land and buildings in the CBD. Council's statutory planning functions should have due regard in decision-making for the policy priority for renewal of the CBD, including seeking guidance and feedback from other relevant parts of Council (such as Investment Attraction and Planning), as appropriate. Measures that reduce costs for developers seeking to redevelop vacant buildings and sites may be considered, potentially including reduced parking requirements, rate holidays and cash-in-lieu payments.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (led by Planning)	n/a

CBD Action 5.2 Support the consolidation of sites where this is required to facilitate re-development (subject to other planning considerations being met).

Timeframe	Responsibility	Indicative Cost
Ongoing	Council	n/a

CBD Action 5.3 Encourage the application of the 'Renew Newcastle' or similar schemes seeking to create active frontages and activity in otherwise vacant tenancies or land. This can include the use of pop-up shops, temporary displays and other short-term uses for otherwise un-utilised space. A flexible merit-based approach is required from Council to ensure such projects are feasible and can be approved (or refused) in a prompt manner.

Timeframe	Responsibility	Indicative Cost
Ongoing (related to CBD Action 5.1)	Council: Investment Attraction	n/a

CBD Action 5.4 Ensure that planning policy settings for the CBD are supportive of appropriate residential development. When demand for this housing format is identified in Shepparton, it is important that an existing policy framework which supports appropriate infill residential development is already in place.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council: Planning	n/a

Objective 6: Promote the CBD as Clean, Safe and Friendly

Rationale

Centres with a perception of being **clean**, **safe** and **friendly** are always at a competitive advantage over those centres that do not enjoy this perception.

Experience, nationally, shows that centres with a poor perception among potential shoppers and visitors generate lower property values and struggle to achieve sales and visitation growth. This is at the direct expense of businesses and property owners (and, ultimately, local jobs and local incomes).

Considerable improvements to safety and security in the Shepparton CBD have occurred recently. In 2014, the *Safer City Camera Network* was established. The scheme was a jointly funded by Federal and State governments, and Council, and included the installation of closed circuit television (CCTV) surveillance cameras in identified high-risk pedestrian areas and in locations of community concern associated with poor safety perceptions and areas of congregation.

Other Council-led initiatives include:

- **Street Rider Night Bus Service**, established in 2008 to address instances of late night altercations and assaults and disorderly behaviour in the CBD
- **Improved Lighting in the Maude Street Mall** and selected other locations in the CBD

- **Abandoned Shopping Trolleys**, to report, collect and impound abandoned shopping trolleys
- **Dob in A Hoon Program**, supports a Victoria Police telephone hotline to report inappropriate driver behaviour
- **Wipeout Graffiti Program**, to remove graffiti quickly, via a rapid response team, to discourage further incidents.

Continued development and implementation of programs which highlight Shepparton CBD as a place that is clean, safe and friendly will assist in attracting a broader demographic to the centre, and potentially attract new visitors to the centre from across the wider region.

Furthermore, continued development and implementation of programs could significantly improve night time activity in the CBD, a market that is currently under-provided in Shepparton and which could further improve overall sales and visitation. A stronger night economy expected to primarily relate to dining and entertainment (Fryers Street has particularly strong opportunities in this regard), although opportunities may exist for other businesses to also remain open later than is currently the case.

Actions

CBD Action 6.1 Ensure that advertising and marketing for the Shepparton CBD includes (but is not dominated by) the generalised theme for the centre as a 'clean, safe and friendly' destination. It is important that community perceptions change in parallel with, rather than lag, real improvements in the quality of the CBD as a place to visit. Wherever possible, encourage stakeholders (such as retailers and Shepparton Show Me) to pursue the clean, safe and friendly theme. Council has a role in being a leading advocate and co-ordinating the efforts of all relevant stakeholders in ensuring that the CBD experience is consistent with the clean, safe and friendly image.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (All), Shepparton Show Me, CBD Businesses, Police, Community Groups	n/a

CBD Action 6.2 Encourage a night-time economy in the Shepparton CBD that includes casual dining, entertainment and family activities for a broader demographic than currently uses the centre after normal business hours. Develop a Night-time Strategy for the Shepparton CBD that ensures Council policies and actions are reflective of the following core outcomes:

1. Reducing crime and anti-social behaviour after 8pm

2. Reducing alcohol abuse and harm after 8pm

3. Creating a diversity of venues and attractions extending beyond alcohol-based venues

4. Encouraging increased night-time visitation

5. Improving perceptions of night-time safety

6. Encouraging and supporting businesses open after 5pm

7. Widening the demographics of night-time visitors to include families with children and people aged over 30 years.

The Night-time Strategy would also identify potential opportunities to expand after-hours visitation to the CBD, with possible measures including night markets, cultural events (see also CBD Action 6.4) and renewed support for late night shopping.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council (Planning and Investment Attraction), CBD Traders	n/a Night Time Strategy - $30,000 if undertaken by consultancy

CBD Action 6.3 Undertake an annual review of safety measures and programs for the Shepparton CBD, including consideration of new measures that might be implemented (in consultation with police, businesses and other stakeholders), as well as review of existing programs and actions. This could take the form of an annual 'round table' that is facilitated by Council. Another possibility is a more formal Shepparton CBD Safety Working Group, with a specific set of resources and responsibilities related to promoting a safer CBD for all residents to use.

Timeframe	Responsibility	Indicative Cost
Ongoing	Council, CBD Businesses, Emergency Services, Other Community Stakeholders	A working group would require a nominal operational budget.

CBD Action 6.4 New residents of Shepparton are encouraged to establish shops and other businesses in the CBD. Council, in association with other stakeholders such as the Chamber of Commerce, will actively engage with new migrant communities to advocate the CBD as a location for new business opportunities. A recruitment or engagement drive with members of these new communities will be implemented. New residents may be engaged to operate in the CBD through involvement in Actions 5.1 and 5.3.

Timeframe	Responsibility	Indicative Cost
Short-term	Council, Chamber of Commerce, Shepparton Show Me	n/a

9 DETAILED ACTIONS FOR ACTIVITY CENTRES

This Chapter provides specific direction, where required, in relation to activity centres other than the Shepparton CBD.

9.1 Shepparton Marketplace

As a designated Regional Retail Centre in the activity centre hierarchy, Shepparton Marketplace has an important role in complementing the Shepparton CBD as a high-quality retail destination frequented by local residents and people from across the broader region.

Marketplace Action 1: Shepparton Marketplace will expand to provide additional retail-focused facilities, as supported by growth in population and demand over time. Any expansion will be supported by a detailed retail-economic analysis (to the satisfaction of Council – see Planning and Development Assessment Criteria) that identifies implications for the Shepparton CBD and balance of the activity centres hierarchy associated with any proposed centre expansion.

Marketplace Action 2: Implement appropriate planning controls, including those identified in this Strategy, to prevent the Shepparton Marketplace from undermining the role and function of the Shepparton CBD as the higher-order Central Activities District serving north-central Victoria and southern New South Wales. Potential planning controls include:

- Continued application of a shop floorspace cap (currently 15,000m^2)
- Potential application of an office floorspace cap (equivalent to 10% of shop floorspace cap – see Action 3)
- Potential limits on cinema and cinema-based entertainment uses (as available under relevant planning zone)
- A potential cap on new tenancies of greater than 4,000m^2 in size (subject to a planning permit)
- Possible application of the Activity Centres Zone.

Marketplace Action 3: Without prejudice to the above actions, approach the owners of Shepparton Marketplace to collaboratively initiate and fast-track a planning scheme amendment that applies the Activity Centre Zone, including:

- An immediate increase in the shop floorspace cap to 22,500m^2 (a 50% increase from 15,000m^2 currently)
- Introduce an office floorspace cap of 2,250m^2
- Prohibition of cinema and cinema based activities

- A potential cap on new tenancies of greater than 4,000m^2 in size (subject to obtaining a planning permit).

The intent of this action is to work pro-actively with Shepparton Marketplace to introduce a policy framework that supports the expansion and development of the centre in a manner complementary to the role and function of the Shepparton CBD.

Any subsequent expansion in shop floorspace above 22,500m^2 would remain subject to planning approval and rigorous application of the Planning and Development Assessment Criteria in this Strategy.

If this Marketplace Action 3 cannot be achieved as envisaged, Marketplace Action 1 and 2 continue to apply at all times.

Shepparton Marketplace Strategic Planning Guidance	
Zoning:	Currently Commercial 1 Zone. Possible Activity Centre Zone.
Schedules:	Currently 15,000m^2 shop floorspace cap with possible increase to 22,500m^2 (Marketplace Action 4). Further increase in shop floorspace subject to strict application of planning and development assessment criteria. An office floorspace cap equivalent to approximately 10% of shop floorspace cap recommended. A cap on new shop tenancies above 4,000m^2 in size (subject to planning permit) would provide greater certainty to Council in terms of potential adverse impacts on CBD. Prohibition or control of cinema and cinema based entertainment facility would require rezoning to Activity Centre Zone.
Local Centres Policy:	A structure plan or similar assessment is required to provide guidance on appropriate long-term planning and design framework for the centre. In particular, the assessment should seek improved public and private realm improvements, and ensure the centre engages with urban growth occurring in adjacent south-east growth corridor.
Centre Outlook:	Expansion of the centre as identified in Marketplace Action 3 is expected to be sufficient to meet market demand and community need for the next 10-plus years. Council is able to apply the planning and development assessment criteria to Shepparton Marketplace, as required, throughout the life of this Strategy.

9.2 Mooroopna CBD

The Mooroopna CBD will continue to be a high-quality street-based activity centre that serves the local community, as well as serving people living in a broad rural hinterland to the west and north.

Mooroopna Action 1: Support a new major supermarket in Mooroopna CBD (possibly through re-location of Coles at Mooroopna North), particularly if a location can be identified on the northern side of the Midland Highway. A location on the north side of the Highway supports the specialty retailing concentrated in this part of the centre.

Mooroopna Action 2: Continue to ensure that the Mooroopna CBD has a high-quality street-based shopping environment that reflects positively on the centre and on the wider Mooroopna community. Support this outcome in future Council capital works priorities. If required, implement an urban design framework to identify potential urban design outcomes and priorities.

Mooroopna Action 3: Implement a review of the level of pedestrian accessibility across the Midland Highway in a north-south direction in the centre – particularly in proximity to the ALDI and Woolworths supermarkets. Identify and implement any opportunities for relatively cost-effective improvements to accessibility.

Mooroopna CBD Strategic Planning Guidance	
Zoning:	Commercial 1 Zone.
Schedules:	Not required.
Local Centres Policy:	An urban design framework would assist in ensuring the Mooroopna CBD continues to provide a high-quality street-based shopping environment. Any such assessment should allow for a potential new supermarket as per Mooroopna Action 1. Current priority for such a study is low.
Centre Outlook:	Expansion of the centre to include a new supermarket is not considered likely during the next 10 years.

9.3 Riverside

Riverside is identified in the proposed hierarchy as a sub-regional activity centre and has an important role in meeting the basic retail and other needs of residents in the southern parts of urban Shepparton, as well as people living in rural areas to the south.

Riverside Action 1: Retain the importance of the Riverside Plaza as the focus for 'core' retail uses, including as supermarkets and specialty shops. Ensure that similar core retail functions do not inappropriately locate in the adjacent Gateway South enterprise corridor.

Riverside Action 2: Consider the creation of a Riverside activity centre that potentially includes land outside the current Riverside Plaza boundary (possibly to the north) and which allows for a more diverse and mixed-use centre.

Riverside Action 3: Allow changes to the current floorspace cap at Riverside Plaza where this is supported by appropriately detailed retail-economic justification (see Planning and Development Assessment Criteria) and where such change is consistent with the role and function of the centre in the activity centres hierarchy. It is not anticipated that this would include a major non-food retail anchor such as a discount department store.

Riverside Strategic Planning Guidance	
Zoning:	Currently Commercial 1 Zone. Possible Activity Centre Zone.
Schedules:	Currently 4,300m^2 supermarket floorspace cap and 2,300m^2 of other shop.
	Further increase in floorspace caps subject to strict application of planning and development assessment criteria. No immediate need for increase in floorspace caps identified in the analysis supporting this Strategy.
	No office floorspace cap required.
	A cap on new shop tenancies above 4,000m^2 in size (subject to planning permit) would provide greater certainty to Council in terms of potential impacts on CBD.
	Prohibition or control of cinema and cinema-based entertainment facility would require rezoning to Activity Centre Zone.
Local Centres Policy:	A structure plan or similar assessment is required as a medium priority to provide guidance on appropriate long-term planning and design framework for centre. In particular, the assessment should seek improved public and private realm improvements, and consider options to expand the Commercial 1 Zone onto land to the north-east fronting the Goulburn Valley Highway.
Centre Outlook:	Significant expansion of the centre is not considered likely during the next 5 years.

9.4 Shepparton North

Shepparton North currently functions as a neighbourhood activity centre, yet this role must be enhanced over time through the expansion of retail and commercial facilities consistent with the centre's sub-regional role in the Shepparton activity centre hierarchy.

Located on the eastern side of the Goulburn Valley Highway, the existing centre occupies a prominent position at a 'gateway' location on the northern edge of the Shepparton urban area. This location is of strategic importance with regard to access from northern areas of urban Shepparton and from rural and regional areas to the north and north-west.

Shepp. North Action 1: Encourage the expansion of retail and commercial facilities in the existing Commercial 1 Zone area so that residents of Shepparton North are provided with an enhanced range of local convenience shopping facilities and services.

Shepp. North Action 2: Expansion of the Shepparton North centre to provide a range of retail and non-retail facilities that is consistent with sub-regional status in the activity centres hierarchy. This could include the addition of a second full-line supermarket and enhanced supporting retail (not including a major non-food retail anchor such as a discount department store).

Shepp. North Action 3: Ensure that future development of the Shepparton North centre takes place in a manner supported by appropriate urban design and planning guidance. In indicative terms, an increase of 6,000m^2 in shop floorspace may be supported on land outside the existing Commercial 1 Zone at Shepparton North, which is sufficient to accommodate a 2nd supermarket and supporting retail such as specialty shops. This should be subject to detailed assessment through application of the Planning and Development Assessment Criteria to any proposal.

An appropriate site in the area fronting the Goulburn Valley Highway between Ford Road in the north and Hawkins Street in the south can be endorsed for this extension to the Commercial 1 Zone.

Shepp. North Action 4: Consider implementation of a maximum shop tenancy size which restricts a discount department store or other major non-food based anchor 'shop' tenant in the Shepparton North centre (similar to that applied to a supermarket in Riverside Plaza). This will ensure large anchor tenants better suited to the CBD or Shepparton Marketplace are not located in the Commercial 1 Zone at Shepparton North.

Shepp. North Action 5: Once the location of an expanded Commercial 1 Zone in Shepparton North is identified, develop an urban design framework or similar assessment that provides appropriate guidance on how the centre can develop in a manner that provides a high-level of amenity to shoppers and is consistent with best-practice activity centre development guidelines. If required, apply a Development Plan Overlay (DPO) or similar mechanism to the Shepparton North centre.

Shepp. North Action 6: Allow for the development of a small local centre in association with the new North-East residential growth area. This centre will meet local convenience needs only, and will not include uses (such as a full-line supermarket) that would be more appropriately located in the Shepparton North centre.

Shepparton North Strategic Planning Guidance	
Zoning:	Currently Commercial 1 Zone. Possible Activity Centre Zone.
Schedules:	Currently 8,000m^2 shop floorspace cap.
	Further increase in floorspace caps subject to strict application of planning and development assessment criteria. In indicative terms, an additional 6,000m^2 of shop floorspace is supported on the extension of the Commercial 1 Zone.
	No office floorspace cap required.
	A cap on new shop tenancies above 4,000m^2 in size (subject to planning permit) would provide greater certainty to Council in terms of potential impacts on CBD.
	Prohibition or control of cinema and cinema based entertainment facility would require rezoning to Activity Centre Zone.
Local Centres Policy:	Council to initiate a process with landowners and developers to identify the appropriate location for expansion to the Commercial 1 Zone. A preferred outcome is an extension of the existing Commercial 1 Zone, although another location in the area between Ford Road and Hawkins Street may be required subject to site suitability and availability.
	Once a preferred location for expansion of the Commercial 1 Zone is identified, an urban design framework or similar assessment guiding built-form and development outcomes will be urgently required to ensure that expansion of the centre occurs in a manner that meets best-practice centre design principles.
Centre Outlook:	Development of additional retail floorspace in the Shepparton North centre is likely within the next 5 years, as indicated in Shepp. North Actions 2 and 3.

9.5 Rowe Street East

The Rowe Street East centre is not formally considered a part of the Shepparton CBD for the purposes of this Strategy, and its exclusion from the CBD in future strategic land use planning is also advocated. The Rowe Street East centre has its own specific role and function that requires independent direction. Nonetheless, the role of the centre as a 'gateway' location to the Shepparton CBD is recognised, and the directions for the area identified in the Shepparton CBD Strategy are considered sound.

Rowe St East Action 1: Recognise the exclusion of Rowe Street East from the Shepparton CBD, and that the broad set of directions for the CBD outlined in this Strategy do not necessarily apply to this area.

Rowe St East Action 2: Continue to apply the specific set of strategic policy guidelines contained in the Shepparton CBD Strategy to what was then defined as Precinct 9 – Rowe Street East.

Rowe St East Action 3: Ensure that future development of the Rowe Street East centre is consistent with its role and function as a neighbourhood activity centre, and discourage major non-food shop and entertainment functions (such as cinema). Consider amending the Activity Centre Zone applying to Rowe Street East to avoid this outcome.

Rowe Street East Strategic Planning Guidance	
Zoning:	Currently Commercial 1 Zone. For inclusion in Activity Centre Zone as part of Amendment C92.
Schedules:	Proposed as part of Amendment C92.
	Potential to change schedule to discourage cinemas and large non-food anchor tenants.
Local Centres Policy:	Strategic principles contained in Shepparton CBD Strategy for Rowe Street East continue to be generally sound.

9.6 Enterprise Corridors

Enterprise Corridors in Greater Shepparton accommodate a wide range of non-retail and large-format retail uses that have an important role in serving both household and business customers. Over time, Enterprise Corridors will have a more integrated development pattern, rather than standalone development which has little integration or orientation to adjacent land uses. Enterprise Corridors also need to have a standard of presentation that reflects their important gateway location to urban Shepparton.

Corridor Action 1: Encourage Enterprise Corridors as locations for a wide range of businesses seeking large sites with high levels of exposure to passing trade and which are not necessarily appropriate for an activity centre location. Support the growth and development of homemaker retail, showrooms, trade supplies and other complementary uses in Enterprise Corridors. Ensure such growth and development is in a manner that reflects an urban design outcome of an appropriate standard in view of the important gateway location to urban Shepparton of the three Enterprise Corridors.

Corridor Action 2: Recognise the popularity of homemaker retail and their specific site criteria in terms of site size, location, exposure and access, etc. Encourage homemaker development which promotes integration with adjacent land uses and which contributes to the overall attractiveness of Enterprise Corridors as a location to undertake homemaker retail shopping.

Corridor Action 3: Council will actively enforce planning policy to ensure that the primary purpose of all homemaker retailers is to sell merchandise consistent with the planning scheme definition for “restricted retail”. The sale of goods and services outside this definition will be ancillary only, and must not undermine the activity centre hierarchy. Apply appropriate scrutiny to development that may be more suited to an activity centre location through the application of Action 8.1 (assessing out-of-centre proposals).

Corridor Action 4: Consider options to discourage office and cinemas in Enterprise Corridors. This will be associated with Action 4.2 and could include measures such as the extension of the Activity Centre Zone or implementation of Special Use Zone to Enterprise Corridors. Either of these zones allows schedules to apply that give Council greater certainty in discouraging inappropriate office and cinema development which may otherwise undermine the role and function of the Shepparton CBD.

Enterprise Corridors Strategic Planning Guidance	
Zoning:	Currently Commercial 2 Zone.
	Potential for inclusion in Activity Centre Zone or Special Use Zone.
Schedules:	Currently none.
	Prohibition or control of cinema, cinema-based entertainment facility and office would require rezoning to Activity Centre Zone or Special Use Zone.

Local Centres Policy:	Corridor plans may be required to support any rezoning process or implement design guidelines. This is a high priority if a rezoning process is sought by Council.
Outlook:	Development of additional retail floorspace expected on an incremental basis in Enterprise Corridors throughout the life of the Strategy.

10 MONITORING AND REVIEW

An important part of the implementation process for Greater Shepparton Commercial Activity Centres Strategy is to ensure that the Strategy remains relevant as circumstances change and as new opportunities arise.

Monitoring of progress in the implementation of the Strategy will be important, and this will allow proper assessment as to how the Strategy is performing and whether or not changes are warranted as a result of new and emerging trends.

Monitoring also enables the Council and the community to judge how well and how efficiently the Strategy is being implemented. It is important, however, that speed of implementation should not be the sole criterion for success. Most communities seek good quality outcomes and, with a little patience, will be pleased to see on-the-ground results which ensure viable activities and attractive, competitive activity centres.

Council must ensure, therefore, that the Strategy is monitored and reviewed on a regular basis. Some indicators of progress can be readily assessed on an annual basis, while other indicators can be assessed over a longer period or sooner if important changes are identified in the marketplace and other conditions.

Indicators for monitoring and review purposes are listed in Table 10.1. These indicators are based on readily available and relatively inexpensive data, including official data, Council planning approvals and commencements data, land use and floorspace surveys, and reference to consultant reports.

Table 10.1: Indicators for Monitoring Process

Indicator	Source	Comment
1. Activity Centre Floorspace	Commercial Activity Centres Strategy, floorspace surveys, Council data for planning and building approvals.	Implement retail/commercial floorspace survey in order to allow an up-to-date estimate of total floorspace and the mix of retail/office activities. The floorspace survey presented in this Strategy will serve as the base-year survey. Alternatively, Council planning and approvals data could be added to the floorspace data presented in this Strategy.
2. In-centre surveys	In-centre surveys	Undertake, in cooperation with Shepparton Show Me, Chamber of Commerce etc, a series of short in-centre surveys in the Shepparton CBD of businesses and customers on a regular basis (eg every one or two years). The survey could cover issues such as the local community's views on the centre, changes in people's perception of the centre as a place to visit, views on competing centres, issues they identify and actions that need doing, trends in employment levels, etc. The surveys would be a helpful reference point in assessing potential impacts of the initiatives contained in the Strategy.
3. Property development proposals and projects	Council records	Track development applications, proposals, and completions through Council data.
4. Retail trading performance	Consultant reports; Property Council; industry liaison	Especially track official sources of data. Note numbers of new or expanded businesses and estimate of new jobs on an annual basis.
5. Increased floorspace provision for shops and services, as well as increased value of buildings and works	Council data for planning and building approvals, and building completions	This measure uses regular and up-to-date data, and is therefore very useful. Can indicate change in use from shop to other use and vice-versa.
6. Vacancy rates for retail and commercial floorspace (vacant m^2 expressed as a % of total m^2)	Land use and floorspace surveys	Can be undertaken at any time. As a guideline, the acceptable retail floorspace vacancy rates average around 4-6% of total retail floorspace for street-based centres. Planned under-cover modern shopping centres usually have zero vacancies due to centre management of tenant mix. These measures provide a useful indication of general health of a centre.
7. Changes in property values and rates	Council rate records; data from Victorian Valuer-General	Useful indicator, especially as a relative indicator (eg different rate valuations for different centres).
8. Viewpoints on health of centres as expressed by those in property, real estate, retailing, and in other relevant industry sectors	Regular contact with real estate agents, property owners, developers, retail industry, other businesses, business associations, and the wider community.	Possible annual forum organised by Council at a venue for information exchange between property and retail industry, local traders, other businesses and stakeholders, Council and other community representatives.

Source: Essential Economics Pty Ltd

11 FURTHER IDEAS FOR CONSIDERATION

During the course of developing the Strategy, a number of ideas were presented by various stakeholders that have not been formally adopted in the Strategy, but which nonetheless have the potential to be considered by Council and other relevant stakeholders.

Idea 1 Free or Near-Free Shuttle Bus Linking the CBD with Marketplace and Riverside

Rationale: The creation of a regular free or near-free (gold coin all-day ticket) shuttle bus would leverage off the physical proximity between these locations and support the desire to create a more integrated retail and commercial sector in Shepparton. The service would only operate during normal shopping hours and provide a limited-stop service (possibly five stops at: Shepparton Marketplace, Shepparton Plaza, Maude Street Mall, Mill site and Riverside).

Idea 2 Light Up the Telstra Tower

Rationale: The Telstra tower was identified as an under-utilised asset for the Shepparton CBD. In particular, the loss of the former clock was mentioned regularly during consultation. The potential for a significant upgrade in night-lighting to include fibre optics and a colourful night display (similar to Melbourne Star observation wheel) has been mentioned as a way of both activating the night economy and creating a new attraction for tourists and other visitors.

Idea 3 Re-launch Shepparton Show Me

Rationale: Some stakeholders identified the potential for a re-launch and re-naming of Shepparton Show Me in order to keep the branding and focus for the program 'fresh' with the target market. This would be a re-branding exercise rather than a change in the rationale and objectives of the Shepparton Show Me scheme.

Idea 4 Consistent CBD Trading Hours

Rationale: At present, CBD trading hours tend to be inconsistent on evenings and at weekends. The lack of consistency creates confusion for shoppers and undermines attempts to activate the centre outside normal business hours. A scheme that creates a set of 'core hours' for various business types within the CBD would potentially make the centre more attractive as a destination outside of normal weekday business hours. Traders that adopt the core trading hours relevant to their business type could potentially be rewarded through free advertising or other promotional support provided by Council or Shepparton Show Me.

APPENDIX A – PLANNING AND DEVELOPMENT ASSESSMENT CRITERIA

When does a Proposal need a Planning Approval?

A Planning Scheme Amendment will normally be needed to create or expand an activity centre if:

- The Planning Scheme or an applicable local policy does not currently provide for an activity centre, "town centre" or shops on the subject land; or
- The proposal would locate or extend the retail proposal, or its access, parking or other ancillary areas, onto land whose zoning, or overlays or other planning provisions preclude the proposal or regulate it or the site in a manner that would not allow the proposal to proceed; or
- The proposal would exceed any expressed floorspace limit in the Planning Scheme, or exceeds any level that significantly revises the centre's role and function. This definition is at the discretion of Council.
- A Town Planning permit will be needed in any case where the Planning Scheme requires such approval.

Information Applicants must provide when Seeking Planning Approval for a Proposal

Address of the subject site and Title particulars.

Details of any proposed development:

- Amount of retail, commercial and other floorspace (in m^2)
- Number of tenancies and their sizes
- Any particulars on type of floorspace (e.g., supermarket, discount department store, specialty stores, offices, consulting rooms etc.)
- Car parking (e.g., number of spaces, at-grade and grade-separated components).

Where Council considers strategic policy directions are not being met, or it is unclear that they are met, justification can be sought from applicants.

The application must meet any other site planning and other requirements specified in the planning scheme and in other planning policy documents with statutory effect.

An economic impact report may be required for new retail developments, if a planning scheme amendment or permit for the use is required. The need for such a report in this circumstance is entirely at the discretion of Council. In general terms, any required economic impact report should provide the following information:

- Supporting evidence of market demand or need
- Assessment of any likely impact (adverse or positive) on existing or proposed activity centres
- Description of anticipated benefits to the community (measurable and non- measurable)
- Estimated net contributions to employment (in the attraction of retail, non-retail jobs and services), and noting the creation of indirect or flow-on jobs (although these generally accrue to a wide area, including the State and national economies)
- Overall contribution to net community benefit.

Council will decide on the extent of supporting economic impact information required of the applicant on the basis of the size of the floorspace component for which approval is being sought. Council would require a more detailed economic impact assessment if:

- The proposal involves the development of a major shopping facility such as a neighbourhood shopping centre, sub-regional centre or a large homemaker retail outlet or centre that is not currently explicitly envisaged by strategic land use policy, or
- Extension of the commercial zone or town centre site where economic or community benefits may need to be weighed against other impacts.

Prospective developers should discuss their proposals with Council officers prior to formal submission of a Planning Permit Application or rezoning request so that the extent of supporting information required by Council can be ascertained. Council reserves the right to request additional information on economic impact from the applicant, if required.

The proposal should be accompanied by an analysis of the development in the context of the policies presented in this Strategy, including (where relevant):

- How the proposal meets the strategic policy directions presented the Strategy, including those measures relating to defined activity centre roles, retention of spending, mixed-use development and so on; and
- The extent to which the proposal is an appropriate development for the location and in the context of the activity development framework.

The proposal should show that it meets or exceeds accepted standards of urban design, including the provisions contained in State Planning Policy Framework (SPPF) Clause15 Built Environment and Heritage, related provisions in the Municipal Strategic Statement, (MSS), and the urban design elements considered below.

Considerations in the Assessment of Planning Applications

The following considerations are provided as guidance to Council in assessing applications for relevant development in Shepparton. These considerations are provided also as guidance to proponents in terms of the level of information required to support major development applications. Note that the level of information required to support an application will be at the discretion of Council.

1 Accessibility and Urban Design

Activity centre design in Shepparton is to be informed by:

- The relevant sections in the SPPF and MSS
- The relevant sections in this Strategy
- Any relevant provisions in local policies
- State Government Urban Design Guidelines.

Council should be satisfied that the proposed centre is consistent with the following community development issues:

1 Demonstrate that the proposed centre would be an accessible focal point for the community to be served, and consistent with any relevant structure plan or development plan for the area

2 Indicate the extent to which the proposal is to be transit-based, and the extent to which it is suitably integrated with public transport and is accessible by cycling and walking

3 Integrate architecturally and functionally into the surrounding urban areas

4 Ensure that, where commercially viable, any retailing is integrated with a range of non-retail commercial and community facilities and activities

5 Include opportunities to promote residential development within or adjacent to existing and proposed activity centres.

2 Retail Demand/Need

Council should be satisfied that the economic analysis accompanying the proposal:

6 Shows an existing or imminent need or demand for new or expanded retail floorspace provision to serve an identified catchment

7 Indicates the current catchment population level, and the current and forecast population and retail spending growth rate for the next 5 and 10 years

8 Shows the extent to which the proposal will draw trade from beyond the catchment, or from passing trade

9 Indicates how the new retail provision supports the activity centre hierarchy

10 Shows, for homemaker retail proposals, the extent to which they are also supported by the demands of the business or trade community, as well as by household shoppers

11 If required, Council can also seek similar economic demand justification for non-retail proposals.

3 Retail Supply

Council should be satisfied that the economic analysis accompanying the proposal:

12 Indicates the existing supply of retail floorspace serving the catchment

13 Provides details of any other proposals for new or expanded retail development in the catchment or beyond, and which could have an effect on the viability or appropriate timing of what is presently proposed

14 Indicates the main features of the activity centres which serve (or are intended to serve) the catchment and show how the proposed development is consistent with activity centre planning for the area

15 Demonstrates that the proposal is consistent with the longer-term objectives of the Activity Centre Strategy and that it does not compromise the ability of other activity centres to meet their designated roles in the activity centre network serving Shepparton

16 Indicates any existing retail gaps in merchandise/services which the proposal will fill

17 Clearly identifies where a site is proposed which is an alternative to that identified in the activity centre network, and the extent to which the proposal represents a preferred site and does not impact on the objectives of the Activity Centres Strategy.

18 If required, Council can also seek similar supply-side justification for non-retail proposals.

APPENDIX B – BUSINESS SURVEY RESULTS

Business Survey Results Summary

The Business Survey provides quantitative and qualitative input to the Greater Shepparton Commercial Activity Centres Strategy. The survey targeted businesses operating from retail or office shopfronts and from dedicated office tenancies. The 14 questions in the survey are designed to reveal the condition and nature of the business environment in retail/commercial centres in Greater Shepparton.

The survey includes 11 closed-response and 3 open-ended response questions. Selected business traders were invited by email and flyer to complete the survey, which was open to responses between 14 August and 2 September, 2014.

The survey was produced and responses collated by Essential Economics using the Survey Monkey software program.

Table 1: Location of business (single response)

Response	Number of Business	Share
Shepparton CBD	18	46%
Shepparton Marketplace	1	3%
Shepparton East (Industrial Area)	3	8%
Benalla Road	3	8%
Shepparton North	3	8%
Shepparton South/Kialla	2	5%
Riverside Plaza	1	3%
Mooroopna	4	10%
Tatura	3	8%
Other (please specify)	1	3%
Total	**39**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 2: Type of business (single response)

Response	Number of Businesses	Share
Apparel	2	5%
Bulky Merchandise	1	3%
Café & Restaurant	4	10%
Food & Groceries	4	10%
Leisure & General	2	5%
Home wares	1	3%
Retail (type of retail not specified)	7	18%
Services	4	10%
Office	6	15%
Industry	8	21%
Total	**39**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 3: How long has your business been operating in Greater Shepparton? (single response)

Response	Number of Businesses	Share
Less than 2 years	1	3%
2-5 years	5	13%
6-10 years	9	23%
More than 10 years	24	62%
Total	**39**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 4: Number of employees (single response)

Responses	Number of Businesses	Share
1-3	16	41%
4-6	7	18%
7-10	5	13%
10+	11	28%
Total	**39**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 5: Age/gender of business's typical customer (multiple response)

Response	Number of Businesses		
	Male	Female	Response Count
0-17 years	10	8	10
18-24 years	19	19	20
25-49 years	34	30	36
50+ years	29	28	32

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 6: Geographic location of customers (single response)

Response	Number of Businesses	Share
Local residents only (within 5 minute drive time)	3	8%
Customers from across Greater Shepparton	13	33%
Customers from across Goulburn Valley region and southern NSW	17	44%
Victoria (including Melbourne) and beyond	6	15%
Total	**39**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 7: Businesses involved in, or planning to be involved in internet sales (single response)

Response	Number of Businesses	Share
Yes, we are currently	9	23%
Yes, we are planning to	7	18%
Yes, we would like to but are unsure how	2	5%
No	21	54%
Total	**39**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 8: Is your financial turnover greater than it was one year ago? (single response)

Response	Number of Businesses	Share
Yes	15	39%
No, it's smaller	12	32%
It's about the same	11	29%
Total	**38**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 9: Location of Main Competition (multiple response)

Response	Number of Businesses	Share
Other businesses in your own local area (within 5 minute drive)	16	42%
Other businesses across the wider Greater Shepparton area	16	42%
Other large regional centres (Bendigo, Albury etc.)	8	21%
Competitors in Melbourne	7	18%
The internet	9	24%

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 10: Positive things about doing business in Greater Shepparton (multiple response)

Response	Number of Businesses	Share
Stable economy	3	9%
Service role for wider region	21	66%
Strong business community	5	16%
Marketing and Promotions Activities	3	9%
Presence of national brand traders and businesses	13	41%
Prospects for growth	9	28%

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 11: What would most improve the business environment in the commercial centres located in Greater Shepparton? (single response)

Response	Number of Businesses	Share
Better marketing	3	9%
Streetscape improvements	6	17%
Parking changes (Cost and Availability)	16	46%
Crime and safety issues addressed	2	6%
Improved levels of collaboration between businesses	2	6%
Residential/population growth	6	17%
Total	**35**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Summary of Open Ended Response Questions

Table 12: Ideas that might attract more customers and private investment to Shepparton

Response	Number of Businesses	Share
CBD vibrancy	11	28%
Parking issues	5	13%
Capitalise on sporting and cultural identity	6	15%
Streetscape improvements	5	13%
Small business assistance	10	26%
Need for greater tourism and marketing	2	5%
Total	**39**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 13: The main advantages Greater Shepparton as a place to do business

Response	Number of Businesses	Share
Regional service role	17	61%
Variety of businesses	4	14%
Liveability and community	2	7%
National brand stores	2	7%
Customer loyalty	2	7%
Stronger economy	1	4%
Total	**28**	**100%**

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

Table 14: The main weaknesses of Greater Shepparton as a place to do business

Response	Number of Businesses	Share
Transport Infrastructure	3	8%
CBD functionality	5	14%
Parking issues	7	19%
Decline of regional service role	6	17%
High cost of business	8	22%
Crime and safety	2	6%
Staff skill level	3	8%
Poor marketing and outside perception of Shepparton	2	6%
Total	**36**	100%

Source: Essential Economics Greater Shepparton Business Survey – August to September 2014

APPENDIX C – TELEPHONE SURVEY RESULTS

Telephone Survey Results Summary

Table 1: Survey Respondents

		Location							**Gender**	
Age	**TOTAL**	Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW	Male	Female
19-35 years	**73**	27	8	7	9	7	7	8	18	55
	15%	**12%**	**20%**	**14%**	**18%**	**18%**	**14%**	**16%**	**15%**	**14%**
36-55 years	**125**	48	8	18	12	14	11	14	21	104
	25%	**22%**	**20%**	**36%**	**24%**	**35%**	**22%**	**28%**	**18%**	**27%**
over 55 years	**302**	145	24	25	29	19	32	28	78	224
	60%	**66%**	**60%**	**50%**	**58%**	**48%**	**64%**	**56%**	**67%**	**58%**
TOTAL	**500**	**220**	**40**	**50**	**50**	**40**	**50**	**50**	**117**	**383**
Share	100%	44%	8%	10%	10%	8%	10%	10%		

Source: Field Force and Essential Economics, 2014

Table 2: Centres mainly visited for grocery and supermarket shopping
(multiple response)

		Location						
	TOTAL	Urban Shepparton	Urban Mooroopna	Rural North-West	Rural North East	Rural South East	Rural South West	Rural NSW
Number of Respondents	**500**	**220**	**40**	**50**	**50**	**40**	**50**	**50**
Within City of Greater Shepparton								
Shepparton CBD	**17%**	30%	5%	8%	10%	8%	8%	6%
Shepparton Marketplace	**15%**	18%	3%	16%	28%	15%	6%	8%
Shepparton North (IGA on Highway)	**15%**	25%	0%	12%	22%	0%	2%	2%
Mooroopna	**11%**	2%	73%	8%	0%	3%	30%	0%
Riverside Plaza	**6%**	12%	3%	2%	2%	8%	0%	0%
Shepparton	**6%**	6%	10%	4%	0%	18%	4%	0%
Shepparton Plaza (Benalla Road)	**6%**	11%	0%	0%	2%	0%	4%	0%
Mooroopna North (Coles)	**2%**	0%	15%	0%	0%	3%	0%	0%
Tatura	**1%**	0%	0%	0%	0%	0%	8%	0%
Murchison	**0%**	0%	0%	0%	0%	0%	2%	0%
Other	**4%**	9%	6%	2%	0%	0%	2%	0%
Outside City of Greater Shepparton								
Cobram	**6%**	0%	0%	0%	26%	0%	0%	36%
Echuca	**4%**	0%	0%	34%	0%	0%	2%	8%
Kyabram	**4%**	0%	0%	12%	4%	0%	24%	0%
Euroa	**3%**	0%	0%	0%	0%	35%	0%	0%
Yarrawonga	**2%**	0%	0%	0%	14%	0%	0%	8%
Benalla	**2%**	0%	0%	0%	0%	23%	0%	0%
Nathalia	**2%**	0%	0%	16%	0%	0%	0%	0%
Deniliquin (NSW)	**1%**	0%	0%	0%	0%	0%	0%	14%
Finley (NSW)	**1%**	0%	0%	0%	0%	0%	0%	14%
Tocumwal	**1%**	0%	0%	0%	2%	0%	0%	10%
Numurkah	**1%**	0%	0%	6%	4%	0%	0%	0%
Bendigo	**0%**	0%	0%	0%	0%	0%	4%	0%
Other	**3%**	0%	0%	6%	0%	6%	16%	8%
Share	**116%**	114%	113%	126%	114%	115%	114%	120%

Source: Field Force and Essential Economics, 2014

Table 3: Centres mainly visited for convenience items (multiple response)

		Location						
	TOTAL	Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW
Number of Respondents	**500**	**220**	**40**	**50**	**50**	**40**	**50**	**50**
Within City of Greater Shepparton								
Shepparton CBD	**34%**	61%	10%	12%	28%	10%	16%	4%
Shepparton Marketplace	**8%**	10%	3%	10%	10%	8%	2%	4%
Mooroopna	**7%**	0%	78%	4%	0%	3%	4%	0%
Shepparton	**5%**	7%	13%	4%	0%	8%	2%	0%
Shepparton Plaza (Benalla Road)	**4%**	9%	0%	0%	0%	0%	0%	0%
Riverside Plaza	**4%**	6%	0%	2%	0%	3%	6%	0%
Tatura	**3%**	0%	0%	0%	0%	0%	26%	0%
Shepparton North (IGA on Highway)	**2%**	3%	0%	0%	6%	0%	0%	0%
Shepparton South (Goulburn Valley Highway)	**1%**	3%	0%	0%	0%	0%	0%	0%
Murchison	**1%**	0%	0%	0%	0%	0%	8%	0%
Shepparton Other	**1%**	1%	0%	0%	0%	0%	0%	0%
Benalla Road (Other)	**0%**	1%	0%	0%	0%	0%	0%	0%
Outside City of Greater Shepparton								
Cobram	**5%**	0%	0%	0%	26%	0%	0%	20%
Euroa	**4%**	0%	0%	0%	0%	53%	0%	0%
Kyabram	**3%**	0%	0%	10%	4%	0%	16%	0%
Echuca	**3%**	0%	0%	24%	0%	0%	0%	4%
Tocumwal	**2%**	0%	0%	0%	2%	0%	0%	18%
Nathalia	**2%**	0%	0%	20%	0%	0%	0%	0%
Numurkah	**2%**	0%	0%	6%	12%	0%	0%	0%
Finley (NSW)	**2%**	0%	0%	0%	0%	0%	0%	18%
Yarrawonga	**2%**	0%	0%	0%	14%	0%	0%	2%
Benalla	**1%**	0%	0%	0%	0%	18%	0%	0%
Deniliquin (NSW)	**1%**	0%	0%	0%	0%	0%	0%	12%
Berrigan	**1%**	0%	0%	0%	0%	0%	0%	10%
Other	**6%**	1%	3%	14%	2%	3%	14%	16%
Share	**104%**	103%	105%	106%	104%	103%	106%	108%

Source: Field Force and Essential Economics, 2014

Table 4: Centres mainly visited for apparel (multiple response)

		Location						
	TOTAL	Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW
Number of respondents	**500**	**220**	**40**	**50**	**50**	**40**	**50**	**50**
Within City of Greater Shepparton								
Shepparton CBD	**53%**	70%	48%	32%	42%	40%	54%	28%
Shepparton Marketplace	**19%**	16%	13%	10%	34%	10%	32%	22%
Shepparton	**11%**	4%	38%	14%	0%	30%	4%	20%
Mooroopna	**2%**	2%	13%	2%	0%	3%	0%	0%
Shepparton Plaza (Benalla Road)	**1%**	2%	0%	0%	2%	3%	0%	2%
Benalla Road (Other)	**0%**	1%	0%	0%	0%	0%	0%	0%
Shepparton Other	**0%**	0%	0%	2%	0%	0%	0%	0%
Shepparton South (Goulburn Valley Highway)	**0%**	0%	0%	0%	0%	0%	0%	0%
Outside City of Greater Shepparton								
Melbourne	**6%**	8%	0%	6%	8%	8%	2%	8%
Echuca	**5%**	0%	0%	32%	2%	0%	6%	12%
I don't shop for these items	**3%**	5%	0%	0%	2%	3%	0%	0%
Kyabram	**2%**	0%	3%	4%	0%	0%	16%	0%
Albury/Wodonga	**2%**	0%	0%	0%	4%	0%	0%	14%
Cobram	**2%**	0%	0%	0%	8%	0%	0%	10%
Internet	**2%**	1%	0%	2%	0%	5%	0%	4%
Euroa	**1%**	0%	0%	2%	0%	13%	0%	0%
Deniliquin (NSW)	**1%**	0%	0%	0%	0%	0%	0%	10%
Yarrawonga	**1%**	0%	0%	0%	6%	0%	0%	4%
Bendigo	**1%**	0%	0%	2%	0%	0%	4%	2%
Wangaratta	**1%**	0%	0%	0%	4%	3%	0%	2%
Benalla	**1%**	0%	0%	0%	0%	8%	0%	0%
Other	**0%**	0%	0%	4%	0%	2%	0%	8%
Share	**116%**	109%	113%	112%	112%	123%	122%	146%

Source: Field Force and Essential Economics, 2014

Table 5: Centres mainly visited for household items (multiple response)

		Location						
	TOTAL	Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW
Number of Respondents	**500**	**220**	**40**	**50**	**50**	**40**	**50**	**50**
Within City of Greater Shepparton								
Shepparton CBD	**23%**	28%	23%	14%	20%	20%	20%	14%
Shepparton	**17%**	10%	48%	28%	4%	23%	18%	22%
Benalla Road (Other)	**13%**	21%	3%	10%	12%	0%	14%	4%
Shepparton Marketplace	**13%**	14%	10%	8%	18%	8%	16%	10%
Shepparton South (Goulbourn Valley Highway)	**12%**	18%	10%	4%	14%	5%	4%	4%
Shepparton Plaza (Benalla Road)	**7%**	9%	3%	2%	8%	8%	2%	12%
Shepparton Other	**3%**	3%	3%	8%	2%	0%	0%	0%
Shepparton North (IGA on Highway)	**1%**	0%	0%	0%	6%	0%	0%	0%
Mooroopna	**1%**	0%	8%	0%	0%	3%	0%	0%
Riverside Plaza	**0%**	1%	0%	0%	0%	0%	0%	0%
Tatura	**0%**	0%	0%	0%	0%	0%	2%	0%
							++	
Outside City of Greater Shepparton								
I don't shop for these items	**5%**	9%	0%	4%	0%	8%	2%	0%
Kyabram	**3%**	0%	0%	12%	2%	0%	18%	0%
Echuca	**3%**	0%	0%	18%	0%	0%	2%	10%
Cobram	**2%**	0%	0%	0%	16%	0%	0%	6%
Melbourne	**2%**	1%	0%	2%	0%	5%	2%	4%
Euroa	**2%**	0%	0%	0%	0%	23%	0%	0%
Albury/Wodonga	**2%**	0%	0%	0%	2%	0%	0%	14%
Bendigo	**2%**	0%	0%	6%	0%	0%	6%	4%
Finley (NSW)	**2%**	0%	0%	0%	0%	0%	0%	16%
Wangaratta	**1%**	0%	0%	0%	6%	5%	0%	2%
Deniliquin (NSW)	**1%**	0%	0%	0%	0%	0%	0%	8%
Yarrawonga	**1%**	0%	0%	0%	6%	0%	0%	2%
Benalla	**1%**	0%	0%	0%	0%	8%	0%	0%
Other	**1%**	0%	0%	2%	0%	3%	4%	4%
Share	**116%**	115%	105%	118%	116%	115%	110%	136%

Source: Field Force and Essential Economics, 2014

Table 6: Centres mainly visited for dining and/or entertainment purposes (multiple response)

		Location						
	TOTAL	Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW
Number of Respondents	**500**	**220**	**40**	**50**	**50**	**40**	**50**	**50**
Within City of Greater Shepparton								
Shepparton CBD	**42%**	68%	33%	22%	38%	15%	18%	6%
Shepparton	**12%**	9%	38%	6%	2%	13%	22%	8%
Mooroopna	**5%**	1%	48%	0%	0%	3%	0%	0%
Tatura	**2%**	1%	0%	0%	0%	0%	14%	0%
Shepparton Marketplace	**1%**	1%	0%	0%	0%	3%	0%	4%
Shepparton South (Goulburn Valley Highway)	**1%**	3%	0%	0%	0%	0%	0%	0%
Shepparton Other	**1%**	1%	0%	4%	0%	0%	0%	0%
Riverside Plaza	**1%**	1%	0%	0%	2%	0%	0%	0%
Shepparton Plaza (Benalla Road)	**0%**	1%	0%	0%	0%	0%	0%	0%
Shepparton North (IGA on Highway)	**0%**	1%	0%	0%	0%	0%	0%	0%
Benalla Road (Other)	**0%**	0%	0%	0%	0%	0%	2%	0%
Murchison	**0%**	0%	0%	0%	0%	0%	2%	0%
Outside City of Greater Shepparton								
I don't shop for these items	**11%**	12%	3%	10%	8%	23%	10%	6%
Echuca	**6%**	0%	0%	36%	2%	0%	12%	12%
Cobram	**4%**	0%	0%	0%	14%	0%	0%	22%
Melbourne	**3%**	2%	0%	0%	4%	10%	6%	4%
Yarrawonga	**2%**	0%	0%	0%	10%	0%	0%	14%
Kyabram	**2%**	0%	0%	2%	0%	0%	18%	0%
Numurkah	**2%**	0%	0%	8%	12%	0%	0%	0%
Euroa	**2%**	0%	0%	0%	0%	20%	2%	0%
Benalla	**1%**	0%	0%	0%	0%	15%	0%	0%
Wangaratta	**1%**	0%	0%	0%	6%	3%	0%	0%
Deniliquin (NSW)	**1%**	0%	0%	0%	0%	0%	0%	8%
Barooga	**1%**	0%	0%	0%	0%	0%	0%	8%
Other	**3%**	1%	3%	16%	4%	6%	8%	28%
Share	**108%**	103%	123%	104%	102%	108%	114%	120%

Source: Field Force and Essential Economics, 2014

Table 7: Frequency of Shopping in Shepparton

		Location					Gender		Age		
	TOTAL	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW	Male	Female	19-35	36-55	55+
Number of Respondents	**240**	**50**	**50**	**40**	**50**	**50**	**58**	**182**	**38**	**69**	**133**
At least once a week	**22%**	22%	36%	28%	24%	2%	16%	24%	18%	26%	21%
At least once a fortnight	**20%**	18%	18%	23%	34%	8%	19%	20%	24%	22%	18%
At least once a month	**29%**	26%	20%	33%	24%	42%	34%	27%	42%	23%	28%
At least every 6 months	**18%**	22%	18%	10%	6%	34%	21%	18%	11%	19%	20%
About once a year	**7%**	6%	4%	8%	6%	10%	5%	7%	5%	7%	7%
Never shop there	**4%**	6%	4%	0%	6%	4%	5%	4%	0%	3%	6%

Source: Field Force and Essential Economics, 2014

Table 8: Reasons for Shopping in Shepparton (multiple response)

		Location					Gender		Age		
	TOTAL	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW	Male	Female	19-35	36-55	55+
Number of Respondents	**230**	**47**	**48**	**40**	**47**	**48**	**55**	**175**	**38**	**67**	**125**
Closest large centre in the region	**42%**	47%	42%	40%	36%	46%	31%	46%	37%	45%	42%
Has a good selection of Major Stores and National Brands (Kmart, Target, Big W, Bunnings etc)	**42%**	32%	48%	38%	32%	60%	44%	42%	55%	43%	38%
Has everything I need	**24%**	15%	29%	33%	28%	17%	18%	26%	34%	18%	24%
Has major services (Hospital, Council etc)	**11%**	15%	6%	18%	6%	10%	15%	10%	3%	12%	13%
I visit family/friends there	**10%**	6%	13%	3%	11%	17%	7%	11%	18%	4%	10%
I work there	**7%**	9%	8%	5%	13%	0%	7%	7%	8%	9%	6%
Cheap prices	**6%**	4%	4%	10%	6%	4%	7%	5%	5%	6%	6%
Easy to travel to via highway	**1%**	0%	0%	3%	0%	4%	2%	1%	0%	1%	2%
Other	**1%**	0%	2%	0%	0%	6%	6%	1%	0%	1%	3%
Share	**145%**	128%	152%	148%	132%	165%	136%	147%	161%	140%	142%

Source: Field Force and Essential Economics, 2014

Table 9: Frequency of Shopping in Shepparton CBD

		Location		Gender		Age		
	TOTAL	Urban Shepparton	Urban Mooroopna	Male	Female	19-35	36-55	55+
Number of Respondents	**260**	**220**	**40**	**59**	**201**	**35**	**56**	**169**
At least once a week	**47%**	51%	25%	49%	46%	43%	41%	50%
At least once a fortnight	**22%**	21%	28%	20%	23%	26%	32%	18%
At least once a month	**20%**	18%	33%	10%	23%	26%	16%	21%
At least every 6 months	**8%**	7%	10%	12%	6%	3%	11%	8%
About once a year	**2%**	1%	5%	5%	0%	3%	0%	2%
Never shop there	**1%**	1%	0%	3%	0%	0%	0%	2%

Source: Field Force and Essential Economics, 2014

Table 10: Usual Method of Travel to Shepparton CBD

		Location		Gender		Age		
	TOTAL	Urban Shepparton	Urban Mooroopna	Male	Female	19-35	36-55	55+
Number of Respondents	**257**	**217**	**40**	**57**	**200**	**35**	**56**	**166**
Private Vehicle (Car, Motorbike, Ute, etc)	**92%**	91%	95%	89%	93%	89%	91%	93%
Walk	**4%**	4%	0%	7%	3%	6%	7%	2%
Bus	**3%**	3%	5%	2%	4%	6%	0%	4%
Combination of modes	**1%**	1%	0%	0%	2%	0%	2%	1%
Taxi	**0%**	0%	0%	2%	0%	0%	0%	1%

Source: Field Force and Essential Economics, 2014

Table 11: Reasons for Shopping in Shepparton CBD (multiple response)

		Location		Gender		Age		
	TOTAL	Urban Shepparton	Urban Mooroopna	Male	Female	19-35	36-55	55+
Number of Respondents	**257**	**217**	**40**	**57**	**200**	**35**	**56**	**166**
Has a good selection of Major Stores and National Brands (Kmart, Target, Big W, Bunnings etc)	**36%**	35%	45%	33%	37%	40%	52%	30%
Closest shopping centre to where I live	**34%**	36%	20%	32%	35%	29%	25%	38%
Has everything I need	**34%**	34%	35%	30%	35%	34%	32%	34%
Closest large centre in the region	**6%**	6%	10%	7%	6%	9%	5%	6%
Easy to park	**5%**	5%	5%	4%	6%	11%	0%	5%
On my way home	**3%**	4%	0%	5%	3%	0%	5%	3%
Has major services (Hospital, Council etc)	**3%**	3%	0%	7%	2%	0%	2%	4%
I work there	**2%**	1%	5%	0%	3%	6%	5%	0%
Atmosphere	**2%**	1%	5%	2%	2%	3%	2%	1%
Cheaper	**2%**	1%	3%	2%	2%	0%	2%	2%
Other	**0%**	0%	3%	0%	2%	0%	0%	2%
Share	**127%**	126%	130%	121%	129%	131%	130%	125%

Source: Field Force and Essential Economics, 2014

Table 12: Positive things about Shopping in Shepparton CBD (multiple response)

		Location						
	TOTAL	Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW
Number of Respondents	**487**	217	40	47	48	40	47	48
Attractive range of goods and services	**36%**	33%	28%	47%	42%	28%	34%	52%
Alternative/different shops	**18%**	12%	20%	17%	23%	33%	11%	40%
Good shopping atmosphere	**18%**	17%	28%	2%	19%	20%	26%	17%
Good range of other facilities (eg banks, community services, toilets, etc)	**13%**	12%	23%	9%	13%	18%	9%	17%
Adequate car parking available	**12%**	10%	13%	11%	8%	15%	19%	17%
Maude Street Mall	**12%**	10%	15%	2%	15%	3%	19%	23%
Convenient opening hours	**6%**	9%	8%	4%	4%	5%	4%	0%
Good trader service	**3%**	5%	3%	0%	2%	0%	2%	4%
Close to home	**1%**	3%	0%	0%	0%	0%	0%	0%
Good public transport access	**1%**	1%	5%	0%	0%	0%	0%	0%
Price	**1%**	0%	3%	2%	2%	0%	0%	0%
Clean	**0%**	0%	3%	0%	0%	3%	0%	0%
Playground	**0%**	0%	3%	2%	0%	0%	0%	0%
Support local traders	**0%**	1%	0%	0%	0%	0%	0%	0%
Nothing	**17%**	19%	24%	26%	15%	23%	11%	13%
Share	**141%**	131%	170%	121%	142%	145%	134%	181%

Source: Field Force and Essential Economics, 2014

Table 13: Problems with Shepparton CBD as a place to visit and shop (multiple response)

	TOTAL	Location Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW
Number of Respondents	**490**	**220**	**40**	**47**	**48**	**40**	**47**	**48**
poor parking facilities	**37%**	39%	40%	38%	56%	25%	28%	23%
need to pay for parking/parking restrictions	**29%**	29%	28%	36%	31%	15%	38%	21%
unattractive shopping atmosphere	**20%**	23%	18%	13%	17%	23%	15%	21%
limited range of goods and services available	**18%**	23%	18%	4%	15%	18%	15%	15%
unsafe/personal safety	**14%**	17%	20%	6%	10%	15%	11%	8%
difficult to get from one point to another by car	**10%**	5%	3%	13%	19%	15%	19%	13%
untidy/dirty streets	**10%**	12%	13%	9%	2%	8%	9%	10%
crime	**5%**	7%	10%	2%	2%	3%	2%	6%
drug use issues	**2%**	2%	8%	0%	2%	3%	0%	2%
poor pedestrian access around the centre	**2%**	1%	3%	0%	0%	0%	9%	0%
not enough toilets	**1%**	1%	3%	0%	0%	0%	9%	0%
poor customer service	**1%**	1%	0%	2%	2%	0%	2%	0%
limited trading hours	**1%**	1%	0%	0%	0%	3%	2%	2%
not enough /poor quality of cafes or restaurants/eating places	**1%**	2%	0%	0%	2%	0%	0%	0%
not enough public open space	**1%**	1%	3%	0%	0%	3%	0%	0%
difficult to cross roads as a pedestrian	**1%**	2%	0%	0%	0%	3%	0%	0%
Other	**3%**	3%	6%	4%	0%	6%	4%	6%
None	**18%**	15%	18%	21%	8%	18%	19%	31%
Share	**175%**	188%	185%	149%	167%	153%	181%	158%

Source: Field Force and Essential Economics, 2014

Table 14: Main problems if improved, would shop in Shepparton more often

	TOTAL	Location Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW	Age 19-35	36-55	55+
Number of Respondents	**490**	**220**	**40**	**47**	**48**	**40**	**47**	**48**	**73**	**123**	**294**
YES	**49%**	50%	35%	53%	56%	40%	62%	42%	66%	62%	40%
NO	**51%**	50%	65%	47%	44%	60%	38%	58%	34%	38%	60%

Source: Field Force and Essential Economics, 2014

Table 15: Reasons for not shopping in Shepparton more often (multiple response)

		Location				Gender		Age	
	TOTAL	Rural North West	Rural North East	Rural South West	Rural NSW	Male	Female	36-55	55+
Number of Respondents	**10**	**3**	**2**	**3**	**2**	**3**	**7**	**2**	**8**
Not located close to me	**50%**	67%	0%	67%	50%	33%	57%	50%	50%
Difficult to drive to/ inaccessible	**30%**	0%	50%	33%	50%	33%	29%	0%	38%
Have better options closer to home	**10%**	0%	0%	0%	50%	0%	14%	0%	13%
Concerns for personal safety/security	**10%**	33%	0%	0%	0%	0%	14%	50%	0%
Don't like it	**10%**	33%	0%	0%	0%	0%	14%	50%	0%
Health Issues	**10%**	0%	50%	0%	0%	33%	0%	0%	13%
Share	**120%**	133%	100%	100%	150%	100%	129%	150%	113%

Source: Field Force and Essential Economics, 2014

Table 16: Familiar with Shepparton SHOW ME Program

		Location							Gender		Age		
	TOTAL	Urban Sheppa rton	Urban Mooro opna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW	Male	Female	19-35	36-55	55+
Number of Respondents	**500**	**220**	**40**	**50**	**50**	**40**	**50**	**50**	**117**	**383**	**73**	**125**	**302**
Yes	**79%**	88%	80%	68%	88%	70%	84%	42%	73%	81%	77%	86%	77%
No	**21%**	12%	20%	32%	12%	30%	16%	58%	27%	19%	23%	14%	23%

Source: Field Force and Essential Economics, 2014

Table 17: Effectiveness of Shepparton SHOW ME Program

		Location							Gender		Age		
	TOTAL	Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW	Male	Female	19-35	36-55	55+
No. of Respondents:	**395**	**194**	**32**	**34**	**44**	**28**	**42**	**21**	**85**	**310**	**56**	**107**	**232**
Very Effective	**7%**	8%	13%	3%	7%	11%	2%	5%	7%	7%	4%	7%	8%
Effective	**30%**	29%	31%	29%	20%	25%	45%	33%	22%	32%	48%	26%	27%
Undecided	**44%**	44%	38%	44%	50%	46%	38%	48%	44%	44%	32%	49%	45%
Ineffective	**13%**	12%	9%	18%	20%	11%	10%	10%	15%	12%	9%	12%	14%
Very Ineffective	**6%**	7%	9%	6%	2%	7%	5%	5%	12%	5%	7%	6%	6%

Source: Field Force and Essential Economics, 2014

Table 18: Shop for retail goods and services on the internet more than once a month

		Location							Gender		Age		
	TOTAL	Urban Shepparton	Urban Mooroopna	Rural North West	Rural North East	Rural South East	Rural South West	Rural NSW	Male	Female	19-35	36-55	55+
Number of Respondents:	**500**	**220**	**40**	**50**	**50**	**40**	**50**	**50**	**117**	**383**	**73**	**125**	**302**
Yes	**14%**	12%	10%	18%	12%	23%	10%	20%	20%	12%	36%	22%	5%
No	**86%**	88%	90%	82%	88%	78%	90%	80%	80%	88%	64%	78%	95%

Source: Field Force and Essential Economics, 2014

APPENDIX D – FLOORSPACE SUMMARY

Floorspace Provision by Activity Centre, 2014-15

Centre Type	Food, Liquor and Groceries	Food Catering	Non-food	Services	Total Retail	Shopfront Office	Vacant Shopfront	Total Shopfront	Occupied Dedicated Office
Central Activities District									
Shepparton CBD	13,030m²	9,570m²	55,460m²	7,250m²	85,310m²	13,420m²	12,520m²	111,250m²	58,600m²
Total Central Activities District	**13,030m²**	**9,570m²**	**55,460m²**	**7,250m²**	**85,310m²**	**13,420m²**	**12,520m²**	**111,250m²**	**58,600m²**
Regional Retail Centre									
Shepparton Marketplace	4,160m²	550m²	10,230m²	310m²	15,250m²	350m²	0m²	15,600m²	0m²
Total Regional Retail Centre	**4,160m²**	**550m²**	**10,230m²**	**310m²**	**15,250m²**	**350m²**	**0m²**	**15,600m²**	**0m²**
Sub-Regional Centre									
Riverside	4,670m²	830m²	13,340m²	100m²	18,940m²	5,760m²	5,110m²	29,810m²	0m²
Mooroopna CBD	5,860m²	1,170m²	3,200m²	1,040m²	11,270m²	820m²	660m²	12,750m²	180m²
Shepparton North	3,780m²	150m²	30m²	0m²	3,960m²	0m²	0m²	3,960m²	0m²
Total Sub Regional Centre	**14,310m²**	**2,150m²**	**16,570m²**	**1,140m²**	**34,170m²**	**6,580m²**	**5,770m²**	**46,520m²**	**180m²**
Neighbourhood Centre/Town Centre									
Echuca Road (Mooroopna North)	2,640m²	0m²	0m²	0m²	2,640m²	0m²	80m²	2,720m²	0m²
Shepparton Plaza	5,440m²	470m²	6,420m²	210m²	12,540m²	70m²	530m²	13,140m²	80m²
Tatura	3,270m²	610m²	4,750m²	470m²	9,100m²	1,790m²	1,080m²	11,970m²	1,770m²
Total Neighbourhood Centre/Town Centre	**11,350m²**	**1,080m²**	**11,170m²**	**680m²**	**24,280m²**	**1,860m²**	**1,690m²**	**27,830m²**	**1,850m²**
Local Centres/Township Centre	**3,040m²**	**1,530m²**	**740m²**	**1,670m²**	**6,980m²**	**1,270m²**	**1,000m²**	**9,250m²**	**50m²**
Enterprise Corridors									
Benalla Road	110m²	390m²	38,880m²	80m²	39,460m²	0m²	2,520m²	41,980m²	0m²
Gateway North	40m²	640m²	850m²	0m²	1,530m²	0m²	150m²	1,680m²	0m²
Gateway South	340m²	330m²	10,470m²	90m²	11,230m²	150m²	370m²	11,750m²	850m²
Total Enterprise Corridors	**490m²**	**1,360m²**	**50,200m²**	**170m²**	**52,220m²**	**150m²**	**3,040m²**	**55,410m²**	**850m²**
Total Greater Shepparton	**46,380m²**	**16,240m²**	**144,370m²**	**11,220m²**	**218,210m²**	**23,630m²**	**24,020m²**	**265,860m²**	**61,530m²**

APPENDIX E – SUMMARY OF OBJECTIVES AND ACTIONS

Summary of Objectives and Actions for Activity Centres

OBJECTIVE / ACTIONS		*RESPONSIBILITY*	*TIMING*	*INDICATIVE COST*
1	**To support the activity centres hierarchy**			
1.1	Adopt the activity centre hierarchy as a beneficial planning tool to guide the location, type and volume of new and/or expanded retail, commercial and other development. Ensure this hierarchy is referenced when considering development applications and determining Council land use policies.	Council: Planning	Short-term	n/a
1.2	Incorporate the revised hierarchy identified in this Strategy in the Greater Shepparton Planning Scheme, and subsequently update as required	Council: Planning	Short-term	n/a
2	**Maximise the regional service role of Shepparton through the provision of a dynamic and efficient activity centre hierarchy**			
2.1	Support proposals for development of new retail, commercial and other facilities that are consistent with the regional service role of Shepparton, where this is consistent with the activity centre hierarchy and other relevant strategic policy objectives.	Council: Planning	Ongoing	n/a
2.2	Continue to implement a pro-active and whole-of-Council approach to ensure that activity centres provide a range and scale of facilities that support Shepparton's role as the 'service centre of choice' for people living in north-central Victoria and southern New South Wales. Implement all relevant Council policies and resources in a manner that ensures the regional service role of Shepparton is retained and enhanced.	Council: Investment Attraction and Planning (primary responsibility)	Ongoing	n/a
2.3	Develop a simple and coherent set of dining and entertainment guidelines for activity centres in Greater Shepparton. This will provide traders with an easily understood set of guidelines in relation to street and outdoor dining, signage, health and safety, equitable access, night time dining, noise management etc. Distribute to relevant traders, as required.	Council: Investment Attraction and Planning	Short-term	$1,500 (printing and distribution)
2.4	Direct public sector facilities and activities to locations which support the activity centre hierarchy (as appropriate). Council will actively engage with State and Federal Government to seek the location of key cultural, community and administrative infrastructure within the relevant activity centres in Greater Shepparton.	GSCC, State and Federal Government	Ongoing	n/a
2.5	Continue to support Council initiatives seeking to attract private sector investment to activity centres in Greater Shepparton, including efforts to attract national brand retailers and other new businesses. Provide a concise and up-to-date retail investment prospectus to retailers and other relevant business considering establishing a presence in Greater Shepparton's activity centres. Opportunities include the market gaps for the CBD identified in Chapter 2.	GSCC	Ongoing	$5,000 (investment prospectus)

OBJECTIVE / ACTIONS		RESPONSIBILITY	TIMING	INDICATIVE COST
3	**Consolidate a diverse range of activities in centres**			
3.1	Consolidate retail and other business development at activity centres in accordance with the hierarchy of activity centres contained in this Strategy. Ensure all relevant Council polices have due regard to the activity centres hierarchy. Discourage out-of-centre development (see also Objective 8). As a general priority, direct appropriate public sector facilities and activities to locations which support the activity centre hierarchy.	Council: Planning	Ongoing	n/a
3.2	Establish a wide variety of non-retail uses at identified activity centres (noting the need to maintain the retail-focus specific to Shepparton Marketplace), including medium-density residential development, where this is also supported by other Council policies.	Council, private sector	Ongoing	n/a
4	**Confirm the primacy of the Shepparton CBD**			
4.1	Re-affirm the primacy of the Shepparton CBD in the activity centres hierarchy and as the regional focus for a wide range of activities, including retail, commercial, community, cultural, residential and other facilities and services. Reflect this direction when developing future policies and actions which are relevant to activity centres, and encourage development that consolidates the primacy of the CBD.	Council (All)	Ongoing	n/a
4.2	Retain and enhance a major cinema complex as a key Shepparton CBD anchor and activity generator. Discourage the location of cinemas and other directly-associated entertainment functions outside of the CBD. A range of planning provisions could be implemented to achieve this intended outcome, including the application of schedules to relevant zones (e.g. Activity Centre Zone, Special Use Zone and Comprehensive Development Zone). Council to seek legal advice on ways in which these zones and schedules may be applied in a manner able to be best enforced by Council.	Council: Planning	Short-term	$10,000
4.3	Ensure the continued role of the Shepparton CBD in providing higher-order retailing including discount department stores, supermarkets and wide range of supporting shops in an attractive and convenient 'street-based' shopping environment. Implement those elements of the Shepparton CBD Strategy consistent with this outcome. Discourage the re-location of major traders outside of the CBD through measures including the appropriate use of floorspace caps in zone schedules at other activity centres in the hierarchy.	Council: Planning	Ongoing	n/a
4.4	Ensure that development in the Shepparton CBD creates a positive urban environment. Encourage the redevelopment of poor-quality building stock, actively enforce appropriate minimum standards of presentation for vacant tenancies and buildings, and engage with owners of vacant buildings to provide assistance in identifying alternative uses or attracting tenants.	Council (Planning and Investment Attraction) and Property Owners	Ongoing	n/a

OBJECTIVE / ACTIONS		RESPONSIBILITY	TIMING	INDICATIVE COST
4.5	Create a policy framework that supports the potential for future development of higher-density residential living in Shepparton CBD. While currently little demand exists for this housing type currently in Shepparton, trends elsewhere in Australia indicate that over time increasingly more people in the community will seek to live in the CBD, and this outcome is strongly supported. Implement the directions contained in the Shepparton CBD Strategy in relation to higher-density housing.	Council: Planning	Short-term	n/a
4.6	Create a pedestrian-friendly environment which promotes the cross-use of facilities. Support street-based activities including street dining, markets and other initiatives that make full use of the outdoor street-based shopping environment that characterises the CBD and which differentiates it from other centres in Shepparton. Implement the Shepparton CBD Strategy, including streetworks, in relation to these aspects.	Council: Planning, Infrastructure	Ongoing	n/a
4.7	Recognise the creation of Rowe Street East as a separate activity centre from the Shepparton CBD with its own neighbourhood activity centre role and function. Continue to implement the Activity Centre Zone in Rowe Street East as identified in Amendment C92, as well as the general directions contained in the Shepparton CBD Strategy. Ensure that any future development in the Rowe Street East centre is complementary to, and does not undermine, the adjacent Shepparton CBD.	Council: Planning	Short-term	n/a
4.8	Ensure that the office precinct located at the northern end of the Shepparton CBD fronting Wyndham Street between Knights Street and Balaclava retains its current primary role and function as an office precinct. Consider application of the Activity Centre Zone to this area in a way that encourages continued office and business development, with only limited retail floorspace growth (to prevent core retail areas of the CBD being undermined). This would require preparation of an urban design framework or similar by an appropriate planning consultant, with these guidelines then implemented through the Activity Centre Zone.	Council: Planning	Short-term	$15,000
5	**Support the regional retail role of Shepparton Marketplace in a manner complementary to the Shepparton CBD**			
5.1	Council and the property owner to recognise the role of Shepparton Marketplace as a Regional Retail Centre in the hierarchy with a retail-specific role. This regional retail function for Shepparton Marketplace will complement the operation of the Shepparton CBD as the highest-order centre serving Shepparton and the surrounding region. Re-location of large 'anchor' retailers from the Shepparton CBD to Shepparton Marketplace will be discouraged.	Council (Planning) and Property Owners	Short-term	n/a

OBJECTIVE / ACTIONS		RESPONSIBILITY	TIMING	INDICATIVE COST
5.2	Support the appropriate growth of retail facilities at Shepparton Marketplace that reflect growth in population and spending across the region, rather than simply a redirection of sales away from the Shepparton CBD. Provide some limited non-retail uses (such as personal and professional services) at Shepparton Marketplace only where these are directly ancillary to retail operations at the centre, and where such uses would not be more appropriately located in the Shepparton CBD or elsewhere in the activity centres hierarchy.	Council (Planning) and Property Owners	Short-term	n/a
5.3	Consider placing a cap on office floorspace at Shepparton Marketplace in the Greater Shepparton Planning Scheme to achieve Action 5.2. An office floorspace cap in the order of 1,500m2 would allow for ancillary office uses equivalent to 10% of the current shop floorspace cap (15,000m2). This could potentially be increased on a pro-rata basis with any subsequent increase in the shop floorspace cap. Measures to prohibit cinema and cinema-based entertainment uses at Shepparton Marketplace may also be considered (see also Chapter 9) to ensure that the CBD retains primacy as an entertainment destination.	Council: Planning	Short-term	n/a
5.4	Ensure any application for expansion of the Shepparton Marketplace is supported by suitably detailed retail-economic analysis (at the proponent's expense) that includes a detailed assessment of potential trading impacts on the Shepparton CBD and any other relevant centres. Council should seek information and analysis from the proponent, as required, in order to make an informed planning decision (see also Objective 9).	Council (Planning) and Property Owners	Short-term	$50,000
5.5	Continue to apply a shop floorspace cap at Shepparton Marketplace in the Greater Shepparton Planning Scheme that will increase only with Council discretion (see also Chapter 9).	Council: Planning	Ongoing	n/a
6	**Support growth of existing centres and the development of new centres to meet urban growth**			
6.1	Ensure that a balanced approach is made to the planning of activity centres that recognises the role of both existing and new centres in meeting the needs of new urban growth areas. This includes the opportunities for an appropriate share of growth in retail demand to be accommodated by currently vacant tenancies, or currently under-performing traders (noting that all retailers must continue to meet the needs of consumers).	Council (Planning) and Developers	Ongoing	n/a
6.2	Support the creation of new local activity centres at the Shepparton North-East and South-East growth areas to meet basic convenience needs of new residents. Allow for approximately 0.8 hectares of land in the Commercial 1 Zone at each location in order to accommodate centres with a total floorspace in the order of 2,000m2 to 3,000m2 (including all retail and non-retail). Recognise the role of other existing centres in meeting additional demand generated by population growth in these locations.	Council (Planning) and Developers	Ongoing	n/a

OBJECTIVE / ACTIONS		RESPONSIBILITY	TIMING	INDICATIVE COST
7	**Support retail and commercial businesses in smaller towns so they continue to serve as important focal points for local communities**			
7.1	Encourage participation of rural retailers and businesses in appropriate public forums and consultation processes to ensure that their unique challenges and issues are taken into account by Council. This could include Council engaging periodically with traders and trader representatives in small centres (say, one town or township centre per year) to obtain comprehensive feedback on relevant issues and identifying opportunities.	Council (Investment Attraction) and Retailers	Short-term	2,000 for stakeholder engagement and feedback process in a town or township centre
7.2	Make available base-level retail and professional development on a subsidised basis that assists businesses in small towns to meet challenges in the marketplace. For example, Council could host an annual retail development forum that is open to all traders in Greater Shepparton and which provides guidance on a particular business issue.	Council (Investment Attraction) and Retailers	Short-term	$4,000 for retail forum including speaker/educator
7.3	Ensure that town centres and township centres are recognised and included in relevant tourism and marketing material to ensure that opportunities to generate additional trade from visitors are realised. That is, ensure that centres located outside urban Shepparton, such as Tatura and the Mooroopna CBD, receive appropriate support from marketing and promotions activities.	Council (Investment Attraction) and Tourism Industry	Ongoing	n/a
7.4	Continue to ensure that the physical environment in town centres and township centres continues to be attractive and user-friendly, including a physical audit of the quality of the streetscape by relevant Council officers (traffic, infrastructure, investment attraction etc) in association with the stakeholder engagement process considered in Action 7.1.	Council	Ongoing	n/a
8	**Closely monitor out-of-centre development**			
8.1	Assess proposals for out-of-centre developments carefully to ensure that such development occurs in a manner consistent with the achievement of a net community benefit without undermining the activity centres hierarchy. This assessment should include consideration of Locational Framework, Urban Design Framework, Economic Justification and Net community benefit.	Council (Planning) and Developers	Ongoing	Cost of supporting information borne by proponent
9	**Apply appropriate planning and development assessment criteria**			
9.1	Ensure that, as required, any proposals for new or expanded activity centres are accompanied by a suitably-detailed economic analysis showing market justification for the development. Evidence is also required to show that that the existing activity centre hierarchy will not be adversely affected and that the proposed development will generate a net community benefit is also required.	Council and Developers	Ongoing	Cost of supporting information borne by proponent

OBJECTIVE / ACTIONS		RESPONSIBILITY	TIMING	INDICATIVE COST
9.2	Recognise that the level of detail and justification required from proponents is at the discretion of Council. Where a proposal already has strategic policy support, the level of detail required is likely to be lower than for a proposal outside existing policy objectives. Council reserves the right to request additional information on economic impact from the applicant, if required. The information sought by Council can include: -Specific detail on the scale and type of retail and commercial uses proposed -An economic analysis that provides supporting evidence of demand, identifies potential economic or trading impacts on existing activity centres, and identifies economic aspects relevant to the contribution of the proposal to net community benefit -A planning assessment that considers the proposal in the context of the directions contained in this Strategy and other relevant strategic land use and development policies and the Planning Scheme -The proposal must also consider (as appropriate) traffic circulation and parking demand/supply, environmental effects on adjoining activities, local character and amenity impacts, and so on.	Council/Developers	Ongoing	Cost of supporting information borne by proponent

Summary of Shepparton CBD Action Plan

OBJECTIVE / ACTIONS		RESPONSIBILITY	TIMING	INDICATIVE COST
1	**Consider options for the Maude Street Mall to include shared pedestrian-vehicle space**			
CBD 1.1	Implement a design process that identifies options for the creation of a shared pedestrian-vehicular space in the Maude Street Mall (potentially including only that area north of Stewart or Fraser Street). Ensure that best-practice examples of similar shared space areas nationally and internationally are considered. This process could involve a specific project brief to appropriately qualified consultants, or an alternative process such as a design competition..	Council: Planning	Short-term	$50,000
CBD 1.2	Present a set (2 or 3) of design options for Council (potentially represented by an independent panel of experts) and the community to consider, including estimated costings. If a preferred option is identified by Council and the community, introduce an appropriate implementation program (to be determined by Council).	Council (All) and Community	Ongoing	n/a
CBD 1.3	If the shared space model determined by CBD Action 1.2 is adopted by Council and supported by the community, ensure that the lessons (as identified during consultation for the Strategy) from other malls that have adopted the shared pedestrian-vehicle model are considered.	Council (All) and Community	Ongoing	n/a
2	**Encourage investment in community infrastructure with a focus on education**			
CBD 2.1	Create a working group or other similar collaboration between Council, La Trobe University and GOTAFE that ensures the synergies between the operation of these entities and the Shepparton CBD are maximised. Meet annually, or as required to respond to specific issues related to current outcomes, and planning for the future growth of these education facilities. Use the collaboration as a tool for Council to have a positive influence on the growth of these facilities and the benefits this growth brings to shops, businesses and investment in the Shepparton CBD.	Council/La Trobe Uni/GOTAFE	Short-term	n/a
CBD 2.2	Develop a long-term process of co-ordination of planning and development that integrates the future growth and expansion of La Trobe University and GOTAFE into the Shepparton CBD. This will be informed by the dialogue developed in CBD Action 2.1.	Council/La Trobe Uni/GOTAFE	Ongoing	n/a
CBD 2.3	Council will build on its existing experience to ensure that lobbying continues for the location and expansion of major public infrastructure in the Shepparton CBD. This potentially includes engagement with State and Commonwealth Government agencies to demonstrate why investment in the Shepparton CBD represents sound public policy.	Council (led by Investment Attraction)	Ongoing	n/a
3	**Promote 'cycle-friendly' infrastructure and encourage 'convenience-oriented' car parking**			
CBD 3.1	Ensure that future transport planning for the Shepparton CBD takes into account cycling access and facilities. Recognise the ability of high-quality cycling infrastructure to create additional visitation associated with recreational visits, as has been identified in main street style centres elsewhere in Australia. Implement those aspects of the Cycling Strategy 2013-2017 that are relevant to the Shepparton CBD.	Council: Planning and Infrastructure	Long-term	n/a

OBJECTIVE / ACTIONS		RESPONSIBILITY	TIMING	INDICATIVE COST
CBD 3.2	Review the location and availability of very short-term convenience parking in the CBD (up to 15 minutes) as per the "Shepparton Central Business District Parking Precinct Plan". Ensure that the Shepparton CBD remains attractive to convenience shoppers, as well as those undertaking more complex or lengthy visits. If required, engage a traffic/parking consultant to assist Council in identifying the appropriate location and number of short-term spaces.	Council: Infrastructure	Short-term	$10,000 for traffic consultant
4	**Support Shepparton Show Me and other practical measures reinforcing the regional service role**			
CBD 4.1	Council to publicly re-confirm (possibly through a formal public statement) the value to the community of having a centralised event, promotions and branding program (Shepparton Show Me) which supports Shepparton CBD as the Central Activities District for north-central Victoria and southern New South Wales.	Council	Short-term	n/a
CBD 4.2	Council to ensure that the focus of Shepparton Show Me remains on creating 'visitation and sales to businesses in the special rate area that otherwise would not occur'. This is particularly true for people living outside of the City of Greater Shepparton. Support this through the application of appropriate performance monitoring measures such as event attendance estimates and visitor surveys (see also Shepparton Show Me – Assessment of Economic Benefits Report, April 2008) and ensuring committee members accept and respond to this core focus.	Council	Ongoing	n/a
CBD 4.3	Implement a bias towards marketing and promotional activities in areas to the north of Shepparton, having regard for the population growth that is occurring in this direction. Ensure that new residents of towns such as Yarrawonga and Echuca are quickly informed of the range and scale of facilities and services available in Shepparton. This could potentially include special sales or discounts, or other promotions, specific to residents living in these areas.	Council: Investment Attraction and Shepparton Show Me	Ongoing	n/a
5	**Encourage re-development and re-use of vacant sites and shops**			
CBD 5.1	Support the innovative use of vacant buildings or sites, including consideration of proposals that may not strictly meet existing development guidelines or expectations. That is, support a flexible merit-based approach to the re-development or refurbishment of vacant land and buildings in the CBD. Council's statutory planning functions should have due regard in decision-making to the policy priority for renewal of the CBD, including seeking guidance and feedback from other relevant parts of Council (such as Investment Attraction and Planning) as appropriate. Measures that reduce costs for developers seeking to redevelop vacant buildings and sites may be considered, potentially including reduced parking requirements, rate holidays and cash-in-lieu payments.	Council (led by Planning)	Ongoing	n/a

CBD 5.2	Support the consolidation of sites where this is required to facilitate re-development (subject to other planning considerations being met).	Council	Ongoing	n/a
OBJECTIVE / ACTIONS		***RESPONSIBILITY***	***TIMING***	***INDICATIVE COST***
CBD 5.3	Encourage the application of the 'Renew Newcastle' or similar schemes seeking to create active frontages and activity in otherwise vacant tenancies or land. This can include the use of pop-up shops, temporary displays and other short-term uses for otherwise un-utilised space. A flexible merit-based approach is required from Council to ensure such projects are feasible and can be approved (or refused) in a prompt manner.	Council: Investment Attraction	Ongoing	n/a
CBD 5.4	Ensure that planning policy settings for the CBD are supportive of appropriate residential development. When demand for this housing format is identified in Shepparton, it is important that an existing policy framework which supports appropriate infill residential development is already in place.	Council: Planning	Ongoing	n/a
6	**Promote the CBD as Clean, safe and friendly**			
CBD 6.1	Ensure that advertising and marketing for the Shepparton CBD includes (but is not dominated by) the generalised theme for the centre as a 'clean, safe and friendly' destination. It is important that community perceptions change in parallel with, rather than lag, real improvements in the quality of the CBD as a place to visit. Wherever possible, encourage the clean, safe and friendly theme. Council has a role in being a leading advocate and co-ordinating efforts in ensuring that the CBD experience is consistent with the clean, safe and friendly image.	Council (All), Shepparton Show Me, CBD Businesses, Police, Community Groups	Ongoing	n/a
CBD 6.2	Encourage a night-time economy in the Shepparton CBD that includes casual dining, entertainment and family activities for a broader demographic than currently uses the centre after normal business hours. Develop a Night-time Strategy for the Shepparton CBD that ensures Council policies and actions are reflective of the following core outcomes: 1.Reducing crime and anti-social behaviour after 8pm 2.Reducing alcohol abuse and harm after 8pm 3.Creating a diversity of venues and attractions extending beyond alcohol-based venues 4.Encouraging increased night-time visitation 5.Improving perceptions of night-time safety 6.Encouraging and supporting businesses open after 5pm 7.Widening the demographics of night-time visitors	Council (Planning and Investment Attraction), CBD Businesses	Ongoing	n/a Night Time Strategy - $30,000 if undertaken by consultancy
CBD 6.3	Undertake an annual review of safety measures and programs for the Shepparton CBD, including consideration of new measures that might be implemented (in consultation with police, businesses and other stakeholders), as well as review of existing programs and actions. This could take the form of an annual 'round table' that is facilitated by Council. Another possibility is a more formal Shepparton CBD Safety Working Group, with a specific set of resources and responsibilities related to promoting a safer CBD for all residents to use.	Council, CBD Businesses, Emergency Services, Other Community Stakeholders	Ongoing	A working group would require a nominal operational budget.

CBD 6.4	New residents are encouraged to establish shops and other businesses in the CBD. Council, in association with other stakeholders, will actively engage with new migrant communities to advocate the CBD as a location for new business opportunities. A recruitment or engagement drive with members of these new communities will be implemented.	Council/ Chamber of Commerce, Shepparton Show Me	Short-term	n/a

Detailed Actions for Activity Centres

OBJECTIVE / ACTIONS	
	Shepparton Marketplace
1	Shepparton Marketplace will expand to provide additional retail-focussed facilities, as supported by growth in population and demand over time. Any expansion will be supported by a detailed retail-economic analysis (to the satisfaction of Council – see Actions 9.1 and 9.2) that identifies implications for the Shepparton CBD and balance of the activity centres hierarchy associated with any proposed centre expansion.
2	Implement appropriate planning controls, including those identified in this Strategy, to prevent the Shepparton Marketplace from undermining the role and function of the Shepparton CBD as the higher-order Central Activities District serving north-central Victoria and southern New South Wales. Potential planning controls include: - Continued application of a shop floorspace cap (currently 15,000m2) - Potential application of an office floorspace cap (potentially equivalent to 10% of shop floorspace cap – see Action 3) - Potential limits on cinema and cinema-based entertainment uses (as available under relevant planning zone) - A potential cap on new tenancies of greater than 4,000m2 in size (subject to a planning permit) - Possible application of the Activity Centres Zone.
3	Without prejudice to the above actions, approach the owners of Shepparton Marketplace to collaboratively initiate and fast-track a planning scheme amendment that applies the Activity Centre Zone, including: - An immediate increase in the shop floorspace cap to 22,500m2 (up from 15,000m2 currently) - Introduce an office floorspace cap of 2,250m2 - Prohibition of cinema and cinema based activities - A potential cap on new tenancies of greater than 4,000m2 in size (subject to obtaining a planning permit). The intent of this action is to work pro-actively with Shepparton Marketplace to introduce a policy framework that supports the expansion and development of the centre in a manner complementary to the role and function of the Shepparton CBD. Any subsequent expansion in shop floorspace above 22,500m2 would remain subject to planning approval and rigorous application of the Planning and Development Assessment Criteria in this Strategy. If this Marketplace Action 3 cannot be achieved as envisaged, Marketplace Action 1 and 2 continue to apply at all times.
	Mooroopna CBD
1	Support a new major supermarket in Mooroopna CBD (possibly through re-location of Coles at Mooroopna North), particularly if a location can be identified on the northern side of the Midland Highway. A location on the north side of the Highway supports the specialty retailing concentrated in this part of the centre.

2	Continue to ensure that the Mooroopna CBD has a high-quality street-based shopping environment that reflects positively on the centre and on the wider Mooroopna community. Support this outcome in future Council capital works priorities. If required, implement an urban design framework to identify potential urban design outcomes and priorities.
3	Implement a review of the level of pedestrian accessibility across the Midland Highway in a north-south direction in the centre – particularly in proximity to the ALDI and Woolworths supermarkets. Identify and implement any opportunities for relatively cost-effective improvements to accessibility.
	Riverside
1	Retain the importance of the Riverside Plaza as the focus for 'core' retail uses, including supermarkets and specialty shops. Ensure that similar core retail functions do not inappropriately locate in the adjacent Gateway South enterprise corridor.
2	Consider the creation of a Riverside activity centre that potentially includes land outside the current Riverside Plaza boundary (possibly to the north) and which allows for a more diverse and mixed-use centre.
3	Allow changes to the current floorspace cap at Riverside Plaza where this is supported by appropriately detailed retail-economic justification (see Planning and Development Assessment Criteria) and where such change is consistent with the role and function of the centre in the activity centres hierarchy. It is not anticipated that this would include a major non-food retail anchor such as a discount department store.
OBJECTIVE / ACTIONS	
	Shepparton North
1	Encourage the expansion of retail and commercial facilities in the existing Commercial 1 Zone area so that residents of Shepparton North are provided with an enhanced range of local convenience shopping facilities and services.
2	Expansion of the Shepparton North centre to provide a range of retail and non-retail facilities that is consistent with sub-regional status in the activity centres hierarchy. This could include the addition of a second full-line supermarket and enhanced supporting retail (not including a major non-food retail anchor such as a discount department store).
3	Ensure that future development of the Shepparton North centre takes place in a manner supported by appropriate urban design and planning guidance. In indicative terms, an increase of 6,000m2 in shop floorspace may be supported on land outside the existing Commercial 1 Zone at Shepparton North, which is sufficient to accommodate a 2nd supermarket and supporting retail such as specialty shops. This should be subject to detailed assessment through application of the Planning and Development Assessment Criteria to any proposal. An appropriate site in the area fronting the Goulburn Valley Highway between Ford Road in the north and Hawkins Street in the south can be endorsed for this extension to the Commercial 1 Zone.
4	Consider implementation of a maximum shop tenancy size which restricts a discount department store or other major non-food based anchor 'shop' tenant in the Shepparton North centre (similar to that applied to a supermarket in Riverside Plaza).
5	Once the location of an expanded Commercial 1 Zone in Shepparton North is identified, develop an urban design framework or similar assessment that provides appropriate guidance on how the centre can develop in a manner that provides a high-level of amenity to shoppers and is consistent with best-practice activity centre development guidelines. If required, apply a Development Plan Overlay (DPO) or similar mechanism to the Shepparton North centre.

6	Allow for the development of a small local centre in association with the new North-East residential growth area. This centre will meet local convenience needs only, and will not include uses (such as a full-line supermarket) that would be more appropriately located in the Shepparton North centre.
	Rowe Street East
1	Recognise the exclusion of Rowe Street East from the Shepparton CBD, and that the broad set of directions for the CBD outlined in this Strategy do not necessarily apply to this area.
2	Continue to apply the specific set of strategic policy guidelines contained in the Shepparton CBD Strategy to what was then defined as Precinct 9 – Rowe Street East.
3	Ensure that future development of the Rowe Street East centre is consistent with its role and function as a neighbourhood activity centre, and discourage major non-food shop and entertainment functions (such as cinema). Consider amending the Activity Centre Zone applying to Rowe Street East to avoid this outcome.
	Enterprise Corridors
1	Encourage Enterprise Corridors as locations for a wide range of businesses seeking large sites with high levels of exposure to passing trade and which are not necessarily appropriate for an activity centre location. Support the growth and development of homemaker retail, showrooms, trade supplies and other complementary uses in Enterprise Corridors. Ensure such growth and development is in a manner that reflects an appropriate urban design outcome in view of the important gateway location to urban Shepparton of the three Enterprise Corridors.
2	Recognise the popularity of homemaker retail and the specific site criteria in terms of site size, location, exposure and access, etc. Encourage homemaker development which promotes integration with adjacent land uses and which contributes to the overall attractiveness of Enterprise Corridors as a location to undertake homemaker retail shopping.
3	Council will actively enforce planning policy to ensure that the primary purpose of all homemaker retailers is to sell merchandise consistent with the planning scheme definition for "restricted retail". The sale of goods and services outside this definition will be ancillary only, and must not undermine the activity centre hierarchy. Apply appropriate scrutiny to development that may be more suited to an activity centre location through the application of Objective 8 and the associated Action 8.1 (assessing out-of-centre proposals).
4	Consider options to discourage office and cinemas in Enterprise Corridors. This will be associated with Action 4.2 and could include measures such as the extension of the Activity Centre Zone or implementation of Special Use Zone to Enterprise Corridors. Either of these zones allows schedules to apply that give Council greater certainty in discouraging inappropriate office and cinema development which may otherwise undermine the role and function of the Shepparton CBD.