

Warrnambool Retail Strategy 2025



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Acknowledgement of Country

Warrnambool City Council acknowledge the Peek Whurrong and Kirrae Whurrung Peoples of the Eastern Maar Nations the Traditional Owners and custodians of the lands, waterways, and skies within Warrnambool municipality.

We pay our respects to their Elders, past and present, and recognise their ongoing connection to Country—one that has existed for tens of thousands of years and continues to this day.

The lands of Warrnambool and its surrounding townships—Allansford, Dennington, Bushfield, and Woodford—form part of a deeply interconnected cultural landscape that exists beyond an arbitrary local government area boundary.

The Eastern Maar have long lived between the coastal, riverine, and woodland environments, sustainably harvesting food and resources while maintaining complex trade and cultural networks across the region and cared for these sacred lands through ingenuity, resilience, and an enduring knowledge of the environment.

From the rich volcanic plains to the coastline, these landscapes are part of a much greater bio-cultural landscape. Even as the City grows and changes, this history must remain central to planning and decision-making, ensuring that future development celebrates and uplifts the enduring presence of First Peoples.

We acknowledge that sovereignty was never ceded.
This always was, and always will be, Aboriginal land.

INTRODUCTION

01

1.0 Purpose

This strategy sets out economic development and land use planning actions to help our retail and services sectors and the centres from which they operate to pro-actively grow and effectively respond to ongoing change for the benefit of our community and economy.

Our City is home to a breadth of hospitality, fashion, homeware and food retailers. We are also home to a growing array of service providers including health, social, employment, technical and professional services. Everyday retail and service sectors draw local and regional visitation to our City.

The combination of local and regional population growth and a growing tourism sector set the conditions for our retail and services sectors to continue to grow. For our Activity Centres more growth and demand provides opportunity to strengthen the Warrnambool's role as a destination to consume, connect and socialise.

Our centres and the industries they support are critical places of employment, social and cultural engagement and economic activity. Technology and changing retail and consumer trends have, however, permanently changed the way in which people engage with physical retail environments. Our City is, nonetheless, committed to helping industry and our centres to successfully adapt to change.

The future entails both challenges and opportunities. In this context, our City is committed to maintaining vibrant and attractive retail streets and centres as multi-faceted places of commerce, service, visitor attraction and civic destinations.

1.1 Warrnambool Retail Strategy 2025

The *Warrnambool Retail Strategy 2025* is guided by a long term vision for our retail and services centres. The vision is supported by development objectives and directions which will be delivered by the actions detailed in this strategy.

Vision



Sets the strategic direction for Warrnambool's retail and commercial centres

Actions



Canvasses statutory and non-statutory initiatives to ensure on the ground change aligns with Strategy objectives.

Objectives



Detail strategic goals that will guide the long term development of Warrnambool's retail and commercial centres to support economic development, resilience and jobs growth.

Directions



Provides clear and specific directions to shape the future growth and development of our centres.

Warrnambool Retail and Commercial Centres

Warrnambool's four Activity Centres; The Warrnambool City Centre (CBD), the Eastern Activity Centre (EAC) and the Dennington and Northpoint Village neighbourhood activity centres (NACs) function as retail and service centres as well as community, civic and social spaces.

Our CBD offers a breadth of retail and service options set within attractive and up to date streetscapes defined by heritage buildings that date back to Warrnambool's European founding. Our newer Centres provide contemporary self-enclosed retail spaces that cater to the local everyday and weekly shopping needs of residents and their occasional service and recreation needs.

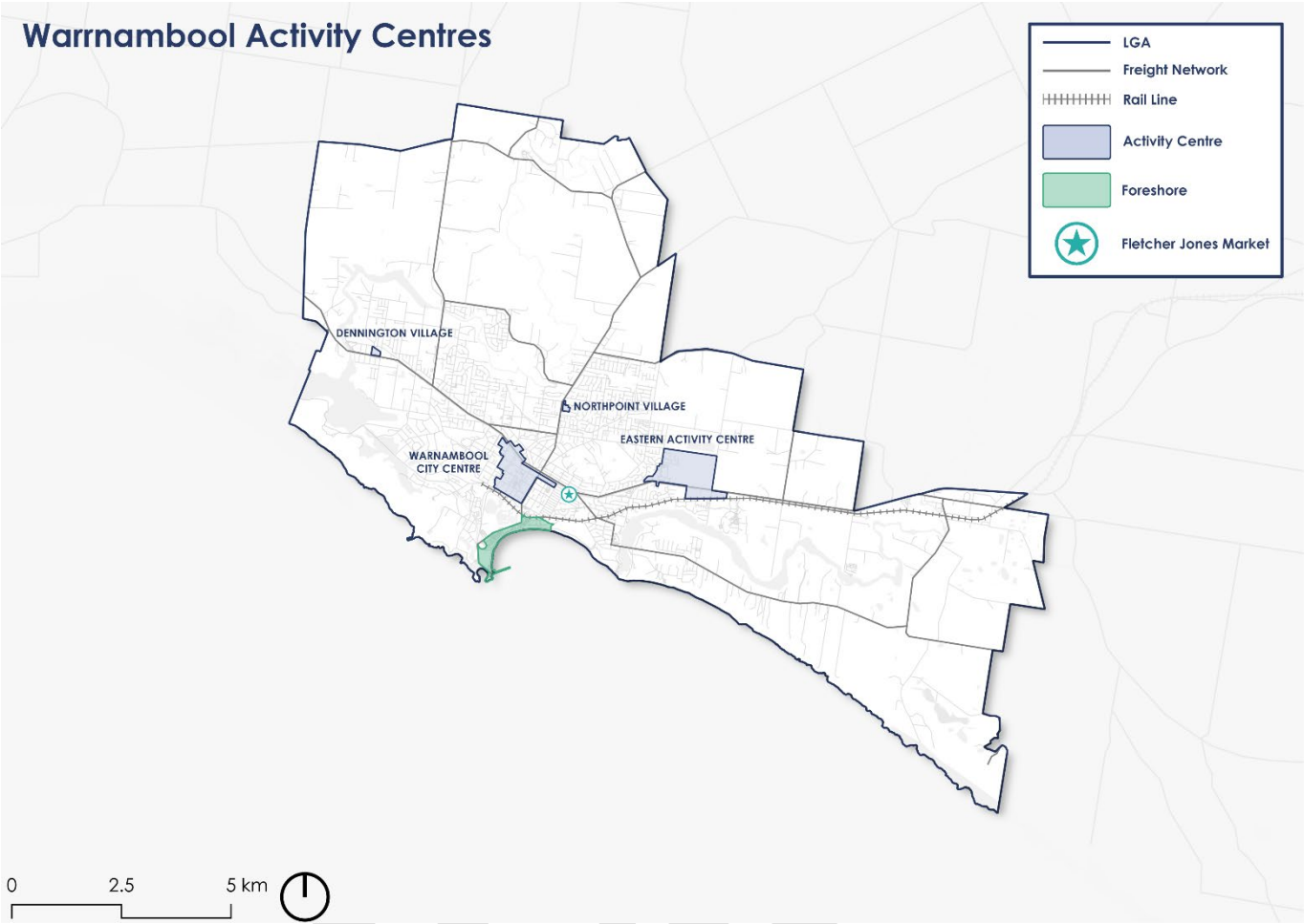
The Princes Highway (Raglan Parade) is also a focus for retail uses including fuel, automotive sales, fast food, large format retail and specialised services. Additionally, our Foreshore caters to the hospitality and recreation needs of locals and visitors.

Together, Warrnambool's four Activity Centres, highway retailers and foreshore constitute this Strategy's primary study area.

Table 1: Warrnambool's Activity Centres

Centre	Description
City Centre	<p>Warrnambool's City Centre is the leading hospitality, entertainment, accommodation, service and civic centre in the region. Leibig Street supports the region's main cluster of hospitality establishments and is the prime visitor destination in the CBD</p> <p>The CBD also supports a significant sector of specialty retailers (pharmacists, book stores, florist, stationery providers, technology sales) and health and retail services (banks, realtors, massage, optical, travel agents, fitness and insurers).</p>
Eastern Activity Centre	<p>The EAC combines a sequence of large format retail locations and two self-enclosed shopping centres. Located on the Princes Highway, the EAC leverages its accessibility to support large format retail outlets including clothing, homewares, hardware, furniture and specialist sporting and recreation retailers.</p> <p>The EAC draws visitation from a substantive catchment that includes locations greater than 100 kilometres from the Centre.</p>
Dennington	<p>Dennington Village's current make-up reflects its role as a Neighbourhood Activity Centre. It encompasses a Woolworths and ancillary food & drink and specialty businesses which service the local community's everyday shopping needs. At 2024, the centre featured minimal vacancies.</p>
Northpoint	<p>Northpoint Village's retail landscape is reflective of its role as a Neighbourhood Activity Centre, with food & drink businesses occupying the largest proportion of the centre's stores and floorspace. Northpoint Village services the local community's everyday needs and is anchored by a Coles supermarket.</p> <p>The Centre's proximity to the identified Northern growth areas is likely to see demand as population increases. The Centre includes vacant land that may support future expansion.</p>
Foreshore	<p>The Foreshore is a major local visitor and tourist attraction. Pertobe Road supports commercial uses that address the hospitality and recreation needs of visitors.</p>

Figure 1: Warrnambool Activity Centres Map



Why are Retail and Service Areas Important?

Our Activity Centres are critical to the liveability of our community and the capacity of residents and the region to access a wide array of retail goods and services.

Our Centres impact on the social, civic and economic life of our City, which is why their vitality, attractiveness and economic success is central to the life of our community:

- **Liveability:** Our Centres enable our residents and the region to attend to the essentials of daily life while also providing for an array of discretionary consumption, entertainment, service and recreation options. Our Centres are therefore pivotal in maintaining our standard of living by minimising the need for lengthy travel to attend to service and retail needs. Our Centres are also vital meeting points and places of social connection that contribute to the well being of daily life.
- **Visitor Experience:** Our Centres are regional visitor and tourist destinations. We attract large numbers of visitors from within a 50 kilometre catchment to the City and over 900,000 tourists per annum.¹ The amenity, experience and quality of our centres shapes the way the region and state perceives our City and directly informs the length and frequency of return visitation and resulting expenditure. At 2023, visitation expenditure comprised 42% (\$454M) of total retail expenditure comprising both tourist and regional visitor expenditure.²
- **Regional Capital:** Warrnambool City Centre is the regional capital of Victoria's South West. The City Centre is therefore the primary administration, health, justice, social service and civic centre of the region which is reflected in the diversity and scope of service uses it supports. Services employment is a key driver of the City's economy and local incomes. The liveability of the region is tied to the functions of Warrnambool City Centre and the operation of its many institutions. The City Centre might also be considered as the region's hospitality capital with its array of cafés, entertainment and recreation venues central to the cultural and social life of the region.
- **Employment and Economy:** Our Centres are places of employment and economic activity. The City Centre is estimated to support 5,580 jobs and generates over \$1.6 billion in output per annum. The EAC area supports an estimated 2,200 jobs and produces approximately \$664 million in annual output.³

Our City is urbanising. Population serving, professional and administrative jobs are now 70% of the City's jobs and account for 80% of recent jobs growth. As our City urbanises and demand for services and goods grows, our Centres will be a focus for ongoing jobs growth, investment and activity. The retail sector still a critical employment sector supporting an estimated 2400 jobs while accommodation and food based employment supports a further 1,840 jobs. In 2023, the retail sector accounted for over \$1 billion in local expenditure.

Our City enjoys incomparable lifestyle advantages and scenic beauty which every year attracts new residents to our community and visitors. The needs of a growing community and visitor economy will inevitably compel our Centres to grow their service and retail offer while continuing to attract major investment from national retailers.

The ongoing growth of e-commerce will likewise continue to impact on the role, function and competitiveness of our Centres and local business. In response, contemporary retail areas and Centres focus on ensuring retail locations are places to work, play and socialise rather than purely transactional environments.

We have heard from our retail traders about the impact of digital and consumer change on their businesses, how they have and plan to adapt and how the physical appearance, accessibility and function of Centres can help their business.

As our City and region grows, it's of vital importance to our economy, employment base, investment and visitor attraction and the overall welfare of our community that our centres are positioned to thrive, adapt and grow.



Figure 2: Whalers Hotel

¹ Tourism Research Australia datasets

² Spendmapp – Geografia

³ Remplan Warrnambool website September 2025

About the Strategy

1.2 Project Goals

The development of the Strategy is guided by the overarching project objectives detailed below.

- 1

Develop an evidence base to review and affirm an updated activity centres hierarchy to guide long term growth in response to a growing population and growing visitor economy.
- 2

Update Centre specific planning directions to guide long term growth and change in individual centres in line with the City's overarching Centre's hierarchy.
- 3

Explore the scale and characteristics of future retail growth and floor space demand.
- 4

Establish strategic directions and priorities to direct future floor space growth.

1.3 Project Stages

The development of the Strategy is comprised of a series of project stages that encompass background research, community, government and industry consultation. This draft Strategy will be finalised following further consideration of the community and industry and their resulting feedback.

Following the finalisation of the Strategy a planning scheme amendment will be prepared to implement the key recommendations outlined in the Final Strategy.



Strategic Context

The City's retail and service sectors are influenced and guided by a series of strategic land use policy directions set by Council and State government.

The following examines the key strategic directions and plans that currently guide the City's retail and service land uses.

Figure 3: Policy Hierarchy Tree



State Government Policy

1.4 Plan for Victoria (2025)

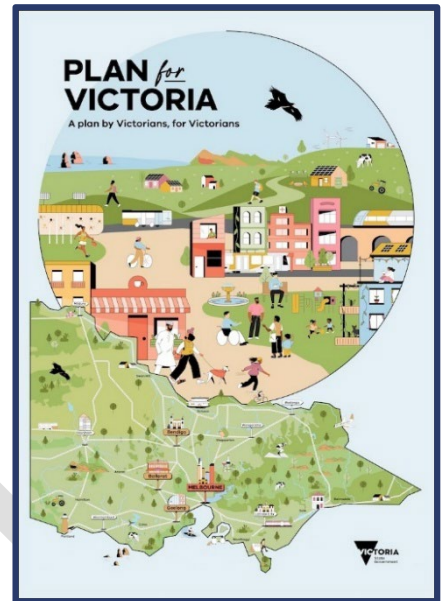
Plan for Victoria (2025) provides overarching directions for planning the long-term future of metropolitan Melbourne and regional Victoria.

The Plan provides guidance across a set of key themes as follows:

1. *Housing for all Victorians*
 - Providing all Victorians with a choice of a well-design home at an affordable price and close to daily needs.
2. *Accessible jobs and services*
 - Enabling connection to jobs, education, healthcare, shops and services needed to live a productive and prosperous life.
3. *Great places, suburbs and towns*
 - Ensuring Victoria's suburbs, towns and neighbourhoods are vibrant, resilient and inclusive to support strong communities.
4. *Sustainable environments*
 - Protecting our environment, agricultural land and natural resources for a sustainable and health future.
5. *Self-determination and caring for Country*
 - Policy and decision making is underpinned by a recognition of the rights and self-determination of Traditional Owners and a need to care for Country.

In relation to retail uses, *Plan for Victoria* seeks to provide greater certainty for business investment in order to enable the growth of small and medium-sized businesses.

Figure 4: Plan For Victoria



1.5 Great South Coast Regional Economic Development Strategy (2022)

Figure 5: GSCREDS

The Great South Coast Regional Economic Development Strategy (2022) provides directions to guide the economic evolution of the region.

The Strategy sets out strategic aspirations related to energy, agriculture, visitation, education and workforce to boost the region's economy. This includes affirming Warrnambool's status as the region's leading service, education, visitor and urban node:

The City of Warrnambool is the economic hub for employment and service provision in the region and is connected by road and rail to major consumer and visitor markets.

Deakin University Warrnambool is identified as pivotal to enhancing the region's educational status and innovation capability.

Deakin University Warrnambool Campus will be a key institution to drive further innovation as its research and course offerings align towards high value opportunities in the region.

Warrnambool is well positioned to support, and in some cases lead, the Economic Development Strategy's population growth, visitor economy, education and housing growth aspirations. The delivery of the Economic Development Strategy's population, housing and visitor economy objectives will inevitably boost retail expenditure in the City.



Local Policy

1.6 Warrnambool Retail Strategy (2007)

The *Warrnambool Retail Strategy* sets out the City's overarching retail policy including the City's retail hierarchy, the role of individual retail nodes in the provision of retail uses and services and guiding land use directions to achieve the City's retail policy directions.

Accordingly, the Strategy's retail hierarchy identifies the CBD as the City's primary anchor for retail expenditure and the wider visitor economy. The Eastern Activity Centre is identified as performing a key role in regional bulky good and big box retailing. Dennington and Northpoint Village Activity Centres are recognized as local centres that support weekly shopping and every day retail needs.

The Strategy articulates concerns in relation to the impact of the Eastern Activity Centre on the retail primacy of the CBD and the potential loss of major retailers from the CBD to the City's fringe. It follows that the Strategy incorporates initiatives to retain major retailers in the CBD and to encourage new floor space investment in the CBD.

The Strategy details five objectives:

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

1.7 Warrnambool Futures (2025)

State of Warrnambool Report (2025) explores options to inform the future Warrnambool Futures Strategy, which will set out the municipality's overarching long-term land use strategy.

According to the State of Warrnambool report:

- Unemployment has fallen significantly during the last ten years. While median weekly household income is higher for Warrnambool residents compared to the regional Victorian average, it is still lower than the Victorian median.
- Tourism is an important contributor to the local economy, given Warrnambool's position within the Great Ocean Road region, accounting for approximately 8 per cent of total employment.
- The city is expected to reach a population of about 41,000 by mid-century and will require an additional 2,700 dwellings over the next two decades.

Figure 6: Warrnambool Retail Strategy 2007

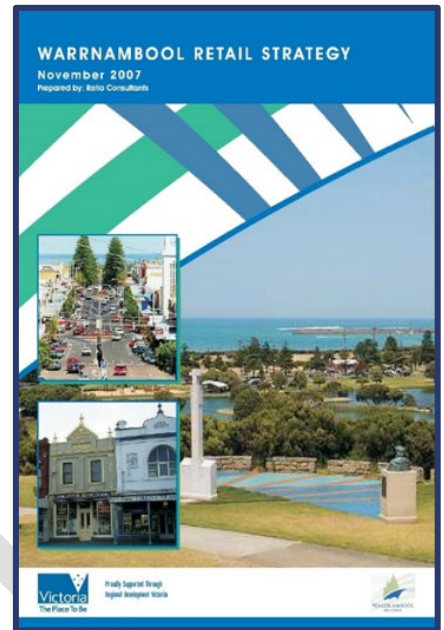
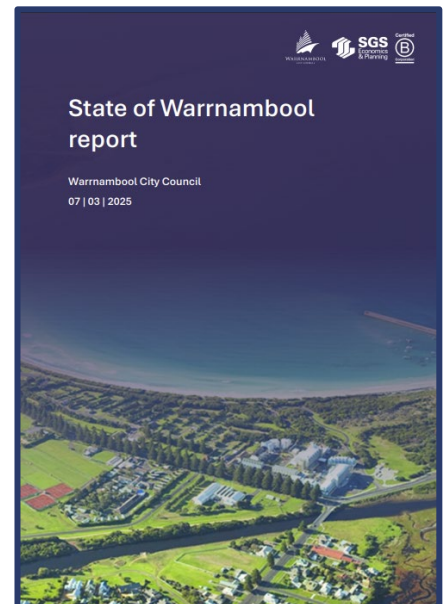


Figure 7: State of Warrnambool Report



1.8 Warrnambool Eastern Activity Centre Structure Plan (2016 Amended 2020)

As the main eastern entry and exit point into Warrnambool, the EAC is ideally positioned to service the merchandise retail needs of Warrnambool's nearby growth area communities and regional households.

The *Warrnambool Eastern Activity Centre Structure Plan 2016* establishes a guiding framework for the ongoing growth and development of the Eastern Activity Centre. The plan updates the previous 2004 plan in response to the directions of Council's 2015 planning scheme review that recommended that planning for the EAC be urgently updated.

The plan envisages the EAC growing into a major mixed use node comprising a series of distinct housing, office, fine grain retail, service and large format retail sub-precincts.

The vision for the EAC is to develop the precinct as a genuine mixed use activity centre, comprising a range of retail, bulky goods, office employment and diverse housing opportunities, that supports the primary retail role of the CBD

Key directions relate to:

- *Fine grain retail:* The plan directs fine grain retail uses, supermarket and personal service uses to the western part of the EAC including land within and adjacent to Gateway Plaza.
- *Large format retail:* The plan directs large format retail uses to the Princes Highway Corridor.
- *Integration:* The EAC is comprised of a series of stand-alone retail facilities (Gateway Plaza, Warrnambool Woolworths, Homemaker Centre, Harvey Norman/Spotlight, JB Hifi and Bunnings). The Plan identifies a lack of integration and connection between individual facilities. It follows that the Plan seeks to promote connectivity between uses and retail locations and for future development to avoid standalone developments that lack integration and connectivity with surrounding uses.

1.9 Warrnambool City Centre Revitalisation – The Structure Plan (2012)

The Warrnambool City Centre Revitalisation Structure Plan details directions and initiatives that seek to enhance the CBD's role as the primary retail and services centre within Warrnambool and the wider region.

Warrnambool CBD's civic, personal service and urban role encompasses uses that extend beyond retail functions to include:

- Professional and business services
- Government and administration
- Justice and legal services
- Higher education
- Health and welfare services
- Hospitality, recreation and entertainment

Through a focus on place and investment the Plan seeks to affirm the CBD's centrality in the life of the region. The Plan:

- Details a program of improvements to the amenity, quality of the public realm, public transport and car parking access and safety and security
- Supports the development of medium density residential development within walking distance of the City Centre
- Seeks to ensure the CBD is well equipped to support new major city and regional events.
- Encourage a diversity of new investments in the City Centre, encompassing retail, commercial, entertainment, recreation, community, cultural and residential services and facilities.
- Seeks to preserve Warrnambool's heritage streetscapes

Figure 8: Eastern Activity Centre Structure Plan

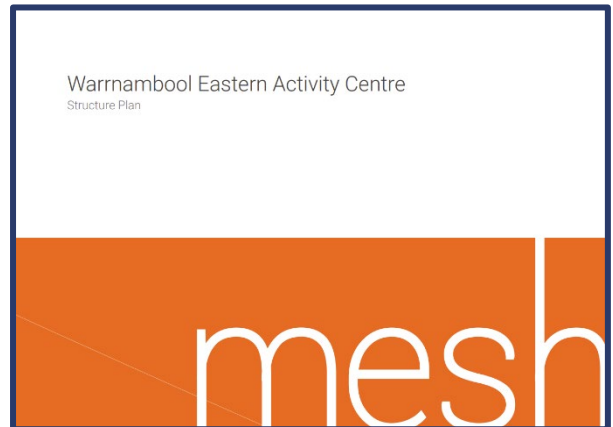


Figure 9: City Centre Revitalisation Structure Plan



1.10 Warrnambool Economic Development Strategy (2023)

The *Warrnambool Economic Development Strategy (2023)* guides the municipality's economic development. The strategy provides directions to foster economic growth and investment across the City.

The strategy is underpinned by four key themes:

- Planning for Sustainable Regional City Growth
Achieve growth through strategic investments and land use planning that enhances Warrnambool's role as the regional hub for business activity, employment and tourism.
- A Collaborative, Productive and Diverse Industry
Develop a resilient and sustainable business community that supports growth in existing industry specialisations and encourages diversity in business investment.
- Workforce Attraction and Skills Development
Attract a skilled and engaged workforce that contributes to service provision, business activity and a productive economy.
- A Successful and High-Value Visitor Economy
Drive visitor growth through destination awareness and support a high-yielding visitor base through high-quality products and experiences.

Figure 10: Economic Development Strategy



How to use the Strategy

Residents	<p>For residents the Strategy details land use and economic development actions that support the retention and growth of existing retail and service industry. The Strategy explores measures to improve the attractiveness and amenity of our Centres while providing direction on the long-term role and development of the City's retail and service centres.</p> <p>The Strategy also aims to raise community awareness of the benefits of the City's Centres and the way in which the Centres might respond to ongoing growth and global change in retail formats.</p>
Workers	<p>For retail and service workers the Strategy affirms the role of the City's retail and service sectors as significant and enduring employment sectors and our centres as locations that combine high amenity and economic activity.</p>
Business	<p>For the City's current and future business community, the Strategy provides investment certainty as to the long-term role of Centres and the City's commitment to the sustainable development of its retail and service sectors.</p>
Landholders	<p>For owners of commercial land, the Strategy provides certainty as to the long-term role of land use and the planning direction of commercial land while also identifying opportunities to improve land use settings in specific locations.</p>
State Government	<p>For Victoria's State Government the Strategy provides insight into the ongoing role of the City's retail and services economy and the future evolution of our Centres in light of both growth opportunities and potential constraints.</p>
Warrnambool	<p>For Warrnambool City Council the Strategy provides the rationale for updating the local planning scheme to bolster economic land uses and Centre amenity while also providing a basis to assess planning applications and strategic initiatives. The Strategy also provides a mechanism to engage with landholders, developers, government agencies and industry sectors and to advocate for infrastructure investment and support from state and federal government and major institutions.</p>

WHAT WE HEARD

02

2.0 Strategy Engagement

Several stages of stakeholder and community engagement have been planned and carried out as to support the development of the Strategy. This includes in depth trader interviews, online surveys, and an industry forum.

The following documents the insights and outcomes arising from the project engagement as at September 2025.

Overall, survey and interview results point to the ongoing transition of the City's retail sector as its offer and form is transformed by global retail trends, the continued expansion of national retailers and changes in consumer behaviour.

As at 2025, the City's retail sentiment is mixed, incorporating both concerns about the enduring viability of the sector and positive sentiment about future growth and opportunity arising from population growth, the tourist economy and the City's regional centrality.

Engagement activities

- 37 survey responses from businesses across retail precincts
- 16 in-depth interviews (30-45 minutes each)
- Industry forum held March 2025
- Businesses primarily located in City Centre (68%) and Eastern Activity Centre (27%)

Key Findings

- Economic pressures: Rising costs (rent, wages, electricity), supplier costs, reduced household incomes
- Drought impact: 18+ months affecting farming community spending power
- Structural change: Online retail, large box stores, and national chains impacting on independent retailers
- Safety concerns: Anti-social behaviour, theft, and intimidation affecting foot traffic
- Parking issues: High fees, limited availability deterring customers particularly in the CBD

City Centre (CBD) Businesses

- Strong concerns about parking, desire for 2-hour free parking zones
- Public Investment has overly focused on Liebig Street at the expense of other CBD areas
- Seasonal reliance on peak tourism times, need to boost off peak visitation
- Need to continue to support outdoor dining and events
- Community support for local businesses
- Trader sentiment is generally less favourable than EAC.

Eastern Activity Centre

- Trader sentiment is generally positive (rated 7-9/10)
- Strategic highway location and regional catchment advantages
- The centre does not foster pedestrian trade (mainly vehicle based)
- Corporate chain stores dominate the Centre
- Offers substantial car parking but lacks amenities like diverse food options
- Promote the EAC as a regional retail destination

Economic Context

- Mixed retail sentiment: Concerns about retail viability alongside optimism about the impact of favourable long term growth drivers such as population and visitation growth.
- Regional hub status: Retailers and service providers acknowledge the City's large regional catchment and regional transport and landscape advantages
- Tourism potential: Great Ocean Road location largely untapped
- Retail structural change: Increasing dominance of large national retailers impacting on the independent retail sector.

Business Aspirations

- 52% plan to expand into new markets
- 35% want to hire more staff
- 30% looking to develop new products
- Strong desire for unified marketing and promotional efforts

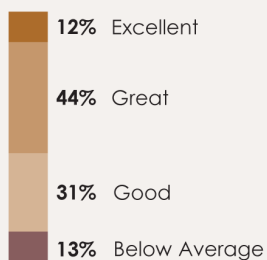
Optimistic Indicators

- Growing population and visitors
- Strong community support for local businesses
- Great Ocean Road location advantage
- Regional prominence and centrality

Figure 11: Survey Responses

Warrnambool for Retail

How do you rate Warrnambool as a location for business?



Our retailers and service providers generally find Warrnambool a great place to operate.

What are the advantages/challenges of operating in Warrnambool?

Advantages

1. Population Catchment
n = 19



2. Tourism
n = 14



3. Location & Access
n = 8



4. Attractive Amenity
n = 7



5. Loyal Customers
n = 5



n = number of respondents

Challenges

1. Seasonality
n = 22



2. Household Incomes
n = 20



3. Competition
n = 13



4. Distance from suppliers
n = 10



5. Planning
n = 8



Would you recommend Warrnambool as a place to do business?



Business Growth

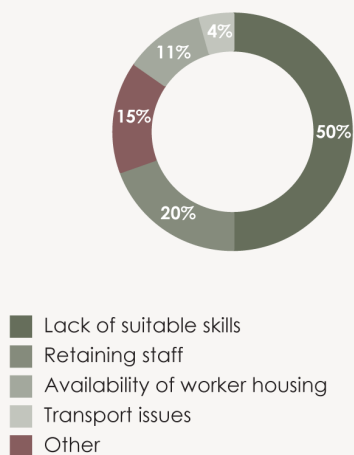
Do you plan to grow your business?



How will you expand your business?



What difficulties have you experienced in attracting staff?



Key Issues to Explore

What are the key issues that need to be addressed in the strategy?

1. Expanding the diversity of business types



26

2. Promoting a night time economy



19

3. Improving safety



18

Figure 12: Key Survey Comments

Night-time economy

"We need a greater mix of retail and hospitality businesses to strengthen the CBD as an entertainment area"

Diversity of businesses and visibility

"Increase advocacy and marketing for services and events to highlight the diverse mix of attractions"

Education and Training

"Bricks and mortar retailers need support and education to help navigate technological changes"

Built-form and vibrancy

"The visual amenity of Liebig Street could do with greater investment to give the CBD a more vibrant feel"

STRATEGIC CONTEXT

03

3.0 Key Influences

The future of our Centres and the City's retail and service sectors will be shaped by the needs of a growing population, the growth of our visitor economy, global retail trends, prevailing economic conditions and the way in which policy, land use planning, and economic development actions influence private and public investment decisions.

The following explores the forces that will shape the future of our Centres and the retail and service sectors they support and the implications of these forces on the City's land use, place making and economic development activities.

1 A growing and ageing community

2 An urbanising city

3 A destination for visitors

4 A transforming retail landscape

5 A changing city

1 A growing and ageing community

Warrnambool's population is set to grow. However, as Warrnambool grows it will also age.

Warrnambool is the largest municipality by population in the Great South West region and the region's largest urban settlement. At 2024 Warrnambool supported a population of near on 36,150 residents, while the Great South West region supported a population of 105,000 residents (including the City of Warrnambool).

Warrnambool and the region is growing. Since 2013, Warrnambool's population has grown by an average of 285 new residents per annum while the broader region added 350 new residents per annum. Warrnambool accounts for the vast majority of the region's population growth and is the major growth centre in Victoria's west outside of Greater Geelong and the Surf Coast.

Growth Outlook

Over the next two decades, the City's population is projected to grow by 4,400 residents. By 2040 we will become a community of 40,000 residents while the region is projected grow to 109,000 residents by 2036 (primarily as a result of Warrnambool's population growth).

A growing population impacts demand across all industry sectors and will inevitably translate into growing local retail and service demand seeding the opportunity for our Centres to translate new health, hospitality, food, personal service, fashion, homewares and entertainment demand into new local expenditure.

While growing, it's also important to note that Warrnambool and the Greater South West region is aging. The City attracts high numbers of 55+ age cohorts which means for the retail sector, an aging population will see a larger pool of households and individuals on fixed incomes with potentially limited discretionary incomes and elevated expenditure on health and service needs.

Figure 13: Projected Population (LGA) 2021 - 2040

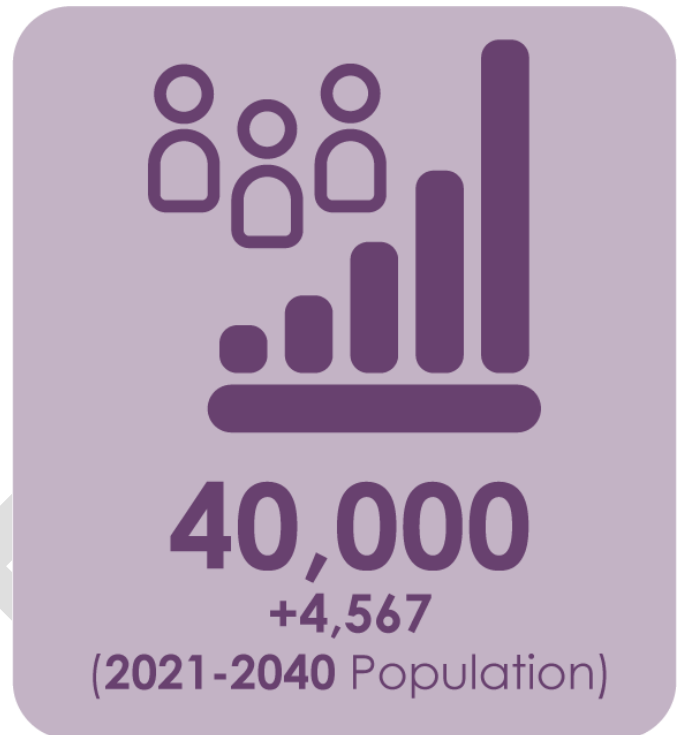
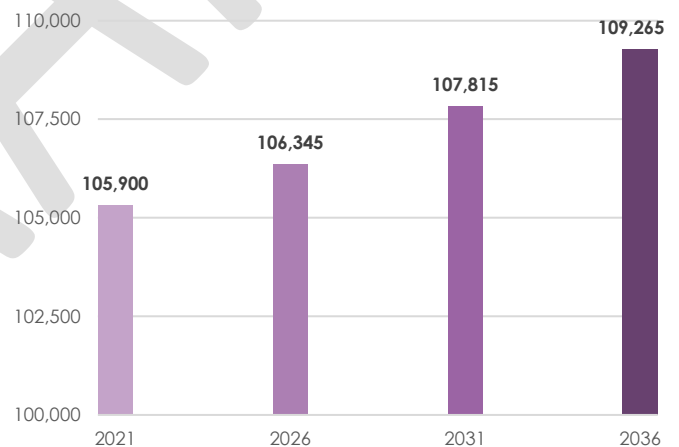


Figure 14: Projected population – Great South Coast 2021 – 2036



Warrnambool's North is Growing

The supply of broadhectare residential lots in Warrnambool's north and north east has been instrumental in facilitating the City's and region's population growth.

Over the past decade broadhectare residential development along Aberline, Wollaston and Mortlake Roads have spurred the City's population growth supporting expenditure in the EAC and Northpoint Village.

East of Aberline Growth Area

Broadhectare land, including the delivery of the East of Aberline growth area, is set to underpin the City's continued residential expansion and population growth.

East Aberline is Warrnambool's and the region's largest broadhectare residential growth area. The precinct's 410 hectares of growth area land provides capacity for 5,000 dwellings and future population of potentially 12,000 residents.

East of Aberline will be developed as a series of predominantly residential neighbourhoods supported by a new Neighbourhood Activity Centre incorporating new retail floor space.

The delivery of East of Aberline will continue to shift the City's population epicentre to the City's north. Over the long term East of Aberline will:

- expand Warrnambool's physical settlement size and population base.
- expand the City's retail and commercial investment attractiveness.
- further direct the City's population density to the north and east of the City with key implications for the provision of transport, service, education and civil infrastructure investment.
- further intensify and grow the scale of retail and service demand in the City's north.

Planning for the precinct is underway. The timing for the first stage of delivery is yet to be determined.

The Future of Established Warrnambool

The overall number of residents living in the City's established neighbourhoods (along the coast and in proximity to the City Centre) will also grow. Growth, however, will not be at the same scale as areas in the City's north and north east.

To 2036 the City's established areas are likely to grow by 400 residents representing approximately 13% of the City's new residents.

Strategic Implications

- *Population growth will underpin growth in future retail and service demand.*
- *Future demand for additional retail and services provides a basis for the City's Activity Centres to grow.*
- *Population and housing growth will be focused on the City's north generating significant local retail and service demand and potential associated floor space investment.*
- *Housing and population growth in the City's north provides an opportunity to further support the diversification and development of the EAC.*
- *The aging of the population is likely to constrain discretionary expenditure on non-essential items.*
- *The established parts of Warrnambool are not projected to grow at the same scale as northern growth areas.*

Figure 15: East of Aberline



2 An urbanising city

Warrnambool is urbanising. As the City's health, education, administrative and hospitality sectors and concomitant workforce grow the focus and outlook for the City's economy and prosperity is increasingly tied to its urban environments.

Today, 70% of the City's jobs are within urban sectors including growing numbers of health, education, professional service and government jobs. These sectors are also driving local jobs growth. The City's health, education, public administration, and professional services sectors added over 1,300 new jobs since 2016 accounting for 80% of the City's recent job growth.

Our Centres are at the heart of our urbanising City and economy. The City Centre is now home to over 5,000 jobs including over 670 public administration, 500 professional service jobs, 820 health and social service jobs while the EAC area supports 360 education jobs and 560 retail jobs.

Expanding Service Sectors

Primary industry has shaped the development and prosperity of our City and will continue to do so. However, looking to the future, the further development of suburban housing throughout the City will see the City become more urban in its character and more urban in its economy.

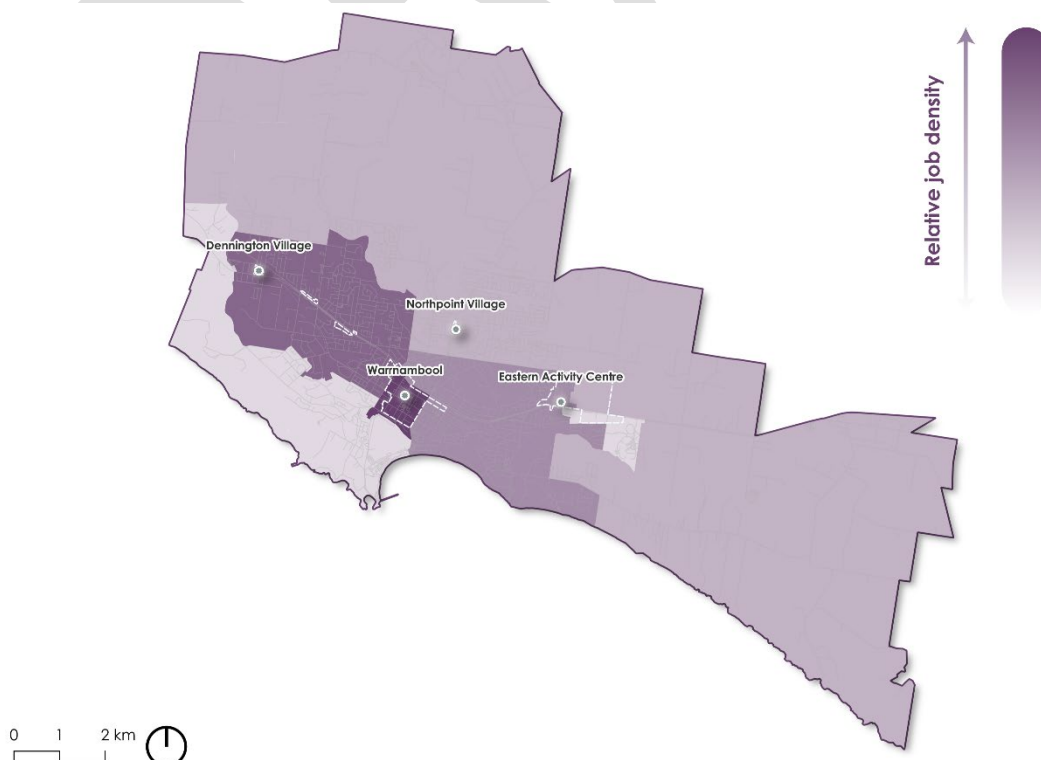
According to the Victorian Skills Authority urban industries are set to lead the region's employment growth with health, education and construction employment projected to grow substantially. Retail and food and accommodation jobs are likewise projected to grow as are professional service jobs. Primary industry employment is also projected to grow.

The continued rise of urban jobs and more urbanised economy will entail further demand for service space enabling our Centres and in particular the City Centre and EAC to diversify their role as dual service, civic and retail nodes. The City Centre already leads the region in its service floor space and job density. Further demand and investment will help consolidate the City Centre as the region's capital.

Strategic Implications

- Recent employment growth in the City Centre and EAC reflects the continued urbanisation of Warrnambool's economy and the further consolidation of population, health, social and civic services in the City.
- Future urbanisation is likely to fuel further growth for population services providing an opportunity for the City Centre and EAC to grow their service space and to continue to diversify their employment base.
- Land use and economic development settings need to enable services growth and investment.

Figure 16: Warrnambool Job Density by DZN (2021)



3 A destination for visitors

The City supports a multi-dimensional retail economy that benefits from the combination of local, regional and tourist expenditure.

According to Spendmapp data, over 2023, expenditure by visitors comprised 42% of the City's total retail and service expenditure of approximately \$1.07 billion. This dually confirms the City's role as a role as regional capital and the centrality of visitors to the health of Warrnambool's retail and service economy. Without visitor expenditure the City's service, hospitality and retail footprint would undoubtedly be significantly smaller and less diverse.

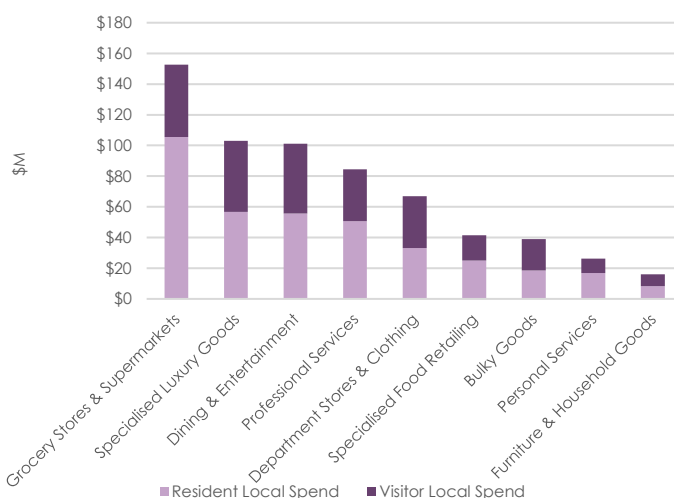
Warrnambool is a visitor destination for:

- **Regional communities:** the City supports the retail, service, health and hospitality needs of surrounding regional communities. Surrounding communities shop for clothing, bulky, household and hardware goods in our Centres - visitor expenditure comprises near on 50% of total expenditure in a number of local merchandise categories.

The City faces minimal service and retail competition from neighbouring towns and is therefore able to capture significant regional demand. Analysis of mobile phone data indicates communities within 50 kilometres of Warrnambool comprise a primary catchment for the City.

- **Tourism:** the City's coast, events and accommodation and position at the conclusion of the Great Ocean Road draws in significant tourism visitation per annum. At 2023, Warrnambool attracts over 900,000 tourists⁴.
- **Education:** Deakin University Warrnambool supports approximately 450 students many of whom are nursing students that travel to the campus to study nursing specialties. The South West TAFE attracts a range of students from across the region.

Figure 18: Resident and Visitor local spend by retail category 2023



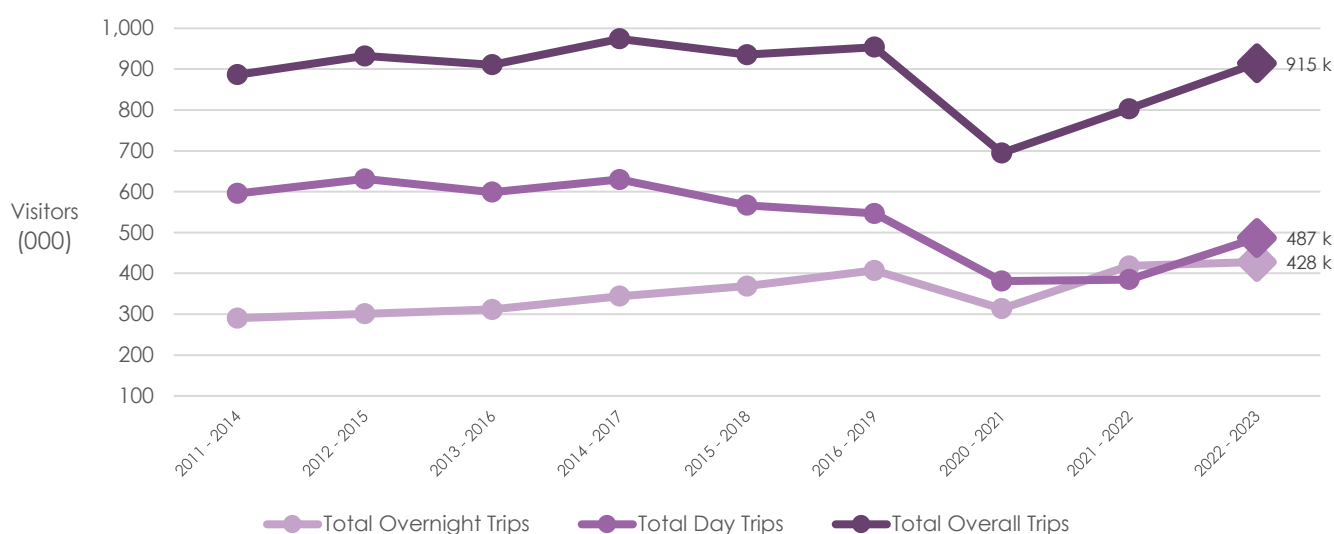
Source: Spendmapp Geografia

At 2025, our visitor and tourist economy shows positive signs of growth. Notably, overnight stays within the City are steadily growing, Leibig Streets vibrant hospitality strip continues to attract new vendors and the EAC's large format retail sector continues to attract investment.

Strategic Implications

- Visitor and tourist expenditure comprises a significant share of local retail and service revenue. It's therefore vital for our local economy and economic well being that our centres and their sectors continue to appeal to regional and tourist demand.
- Centre and sector land use planning and economic development settings need to facilitate visitor and tourist growth and expenditure.

Figure 17: Per year average of day, overnight and total trips – LGA - 2008 – 2023



⁴ Tourism Research Australia datasets

4 A transforming retail landscape

Online retail has disrupted and reduced the demand for physical in-store merchandise retail floor space.

COVID-19 and the subsequent shift towards online goods retailing has disrupted physical in person retail sector, particularly merchandise retailing within physical stores. Across the nation, the share of total online sales rose from 5% in 2014 to 23.6% in 2024, primarily driven by the growth of online based merchandise sales. Online expenditure surged during the COVID-19 pandemic which further habituated households to the role of remote commerce in daily life.

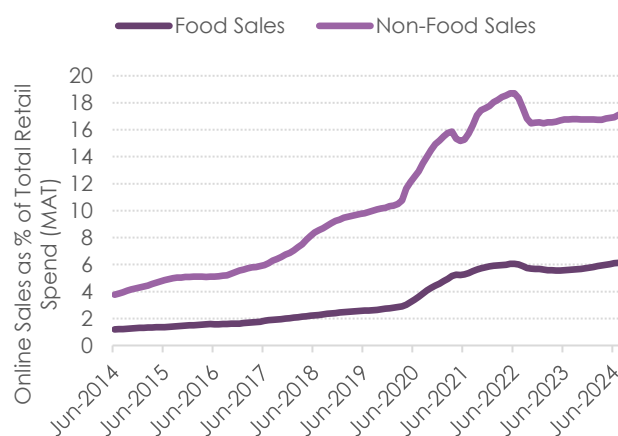
According to 2023 Spendmapp data, online channels now make up a significant share of the City's clothing (33%), luxury goods (45%), furniture and homewares expenditure (26%). At 2023 online expenditure represented 27% of the City's annual retail expenditure having grown consistently since the mid 2000s. Online commerce, according to industry feedback, is also increasingly the preferred method of obtaining goods by younger households.

The growth of online shopping impacts physical retail floor space by reducing the overall need for in store merchandise while also requiring physical retailers to compete with online channels. It is important to note that fresh food sales make up a far smaller proportion of online sales at around 6% of expenditure and that the online fresh food sector is growing at a slower rate than the online merchandise sector.

For our Activity Centres, online disruption entails a number of key implications:

- Major shopping centres that offer a 'shopping experience' that cannot be replicated online, need to compete with online channels via a superior curated shopping experience that appeals to the experiential needs of shoppers. With this aim, major shopping centres such as the City Centre and Gateway Plaza continue to invest in their facilities to curate stimulating and highly diverse, predictable and consistent retail environments that provide a high-quality shopping experience.
- Street based retail centres increasingly focus on food and services. At 2024, Charter's audit of Warrnambool's centres identified a significant shift towards service uses and food related businesses in the City's CBD. The recent renewal of the CBD has assisted the CBD in adapting to changing trends and the impact of online channels on merchandise trade.
- Supermarket based neighbourhood activity centres such as Northpoint and Dennington continue to demonstrate ongoing retail resilience due to their non-discretionary spending focus. These centres support the weekly and daily shopping needs of local residents.

Figure 19: Online Sales % of Total Retail Spend



We have heard from industry that the growth of online channels especially among younger age cohorts has impacted in store retailing. We also note, however, that a number of Warrnambool's retail and service enterprises successfully mix online and physical channels to support commerce. As per global trends, the digitisation of the economy and the growth of online channels is expected to continue shape retail and service sectors requiring ongoing adaptation by our local traders.

Each of the EAC and CBD is well positioned to compete in the digital age. The EAC incorporates a diversity of large format national brands and high-quality enclosed shopping environments that are not subject to equivalent competition within 50 kilometres. Over time, the EAC's large format businesses are likely to support omni-channel functions in which floor space supports both in-person and online activity. The CBD is, likewise, well positioned to compete with online channels owing to its unique environment that promotes services and hospitality and, in turn, the multifaceted consumer experiences needed to compete in the digital age typically combining indulgence, socialization, escapism and relaxation.

Strategic Implications

- *Supporting the ongoing improvement of Centres as places to engage, interact, socialise and relax will enable Centres to compete with the digital space and commerce.*
- *Supporting the ongoing diversification of centres helps enable centres to adapt to the impact of digital channels.*

5

A changing city

Up until the early 2000's Warrnambool's City Centre functioned as the sole retail and service centre. The delivery of new housing in the City's north, however, precipitated the development of new retail centres close to our new communities shifting the everyday retail role of the City Centre.

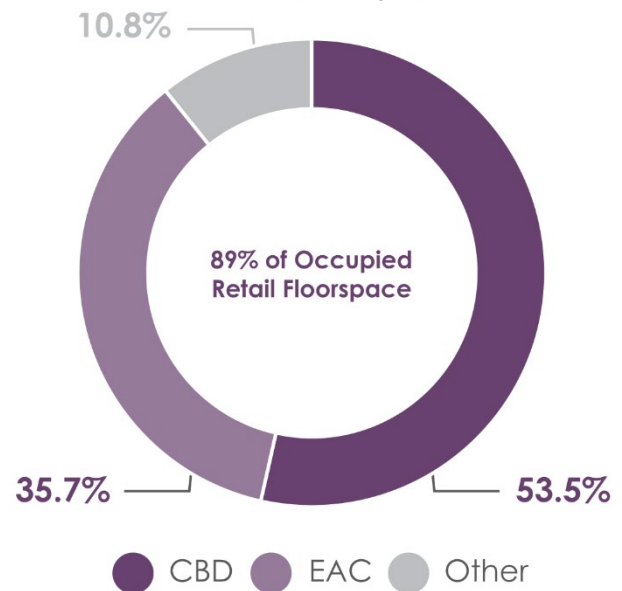
Many Cities encompass dual centres typically comprising a historic and contemporary centres (for instance, the relationship of Melbourne CBD to the newer Docklands and Southbank, the new and old towns of Warsaw and Prague). Warrnambool, similarly, is increasingly defined by a dual centre structure in which Warrnambool's City Centre as the City's largest and primary retail and service node is complimented by the primarily merchandise and everyday shopping spaces of the EAC.

The City Centre and EAC

Together the EAC and City Centre comprise near on 90% of the City's retail floor space. The City Centre supports 117,000 sqms comprising 416 stores while the EAC comprises 78,000 sqms comprising 101 stores.

Each of the CBD and EAC support everyday and weekly shopping, services, hospitality and merchandise retailing. The EAC, however, is a key regional merchandise destination with over 55,000 sqms of merchandise floor space. Equally, the audit confirms the CBD's role as a regional destination for services and hospitality supporting 87 food and beverage outlets and over 60 retail service stores. Each of the City's centres support everyday and weekly shopping needs via supermarket and ancillary fresh food floor space.

% of Occupied Floor Space - CBD & EAC
Warrnambool City Council



Source: CKC

The City Centre

A hub for dining and entertainment

The CBD supports a substantive hospitality sector that comprises 20% of the City Centre's retail floor space that includes 77 cafés and restaurants and 10 bars and pubs.

Leibig Street supports the region's main cluster of hospitality establishments. As per mobile phone data Leibig Street is the prime visitor destination in the CBD.

The CBD also supports a significant sector of specialty retailers (pharmacists, book stores, florist, stationery providers, technology sales) and health and retail services (banks, realtors, massage, optical, travel agents, fitness and insurers) that together comprise near on 40% of floor space.

The CBD's relatively small retail floor plates that average ~190 sqms supports high numbers of smaller service and food establishments that add diversity and interest to Warrnambool's CBD street scape. The continued renovation of shopfronts along Leibig Street points to the ongoing growth of the CBD's hospitality footprint and the expansion of the sector as a critical visitor and local destination.

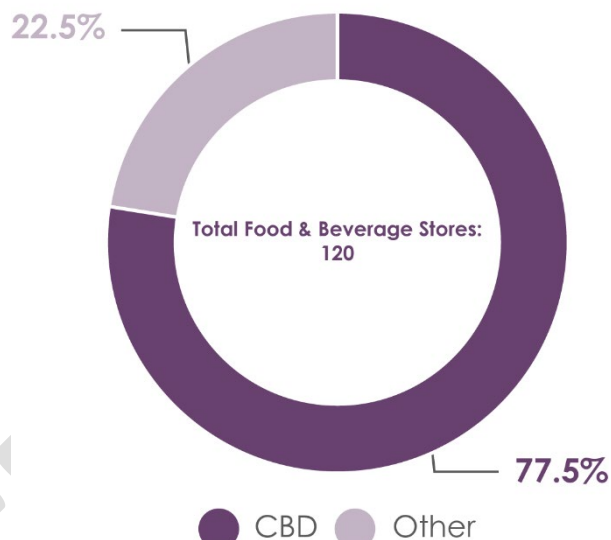
A growing service sector

The CBD supports a substantive office sector. Over 40% of the CBD's potential retail floor space (~83,000 sqms) is currently supporting office uses.

Numerous shopfronts and ground floor establishments along the CBD's outer streets (Fairly and Kepler Streets and the western end of Lava and Koroit Streets) support a wide array of education, employment, health, social service, justice, accounting, and technology services. The scale of services and office uses in the City Centre confirms the City's role as a regional service centre and critical service destination for the region's communities.

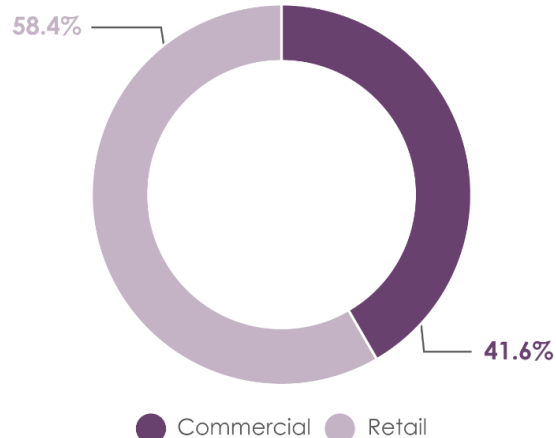
The City's office sector includes numerous enterprises that operate from former retail establishments that have been re-purposed for office uses. The repurposing of retail spaces for office uses has helped to maintain the CBD's occupancy and activation despite significant retail disruption. The use of former retail space for office uses nonetheless may also suggest an unmet demand and need for purpose built high quality office space.

% of Food & Beverage Stores



Source: CKC

% of Occupied Floor Space - Commercial & Retail City Centre



Source: CKC

Figure 20: Leibig Street Dining



Source: Australian Good Food Guide



Eastern Activity Centre

Merchandise Retail Node

Merchandise retailers comprise the majority of the EAC's stores. Merchandise retailers occupy approximately 45,000 sqms of floor space.

The EAC's regional road accessibility has proven to be an ideal location to link national retailers with local and regional consumers. The area experiences high volumes of vehicle movements per day.

As the City's communities in its north and north east grow, the EAC will both expand and diversify its retail floor space through the provision of new dining, food, health, service and professional service floor space.

The EAC will also continue to attract bulky goods and home maker floor space investment in response to growing local demand arising from the continued expansion of the City's nearby growth area communities who will generate significant demand for a wide range of household goods.

Future Retail Floor Space Demand

In the future Charter Keck Cramer has identified the need for between a further 20,000 and 24,000 sqms of additional retail floor space.

This includes:

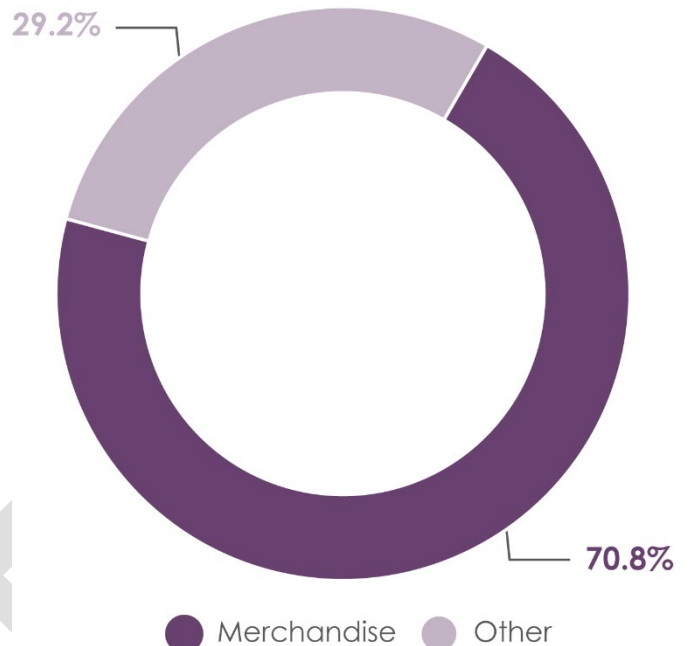
- Growth in City's dining sector via the addition of new outlets.
- Growth in retail services and personal services>
- Expansion of the City's bulky goods, homewares and specialised goods sector. Demand for new household retailing floor space is projected to grow particularly as the City delivers new housing in its growth area communities.
- Demand for new supermarket and ancillary food floor space including specialist food, bakeries and fresh food.

As per the background report, Charter Keck Cramer considers that there is sufficient vacant and underutilised land within (a) existing Centres to accommodate future floor space demand and (b) the East of Aberline will deliver new commercial land to accommodate local retail floor space demand.

Strategic Implications

- The City will see further demand for retail floor space expansion.
- The City supports a dual centres structure in which the City Centre functions as the region's prime retail and service centre supported by the EAC that provides complimentary retail uses.
- In the future, the EAC is likely to diversify while also growing its role in supporting regional large format merchandise. Equally, the City Centre is well positioned to continue to add services, hospitality and retail uses.
- The Strategy provides an opportunity to affirm and consolidate the City's established centres hierarchy while guiding the growth of new floor space.

Eastern Activity Centre - Floor Space by Use



Source: CKC

Figure 21: Gateway Plaza



What are we planning for?

Our City functions as a local, regional and tourist destination and thereby benefits from the multiple streams of expenditure that result from diverse visitation.

The role of the City as a regional destination and central accommodation, merchandise, hospitality and services hub in the region is acknowledged in Warrnambool's designation as regional city in state planning.

In the future, local and regional population growth combined with continued tourist growth will provide the conditions for our retail and services sectors to grow and, likewise, the Centres from which these sectors to operate from to increase their amenity and appeal.

We are planning to ensure that we leverage net employment, investment and visitor attraction benefits from the City's growth. Given ongoing growth of e-commerce and changing consumer trends this is not guaranteed.

In the light of this, the Strategy plans to:

- support the retention and growth of existing retail and service industry
- help Centres maintain and improve their attractiveness as tourist, local and regional destinations.
- support industry and their centres to adapt and compete in the digital era
- continue to support and affirm the evolution of the City Centre as the region's capital
- continue to guide the development and diversification of the EAC as the City's north and region grows.
- enable new investment in retail floor space and the renewal of existing space
- support the evolution and growth of existing and new Neighbourhood Activity Centres.

OUR VISION & DIRECTIONS

04

4.0 Strategic Vision and Objectives

Warrnambool's retail and service centres will be home to a growing array of merchandise, food, dining and service enterprises that appeal to the needs of local and regional households and tourists.

Through the ongoing growth of the City Centre, the strategic expansion of the Eastern Activity Centre, targeted land use policy reform, public investment and the evolution of our foreshore and neighbourhood centres, Warrnambool City will affirm its status as the region's premier retail, service and tourist destination.

The above vision will be implemented through land use policy reform, economic development actions, public and private investment in amenity improvements and regional and statewide advocacy.

Objective 1 Enable Retail and Service Providers to Thrive

Objective 2 Affirm Warrnambool City Centre as our Regional Capital

Objective 3 Facilitate a Diverse, Integrated and Accessible Eastern Activity Centre

Objective 4 Support the Sensitive and Sustainable Development of Foreshore Commerce

Objective 5 Support the evolution of existing and new Neighbourhood and Convenience Centres

Objective 6 Guide Out of Centre Retail Uses

Objective 1 Enable Retail and Service Providers to Thrive

Establish the policy, investment and advocacy conditions for our retail and service centres to thrive

The City is committed to the retention and growth of all existing retail and service providers while enabling new providers and enterprise to establish in Warrnambool.

We are committed to land use policy and economic development actions that will support the attractiveness and viability of our retail and commercial centres and the many enterprises that make up our retail and service sectors.

To do so, this strategy, details opportunities to reform land use policy, establishes clear guidance to direct future retail and commercial investment, identifies opportunities to improve the public experience of our centres and initiates economic development activities that promote greater visitation and activity.

Directions & Actions

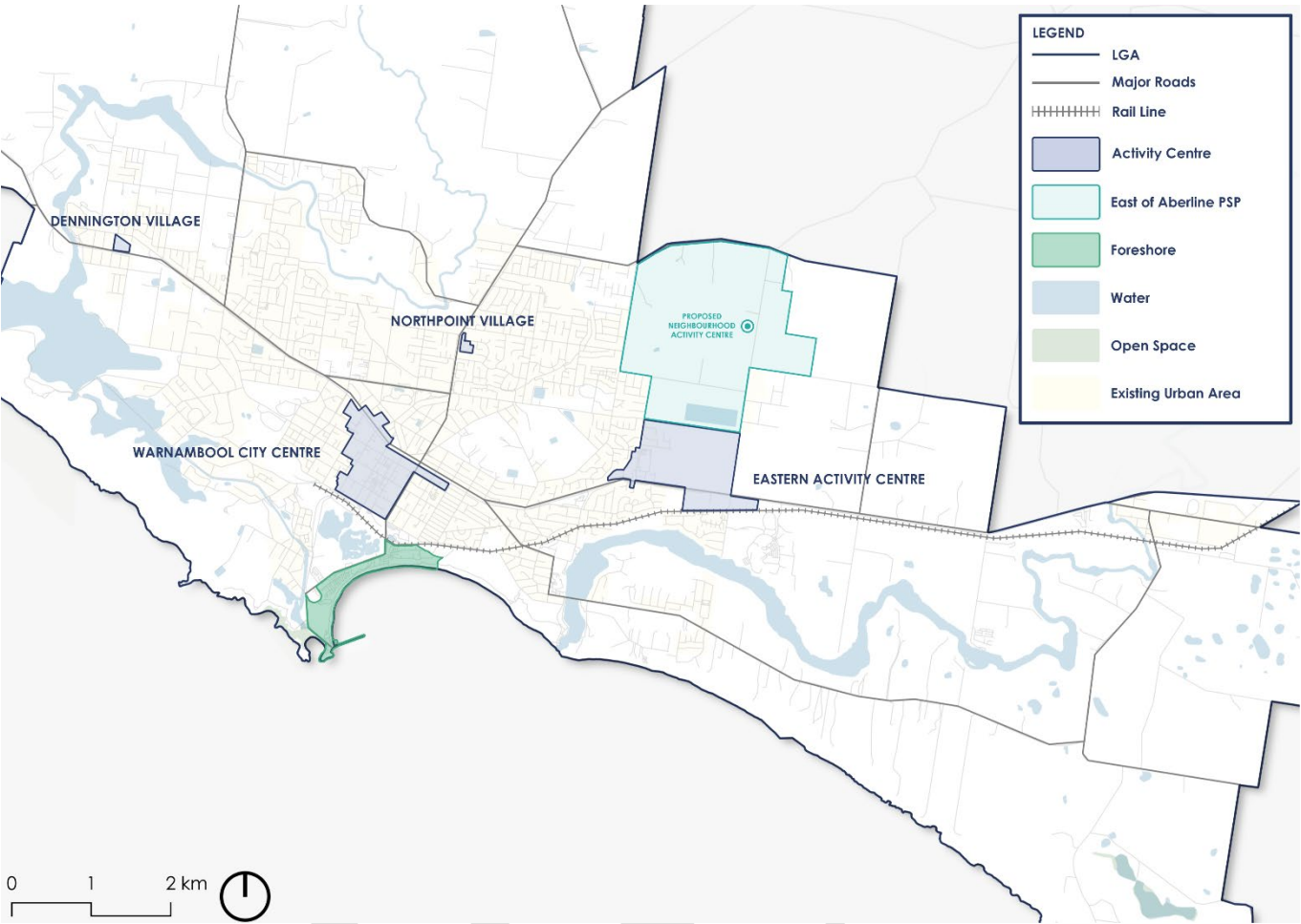
Direction 1.1 – Establish the Conditions for Our Retail and Service Centres to Undergo Strategic Growth	Action 1 Planning Scheme Amendment
<p>The Strategy supports and guides the growth of our retail and commercial centres by:</p> <ul style="list-style-type: none"> • Affirming Warrnambool City Centre as the region's capital. • Guiding the expansion of the Eastern Activity Centre. • Supporting the evolution of the Dennington and Northpoint Village neighbourhood centres. • Supporting the sustainable and sensitive development of commercial uses along Pertobe Road within the Warrnambool Foreshore precinct. • Delivering a new Neighbourhood Activity Centre in the East of Aberline growth area. • Guiding the location of retail and service growth. • Improving the attractiveness and accessibility of our retail and service centres. • Undertaking targeted economic development activities that promote our retail and service sectors. • Guiding the ongoing use and development of out of centre retail uses. 	<p>Undertake a planning scheme amendment to implement the <i>Warrnambool Retail Strategy</i> into the Warrnambool Planning Scheme by amending:</p> <ul style="list-style-type: none"> • Clause 02.03 -1 Activity Centres: Update to reflect the directions and actions of the Strategy • Clause 11.03-1L – Update to reflect the directions of the Strategy and the <i>Warrnambool Retail and Service Centres Framework</i> • Clause 34: Amend to rezone land at 57 Mortlake Road to the Commercial 1 Zone to reflect ongoing retail uses. • Clause 30: Rezone land at 49 Raglan Parade to the Commercial 2 Zone to support the ongoing development of Eastern Activity Centre's core Activity Centre and to reflect the ongoing role of the site as a large format retail location consistent with the <i>Eastern Activity Centre Structure Plan</i>. • Clause 34.01 – Schedule to the Commercial 1 Zone: Update to remove maximum leasable floor area for a shop at Gateway Plaza and adjacent sites identified in the Warrnambool Planning Scheme at 40 Gateway Road, 46 Gateway Road, and 54 Gateway Road. • Clause 72.08 Background Documents: Update to include the Strategy as a Background Document.
Direction 1.2 – Guide the Evolution and Growth of Retail and Service Centres	Addressed in Action 1
<p>The <i>Warrnambool Retail and Service Centres Framework</i> sets out the retail and commercial role of our existing and future centres. The future growth and evolution of our existing and new Centres will be directed by this framework.</p>	<p>In updating the Warrnambool Planning Scheme incorporate reference to the directions of the <i>Warrnambool Retail and Service Centres Framework</i>.</p>

Warrnambool Retail and Service Centres Framework

The Warrnambool Retail and Service Centres Framework builds on the City's existing strengths to envisage a retail and service sector structure comprising regionally significant, visitor oriented and locally focused Centres and uses.

Centre	Status	Retail and Service Vision	Preferred Retail and Service Uses
City Centre	Region's Capital City and principal retail, service and civic centre	The region's capital city and principal mixed retail and service destination that integrates a day and night economy combining dining, hospitality, fashion, entertainment and events with an array of regionally significant public and private service sector.	Retail: Department stores Dining and hospitality Fashion Hardware and homewares Supermarket Fresh food and speciality food Automotive and agriculture supplies Retail services and repairs Services: Regional civic, community, education, health, personal, and professional services. Financial, technology, real estate and fitness.
Eastern Activity Centre	Major Activity Centre and Warrnambool's second largest Centre. Largest large format retail and self-enclosed shopping centre in the region.	A contemporary commercial mixed retail and enterprise precinct that caters for the consumer, social and service needs of Warrnambool's growing north eastern population and the large format retail needs of the broader region.	Retail: Dining and hospitality Supermarket Fresh and speciality food Fashion and department stores Hardware and homewares Large format retail and bulky goods Retail services and repairs Automotive Services: Local community, personal, health and fitness services Enterprise: Mixed office and business park uses including wholesale, engineering, technology, distribution, construction, professional services.
Dennington	Neighbourhood Centre	An attractive and accessible Neighbourhood Centre that meets the consumer and social needs of Warrnambool's western community by catering for local dining, fresh food, grocery and personal and community service needs.	Supermarket Health and fitness Fresh and speciality food Dining and hospitality Retail services and repairs Civic and Community services
NorthPoint Village	Neighbourhood Centre	An attractive and accessible Neighbourhood Centre that meets the consumer and social needs of Warrnambool's northern community by catering for local dining, fresh food, grocery and personal and community service needs.	Supermarket Health and fitness Fresh and speciality food Dining and hospitality Retail services and repairs Civic and Community services
East of Aberline	Future Neighbourhood Activity Centre	An attractive and accessible Neighbourhood Centre supporting the consumer and service needs of the East of Aberline growth area	Supermarket Health and fitness Fresh and speciality food Dining and hospitality Retail services and repairs Civic and Community services
Foreshore Precinct – existing activity node	Coastal and heritage hospitality	Sensitive and sustainable hospitality and recreation venues that celebrate Warrnambool's heritage, landscape and cultural values.	Dining and hospitality Foreshore Recreation Tourist services
Future Convenience Centres shops (Hopkins Heights and North of the Merri areas)	Convenience centres and shops	Small clusters of shops that promote local social connection, by catering for local hospitality, services and convenience shopping needs.	Dining and café Mini markets Health and fitness

Warrnambool Retail and Service Centres Framework



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<p>Direction 1.3 – Implement Growth Enabling Reforms</p> <p>Targeted reforms will support the growth and evolution of our Centres.</p> <p>City Centre</p> <ul style="list-style-type: none"> As per <i>Direction 2.1: Maintain Active Retail Uses</i> The Strategy will enact reforms to maintain active retail frontages in the City Centre's core retail precinct. <p>Eastern Activity Centre</p> <ul style="list-style-type: none"> As per <i>Direction 3.1: Enable the EAC to Grow</i> The Strategy will enable the EAC's core activity centre to accommodate future floor space demand through reform of maximum floor space controls and rezoning. <p>Northpoint Village</p> <ul style="list-style-type: none"> As per <i>Direction 5.1: Support the ongoing evolution of Dennington and Northpoint Village</i> The Strategy will seek to formalise commercial uses at 57 Mortlake Road via rezoning. 	<p>Addressed in Action 1</p> <p>Land Use Planning</p> <ul style="list-style-type: none"> In updating the Warrnambool Planning Scheme implement growth enabling land use reforms as set out in the directions of this Strategy.
<p>Direction 1.4 – Enhance Centre Attractiveness and Accessibility</p> <p>We will ensure our Centres are attractive and desirable visitor, civic and consumer locations via ongoing improvements to Centre accessibility and amenity.</p> <p>Ongoing urban improvements will seek to:</p> <ul style="list-style-type: none"> improve visitor circulation and pedestrian connectivity facilitate outdoor dining and nighttime economic activity improve safety foster social connection. <p>City Centre</p> <ul style="list-style-type: none"> As Per <i>Direction 2.4: Maintain and Enhance Centre Attractiveness</i> the City will continue to invest in the City Centre's public realm while ensuring new development enhances public amenity. <p>Eastern Activity Centre:</p> <ul style="list-style-type: none"> As per <i>Direction 3.2 Improve EAC Amenity, Integration and Accessibility</i> the Strategy will instigate a process to investigate urban improvements that enhance EAC pedestrian mobility, planting, and Gateway Road's accessibility and capacity to support future demand resulting from the delivery of the of East of Aberline. <p>Neighbourhood Centres</p> <ul style="list-style-type: none"> As per <i>Direction 5.1: Support the ongoing evolution of Dennington and Northpoint Village</i> the City will work with centre owners to ensure centres maintain a contemporary environment that supports visitation and social connection. 	<p>Action 2: Investigate, Facilitate and Undertake Centre Improvements</p> <p>Urban Improvements</p> <ul style="list-style-type: none"> Through Council's public works program continue to invest in the urban amenity of the City Centre to promote visitation, public safety, night time activity, hospitality and services growth. Identify the next stage of the <i>Warrnambool City Centre Revitalisation Structure Plan</i>. <p>Land Use Planning</p> <ul style="list-style-type: none"> Ensure new commercial, housing and civic investment positively impacts on Centre attractiveness and public realm. <p>Engagement and Advocacy</p> <ul style="list-style-type: none"> Work with Centre owners to maintain the attractiveness of stand alone centres. In the EAC work with Centre owners to identify public realm and pedestrian improvements in the core Activity Centre. In the EAC work with owners and future developers to ensure development results in greater integration, safety and pedestrian mobility.

Direction 1.5: Facilitate Economic Development	Action 3: Facilitate Economic Development
<p>The City through its economic development activities will support the economic development and resilience of the local retail and service sector.</p>	<p>Economic Development</p> <p>Through economic development activities the City will :</p> <ul style="list-style-type: none"> • Online Education: Provide information and education on how local retailers can transform their business into dual physical and online enterprises. • Traders association: support the development of a locally led traders association. • Event synchronicity: Encourage traders to activate businesses during event periods, particularly dining and hospitality enterprise.

Objective 2 Affirm Warrnambool City Centre as our Regional Capital

Facilitate the ongoing growth and development of the CBD's retail and commercial sectors by building on the City's rich infrastructure, public investment and commercial legacies.

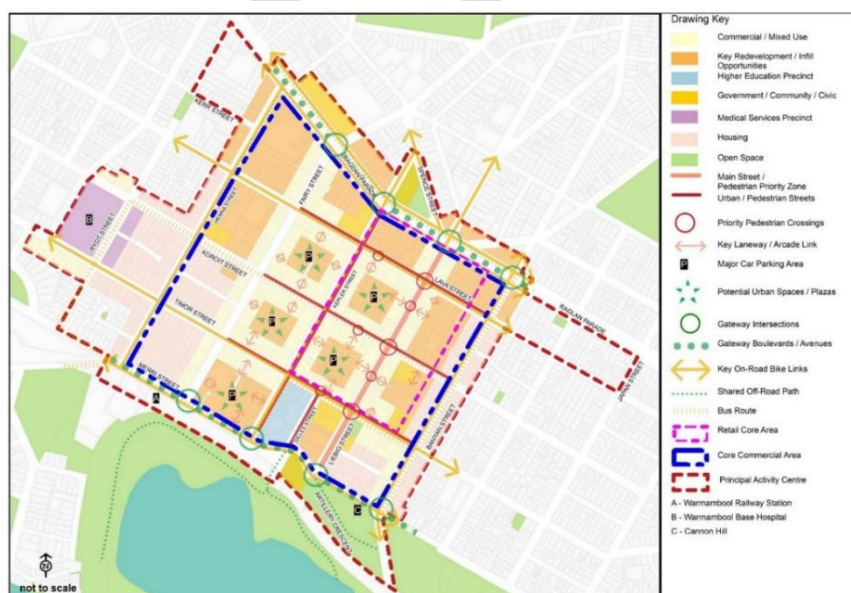
Since its founding in the 1840's the City Centre has accrued a rich legacy of transport, civic, health infrastructure, retail functions, and ornate heritage buildings. Today, the Centre's high quality floor space and attractive and coherent street scapes draw local and regional visitation as well as numerous tourists.

The Strategy is committed to maintaining the primacy of the City Centre as the region's leading institutional, service and retail environment. To do so, the Strategy identifies actions that will position the Centre as the preferred location for future service, tourism and local demand.

Direction 2.1: Maintain Active Retail Uses	Address in Action 1
<p>The City blocks taking in Liebig, Lava, Kepler and Timor Streets comprise the City's core retail precinct and its leading destination for local, regional and tourist visitation.</p> <p>The Strategy seeks to ensure the City's core retail precinct remains vibrant, active and attractive and populated by a density of diverse retailers.</p> <p>In particular, the Strategy aims to ensure frontages throughout the core retail precinct are permeable and generally occupied by active retail uses. As such, the Strategy discourages uses that will de-active the City's retail core area as defined at clause 11.03-1L-02. As such it is policy to discourage:</p> <ul style="list-style-type: none"> uses that will result in non-permeable frontages on the ground floor of the retail core area uses that are not generally public facing from locating at the ground floor in the retail core area. Upper floors are supported. 	<p>Land Use Planning</p> <p>In updating the Warrnambool Planning Scheme:</p> <ul style="list-style-type: none"> Detail policy objectives for the City Centres retail core area as defined by the <i>Warrnambool City Centre Framework Plan</i> at 11.03-1L-02. Policy objectives should (a) require permeable store frontages throughout the Retail Core Area (b) discourage non-public facing uses at the ground floor throughout the retail core area.

Warrnambool City Centre Core Retail Precinct

* The *Warrnambool City Centre Framework Plan* at 11.03-1L-02 defines the City's core retail precinct.



Direction 2.2 Foster a Growing Arts, Dining and Night Time Economy.	Incorporated in Actions 1, 2, and 3
<p>The City Centres' dining, arts and entertainment offer is a major tourist, regional and local attractor that generates substantial annual expenditure and jobs.</p> <p>Investment in new high quality footpaths, passive recreation areas, new traffic management infrastructure as a result of the <i>Warrnambool City Centre Revitalisation Structure Plan</i> has helped propel the ongoing growth of the City's dining sector and night time economy.</p> <p>The strategy supports the continued growth of the City's dining, arts and entertainment sectors by:</p> <ul style="list-style-type: none"> • <i>Enabling growth:</i> the Strategy supports growth enabling initiatives including support for the addition of new outdoor dining options, the expansion of dining options along Koroit, Timor and Kepler Streets and interventions that will support increased night time economic activity. • <i>Improving public safety and amenity:</i> Building on the success of the <i>Warrnambool City Centre Revitalisation Structure Plan</i> the City will continue to explore opportunities to improve amenity that supports increased visitation. Equally, as per Direction 2.3, the City will work with authorities to investigate options to improve public safety. • <i>Economic development:</i> Prioritise the City Centre as a location for events and gathering. Encourage the City Centre hospitality sector to align trading hours with major events and peak seasonality. 	<p>Land Use Planning</p> <ul style="list-style-type: none"> • In updating City Centre policy at Clause 11.03-1L support the ongoing expansion of dining, entertainment, arts and the night time economy as central to the City Centre's commercial and cultural identity and the City's visitor economy. • Seek to work with proponents to support new outdoor dining options and night time economic activity. <p>Public Amenity and Safety</p> <ul style="list-style-type: none"> • Continue to explore opportunities to invest in the urban amenity of the City Centre to promote visitation, public safety and night time economic activity. • Work with authorities and safety professionals to improve public safety. <p>Economic Development</p> <ul style="list-style-type: none"> • In future economic development strategy prioritise the City Centre as a location for events and gathering. • As part of economic development activity encourage City Centre hospitality sector to align trading hours with major events and peak seasonality.
Direction 2.3: Ensure a Safe Visitor and Worker Environment	Action 4: Work with Authorities and Safety Professionals
<p>The Strategy aims to ensure that the City Centre provides a safe environment for visitors and staff.</p> <p>The Strategy aims to identify and implement new measures to elevate public safety.</p>	<p>Advocacy and Engagement</p> <p>Work with authorities to identify and implement measures to improve public safety</p> <p>Urban Amenity</p> <p>Work with professionals to assess the need for public realm improvements that boost safety (lighting, vegetation management)</p>

Direction 2.4: Foster the Growth of the City's Service Sector	Addressed in Action 1
<p>An increasing proportion of the City Centre's commercial floor space supports the delivery of services. Fairy Street, Lava Street, the southern portion of Kepler Street and central Liebig Street support a range of professional, personal and retail services.</p> <p>The growth of the City Centre as a regional service hub has enabled the City's floor space to continue to support productive purposes and maintain high levels of occupancy.</p> <p>The Strategy supports the continued growth of City Centre services by:</p> <ul style="list-style-type: none"> Identifying the City Centre as the preferred location for the delivery of regional services consistent with the Centre's public transport accessibility, the City's established cluster of services and the City's policy status as a regional capital. Supporting the ongoing renewal and adaptation of buildings for service purposes. Support upper story service office growth in the core retail area. 	<p>Land Use Policy</p> <p>In updating City Centre policy at Clause 11.03-1L identify the City Centre as the preferred location for the delivery of regionally significant services and large format office uses.</p> <p>In updating City Centre policy at Clause 11.03-1L support the renewal and adaptive re-use of City Centre buildings and sites for office and service uses.</p> <p>In updating City Centre policy at Clause 11.03-1L support upper story office growth of services in the core retail area.</p> <p>Economic Development</p> <p>Ensure future economic development strategies and investment attraction strategies acknowledge and affirm the City's unique and growing services sector and capability.</p>
Direction 2.5: Maintain and Enhance the Centre Attractiveness	Addressed in Action 2
<p>Maintaining the attractiveness of the City Centre is vital to retaining the City's role as a visitor, regional and local destination and as a centre for ongoing public and private commercial, retail and service investment. Moreover, the City Centre's continued attractiveness and high amenity environment is essential to affirming the City's status as a regional capital.</p> <p>The Strategy commits to maintaining and enhancing the attractiveness of the City Centre via ongoing public investment, ensuring private investment contributes positively to the public realm and by investigating options to update the <i>Warrnambool City Centre Revitalisation Structure Plan</i>.</p> <p>In the recent past, the City has facilitated innovative use of car parks and laneways to precipitate pedestrian activity, vibrance and commercial activity. The Strategy commits Council to continuing to explore public investment options that will facilitate that activate the Centre, result in new destinations and support commercial expansion.</p>	<p>Urban Investment and Policy</p> <p>Through Council's public works program continue to invest in the urban amenity of the City Centre to promote visitation, public safety, night time activity and services growth.</p> <p>Through Council's public works program continue to explore innovative options to activate new spaces and create new destinations.</p> <p>Ensure new commercial, housing and civic investment positively impacts the City's public realm.</p> <p>Investigate options to define the next stage of the <i>Warrnambool City Centre Revitalisation Structure Plan</i></p>

Direction 2.6 Promote Central City Residential Living	Addressed in Action 1
<p>Our City Centre incorporates the amenity, services and civic, cultural, social, retail and transport options to support a high residential standard of living.</p> <p>This strategy affirms existing policy that supports the development of new high density dwellings in the City Centre. High density housing will benefit our aging community, while helping to sustain local trade and service providers and the night time economy.</p>	<p>Land Use Policy</p> <p>In updating Clause 11.03-1L-02 Warrnambool City Centre affirm the role of the Centre as a high density housing location.</p> <p>Support applicants in the delivering new housing in the Centre.</p>
Direction 2.7 Continue to Implement the Warrnambool City Car Parking Strategy 2024	Action 5: Continue to Implement the Car Parking Strategy
<p>The <i>Warrnambool City Car Parking Strategy 2024</i> explored parking conditions across the CBD, the Foreshore, hospital and the west Warrnambool industrial area.</p> <p>The Strategy identified a number of issues related to on-street parking and time-based restrictions. The Strategy recommends a number of reforms to parking arrangements.</p>	<p>As part of the City's placemaking implement the <i>Warrnambool City Car Parking Strategy 2024</i></p> <p>In updating future car parking strategies consider the impact of CBD car parking on the City Centre's commercial competitiveness and attractiveness for visitation.</p>

Objective 3 Facilitate a Diverse, Integrated and Accessible Eastern Activity Centre

The EAC will evolve into an integrated, attractive and high amenity Centre that features a growing mix of enterprise, retail and service uses.

As the main eastern entry and exit point into Warrnambool, the EAC is ideally positioned to service the merchandise retail needs of Warrnambool's nearby growth area communities and the large format and bulky goods needs of regional households.

Since its inception in the early 2000's the EAC has steadily expanded its large format retail space along the Princes Highway Corridor and its finer grain self-enclosed retail shopping space. The EAC functions as a dual large format regional destination and local fresh food, merchandise and grocery destination.

The Centre's vacant developable land enables the Centre to continue to grow its retail, service and enterprise sectors. Additionally, the EAC's close proximity to the East of Aberline growth area, positions the EAC to support the service and retail needs of what will be a growing community of potentially 12,000 new residents.

Direction 3.1: Enable the EAC to grow	Incorporated into Action 1 and 2
<p>The EAC is the City's second largest Activity Centre and the region's largest large format retail node. The Centre combines a core retail centre at the corner of Gateway Road and Princess Highway and large format retail along the Princes Highway.</p> <p>Floor Space Limits</p> <p>The EAC's core retail area is currently subject to retail floor space limits. The Gateway Plaza and adjoining land is subject to a floor space limit of 33,300 sqms while commercial land along Gateway Road to the west is subject to 6,700 sqms space limit (schedule 1 to the Commercial 1 Zone at 34.01).</p> <p>As the East of Aberline and remnant broadhecatre land is developed, household retail demand in the City's north will continue to grow. Floor space restrictions, however, risk limiting the capacity of the EAC's core retail area to grow and evolve in response to new growth drivers and demand.</p> <p>The Strategy enables the EAC's core activity centre to grow, adapt and diversify by removing floor space limits.</p> <p>Provide Land Use Flexibility</p> <p>Contemporary centres are diversifying. Centres increasingly incorporate non-retail uses including accommodation, dwellings and services while also appealing to the role of consumption as a leisure activity via entertainment and extensive dining options.</p> <p><i>The Warrnambool Eastern Activity Centre Amended 2020</i> sets out a land use vision across the Centre. As part of this, vacant land at 82 Raglan Parade/25 Horne Road is subject to land use directions that envisage mixed use development and office development.</p> <p>The land use vision for this area is not in keeping with contemporary mixed commercial environments in which blend commercial uses. The Strategy thereby</p>	<p>Land Use Planning</p> <p>Amend Schedule to Clause 34.01 to remove EAC floor space limits.</p> <p>Support a blend of commercial uses at 82 Raglan Parade/25 Horne Road consistent with consistent with Strategy Direction 3.1.</p> <p>In the medium term review and refine the <i>Eastern Activity Centre Structure Plan</i> at Clause 11.03 to enable greater land use flexibility for vacant land north of Princess Highway.</p>

seeks to enable a blend of retail, large format, office, recreation, warehouse and health and fitness uses at 82 Raglan Parade/25 Horne Road by updating directions for this land to support a blend of commercial uses.	
Direction 3.2: Support the Growth of the Core Activity Centre	Addressed in Action 1
<p><i>The Warrnambool Eastern Activity Centre Structure Plan 2020 sets out a land use vision across the Centre via the Eastern Activity Centre Structure Plan (11.03-1L-04).</i></p> <p>49 Raglan Parade currently supports a range of large format retail uses consistent with the <i>Framework Plan</i> and the overall role of this section of the Prince Highway corridor as a large format retail area. The site is on the southern side of Princes Highway and is currently subject to the Commercial 1 Zone. The Commercial 1 Zone provides for a wide array of retail uses including hospitality, supermarket as well as residential uses. The corridor's other large format retail sites are subject to the Commercial 2 Zone.</p> <p>To reflect the current use and development of the site and to ensure that the EAC's core activity centre at Gateway Road continues to be the primary focus for fine grain retail uses as per the <i>Eastern Activity Centre Structure Plan (11.03-1L-04)</i> the Strategy recommends that 49 Raglan Parade is rezoned into the Commercial 2 Zone consistent with adjoining large format uses.</p>	<p>Land Use Planning</p> <p>Apply the Commercial 2 Zone to land at 49 Raglan Parade to support the long term use of the site for large format retail purposes consistent with the <i>Eastern Activity Centre Structure Plan (11.03-1L-04)</i> and to ensure the primary Activity Centre as identified in the <i>Eastern Activity Centre Structure Plan</i> continues to develop as the Centre's primary location for fine grain retail uses and services.</p>
Direction 3.3 Improve EAC Amenity, Integration and Accessibility	Addressed in Action 2
<p>The Strategy aims to improve the attractiveness of the EAC as a regional and local destination by promoting pedestrian mobility, landscaping, visual amenity and precinct integration.</p> <p>A key focus is:</p> <ul style="list-style-type: none"> Improving pedestrian mobility within the core activity centre Encouraging land holders to improve planting and landscaping Implementing the landmark gateway vision articulated in the 2020 Structure Plan Ensuring Gateway Road is able to support increased movement resulting from ongoing population growth to the north. Improving access and mobility from the north along Gateway Road. 	<p>Place Making and Infrastructure</p> <p>Under take place making analysis that identifies opportunities to:</p> <ul style="list-style-type: none"> rectify integration and pedestrian mobility in the core activity centre improve gateway planting that reflects Warrnambool's ecology and creates a sense of entrance to the City improve transport options and capacity along Gateway Road in anticipation of the delivery of East of Aberline and continued residential development in the City's north. <p>Engagement and Advocacy</p> <p>Engage with Centre owners and authorities to investigate and implement Centre accessibility, mobility and amenity improvements.</p>

Direction 3.4 Achieve the EAC Vision	Addressed in Action 1
<p>The Strategy affirms the EAC vision and its dual role in servicing local household consumption and its regional role in large format retail.</p> <p><i>The vision for the EAC is to develop the precinct as a genuine mixed use activity centre, comprising a range of retail, bulky goods, office employment and diverse housing opportunities, that supports the primary retail role of the CBD</i></p> <p>Over the long term this strategy affirms:</p> <ul style="list-style-type: none"> (a) the EAC as the City's second Activity Centre (b) its primary role in accommodating retail and service growth emerging in Warrnambool's north (c) and the role of the EAC as the region's leading large format retail node. 	<p>Land Use Planning</p> <p>In updating City Centre policy at Clause 11.03-1L update EAC directions to acknowledge the EAC's role in supporting the merchandise and consumption needs of the East of Aberline growth area community and the Centre's role in regional large format trade.</p>

Objective 4 Support the Sensitive and Sustainable Development of Foreshore Commerce

The sustainable development of the Foreshore's hospitality, recreation and tourism sectors will effectively balance the protection and conservation of the coast with the impact of human activity under the stewardship of the Foreshore Strategy Framework Plan 2024

The City's rugged coast is our premier tourist destination in which the City's Foreshore area (as defined by the *Foreshore Strategy Framework Plan 2024*) is our most active coastal destination. The Foreshore area enables visitors and locals to enter into the natural environment to recreate, relax and explore.

There is a desire to further develop the City's Foreshore as a major tourist and recreation areas and an equal desire to ensure the Foreshore and harbour's ecology is preserved and protected. The *Warrnambool Foreshore Strategic Framework Plan 2024* provides directions and a strategic guidance to balance the needs of people and nature as encapsulated in its vision:

The Warrnambool Foreshore is a treasured destination that celebrates its unique natural beauty, cultural heritage, rich history, and vibrant community spirit. It is a place where residents and visitors can immerse themselves in the coastal environment, engage in diverse recreational activities, and create lasting memories, all while fostering a deep appreciation for the delicate balance between human activities and the natural world.

The vision for the Warrnambool Foreshore is to enhance and protect its distinctive character while providing a range of inclusive and sustainable amenities that cater to the needs of all users. This will be achieved through sensitive design interventions that prioritise the preservation of native flora and fauna, tangible and intangible cultural heritage, improve accessibility and connectivity, and create inviting spaces for social interaction and relaxation, while also addressing the challenges posed by coastal vulnerability and climate change.

In keeping with this vision and the desire of the community to expand the Foreshore's hospitality and recreation offer, this Strategy supports the sensitive and sustainable development of foreshore commerce.

Direction 4.1: Promote the sustainable and sensitive growth of foreshore commerce	Addressed in Action 1 and Action 3
<p>The Strategy supports the sustainable growth of the foreshore's hospitality, recreation and tourism sectors in accordance with the <i>Foreshore Strategic Framework Plan 2024</i> and the <i>Marine and Coastal Act 2018</i>.</p> <p>The Strategy likewise supports:</p> <ul style="list-style-type: none">(a) targeted foreshore economic activation and pop-up initiatives that cater for visitor recreation and hospitality needs along Pertobe Road(b) the exploration of a centralised foreshore visitor, water sports and recreation facility.	<p>Land Use Planning</p> <p>In updating Warrnambool Planning Scheme introduce policy at Clause 11.03-1L that supports the sustainable development of foreshore hospitality, recreation and tourism along Pertobe Road in accordance with the <i>Foreshore Strategic Framework 2024</i> and the <i>Marine and Coastal Act 2018</i>.</p> <p>Economic Development</p> <p>Through Council's economic development investigate opportunities to further activate foreshore commerce along Pertobe Road.</p> <p>Investigate options for a centralised activity facility that co-ordinates water sports, recreation and visitor activities.</p>

Objective 5 Support the evolution of existing and new Neighbourhood and Convenience Centres

Our new and existing neighbourhoods will benefit from local shops that support the everyday shopping and social needs of residents.

Over the past two decades the City has successfully supported the development of the Dennington and Northpoint Neighbourhood Activity Centres. Neighbourhood Activity Centres and convenience provide accessible retail services for daily necessities including fresh food and groceries, pharmaceuticals, and basic household items within local communities.

Additionally, Neighbourhood Activity Centres function as informal meeting places where neighbours encounter each other fostering community connections. For older aged groups and vulnerable individuals local convenience areas are critical places of daily connection.

Into the future as the population grows, the City is committed to strategically enabling the development of new Neighbourhood Activity Centres and local convenience centres with the aim of ensuring new retail floor space in new communities supports daily retail needs and social connection without disrupting the viability of the City's existing centres.

Direction 5.1: Support the ongoing evolution of Dennington and Northpoint Village	Addressed in Actions 1 and 3
<p>The strategy supports the ongoing growth and evolution of the Dennington and Northpoint Neighbourhood Centres.</p> <p>Specifically the Strategy supports:</p> <ul style="list-style-type: none"> the development of commercially zoned vacant land in both Northpoint and Dennington the ongoing improvement of each centre as a civic, social and accessible location the continued diversification of the role of each centre in response to changing consumer and civic needs <p>Rezoning Northpoint</p> <p>The Strategy acknowledges and supports the ongoing commercial role of shops at 57 Mortlake Road. The Strategy thereby recommends the rezoning of this land into the Commercial 1 Zone and the acknowledgement of this group of shops in mapping at 11.03-1L-01.</p>	<p>Land Use Planning</p> <p>As part of the planning scheme amendment, update Clause 34 to rezone land at 57 Mortlake Road from the General Residential Zone to the Commercial 1 Zone to reflect ongoing retail uses.</p> <p>Update mapping at 11.03-1L-01 to acknowledge the retail role of this group of shops in the Northpoint Village Activity Centre.</p> <p>Engagement and Advocacy</p> <p>Engage with Centre owners to encourage ongoing centre investment and placemaking.</p>
Direction 5.2 Deliver the East of Aberline Neighbourhood Centre	Action 6: Deliver the East of Aberline
<p>East of Aberline may eventually support a community of over 12,000 new residents. The Strategy supports the development of a new Neighbourhood Activity Centre in the East of Aberline growth area that will cater for the daily grocery, fresh food, and service needs of the new community.</p>	<p>Engagement and Advocacy</p> <p>Continue to work with landholders and the Department of Transport and Planning to deliver the East of Aberline growth area including a new Neighbourhood Activity Centre.</p>

Direction 5.3 Consider New Centres and Convenience Shops	Action 7: Assess the Merit of New Convenience Centres and Shops
<p>Council will work with land holders and enterprise to consider the approval of new convenience centres in new communities provided Centres adhere to the following criteria:</p> <ul style="list-style-type: none"> • The proposal is in a location with limited or no existing retail and service space. • Convenience centres for new communities are delivered in a single location within the community. • The preferred convenience centre is in a location not subject to environmental constraints. • The location of the Centre has regard for the role of the City Centre, the Eastern Activity Centre, Northpoint Village and Dennington Neighbourhood Centres as per the <i>Warrnambool Retail and Service Centres Framework</i>. • The convenience centre is focused on everyday and convenience needs of local residents and occasional visitors. • The proposed centre/shop should be on the Principal road network or on a significant municipal road as defined in 36.04-4. 	<p>Land Use Planning</p> <p>Assess the need for new Centres according to Strategy criteria set out in Direction 5.3.</p> <p>Engagement and Advocacy</p> <p>Engage with land holders to review the economic and community merit and need for new centres and shops.</p>

Objective 6 Guide Out of Centre Retail Uses

Established out centre retail uses will continue to support the fuel, automotive, agricultural and other niche needs of our community and business sector.

Main roads, highway locations and local streets include a range of established retailers including fuel retailers, car wash services, automotive sales and repairs, agricultural supplies, large format uses and fast food and convenience retailers.

In general, out of centre commercial uses are either comprise a single site or a small cluster of outlets. These sites and clusters typically generate visitation for a single use – to service a car, to obtain a household object, for fuel.

The Strategy supports the ongoing role of established out of centre uses and the logical improvement of their premises and enterprise.

Direction 6.1 Guide Out of Centre Retail Uses	Addressed in Action 1
<p>The Strategy:</p> <ul style="list-style-type: none">• Supports the continued operations of out of centre retailers consistent with their existing use rights• Supports the ongoing improvement of existing retail premises to support the logical improvement and expansion of operations.• Discourages the redevelopment of out-of-centre retail locations for new multi store fine grain retail purposes.• Does not support the development of new out of centre self-enclosed shopping facilities.• Does not support the development of new full line supermarket floor space in out of centre locations. <p>The Strategy in undertaking future land use planning recommends Council undertake a review of the zoning of emergency service and public use facilities s in the municipality.</p>	<p>Land Use Planning</p> <p>In updating Centre policy within the Warrnambool planning scheme introduce new out-of-centre policy at clause 11.03 that compliments statewide policy at 17.02-2S.</p> <p>In future planning work review the zoning of emergency service and public use facilities.</p>

Warrnambool Out of Centre Retail Uses



