

State of Warrnambool report

Warrnambool City Council

07 | 03 | 2025





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OFFICES IN CANBERRA, HOBART, MELBOURNE, AND SYDNEY ON THE COUNTRY OF THE NGAMBRI/NGUNNAWAL/NGARIGO, MUWININA/PALAWA, WURUNDJERI, AND GADIGAL PEOPLES.

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1. Introduction

1.1 Acknowledgement of country

SGS Economics and Planning Warrnambool City Council acknowledge the Peek Whurrong and Kirrae Whurrung Peoples of the Gunditjmarra and Eastern Maar Nations as the Traditional Owners 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 Gunditjmarra, world-renowned¹ for their sophisticated aquaculture systems at Tyrendarra and Lake Condah, have shaped and cared for these lands through ingenuity, resilience, and an enduring knowledge of the environment. The Eastern Maar have long moved between the coastal, riverine, and woodland environments, sustainably harvesting food and resources while maintaining complex trade and cultural networks across the region.

From the rich volcanic plains to the coastline, these landscapes hold layers of cultural, spiritual, and practical significance. 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.

1.2 Project brief and scope

Warrnambool Futures is a comprehensive review of the land use strategy for the City of Warrnambool (The City), which will culminate in the preparation of a new City-wide strategic land use plan.

The City's most recent comprehensive land use strategy was prepared in 2004. A great deal of strategic work has been undertaken since then, including new housing, open space, environment, and economic development strategies. The City also has a comprehensive Community Vision (*Warrnambool 2040*), and its Council Plan.

Warrnambool Futures will update the land use strategy to reflect these other strategies, and to account for growth, change, and new issues that have emerged since the previous strategy. It will provide a City-Wide strategic land use plan that sets a broad, integrated vision for the municipality to manage where and how the future growth and development will take place.

¹ <https://www.parks.vic.gov.au/managing-country-together/unesco-world-heritage-listing-for-budj-bim-cultural-landscape>

The project brief notes that the final plan should help Council:

...ensure that the form and function of Warrnambool City and its smaller townships (Allansford, Dennington, Bushfield and Woodford) and rural communities are planned and then developed so as to:

- Strike an appropriate balance between accommodating growth and change while preserving the municipality's unique natural elements, such as productive agricultural lands, and coastal and riparian environments.
- Maximize the quality of life and well-being for community members by providing environments that foster active living, interaction, and communal activities.
- Improve the alignment of infrastructure delivery including transport, and community service facilities with land use and development.
- Mitigate environmental impacts resulting from future developments, especially in terms of carbon emissions, water and energy use, and biodiversity protection, protection of vistas and scenic view lines.
- Facilitate efficient movement for all community members across the city to access amenities and employment centres.

1.3 Report purpose and structure

Community engagement is an important part of the development of *Warrnambool Futures*. A core tenant of community engagement is to ensure that it is informed by a solid evidence base.

To provide this evidence base, we have provided an insight into Warrnambool's present context, as well as outlining the broad challenges facing the City across the next two decades and beyond.

The report is structured as follows:

- Chapter 1: Introduction
- Chapter 2: Policy review
- Chapter 3: Demographics housing and community profile
- Chapter 4: Economy
- Chapter 5: Urban form
- Chapter 6: Natural hazards, assets and resources
- Chapter 7: Transport and Infrastructure

The report is intended spark a conversation about the future of the City, presenting a series of questions and consideration to prompt and guide conversation.

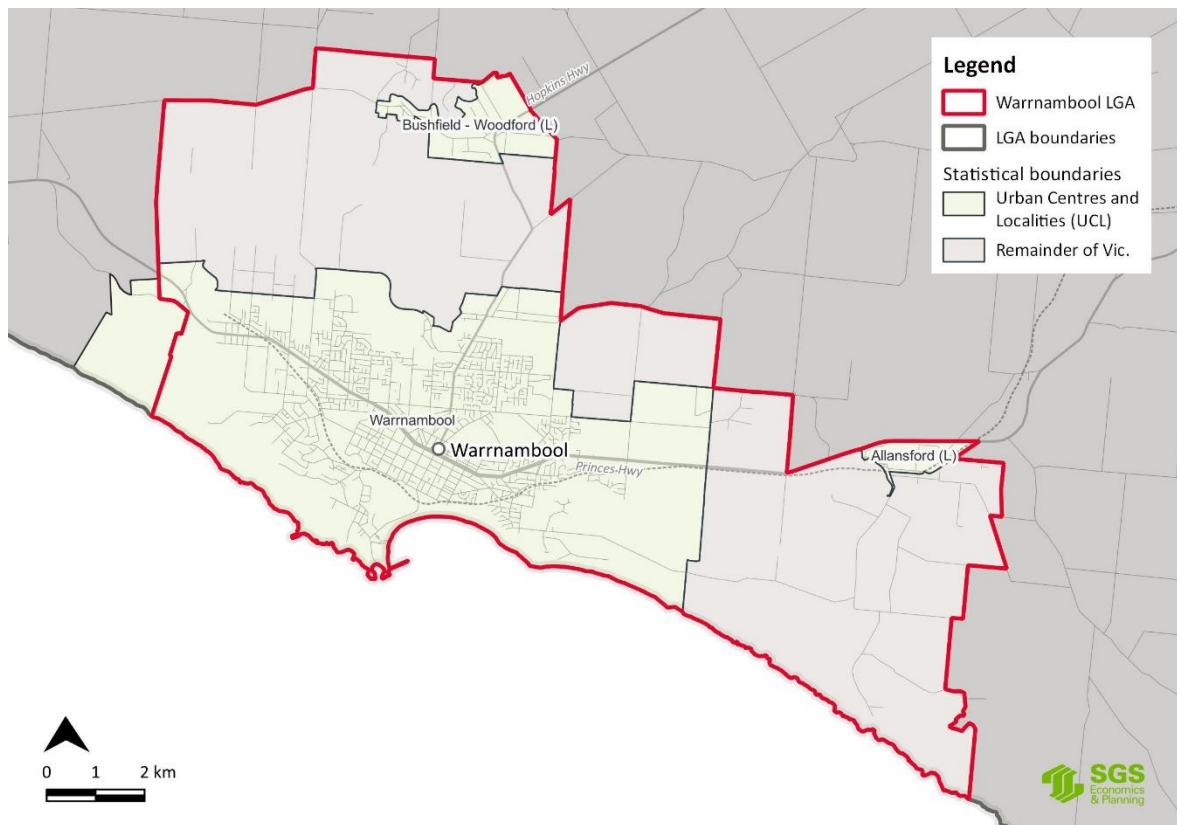
1.4 Overview of Warrnambool

Warrnambool is situated on the traditional lands of the Eastern Maar people. Located approximately 260km west of Melbourne, it is Victoria's largest coastal regional city beyond Port Phillip Bay with a population of over 35,406. It is the key regional centre for the Great South Coast region².

The local government area includes the township of Warrnambool itself, as well as the smaller towns of Allansford to the east, and Woodford and Bushfield to the north. Key natural features include the two key rivers running alongside (and partially through) the township – the Merri River to the west and the Hopkins River to the east. The coast is a defining feature, with attractive beaches and rugged coastline located in the coastal reserve that runs along much of the southern boundary of the City. The surrounding land (within and beyond the council boundaries) includes highly productive agricultural land.

On its land boundaries the City is entirely surrounded by Moyne Shire. While the hinterlands of the local government area are relatively small, covering 120 square kilometres (see Figure 1 below), Warrnambool City acts as the main service centre for the surrounding region.

Figure 1: Statistical Boundaries around Warrnambool LGA



Source: SGS, 2024

² The Great South Coast region includes five municipalities (Corangamite Shire, Glenelg Shire, Moyne Shire, Southern Grampians Shire, City of Warrnambool).

This role includes providing key retail, health and community services; as a location for industry, including that supporting the highly productive agricultural land in the region; and as a hub for tourism. The health care and social assistance sector is the leading source of employment.

Warrnambool's role as a tourist destination encompasses several roles. The City is located on the Great Ocean Road and is a key location for accommodation, hospitality and services for visitors along this route. The City also has notable tourist destinations in its own right.

As a coastal City nestled between two rivers, Warrnambool is subject to natural hazards associated with climate change including sea level rise and increased risk of flooding. Its links to the surrounding region also mean that the effect of climate change upon the agricultural economy will affect the City.

Population growth in the past two decades has remained relatively steady at around 1% a year. Growth has been accommodated largely within several established growth areas, with some capacity added through infill development. There remains established capacity for greenfield growth, but there are increasing challenges to be addressed in addressing housing affordability, diversity, and identifying the longer term growth patterns.

2. Policy review

This chapter examines key state, regional, and local policies, including the planning scheme, to understand the policy framework shaping Warrnambool's future development.

2.1 Key State and Regional Policies

Plan for Victoria

As of writing, the state government has very recently released *Plan for Victoria*, a new planning strategy for the state. This replaces *Plan Melbourne 2017-2050* in metropolitan Melbourne and the Regional Growth Plans that applied across the rest of the state.

Plan for Victoria has relatively limited regional strategy content and it is likely further work by state government will be needed to flesh out state-level regional strategy. However, Warrnambool is identified in the strategy as a "Regional Service Centre," defined as "a pivotal town in Victoria's regional development, fostering economic activity and providing a key network of service hubs."

Warrnambool is shown on a map of Key Regional Values (Map 9) at the western end of the Great Ocean Road Region, described as follows:

An iconic region along Victoria's coast, renowned for its sheer limestone cliffs, pockets of rainforest, shipwreck history, world class-surfing breaks and tourism appeal. The Strategic Framework Plan being prepared by the Victorian Government will provide direction to facilitate appropriate development and protect the characteristics that are the attraction.

The same map also shows an offshore wind declared area in the ocean south of Warrnambool. Rural land surrounding Warrnambool is shown as agricultural.

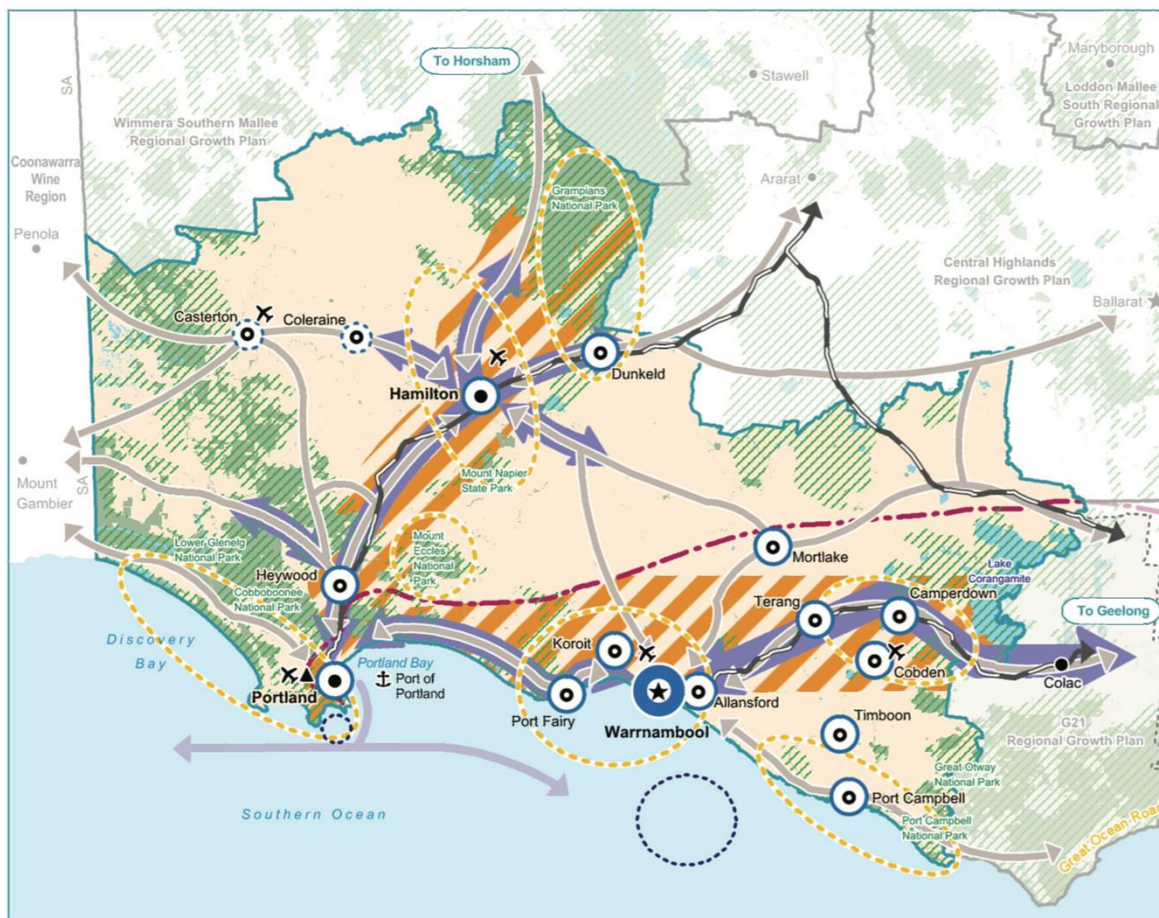
East of Aberline is identified as one of five key regional greenfield projects in the state (Map 2 – Where Victoria Will Change). The Warrnambool Regional Airport Precinct – which is just north of the municipal boundary – is one of 29 regional employment projects and precincts (Map 6 – Victoria's Economic Strengths). The plan sets a housing target of 7,200 homes to be delivered in Warrnambool by 2051.

Great South Coast Regional Growth Plan

Until very recently, the key state planning document outlining Warrnambool's regional role was the Great South Coast Regional Growth Plan (2014), which covered the Warrnambool council area as well as Corangamite, Glenelg, Moyne and Southern Grampians. While the legal status of these documents has not changed as of writing, it appears likely that this will no longer have any formal status given the release of *Plan for Victoria*. However the Regional Growth Plan has more detailed regional content than *Plan for Victoria* and it is therefore expected this strategy may still be referenced to some extent, unless contradicted by new strategy.

Warrnambool's role within the region is summarised in Figure 2 below.

Figure 2: Great South Coast Regional Growth Plan (2014) summary map



Source: Great South Coast Regional Growth Plan

As noted in the map, Warrnambool City is the only Regional City in the region, and is shown as accommodating major growth. Its role is summarised as follows:

Reinforce the role of Warrnambool as the key population and employment centre for the region with key links back to the cities of Geelong and Melbourne. Focus major development to designated growth areas to the north-west, north and north-east, while supporting the CBD as the primary location for retail, services and facilities.

As Warrnambool attracts new higher order services, facilities and service industries, the growth of Warrnambool will produce economic and social benefits for the region.

Allansford is shown as a district town, accommodating medium growth.

It is noted that this regional strategy is due for renewal, which is expected to occur as part of the forthcoming *Plan for Victoria*.

Great Ocean Road Region: Towards a vision for the future (2004)

The state government's strategy for the Great Ocean Road was prepared in 2004. It recognises Warrnambool as the western gateway to the region. This strategy is due to be replaced by a new Great Ocean Road Strategic Framework Plan, expected to be released for comment during 2025.

2.2 Council Strategies and Policies

Key existing council strategies relevant to the current review and their status are summarised in Table 1 below.

Table 1: Key council strategies

Title	Year	Status
Warrnambool Land Use Strategy	2004	Not referenced in planning scheme.
Warrnambool Industrial Land Use Review	2010	Background document in planning scheme.
Warrnambool Sustainable Transportation Strategy 2010-2020	2010	Background document in planning scheme.
Warrnambool Affordable Housing Policy	2012	Background document in planning scheme.
Warrnambool City Wide Housing Strategy 2013	2013	Background document in planning scheme.
Warrnambool Open Space Strategy	2014	Background document in planning scheme.
Green Warrnambool	2018	Not referenced in planning scheme.
Council Plan 2021-2025	2021 (revised 2024)	Council plans are required under s 90 of the <i>Local Government Act 2020</i>). Due for review by 31 October 2025.
Warrnambool 2040	2021	Community vision required under s 88 of the <i>Local Government Act 2020</i>). Due for review by 31 October 2025.
Warrnambool Economic Development and Investment Strategy 2023-2028	2023	Not referenced in planning scheme.

Source: SGS Economics & Planning (2024)

Warrnambool Land Use Strategy (2004)

The Warrnambool Land Use Strategy is the current integrated planning strategy. While not currently directly referenced in the planning scheme, there is a continuity between the general urban structure

approach to infrastructure funding that will achieve progressive delivery of important infrastructure over time.

Warrnambool Sustainable Transportation Strategy 2010-2020 (2010)

This strategy notes the heavy reliance on the private motor vehicle in the City. While it identified various sustainable transport in pre-existing council strategy, it noted that there was no overarching policy bringing these together. While matters such as public transport service levels are outside the control of council, it identified opportunities to improve pedestrian and cycling environments, as well as a range of measures to support sustainable and active transport.

Warrnambool Affordable Housing Policy (2012)

This brief policy identifies a role for council in achieving affordable housing through advocacy, partnership development, advice, research, urban planning, community development, service provision and regulation (with regulation of rooming houses cited).

Urban planning measures identified relate to timely decision-making, provisions of adequate land supply, (unspecified) planning controls, and promoting diversity of housing types in development.

Warrnambool City Wide Housing Strategy (2013)

This strategy noted that the establishment of new growth areas following the 2004 Land Use Strategy had increased land supply so that there was, at that time, 24 years of residential land supply. It noted an expected disparity between merging housing sizes (expected to grow larger) and housing needs (with households expected to become smaller). It supported “identifying further opportunities for development within established urban areas... to reduce pressure on expanding the City’s Urban Settlement Boundary.” Other recommendations included structure planning for the identified growth areas.

Warrnambool Open Space Strategy (2014)

The Open Space Strategy has a stated goal of directing open space planning and management to 2026. It assessed the existing open space network and found a relatively high amount of open space provided per resident, although with some gaps. Access to sports reserves and walking trails was less consistent but still generally good, with the key issue noted being the connectivity between open spaces. The Strategy recommended development of an Open Space Contributions Policy. (The City currently nominates contribution rates in the planning scheme for the North Dennington and North of the Merri River Structure Plan areas, but not elsewhere).

Green Warrnambool (2018)

This strategy expresses a vision that “Warrnambool will be the most environmentally sustainable regional city in Australia.” It identifies goals and actions under six key themes:

- Zero Warrnambool, relating to achieving zero net greenhouse gas emission.
- Adaptable Warrnambool, which specifies actions regarding climate change adaptation.

- Wise Warrnambool, relating to improving waste management practices.
- Naturally Warrnambool, outlining improved maintenance of ecosystems.
- Blue Warrnambool, which addresses waterways, coasts and the marine environment, including Water Sensitive Urban Design.
- Green Warrnambool, which addresses urban greening and cooling.

The Green Warrnambool strategy forms the foundation of the environment goals in the current Council Plan and Community Vision.

Council Plan 2021-2025 (2021, revised 2024) and Warrnambool 2040 (2021)

Council Plans are required to be prepared by councils every four years following local government elections, and reviewed every year as part of the budget process. They identify the key strategic direction for councils and measures that council will take to achieve its objectives, including priorities for services, infrastructure, and amenity. The Warrnambool Council Plan's post-election review will be concluded in 2025.

The current Council Plan exists alongside the Community Vision *Warrnambool 2040*. This is also a statutory requirement, refreshed on the same cycle as the council plan. The Community Vision expresses a vision of at least 10 years, with the Council Plan outlining priorities on a four-year cycle. The vision included in both documents is shown in Figure 4.

Figure 4: Warrnambool Community Vision (Warrnambool 2040)

<h2>OUR PEOPLE</h2> <p>Warrnambool will be a city where all people thrive</p> <p>Our goals:</p> <ol style="list-style-type: none"> 1. A welcoming and inclusive city. 2. A safe and connected community. 3. Warrnambool's people are healthy. 4. Value local Aboriginal identity and culture. 5. A learning community. 	<h2>OUR ECONOMY</h2> <p>Warrnambool will be Australia's most resilient and thriving regional economy</p> <p>Our goals:</p> <ol style="list-style-type: none"> 1. Embrace digital innovation and technological change. 2. Grow a resilient and diverse economy. 3. Foster a creative and collaborative culture. 4. Think globally.
<h2>OUR PLACE</h2> <p>Warrnambool will be Australia's most liveable regional city</p> <p>Our goals:</p> <ol style="list-style-type: none"> 1. An affordable and accessible place to live for every one. 2. Encourages and prioritises sustainable transport. 3. Well-connected outside the city. 4. Has accessible, high-quality public spaces and facilities. 	<h2>OUR ENVIRONMENT</h2> <p>Warrnambool will be Australia's most sustainable city</p> <p>Our goals:</p> <ol style="list-style-type: none"> 1. ZERO WARRNAMBOOL - Innovative solutions for zero net emissions. 2. ADAPTABLE WARRNAMBOOL - adapt to the impacts of climate change. 3. WISE WARRNAMBOOL - a wise city, that wastes not. 4. NATURAL WARRNAMBOOL - enjoy, love, respect and care for the natural environment. 5. BLUE WARRNAMBOOL - water for life. 6. GREEN WARRNAMBOOL - a city in nature.

Source: *Warrnambool 2040* (2021)

Warrnambool Economic Development and Investment Strategy 2023-2028

This strategy outlines key economic priorities and actions over a five-year horizon. It outlines an Economic Development Framework summarised as follows:

- Theme 1 – 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.
- Theme 2 – 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
- Theme 3 – Workforce Attraction and Skills Development: Attract a skilled and engaged workforce that contributes to service provision, business activity and a productive economy.
- Theme 4 – 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.

2.3 Warrnambool Planning Scheme

The following discussion summarises key overarching strategic directions from the Warrnambool Planning Scheme (planning scheme), as well as the key policies and provisions guiding the future growth and development of Warrnambool.

Municipal Planning Strategy

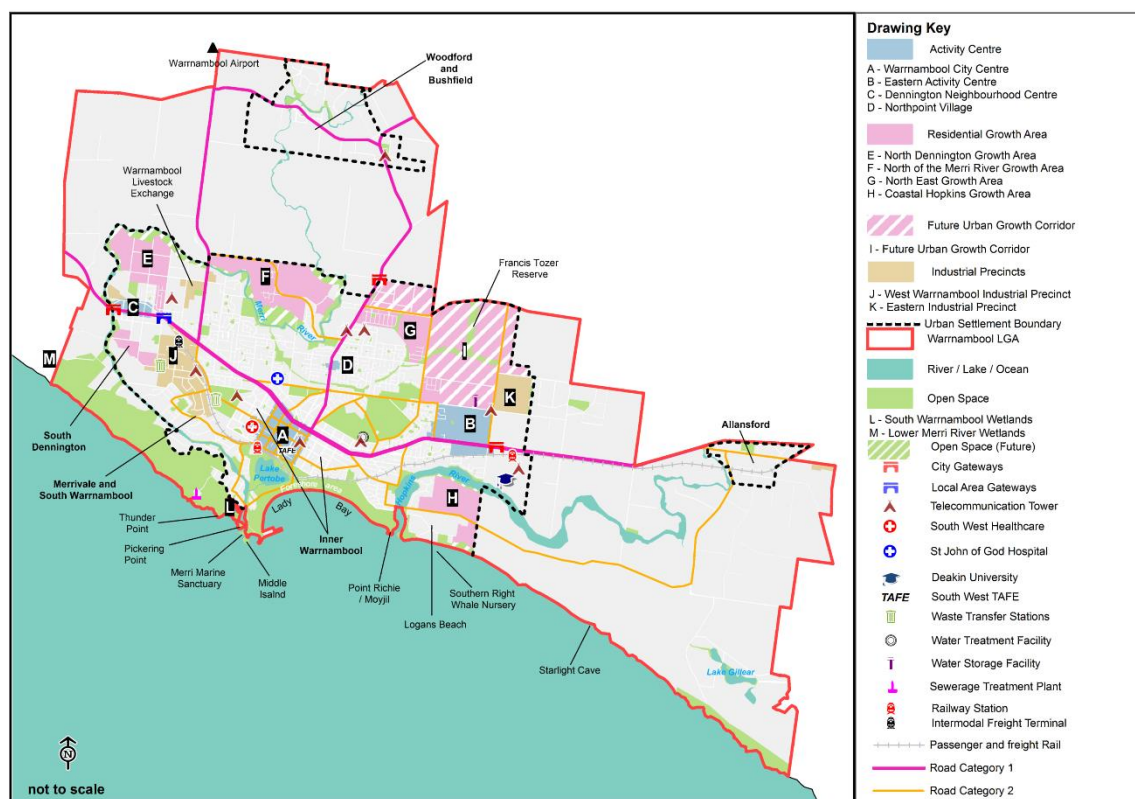
The Municipal Planning Strategy (MPS) uses the vision from the 2016 Council Plan – “a cosmopolitan city by the sea” – as its starting point³. It then extracts four objectives relative to land use planning from the plan:

- Sustain, enhance and protect the natural environment.
- Foster a healthy, welcoming city that is socially and culturally rich.
- Maintain and improve the physical places and visual appeal of the city.
- Develop a smarter economy with diverse and sustainable employment.

The MPS includes a Strategic Framework plan at cl 02.04 that represents the vision for the City (Figure 5). This shows various elements of the City’s structure and growth that are described in the MPS, notably at cl 02.03-1.

³ Of note, this language was not renewed in the 2021 Council Plan. The Planning Scheme Review suggest a revised vision of “A Thriving City at the Heart of the Coast and the Country”.

Figure 5: Existing Strategic Framework Plan



Source: Warrnambool Planning Scheme, cl 02.04

The MPS and its Strategic Framework Plan identify seven major growth areas:

- North East Warrnambool Growth Area.
- Coastal Hopkins Growth Area.
- North Dennington Growth Area.
- North of the Merri River Growth Area.
- East of Aberline Road Future Urban Growth Corridor.
- South Dennington Growth Area.
- Eastern Activity Centre.

Clause 02.03-1 – Settlement also identifies an activity centre hierarchy from the 2007 *Warrnambool Retail Strategy*. The Warrnambool City Centre is identified as a Principal Activity Centre, the “principal location for higher-order professional services, health services, education providers, community services, hospitality, entertainment and tourism.”

This is supplemented by the Eastern Activity Centre, identified as playing “a secondary retail role” and serving “a subregional retail role and is also the principal bulky goods precinct, with a regionally-significant cluster of restricted retail stores.”

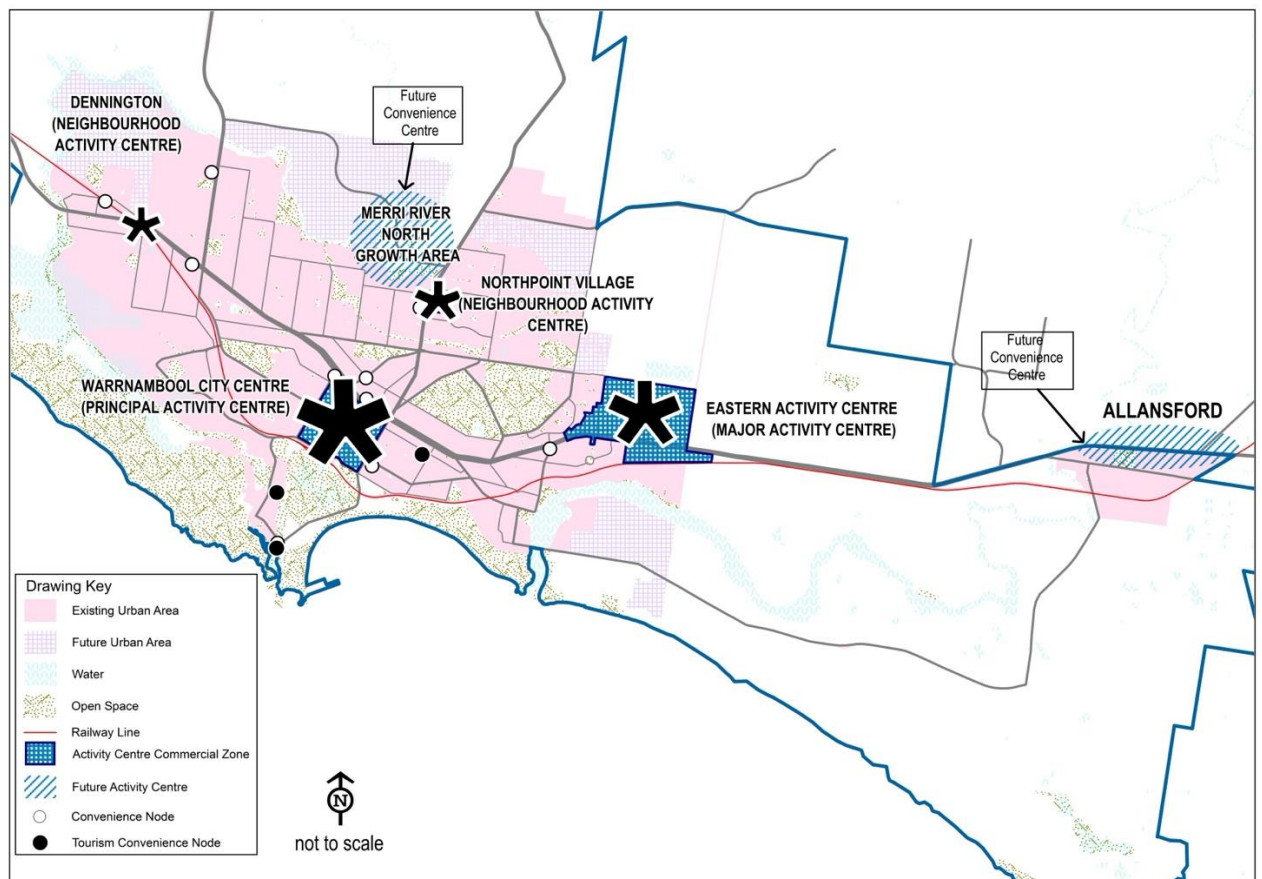
There are two Neighbourhood Activity Centres identified (Northpoint Village and Dennington). Convenience Centres are proposed at Allansford and within the North of the Merri River Growth Area. (Note that there is then a further activity centre map in the Planning Policy Framework at cl 11.03-1L-01, discussed below and reproduced as Figure 6.)

The MPS outlines Strategic Directions under the themes of Settlement (which covers the City structure as discussed above), Environmental and Landscape Values, Environmental Risks and Amenity, Natural Resource Management, Built Environment and Heritage, Housing, Economic Development, Transport and Infrastructure, and Gaming. These are reproduced in Appendix A.

Planning Policy Framework

Place-based guidance in the planning scheme is nested at cl 11.03 – Planning for Places. This notably includes, at cl 11.03-1L-01 – Activity Centres in Warrnambool, policy about the City’s Activity Centre hierarchy. This includes the map reproduced at Figure 6, showing the two key existing activity centres as well as the smaller and proposed centres.

Figure 6: Activity centre map from planning scheme



Source: Warrnambool Planning Scheme, cl 11.03-1L-01

The scheme includes policies relating to the various activities centre as follows:

- Warrnambool City Centre at cl 11.03-1L-02.

- Dennington Neighbourhood Activity Centre at cl 11.03-1L-03.
- Eastern Activity Centre at cl 11.03-1L-04.

These include land use strategies and guidelines reinforcing the preferred roles of each centre, as well as guidance about matters such as urban design, built form, access, open space, and infrastructure. There are framework plans provided for each of the above centres, as well as a map defining the Northpoint Village Neighbourhood Activity Centre.

There are also policies nested at cl 11.03-2L for the various growth areas:

- North of Merri Growth Area at cl 11.03-2L-01.
- Coastal Hopkins Growth Area at cl 11.03-2L-02.
- North Dennington Growth Area at cl 11.03-2L-03.
- These include guidance that supplements Development Plan Overlays for each growth area (discussed below). A fourth policy at cl 11.03-2L-04 relates to Bushfield, Woodford and Allansford. This notes that growth in Bushfield and Woodford should be deferred pending resolution of sewerage and effluent management issues. Further growth in Allansford is to be provided for “on the basis of the availability of stormwater drainage infrastructure.”

Zones

The zoning pattern in Warrnambool generally reflects established patterns and policy settings, with the following points of note:

- Residential areas in both established neighbourhoods and growth areas are overwhelmingly within a single schedule to the General Residential Zone (although Growth Areas are distinguished by the application of Development Plan Overlays as discussed below). However, most of the residential areas will be zoned as Urban Growth Zone (UGZ) on the East of Aberline Structure Plan⁴.
- There is a small area of Neighbourhood Residential Zone used for the Coastal / Hopkins River Environment Growth Area.
- There are limited areas of Rural Living Zone on the northeast, east and southeast edges of Warrnambool City. Those to the northeast are in areas noted on the Strategic Framework Plan (reproduced as Figure 5) as future growth corridors. Rural Living Zone also is in Woodford, with some in Allansford (alongside Township Zone).
- The Urban Floodway Zone is applied along the Merri River and Russells Creek.

Overlays

The City makes extensive use of the Development Plan Overlays (DPOs) across growth areas and key redevelopment precincts.

DPOS applying to key growth areas are:

⁴ <https://vpa.vic.gov.au/project/east-aberline/>

- DPO7 – North East Warrnambool Growth Area.
- DPO8 – North Dennington Development Plan.
- DPO10 – North of the Merri River Development Plan.
- DPO 13 – North Side of Hopkins Point Road.

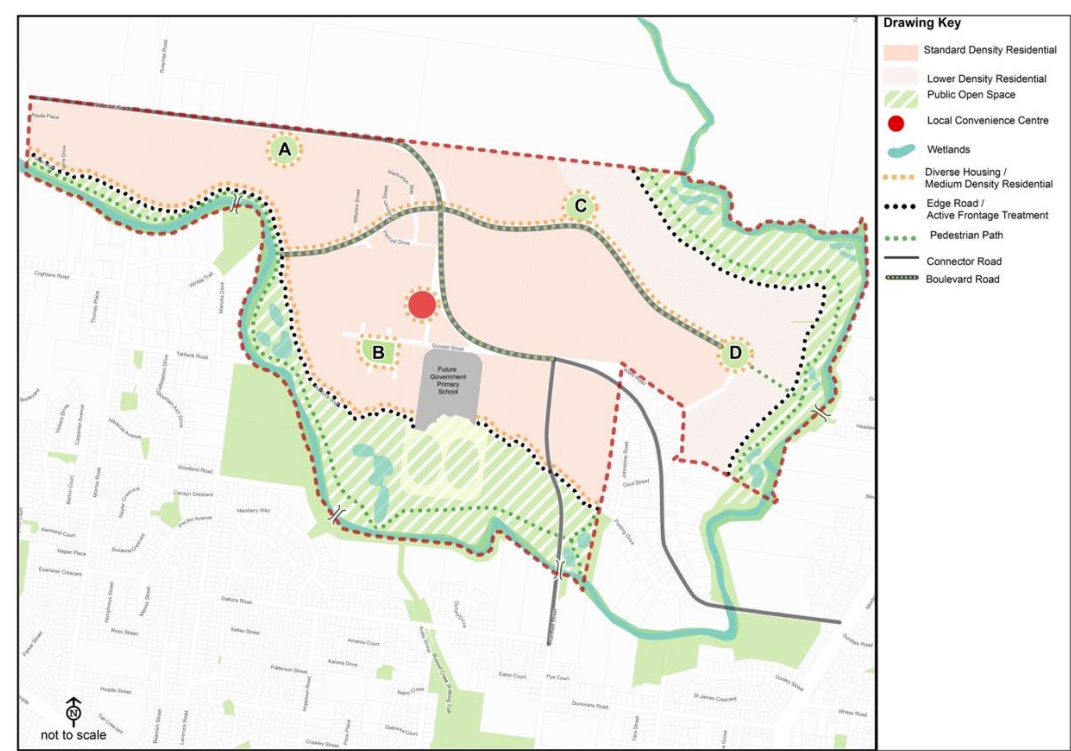
DPO8, DP10, and DPO13 all include Growth Area Framework Plans, shown as Figure 7, Figure 8, and Figure 9. DPOs are also used across activity centres (DPOs 14 and 15 for the Eastern Activity Centre) and industrial areas (DPO11 for the Horne Rd industrial area.)

Figure 7: North Dennington Growth Area Framework Plan



Source: Warrnambool Planning Scheme, DPO8

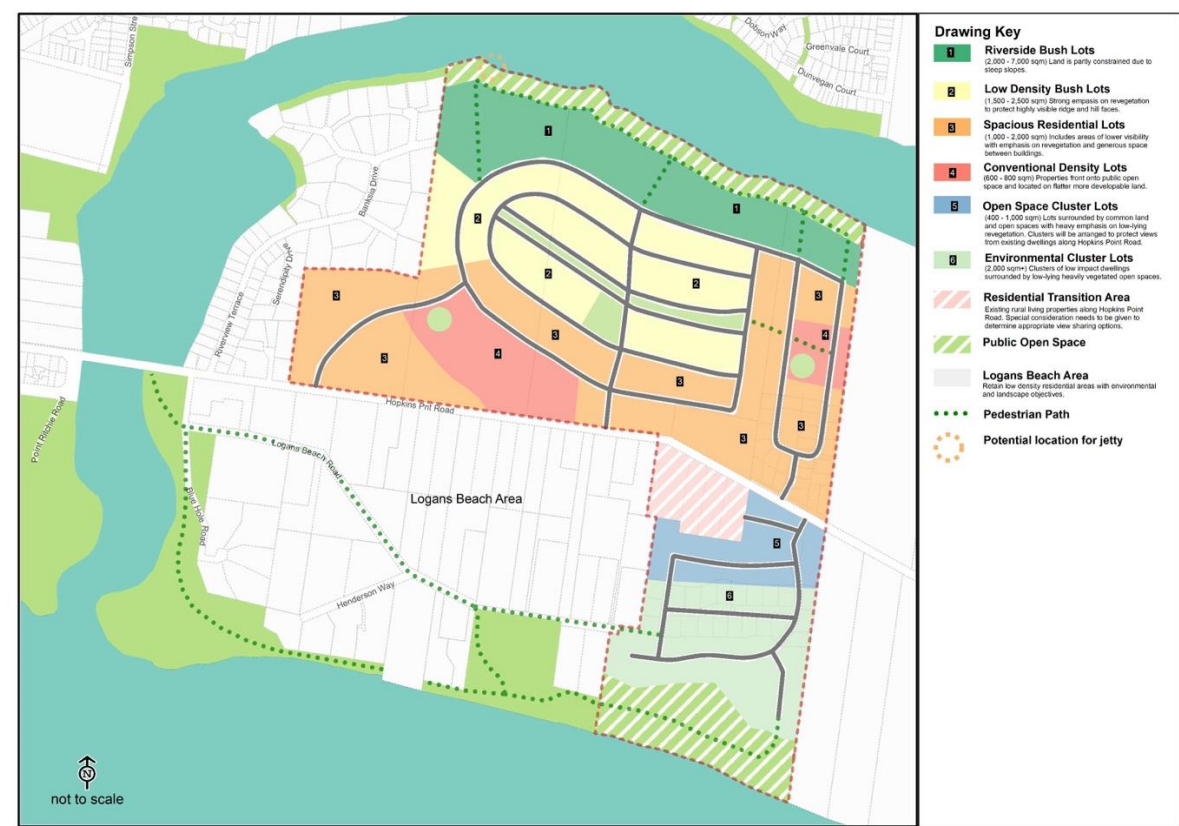
Figure 8: North of the Merri River Growth Area Framework Plan



Source:

Warrnambool Planning Scheme, DPO19

Figure 9: Coastal Hopkins River Growth Area Framework Plan



Source: Warrnambool Planning Scheme, DPO13

Overlays also notably identify key environmental hazards. These are discussed further in Section 6.

3. Demographics, housing and community profile

This chapter explores Warrnambool's population trends, migration patterns, housing dynamics, and community well-being, identifying key social and economic challenges and opportunities.

3.1 Population growth

Historic population growth

Warrnambool experienced a steady population growth of about 3,000 people between Census years 2011 and 2021, representing an average annual growth rate of 1.0 per cent. This is lower than the state's average annual growth rate of 2.0 per cent for the same period. This is shown in Table 2.

Table 2: Population growth of Warrnambool, 2011-2021

	2011	2016	2021	2011-21 Change (#)	2011-21 AAGR (%)
Warrnambool	32,029	33,655	35,406	3,377	1.0%
Victoria	5,354,042	5,926,624	6,503,491	1,149,449	2.0%

Source: ABS Census 2011, 2016 and 2021

Forecast population growth

Warrnambool's population is forecast to reach 41,000 people by 2046, an increase of 5,500 relative to the 2021. This represents a growth rate of 0.6 per cent per annum between 2021 and 2046, which is lower than the annual rate of growth rate (AAGR) between 2011 and 2021 (1%)⁵.

Note that the Warrnambool Planning Scheme projects that Warrnambool's population would reach 41,000 people by 2031. However, data from VIF23 has shown that the population growth of Warrnambool could be lower than that by 2031 (39,000 people). These are shown in the table below.

⁵ Victorian State Government forecasts (Victoria in Future 2023) forecasts are adopted to 2036 (the horizon of published data). Beyond this, to 2046, SGS extends population by age forecasts based on a cohort component modelling approach with key assumptions (fertility, mortality, net migration) assumed to remain stable and reflect those implied by VIF23 for the period 2031-2036.

Table 3: Population forecast of Warrnambool, 2021-2046

	2021	2031	2036	2046	2021-46 Change (#)	2021-46 AAGR (%)
Warrnambool	35,406	37,443	38,584	40,970	5,537	0.58%

Source: ABS Census 2021, SGS Economics and Planning (2025) and VIF23Migration

Overseas migration has been the primary driver of population growth in the Warrnambool LGA over the past five years, except in 2020-21 when the international borders were closed in Australia.

The impact of overseas migration is more pronounced given the decline in internal migration before and after Covid-19. The net internal migration in Warrnambool only increased slightly during 2019–20 and 2021–22, suggesting that many people moved to Warrnambool during Covid-19 years from other regions across Australia. These are shown in Table 4.

Table 4: Components of population change in Warrnambool, 2018-19 to 2022-23

	2018-19	2019-20	2020-21	2021-22	2022-23
Total estimated population change	318	341	85	143	331
Natural increase	74	66	70	1	27
Net internal migration	-62	63	68	-75	-49
Net overseas migration	306	212	-53	217	353

Source: ABS - Regional population (2024)⁶

3.2 Age structure

Historic age structure

Growth in Warrnambool's population between 2011 and 2021 occurred across almost all age groups, with the highest growth totals in *Retirees (65 and over)*, followed by *Mature Adults (45-64)*. During this period, the average annual growth rate of the Retiree population was 1.07 per cent, followed by 0.87 per cent of the Mature Adults group. The Children (0-4) and Youth cohorts (5-19) were the groups that experienced a population plateau or decline over this period, with an average annual growth rate of 0.05 per cent and -1.3 per cent respectively. These are shown in Table 5.

⁶ Australian Bureau of Statistics (2024) *Regional population*, accessed 13 January 2025.
<https://www.abs.gov.au/statistics/people/population/regional-population/latest-release#data-downloads>

Table 5: Historic age profile totals and growth rates in Warrnambool, 2011-2021

Age group	2011	2016	2021	2011-21 Change (#)	2011-21 AAGR (%)
Children (0-4)	2,087	1,948	1,828	-259	-0.0%
Youth (5-19)	6,686	6,405	6,457	-229	-1.3%
Young Adult (20-29)	4,086	4,372	4,120	34	-0.3%
Adult (30-44)	5,918	5,828	6,453	535	0.1%
Mature Adult (45-64)	8,117	8,736	9,032	915	0.9%
Retiree (65 and over)	5,129	6,355	7,516	2,387	1.1%

Source: ABS Census 2011, 2016 and 2021.

Forecast age structure

Extended analysis of VIF23 data shows that the Retiree group will experience the highest growth among all age cohorts in the future. This group is forecast to have an increase of about 4,400 people between 2021 and 2046. This represents an average annual growth rate of 59.7 per cent, significantly higher than the growth rates of the children group (-4.3%), youths (-8.6%), young adults (-3.6%), adults (0.6%) and mature adults (5.5%). These are shown in Table 6.

Table 6: Age structure forecast of Warrnambool, 2021-2046

	2021	2031	2036	2046	2021-46 Growth	2021-46 AAGR (%)
Children (0-4)	1,881	1,838	1,864	1,873	1,859	-4.3%
Youth (5-19)	6,533	6,381	6,014	5,877	5,935	-8.6%
Young Adult (20-29)	4,215	4,013	4,398	4,552	4,241	-3.6%
Adult (30-44)	6,479	6,700	6,466	6,228	6,203	0.6%
Mature Adult (45-64)	8,998	8,854	8,926	9,184	9,610	5.5%

	2021	2031	2036	2046	2021-46 Growth	2021-46 AAGR (%)
Retiree (65 and over)	7,327	8,566	9,775	10,870	11,364	59.7%

Source: SGS Economics and Planning (2025) using data from VIF23. Notes: The 2036-2046 forecast is undertaken using the VIF23 data as the starting point. There exists a small discrepancy in the 2021 age structure numbers in the above table and those in Table 5 as the above table uses 2021 population data from VIF23 instead of ABS Census 2021 data.

3.3 Household composition

Most of the households in Warrnambool are couple families with no children. As shown in the table below, of about 14,000 households in Warrnambool in 2021, 3,900 were couple families with no children. This type of household also has experienced a moderate increase in number between 2011 and 2021 (22%), only behind lone-person households (26%) and non-classifiable households (48%).

Table 7: Family household composition in Warrnambool, 2011-2021

Family household composition	2011	2016	2021	2011-21 Change (#)	2011-21 Change (%)
Couple family with no children	3,177	3,409	3,891	714	22%
Couple family with children	3,416	3,417	3,635	219	6%
One parent family	1,432	810	910	-522	-36%
Other family	137	121	160	23	17%
Group household	493	502	452	-41	-8%
Lone person household	3,369	3,759	4,229	860	26%
Visitors only household	222	158	226	4	2%
Other non-classifiable household	350	757	518	168	48%
Total	12,596	12,933	14,021	1,425	11%

Source: ABS Census 2011, 2016 and 2021

3.4 Dwelling structure

Historic dwelling structure

As shown in Table 9, dwellings in Warrnambool have experienced a steady growth between 2011 and 2021 with an increase of about 2,000 dwellings. In 2021, there were approximately 16,000 dwellings in Warrnambool.

Notably, the annual average growth rate of dwellings in Warrnambool (1.4%) is higher than that of population (1%). This trend could be attributed to several factors, including second-home ownership, declining household sizes, and the presence of Airbnb in the municipality.

Table 8: Historic population and dwelling growths in Warrnambool, 2011-2021

	2011	2016	2021	2011-21 Growth	2011-21 AAGR (%)
Population	32,029	33,655	35,406	3,377	1.0%
Dwellings	13,927	15,124	15,968	2,041	1.4%

Source: ABS Census 2011, 2016 and 2021

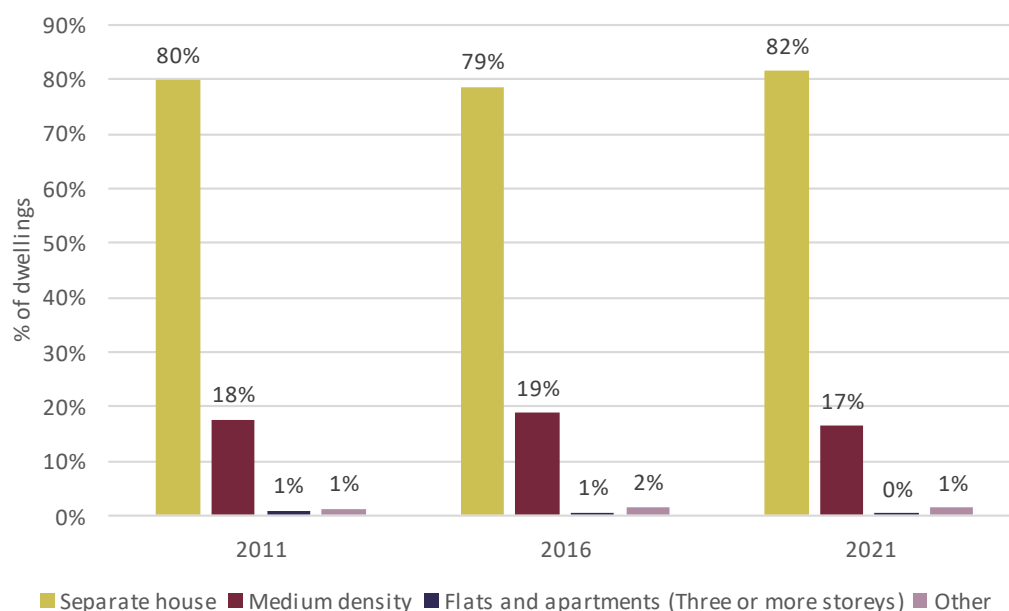
In Warrnambool, the majority of dwellings are separate houses. Of about 16,000 dwellings in Warrnambool in 2021, 82 per cent, or 13,000 were separate houses. Notably, between 2011 and 2021, the number of separate houses in the LGA has increased by 17 per cent, whereas the number of flats and apartments of three or more storeys has decreased by 47 per cent during the same period. The relatively small numbers, combined with categorisation changes between censuses, contribute to a larger percentage decrease. These are shown in Table 9 and Figure 10.

Table 9: Historic dwelling structure in Warrnambool (#), 2011-2021

	2011	2016	2021	2011-21 Change (#)	2011-21 Change (%)
Separate house	11,149	11,906	13,024	1,875	17%
Medium density (units, townhouses and apartments up to two storeys)	2,466	2,872	2,641	175	7%
Flats and apartments (three or more storeys)	130	90	69	-61	-47%
Other	182	256	234	52	29%
Total	13,927	15,124	15,968	2,041	15%

Source: ABS Census 2011, 2016 and 2021. Notes: Medium density dwellings attached dwellings (such as semi-detached, terraced houses and townhouses), as well as one or two storey apartments buildings. Flat and apartments include flats and apartment buildings with three or more storeys.

Figure 10: Historic dwelling structure in Warrnambool (%), 2011-2021



Source: ABS Census 2011, 2016 and 2021. Notes: Medium density dwellings attached dwellings (such as semi-detached, terraced houses and townhouses), as well as one or two storey apartments buildings. Flat and apartments include flats and apartment buildings with three or more storeys.

Forecast dwelling structure

Using the population projection from VIF23 as a starting point, SGS's Housing Demand Model determines how many new dwellings of each type will be required in Warrnambool by 2046. It is forecast that about 2,600 dwellings will be needed between 2021 and 2046 in Warrnambool. This represents a 17 per cent increase in the total housing supply over 25 years with a particular increase in demand for apartment dwellings. Separate houses are also expected to have a moderate increase in demand (19%) and remain the most popular dwelling type in Warrnambool. These are shown in Table 10 and Figure 11.

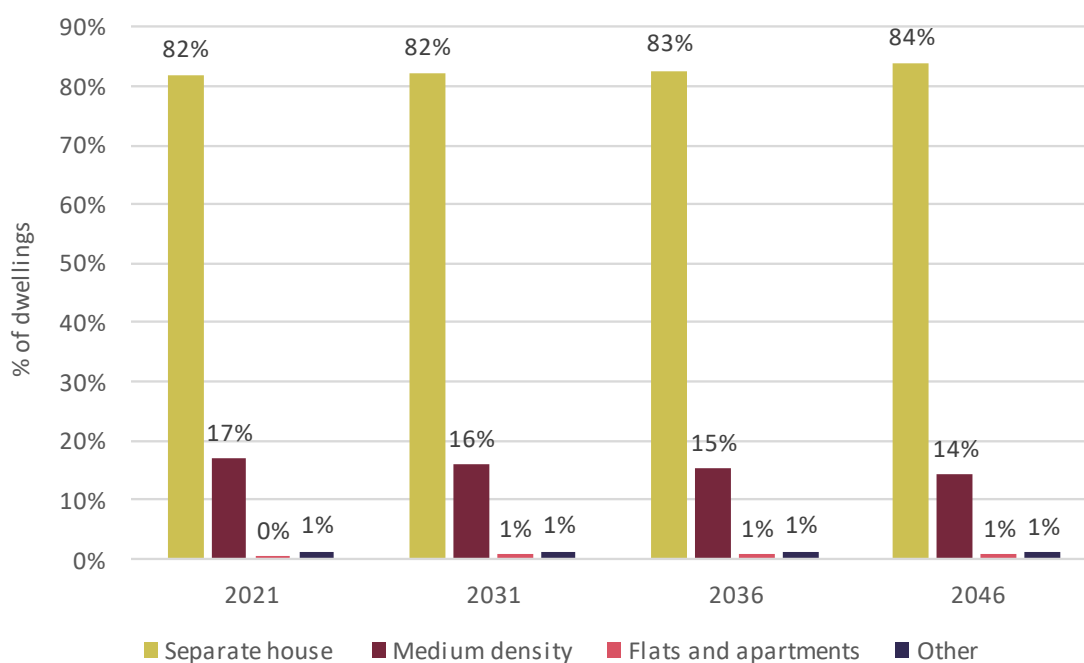
Table 10: Dwelling structure forecast in Warrnambool (#), 2021-2046

	2021	2031	2036	2046	2021-46 Change (#)	2021-46 Change (%)
Separate house	13,033	14,216	14,893	15,569	2,536	19%
Medium density	2,626	2,756	2,759	2,629	3	0%

(units, townhouses and apartments up to two storeys)						
Flats and apartments (three or more storeys)	68	121	130	138	70	103%
Other	206	220	227	229	23	11%
Total	15,933	17,313	18,009	18,565	2,632	17%

Source: SGS Economics and Planning's Housing Demand Model (2025). Notes: There exists a small discrepancy in the 2021 dwelling numbers in the above table and those in Table 8 as SGS's Housing Demand Model uses 2021 population data from VIF23 as an input instead of ABS Census 2021 data. Medium density dwellings attached dwellings (such as semi-detached, terraced houses and townhouses), as well as one or two storey apartments buildings. Flat and apartments include flats and apartment buildings with three or more storeys.

Figure 11: Dwelling structure forecast in Warrnambool (%), 2021-2046



Source: SGS Economics and Planning's Housing Demand Model (2025). Notes: Medium density dwellings attached dwellings (such as semi-detached, terraced houses and townhouses), as well as one or two storey apartments buildings. Flat and apartments include flats and apartment buildings with three or more storeys.

Housing targets

The Victorian government's recent *Plan for Victoria* includes housing targets which identify the number of homes to be built between 2023 and 2051. According to these targets, Warrnambool had approximately 16,400 existing homes as of 2023 and will require an additional 7,200 completed

dwellings by 2051 to meet projected demand. This reflects an average annual growth rate of 1.3 per cent projected between 2023 and 2051. SGS's Housing Demand Model, however, forecasts a lower average annual growth rate of dwellings in the future (0.6%), based on the demand of 2,632 dwellings between 2021 and 2046. Further stages of analysis will test multiple growth scenarios.

Tenure type

In Warrnambool, the majority of dwellings are owned outright. Of about 14,000 private and occupied dwellings in Warrnambool in 2021, 37 per cent, or 5,200 were owned outright. The number of dwellings owned with a mortgage was also significantly (4,500 dwellings or 32%). 29 per cent of dwellings in 2021 were rented dwellings (4,000 dwellings).

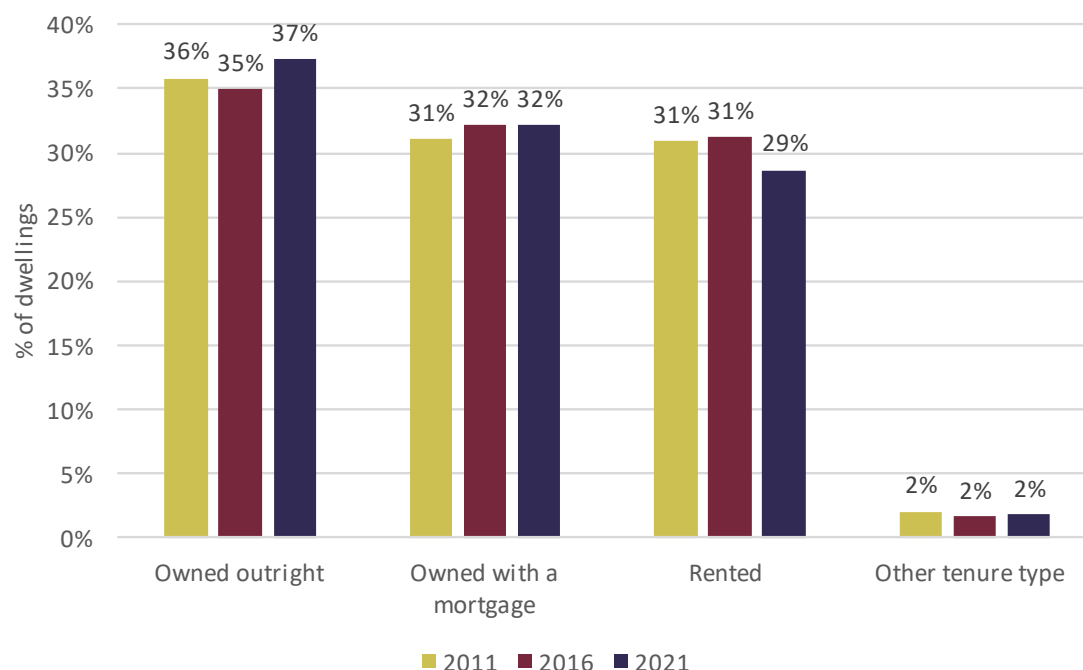
Notably, between 2011 and 2021, the number of dwellings owned outright and those owned with a mortgage increased by 22 percent each. These are shown in Table 11 and Figure 12.

Table 11: Historic tenure type in Warrnambool (#), 2011-2021

	2011	2016	2021	2011-21 Change (#)	2011-21 Change (%)
Owned outright	4,255	4,325	5,207	952	22%
Owned with a mortgage	3,693	3,975	4,503	810	22%
Rented	3,677	3,867	4,008	331	9%
Other tenure type	243	201	254	11	5%
Total	11,868	12,368	13,972	2,104	18%

Source: ABS Census 2011, 2016 and 2021

Figure 12: Historic tenure type in Warrnambool (%), 2011-2021



Source: ABS Census 2011, 2016 and 2021

3.5 Health and well-being

Long-term health conditions

According to the ABS Census 2021, the top five long-term health conditions that Warrnambool residents suffer from are mental health conditions (including depression or anxiety), asthma, arthritis, diabetes (excluding gestational diabetes) and heart disease (including heart attack or angina)⁷.

Persons with disability

As of 2022, 3.21 per cent of Warrnambool residents were participants in the National Disability Insurance Scheme (NDIS). This proportion is higher than the averages for both Victoria (2.2%) and Australia (2.1%)⁸.

⁷ Australian Bureau of Statistics (2023) *Warrnambool – 2021 Census All persons QuickStats*, accessed 13 January 2025. <https://www.abs.gov.au/census/find-census-data/quickstats/2021/LGA26730>

⁸ Western Victoria Primary Health Network (2024) *Western Victoria Health Information by Local Government Area Dataset*, accessed 14 January 2025. <https://westvicphn.com.au/about-us/population-health/western-victoria-health-information-by-local-government-area-dataset/>

3.6 Housing affordability and availability

Mortgage stress

In 2021, about 11 per cent of households in Warrnambool paid more than 30 per cent of household income on mortgage payments (the indicator of mortgage stress). This was lower than the figure of Victoria as a whole (16%), indicating that mortgage stress is less of an issue in Warrnambool compared to the rest of Victoria. These are shown in Table 12.

Table 12: Summary of households with and without mortgage stress in Warrnambool compared to Victoria, 2021

Mortgage affordability indicator	Number and share of households, Warrnambool	Number and share of households, Victoria
Households where mortgage repayments are less than or equal to 30 per cent of household income	3,549 (79%)	637,758 (74%)
Households where mortgage repayments are more than 30 per cent of household income	477 (11%)	133,287 (16%)
Unable to be determined	458 (10%)	91,606 (11%)

Source: ABS Census 2021

Rental vacancy rates

The latest data shows that Warrnambool has the vacancy rate of 0.47 per cent⁹. This is below Real Estate Institute of Australia's healthy benchmark of 3 per cent¹⁰. Having a low vacancy rate means there are limited places to rent in the LGA, which results in the following implications:

- Rents could increase, making renting more expensive
- People looking to move to Warrnambool may struggle to find accommodation
- Those who cannot afford the rents may be forced to move out of the municipality and/or could experience rental stress

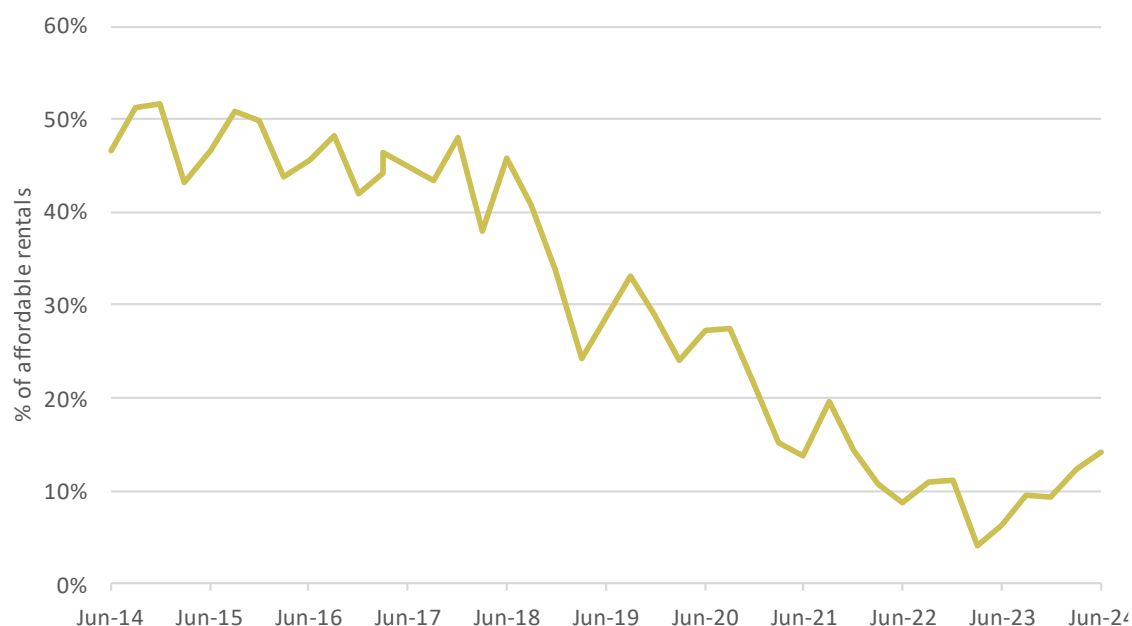
Rental affordability

A direct consequence of low rental availability is decreasing affordability, as prospective tenants pay higher amounts to secure housing. As shown in Figure 13, the proportion of affordable rentals in Warrnambool has decreased significantly from 47 per cent in June 2014 to 14 per cent in June 2024.

⁹ Real Estate Investar Australia (n.d.) *Investment Property Warrnambool, VIC*, accessed 13 January 2025. <https://www.realestateinvestar.com.au/property/victoria/warrnambool>

¹⁰ PRD Real Estate (2021) *Which capital city has broken the record for vacancy rates?*, accessed 13 January 2025. <https://www.prd.com.au/corporate-news-page/article/vacancy-rates-breaking-10-year-records/>

Figure 13: Proportion of affordable rentals in Warrnambool, June 2014 to June 2024



Source: Residential Tenancies Bond Authority (2024) ¹¹

3.7 Educational attainment

In 2021, the majority of residents in Warrnambool's highest level of education was school education or less (60%). This was also higher than that of Victoria (50%). Only 19 per cent of Warrnambool's residents held a bachelor's degree and above, compared to 29 per cent in Victoria. These are shown in Table 13.

Table 13: Highest education attainment of Warrnambool residents compared to Victoria residents, 2021

	Warrnambool	Victoria
Bachelor's degree and above (*)	19%	29%
Certificate or diploma	9%	10%
School education or less (**)	60%	50%
Inadequately described	2%	3%
Not stated	9%	8%

¹¹ Residential Tenancies Bond Authority (2024) *Rental Report - Quarterly: Affordable Lettings by LGA*, accessed 29 January 2025. <https://discover.data.vic.gov.au/dataset/rental-report-quarterly-affordable-lettings-by-lga>

Total	100%	100%
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Source: ABS Census 2021. (*): This includes Bachelor Degree Level, Graduate Diploma and Graduate Certificate Level and Postgraduate Degree Level. (**): This includes Certificate III & IV Level, Secondary Education - Years 10 and above, Certificate I & II Level and Secondary Education - Years 9 and below.

3.8 Inequality and disadvantage

A SEIFA score, more specifically the Index of Relative Socio-economic Disadvantage (IRSD), is a measure of social and economic disadvantage. It is created using information about people and households in a particular area. A lower score indicates that an area is relatively disadvantaged compared to an area with a higher score. This score is standardised against a mean of 1,000. That means that a SEIFA score of 1,000 is average. Anything above or below 1,000 is either more or less than average advantage/disadvantaged¹². Overall, Warrnambool has slightly higher level of disadvantage with the score of 995¹³.

Housing capacity

According to a 2021 residential supply audit, there was an approximate residential lot supply of around 5,550 lots, comprising 77% broad acre and 23% infill¹⁴. The municipality has a relatively recent assessment of supply and demand from October 2022, this supply is estimated to be around 9,372 additional dwellings (including lots not currently zoned for industrial).¹⁵

As noted above, an extended ViF estimate of housing demand to 2046 forecasts and additional 2,600 dwellings.

On balance, there is sufficient land to meet projected demand when looking at a 15-year horizon, but there will need to be a further review to understand types of demand (location and typology).

3.9 Key findings

- Population growth in Warrnambool has been slow during the last ten Census years, and is expected to continue growing slowly into the future.

¹² Australian Bureau of Statistics (2023) *Socio-Economic Indexes for Areas (SEIFA), Australia methodology*, accessed 13 January 2025. <https://www.abs.gov.au/methodologies/socio-economic-indexes-areas-seifa-australia-methodology/2021>

¹³ Australian Bureau of Statistics (2023) *Socio-Economic Indexes for Areas (SEIFA), Australia*, accessed 13 January 2025. <https://www.abs.gov.au/statistics/people/people-and-communities/socio-economic-indexes-areas-seifa-australia/latest-release#data-downloads>

¹⁴

<https://www.warrnambool.vic.gov.au/sites/warrnambool.vic.gov.au/files/documents/property/infrastructure%20and%20planning/strategic%20projects/land%20supply/Residential%20Land%20Supply%202021.pdf>

¹⁵

https://www.warrnambool.vic.gov.au/sites/warrnambool.vic.gov.au/files/documents/property/infrastructure%20and%20planning/strategic%20projects/Residential%20Land%20Supply_Assessment_Final_V1.1.pdf

- An extended ViF estimate of housing demand forecasts and additional 2,600 dwellings by 2046.
- Population growth continues to be driven by overseas migration.
- With young people in decline and older adults increasing most rapidly, Warrnambool is expected to have an ageing population with those aged 65 and older forecasted to become the largest cohort by 2031.
- Households are dominated by couples with no children and lone person households, with dwellings increasing faster than population.
- Separate houses are by far the main dwelling structure and have continued to increase their share, but there will be a significant increase in demand for high-rise dwellings going forward.
- A higher proportion of Warrnambool residents have a disability compared to the rest of Victoria.
- Fewer households in Warrnambool are dealing with mortgage stress compared to the rest of Victoria, however rental affordability has declined significantly over the past ten years and rental vacancies are extremely low.
- Warrnambool residents have a lower level of higher education attainment compared to Victoria, but is neither particularly disadvantaged nor advantaged compared to the state average.

4. Economy

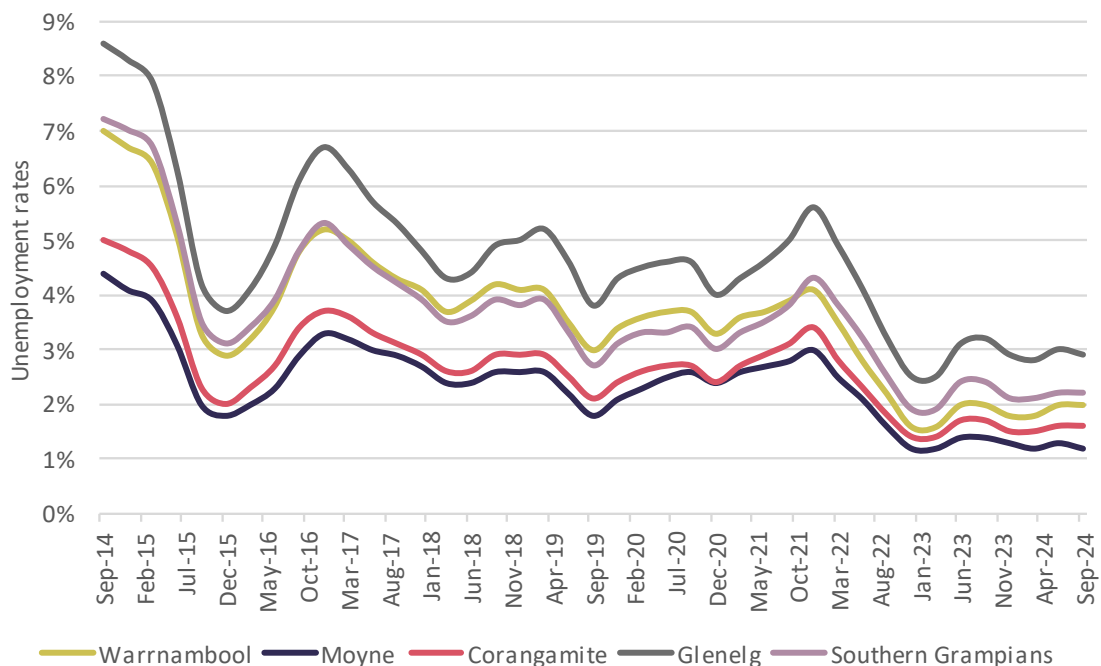
This chapter analyses Warrnambool's employment landscape, including key economic drivers such as tourism, income distribution, and broader economic trends affecting the city's growth and resilience.

4.1 Employment profile

Unemployment rates

The unemployment rates of Warrnambool have decreased significantly in the past 10 years, despite a few spikes in 2014, 2016 and 2021. As of September 2024, Warrnambool's unemployment rate was 2 per cent. This was generally higher than in neighbouring LGAs (Moyne, Corangamite, and Southern Grampians) during the 2014-2024 period, except for Glenelg which had a higher rate. This is shown in Figure 14.

Figure 14: Unemployment rates of Warrnambool LGA compared to neighbouring LGAs, September 2014 – September 2024

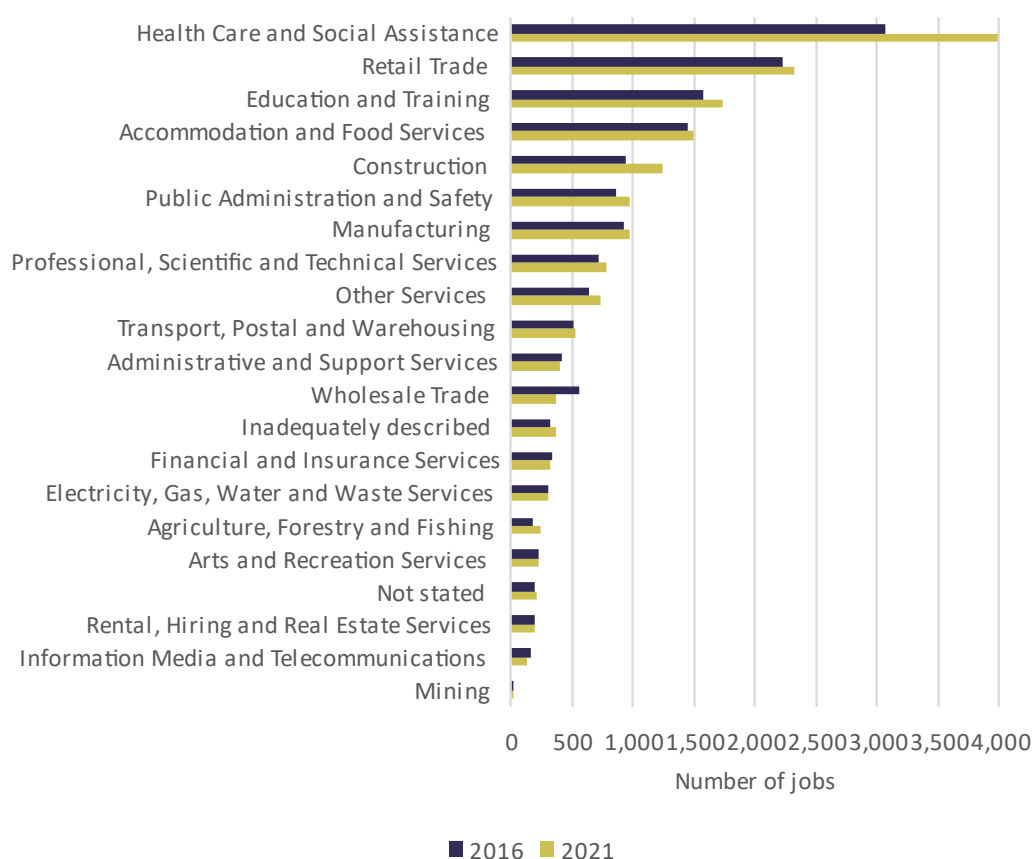


Source: Jobs and Skills Australia (2024)

Employment and output by industry

In 2021, there were estimated to be 17,500 jobs in Warrnambool, this is an increase of around 1,700 jobs from 2016. In 2021, the key employment industries in Warrnambool were Health Care and Social Assistance, Retail Trade, and Education and Training (Figure 15). This is not surprising given that the Warrnambool Base Hospital is a key anchor institution within the municipality, which is supported by a range of supplementary health services. In addition, Deakin University and South West TAFE campuses are key educational institutions in Warrnambool.

Figure 15: Industry of employment in Warrnambool, 2016 and 2021

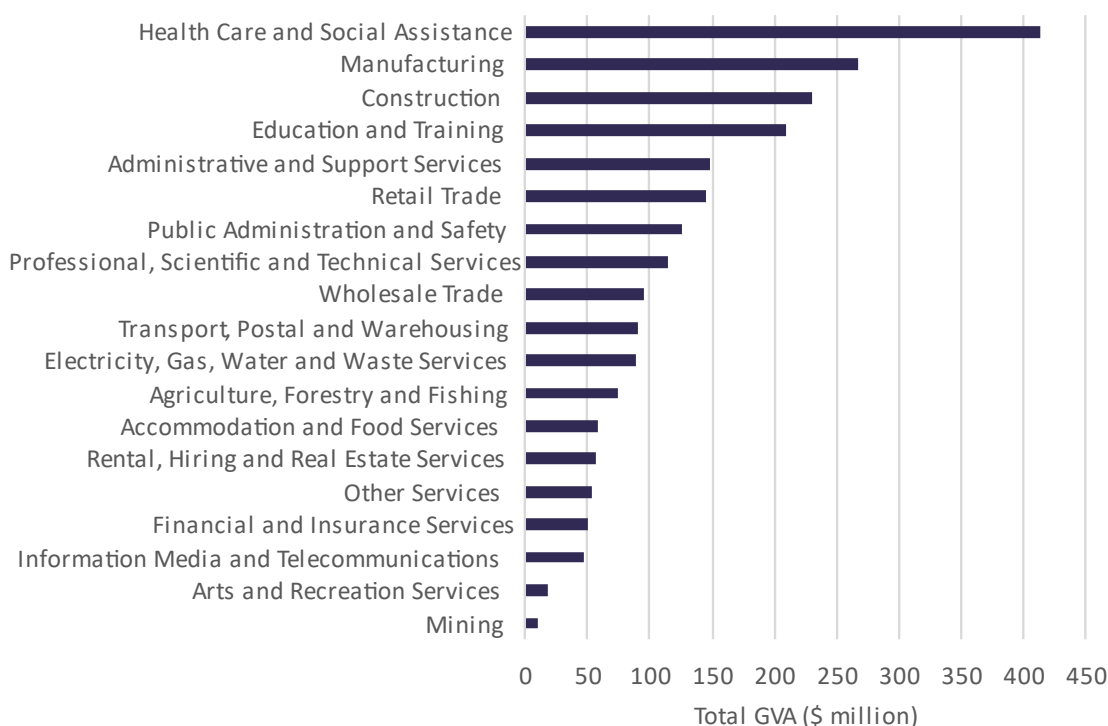


Source: ABS Census 2016 and 2021

Gross Value Added (GVA) represents the difference between the total cost of all of the inputs into production and the cost of the output that is produced. These measures are an attempt to quantify the size of a regional economy in a way analogous to national Gross Domestic Product (GDP). As of 2023, the total GVA of Warrnambool is estimated to be \$2.3 billion.

In terms of Gross Value Added by industry, Health Care and Social Assistance is the largest performing sector in Warrnambool, generating about \$414 million in 2023. Manufacturing, Construction as well as Education and Training are also key sectors with a relatively significant contribution to total GVA in Warrnambool. This is shown in Figure 16.

Figure 16: Total Gross Value Added by industry in Warrnambool, 2023



Source: SGS Economics and Planning using data from SGS's Cities and Region Wellbeing Index (2024)

LQ analysis

A location quotient (LQ) analysis provides further insight into the competitive strengths inherent in the economic structure of the municipality. The LQ score for a sector is given by its proportional representation in the municipality divided by its proportional representation in Victoria, based on employment figures.

An LQ score greater than 1.0 signifies that the sector in question is over-represented in the municipality compared to Victoria. Over-representation suggests the industry has a comparative (can produce products at a lower cost) or competitive (differentiation from competitors) advantage and is exporting these goods or services to other regions specialised in other fields.

The figure below shows the LQ analysis of Warrnambool. While the vertical axis indicates the LQ score, the horizontal axis shows the LQ change between 2016 and 2021. Growth indicates a growing comparative advantage in Warrnambool compared to Victoria (i.e. the industry has been growing faster in Warrnambool than across Victoria). In addition, the quadrants formed in the chart by lines calibrated to an LQ of 1 and an LQ growth rate of 0 per cent per annum (in employment terms) create a framework to judge the strategic value of sectors.

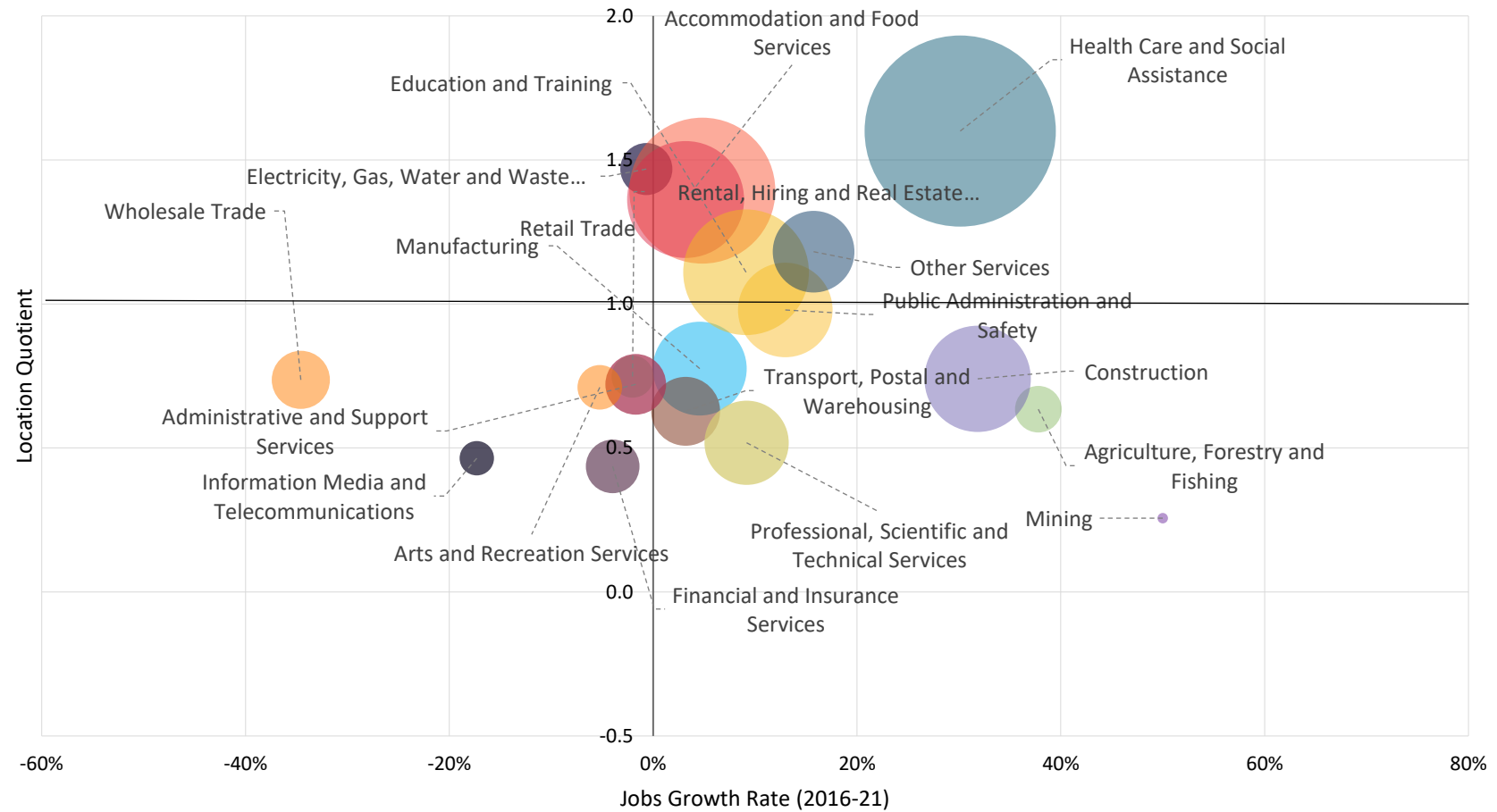
The top right-hand quadrant shows sectors with an existing specialisation or implied competitive advantage, and that advantage is growing (or employment is not falling as quickly as elsewhere). These sectors reflect the municipality's strengths and best future prospects. The bottom right shows emerging sectors growing in advantage but have yet to reach a comparative advantage in Warrnambool. The top

left shows industries with a long-standing local strength, but the advantage is declining. The bottom left quadrant shows industries with no and declining advantage. A further parameter shown in the chart is the size of each sector by employment numbers, represented by the marker's size.

The findings from the LQ analysis regarding the Warrnambool's economy can be summarised as follows:

- **Expanding sectors with a traditional strength:** Health Care and Social Assistance; Accommodation and Food Services; Other Services; Rental, Hiring and Real Estate Services; Education and Training.
- **Emerging sectors:** Construction; Agriculture, Forestry and Fishing; Mining; Transport, Postal and Warehousing and Public Administration and Safety.
- **Industries with a traditional strength but declining in comparative advantage (at least in terms of employment):** None
- **Industries without comparative advantage and declining in advantage (sector growing slower than elsewhere):** Administrative and Support Services; Arts and Recreation Services; Financial and Insurance Services; Wholesale Trade and Information Media and Telecommunications.

Figure 17: Location Quotient analysis of Warrnambool

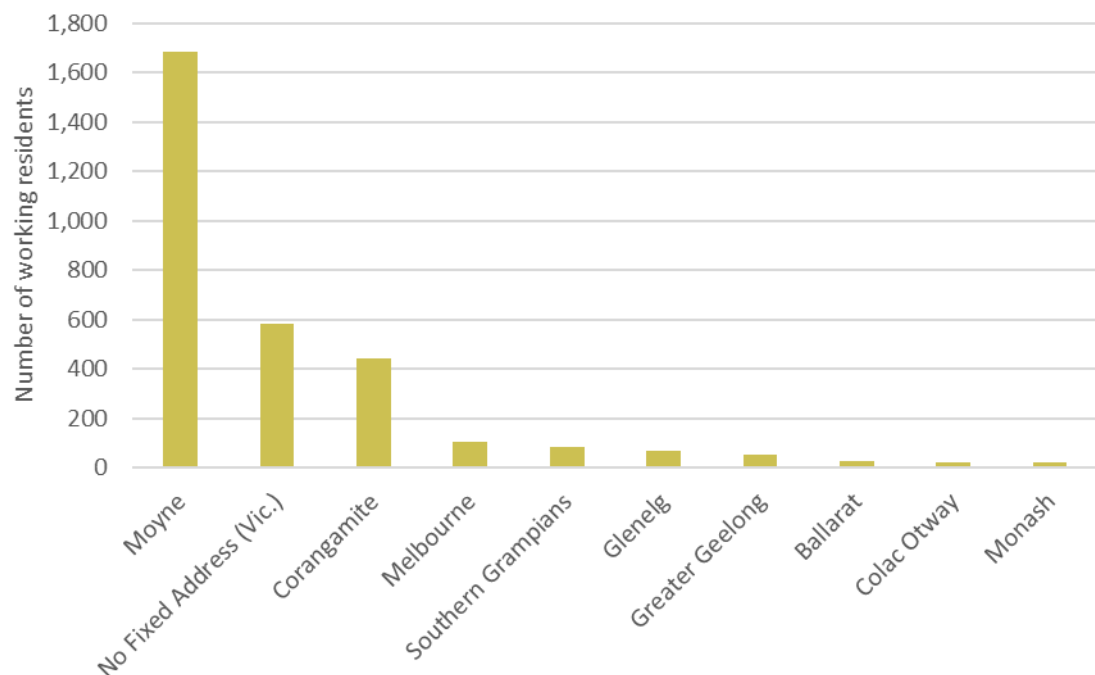


Source: SGS Economics and Planning (2025) using data from ABS Census 2016 and 2021

Place of work

The top ten employment LGAs of Warrnambool residents in 2021 (excluding Warrnambool LGA) included Moyne Shire, Corangamite Shire and the City of Melbourne. This is shown in Figure 18.

Figure 18: Top 10 places of work (LGAs) of Warrnambool residents go to work (excluding Warrnambool LGA), 2021

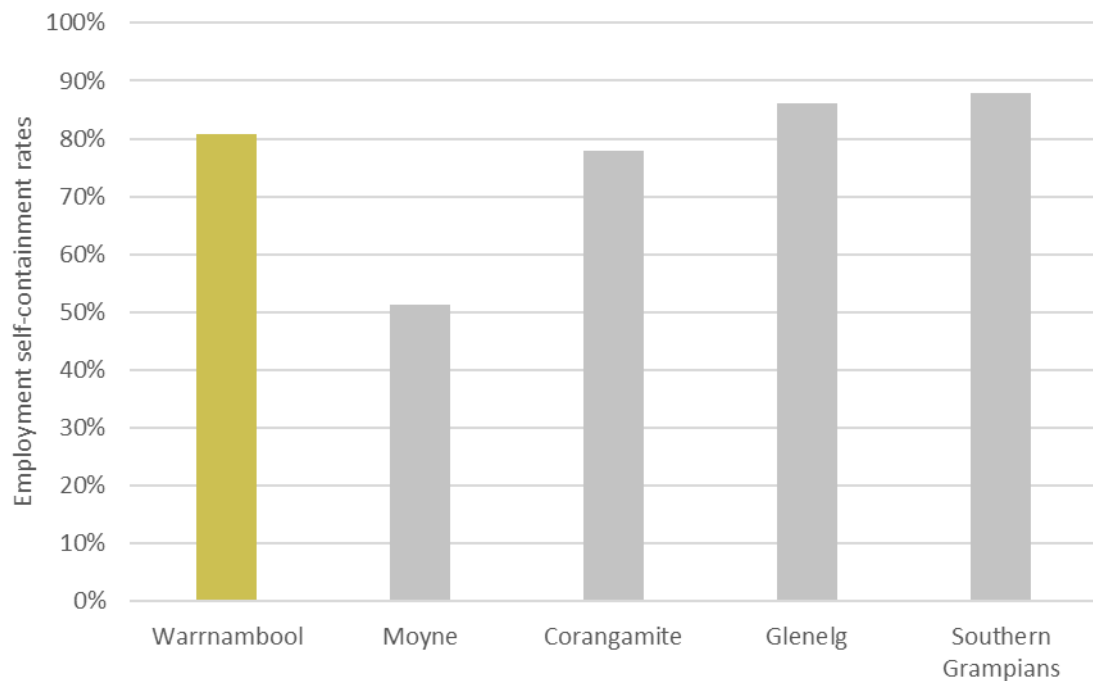


Source: ABS Census 2021

Employment self-containment

Employment self-containment measures the proportion of resident workers who are employed in the boundaries of the municipality or region. Warrnambool has a relatively high containment of local workers. In 2021, 13,896 Warrnambool residents worked in the municipality, representing 81 per cent of the total working population. Compared to other LGAs in the Great South Coast region, Warrnambool has higher level of employment self-containment than Moyne and Corangamite, but lower than Glenelg and Southern Grampians. These are shown in Figure 19.

Figure 19: Employment self-containment rates of Warrnambool compared to neighbouring LGAs, 2021



Source: ABS Census 2021

Anchor institutions

Anchor institution refers to organisations that have an important presence in a place, by virtue of being large-scale employers, a large purchaser of goods and services, overseeing large areas of land and having relatively fixed assets.

Anchor institutions are tied to a place by their mission, histories, physical assets and local relationships. Examples include universities, large local businesses, hospitals, housing providers and councils. Anchor institutions can play an essential role in economic development due to their capacity as large employers and by leveraging their sizeable procurement spending, infrastructure (including land and facilities), networks and assets for local benefit.

Given Warrnambool's competitive advantages in the healthcare and education sectors, notable anchor institutions in the municipality include hospitals (e.g. Warrnambool Base Hospital) and higher education institutions (e.g. Deakin University and South West TAFE).

Figure 20: Warrnambool Base Hospital



Source: The Standard

Figure 21: Warrnambool campus of the Deakin University



Source: Deakin University

Figure 22: Warrnambool campus of the South West TAFE



Source: South West TAFE

A summary of key anchor institutions in Warrnambool is shown in the table below.

Table 14: Key anchor institutions in Warrnambool

Institution type	Anchors
Hospitals and health care centres	Warrnambool Base Hospital, St John of God Warrnambool Hospital, Lyndoch Living
Universities and TAFEs	Deakin University and South West TAFE campuses
Local businesses	Wannon Water, Fletcher Jones Midfield Meat International, Saputo Dairy Australia, Sinclair Wilson Accountants & Business Advisors and Maddens Lawyers, Provico, Warrnambool Cheese and Butter
Research institute	Hycel Technology Hub
Council	Warrnambool City Council

Source: Compiled by SGS Economics and Planning (2025) based on desktop research and information from Council’s list of major employers¹⁶

¹⁶ Warrnambool City Council (n.d.) *Major Employers*, accessed 29 January 2025
<https://www.warrnambool.com/major-employers>

4.2 Tourism contribution

Tourism contributes to the sustainable development of local economies through people spending money in places they do not usually live or work. This includes residents of other parts of Victoria (not just interstate or international arrivals) travelling to Warrnambool for day trips, visiting natural areas, shopping, visiting arts or hospitality venues, or using local services like health care or education.

According to the Warrnambool Economic Development Strategy 2023-28, with the western-most point of the Great Ocean Road locating within the municipal boundaries, Warrnambool serves as the main service centre and visitor hub for the Great Ocean Road Regional Tourism area¹⁷. Other tourism assets within or just outside the municipality include the Flagstaff Hill Maritime Village, Lake Pertobe, Tower Hill Reserve and the Cheese World and Museum.

Jobs of the tourism sector

In Warrnambool, tourism supported an estimate of 1,468 jobs in 2021, accounting for approximately 8 per cent of total employment. This share is larger than the Great South Coast region (7.3%) and Victoria (5.4%)¹⁸. This signifies the relative significance of tourism in the Warrnambool economy.

4.3 Income

Warrnambool residents have had lower median weekly household income than Victorian residents as a whole for last 10 years of Census. However, its figures have been higher compared to those of regional Victoria during the same period. These are shown in Table 15.

Table 15: Median weekly household income of Warrnambool compared to regional Victoria and Victoria, 2011-2021

Geography	2011	2016	2021	2011-21 Change	2011-21 Change (%)
Warrnambool	\$1,025	\$1,182	\$1,420	\$395	39%
Regional Victoria	\$945	\$1,124	\$1,386	\$441	47%
Victoria	\$1,216	\$1,419	\$1,759	\$543	45%

Source: ABS Census 2011, 2016 and 2021

¹⁷ Warrnambool City Council (2023) *Warrnambool Economic Development Strategy*, accessed 30 January 2025.
<https://www.warrnambool.vic.gov.au/sites/warrnambool.vic.gov.au/files/documents/council/about/strategic%20plans/Warrnambool%20Economic%20Development%20Strategy.pdf>

¹⁸ Remplan (2024) *Tourism/Employment - Warrnambool*, accessed 30 January 2025.
<https://app.remplan.com.au/warrnambool/economy/tourism/employment>

4.4 Employment land

As noted above (Figure 15), a variety of industries call Warrnambool home. SGS's analysis of zoned land in the municipality indicate there are approximately 57 hectares of Industrial Land (IN1Z and IN3Z) and 585 hectares of zoned commercial land (C1Z and C2Z). Later stages of this analysis will estimate the potential demand for new land, but any newly zoned land should actively support residents, employees and visitors. Opportunities may exist to redevelop existing-zoned land to encourage a greater density of employment.

4.5 Key findings

- With unemployment falling and the number of jobs increasing across most industries, health care is the largest sector, both in terms of employment and GVA. Just over 8 in 10 residents also works in Warrnambool.
 - Other traditionally strong and expanding sectors include Accommodation and Food Services; Rental, Hiring and Real Estate Services; Education and Training.
 - Emerging sectors include Construction; Agriculture, Forestry and Fishing; Mining; Transport, Postal and Warehousing and Public Administration and Safety.
 - Arts and Recreation Services are among those in decline compared to other regions.
- Key anchor institutions include the Warrnambool Base Hospital, Deakin University, and South West TAFE, and Warrnambool City Council.
- 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 lower than Victoria as a whole.
- 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.
- New or redeveloped zoned industrial or commercial land should be considered to support the changing requirements of businesses and activity centres.

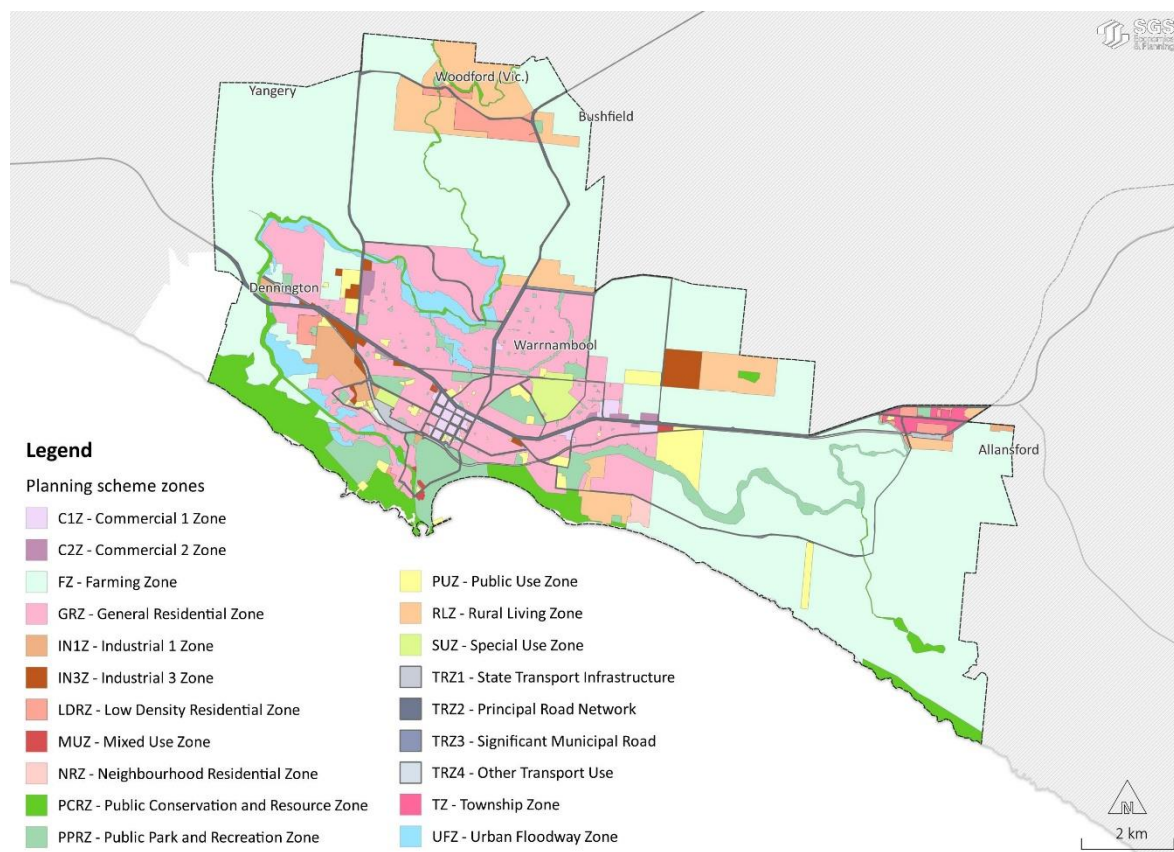
5. Urban form

This chapter examines settlement patterns and the spatial structure of Warrnambool, considering how urban development can accommodate growth while maintaining liveability.

5.1 Settlement patterns

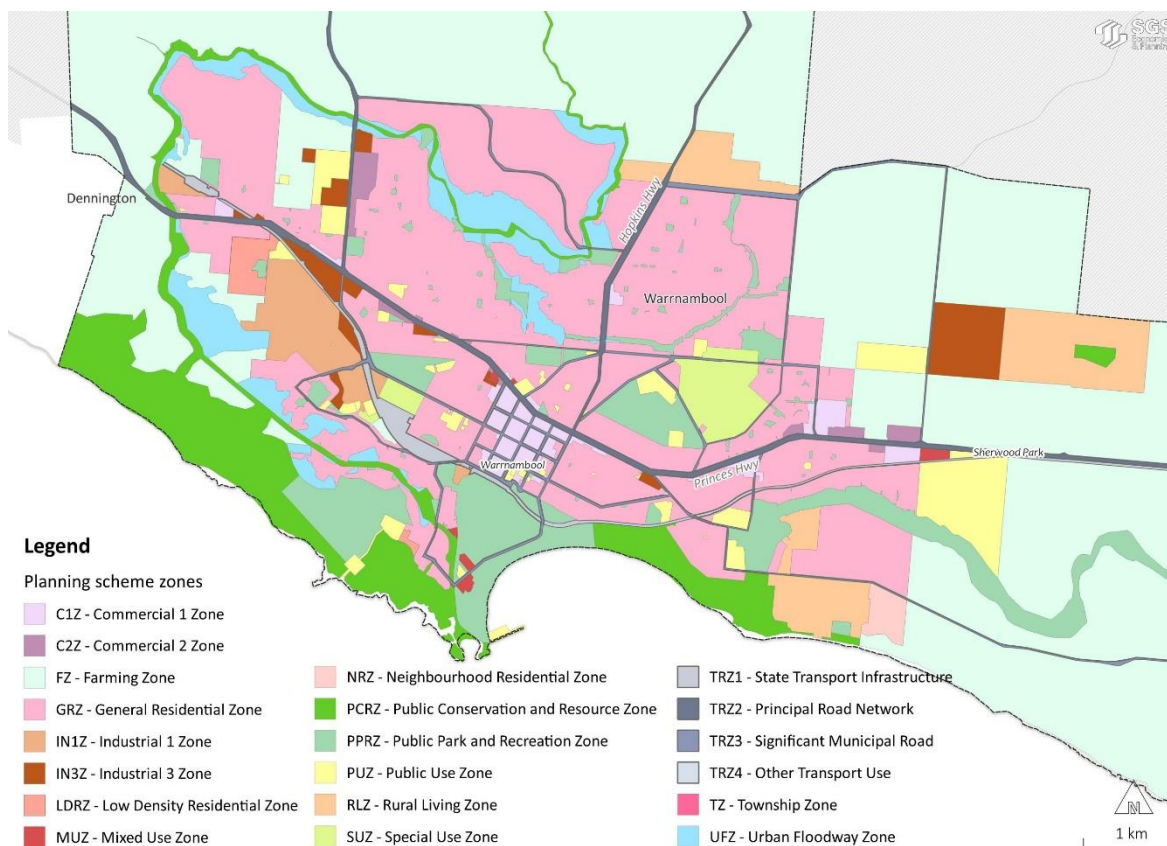
The zoning patterns within Warrnambool reflect the settlement patterns established within the existing Strategic Framework Plan (reproduced earlier in this report as Figure 5), including identified activity centres (consistent with established activity centres shown at Figure 6). Commercial zoning reflects the intended purpose of these centres. The Warrnambool CBD is the prime area for a broad range of service, retail and entertainment uses. The Eastern Activity Centre is zoned to allow for offices and bulky goods retailing. The key industrial precinct is on the western side of the township, with a smaller precinct on the eastern side.

Figure 23: Zoning map of LGA



Source: SGS Economics and Planning, 2025

Figure 24: Detail of Warrnambool township zoning



Source: SGS Economics and Planning, 2025

Urban boundaries are currently relatively clearly defined, with the edge of the township transitioning from standard residential zoning (General Residential Zone) to farmland (Farming Zone) in most locations. There remain areas of undeveloped residential land in the established growth corridors.

While Warrnambool's housing is dominated by detached single-storey houses, architectural styles vary considerably reflecting the different phases of development. Medium density infill such as units remains relatively uncommon, although there are examples. There are a small number apartment developments of up to three storeys near to the foreshore, some of which may be in use as holiday accommodation. This generally low density, while common for regional centres, contributes to a relatively dispersed urban form for the urban area. This increases the challenge of maintaining good accessibility without dependence on cars as Warrnambool's size has increased.

Heritage overlays are quite extensively applied around the centre of Warrnambool, primarily along key streetscapes in the commercial centre and immediate surrounds. In residential areas these include a

range of 19th and early 20th century buildings. The Warrnambool Heritage Guidelines identify 26 heritage precincts in Warrnambool.¹⁹

Within the township residential land is overwhelmingly zoned General Residential Zone. This is applied in its default form, without changes made to the schedules. The consistent application of this zone in an unmodified form is very common in regional towns throughout Victoria, and reflects the broadly consistent typology of detached single storey houses. However changes to the zone in recent years mean that it now allows for relatively intense development compared to traditional development patterns in Warrnambool, and may require refinement in future.

Figure 25: Heritage overlay in central Warrnambool



Source: SGS Economics and Planning, 2025

The former Warrnambool Saleyards site, west of Caramut Road, is a significant redevelopment site. Land in the saleyards and surrounds is currently zoned for a mix of public uses, industrial, and farming land. With remediation this could provide a mix of predominantly residential land with the opportunity for commercial and recreational opportunities. It could also be an opportunity to deliver development products (a greater mix of housing) not currently being delivered in the private market.

There are only limited areas of lower density residential living at the fringes of Warrnambool township, with some Low Density Residential Zone west of Harrington Road and Rural Living Zone on the north side of the town, north of Wangoom Road. The main area for lower density and rural lifestyle living is found in Bushfield and Woodford, which are comprised predominantly of Low Density and Rural Living Zones. There are also rural living areas between Warrnambool and Allansford, and on the south side of Allansford.

5.2 Key findings

- The current Housing Strategy has a focus on affordability, densities, and design. It notes a disparity between shrinking household sizes and increasing dwelling sizes and suggests opportunities for development within established urban areas rather than putting pressure on the Urban Settlement Boundary.
- Most of the residential land in the LGA is zoned GRZ with carries a maximum development height of 11 metres or 3 storeys. Much of the remaining residential land is zoned as either Low Density or Rural Living. Only very small areas are zoned for Mixed Use, with Township zoning allowing non-residential uses in Allansford to the east of Warrnambool.
- Regional planning must account for bushfire and flooding risks (see next chapter).
- Warrnambool's unique shared boundary with Moyne raises concerns about development patterns and rural-residential interfaces.

6. Natural hazards, assets and resources

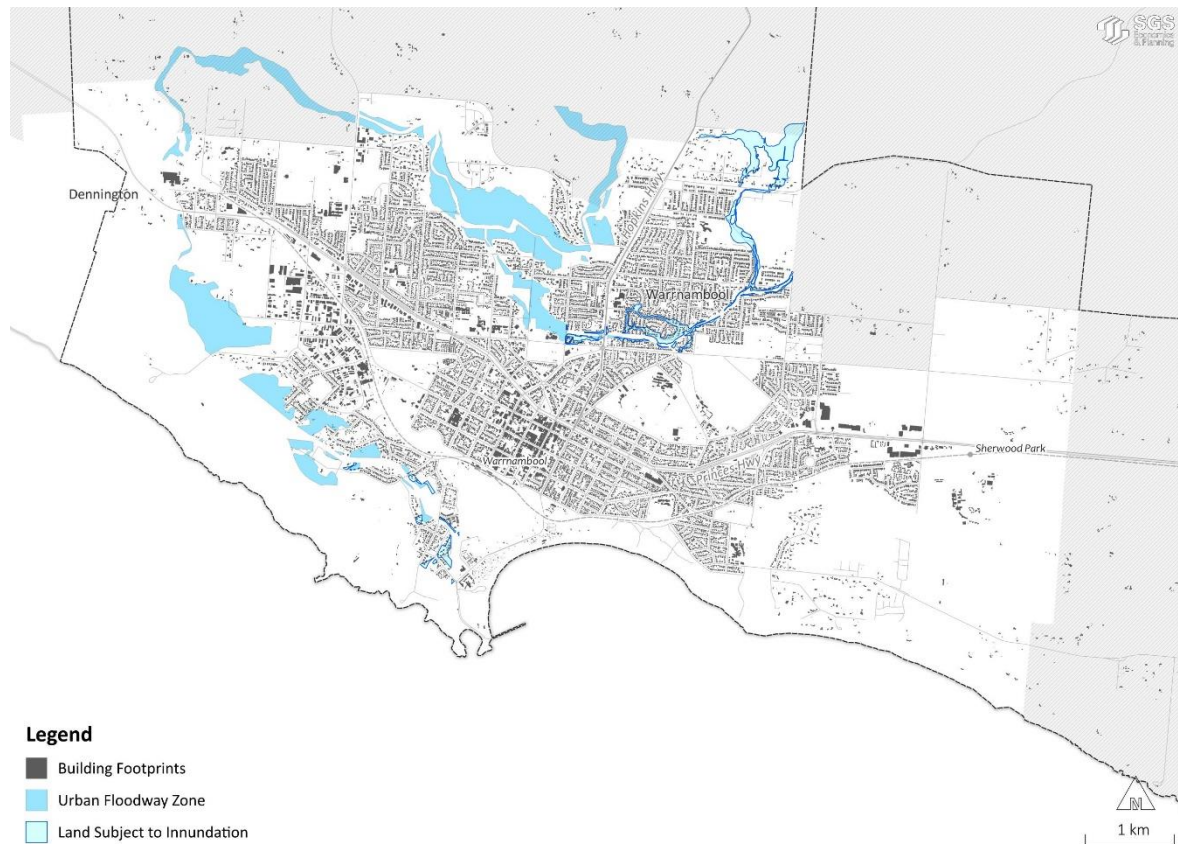
This chapter explores the environmental risks facing Warrnambool, including climate change impacts, as well as the city's natural assets and resource management strategies.

6.1 Natural hazards and climate change

Worsening impacts from climate change require immediate and tangible actions, as acknowledged in the existing *Green Warrnambool* strategy. Warrnambool is at risk from climate change impacts arising from the combination of reduced total rainfall and exposure to drought; heatwaves and associated risks such as bushfire; more intense rainfall and storm events; and the risks associated with sea level rise, inundation and erosion.

Existing flood mapping shows flooding risks already existing along the Merri River and Russells Creek, mapped by the Floodway Overlay and Land Subject to Inundation Overlay (LSIO) apply along the Merri River and Russells Creek. These predominantly apply over land zoned either Farming Zone or Urban Floodway Zone, but there are some limited areas near to Russell Creek where the LSIO applies to residentially zoned land. Sea level rise and more severe rainfall events can be expected to exacerbate these risks.

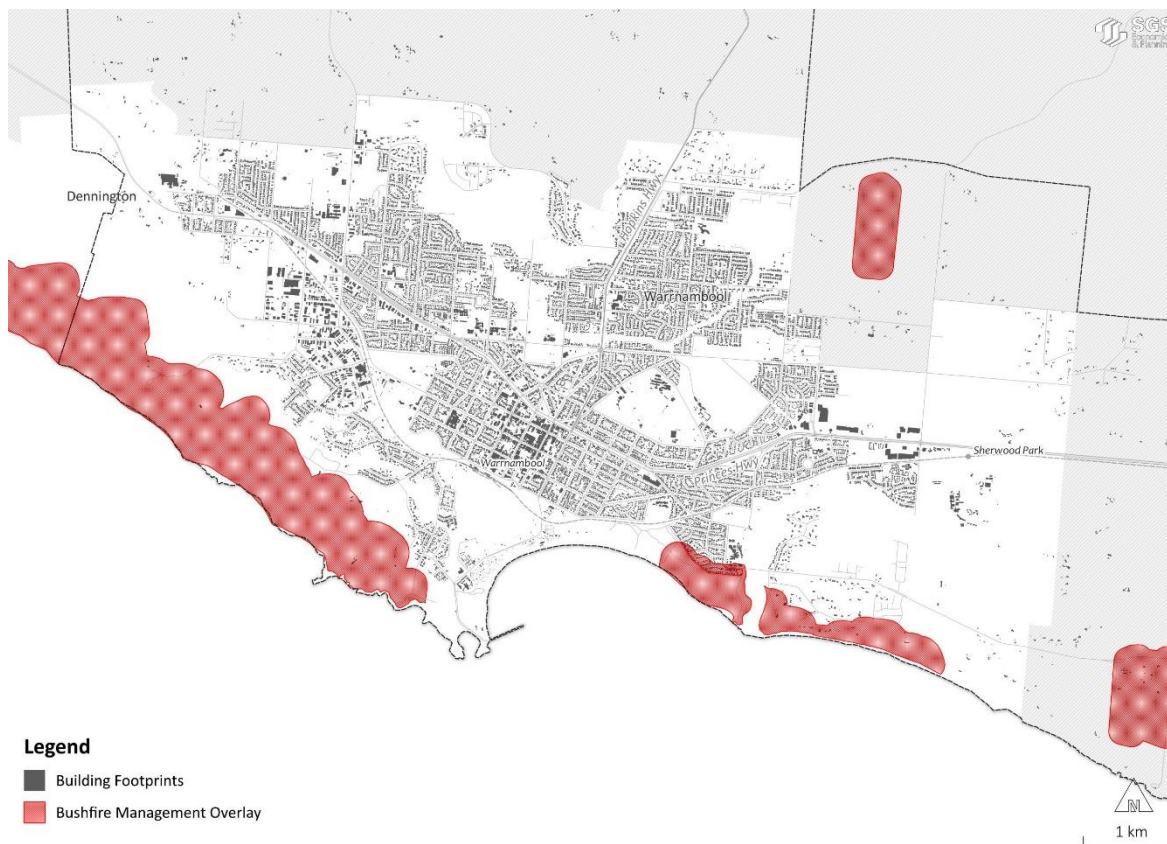
Figure 26: Floodway Overlay and Land Subject to Inundation Overlay in Warrnambool City area.



Source: SGS Economics and Planning, 2025

Bushfire risk is currently concentrated along the coastal reserve. The Bushfire Management Overlay (BMO) applies along much of the coast. While this is largely across land zoned as public reserves or farmland, some areas of encroachment onto residential and rural living land exist, notably on the southeast side of Warrnambool urban area, near the mouth of the Hopkins River. These interface risks will be exacerbated by climate change.

Figure 27: Application of the BMO within Warrnambool.



Source: SGS Economics and Planning, 2025

Another area of BMO applies on land currently zoned Farming Zone, on and around the Francis Tozer reserve northeast of the Warrnambool urban area. This notably sits centrally within the area designated in the Strategic Framework Plan at cl 02.04 of the scheme as a Future Urban Growth corridor.

In addition to direct risks from natural hazards, Warrnambool's position as the key service and agricultural processing centre for the surrounding region means that it will be exposed to economic effects of climate change impacts that affect the Great South Coast region's agricultural sector. Similar economic risks exist from impacts upon the region's tourism sector, such as inundation and storm events that affect the Great Ocean Road.

6.2 Natural assets and resources

Cultural landscapes

The Peek Whurrong and Kirrae Whurrong Peoples of the Eastern Maar Nation are the Traditional Owners of the land and waterways within Warrnambool. The Eastern Maar cared for the Country prior to European settlement and continue to fight to have this role recognised and continued.

Much of Warrnambool is within mapped areas of Aboriginal Cultural Heritage Sensitivity. This recognises the concentration of signs of Eastern Maar settlement along watercourses and the coast.

Moyjil (Point Richie), east of the Warrnambool township, is a significant archaeological site listed on the Victorian Aboriginal Heritage Register. It could be the oldest known human settlement in Australia; regardless of its age it reflects the depth of link the Eastern Maar have with Country.

Water

The waterways and wetlands are a significant asset to Warrnambool with the Hopkins River, Merri River and its tributaries of Russell's Creek and the Yangery Creek. Council recognises the important role waterways play in the region and is committed to protecting and enhancing the local waterways. A key action includes installing a Gross Pollutant Trap to treat stormwater before it drains into Lake Pertobe²⁰. Council has also developed the Albert Park Integrated Water Management Plan which identifies opportunities to implement integrated water management measures within Albert Park²¹.

Wannon Water, the water supply provider of Warrnambool and South West Victoria as a whole, has identified the need for new water resources within the 50-year planning period to meet the projected increase in demand²². This drives the development of the roof water harvesting project in Warrnambool – one of the leading examples of integrated water management, collecting and diverting roof runoff for potable uses.

This roof water harvesting scheme sets out a preference to collect and divert roof water from all new houses and industrial buildings within new estates located in a growth corridor in the City of Warrnambool. Water is then transferred via gravity into an existing untreated water storage where it is treated through the existing treatment plant to provide drinking water for the City of Warrnambool. Commenced in 2011 in Warrnambool's northern growth areas with the initial pilot applied to 250 lots across two subdivisions, the project has led to the following outcomes²³:

- Less urban excess stormwater entering waterways
- Improved environmental flows
- Augmentation of water supply system: Each new dwelling is expected to generate 145KL/ year
- Harvested roof water can meet urban demands
- Informed residents
- Toolkit to assist other growth areas

²⁰ Warrnambool City Council (n.d.) *Blue Warrnambool*, accessed 31 January 2025.

<https://www.warrnambool.vic.gov.au/blue-warrnambool>

²¹ Warrnambool City Council (n.d.) *Albert Park Integrated Water Management (IWM) Plan*, accessed 31 January 2025.

https://www.warrnambool.vic.gov.au/sites/warrnambool.vic.gov.au/files/documents/council/about/strategic%20plans/ECM_10802201_v10_Albert%20Park%20Integrated%20Water%20Management%20Plan_%20IWM%20final%20plan.pdf

²² Wannon Water's Water Supply Demand Strategy 2007-2055

²³ Cooperative Research Centre for Water Sensitive Cities (2018) *Warrnambool Roof Water Harvesting*, accessed 31 January 2025. https://watersensitivecities.org.au/wp-content/uploads/2018/10/1-Warrnambool_FINAL.pdf

Energy transition

With a vision to make Warrnambool “the most sustainable regional city in Australia”, Council has invested and implemented several initiatives, including the provision of electric vehicle charge points across the City²⁴. Other key actions are:

- Council will source 40 per cent of its energy usage from renewable resources
- Achieve a 30 percent vegetation canopy cover in urban areas
- Warrnambool will source 20 per cent of its citywide energy from renewable resources. Warrnambool have at least 1 micro-grid set up and operating
- Pilot a Neighbourhood Energy Project
- Develop Warrnambool Renewable Futures Project with key industry partners to investigate large scale renewable energy investment opportunities

In addition to Council-led efforts, the energy transition in Warrnambool will also be affected by State and Federal government decisions. For example, in March 2024, the Federal government declared an area off the coast of Warrnambool and Port Fairy for offshore renewable energy, paving the way for the construction of offshore wind turbines²⁵. While the value of the renewable energy and the employment flowing from offshore wind farms are clear, their impacts on the local environment and nature remain unclear to Council²⁶.

6.3 Key findings

- As acknowledged in the *Green Warrnambool* strategy, the impacts of climate change are already presenting risks to development. Flooding, land subject to inundation and bushfire currently present the most risk to farmland and public and coastal reserves, though there is currently some risk to land zoned for residential purposes. Ensuring that flood and bushfire mapping is up to date and feeding into strict risk assessments should guide development to suitable and sustainable locations. As heatwaves and intense rainfall intensify, flash flooding becomes more likely. Development along waterways will need to be balanced with the need to retain healthy riparian environments to support their inherent value in supporting natural and connected habitats, and for their value in stormwater and flood management.
- Innovative methods of climate change mitigation and adaptation are required, such as the roof water harvesting scheme, but tried-and-true methods such as increasing canopy cover, avoiding the creation of impermeable surfaces, and supporting a mode shift towards active transport are important for success.

²⁴ Warrnambool City Council (2018) *Green Warrnambool*, accessed 31 January 2025.

<https://www.warrnambool.vic.gov.au/sites/warrnambool.vic.gov.au/files/documents/warrnambool/environment/Green%20Warrnambool%20FINAL%20adopted%203%20September%202018.pdf>

²⁵ Department of Climate Change, Energy, the Environment and Water (2024) *Southern Ocean region off Victoria, declared offshore wind area*, accessed 31 January 2025.

<https://www.dcceew.gov.au/energy/renewable/offshore-wind/areas/southern-ocean-region>

²⁶ Warrnambool City Council (2024) *Concern over wind energy zone decision*, accessed 31 January 2025.

<https://www.warrnambool.vic.gov.au/concern-over-wind-energy-zone-decision>

- The economic effects of climate change should inform the region's strategic planning around the farming, agriculture and tourism industry, as drought, flooding, storms and coastal erosion may increasingly put these at risk.

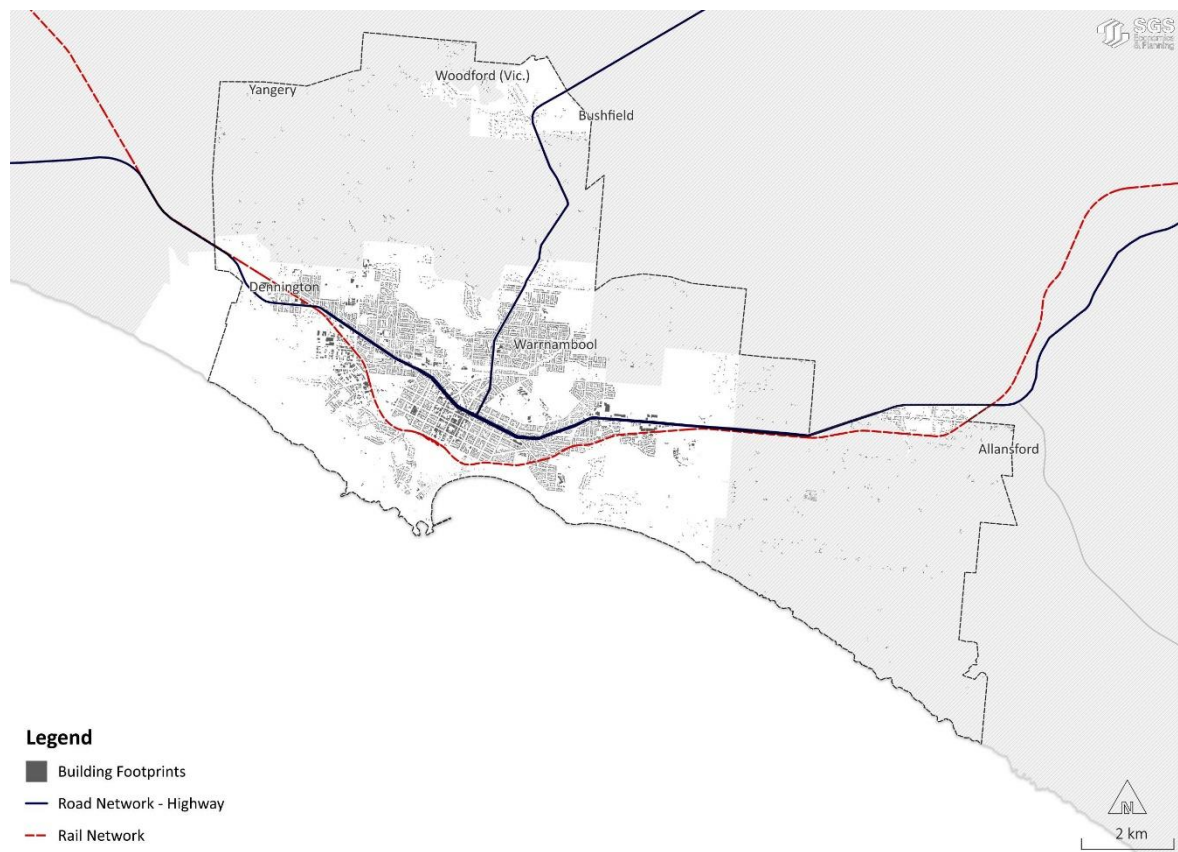
7. Transport and infrastructure

This chapter assesses Warrnambool's transport network, active transport options, and community infrastructure, identifying ways to enhance connectivity and accessibility.

7.1 Transport network

Warrnambool is served by several major road routes, notably the Princes and Hopkins Highways. The Princes Highway also serves as the connection to the Great Ocean Road. Routes to the north (providing connection to Hamilton, Horsham, and the major tourist destination of the Grampians / Gariwerd National Park) are C-level highways. V-Line train services terminate in Warrnambool, with five services to Melbourne per day currently scheduled on weekdays. Between Warrnambool and Allansford the Sherwood Park Station provides service to the Deakin university campus and surrounds.

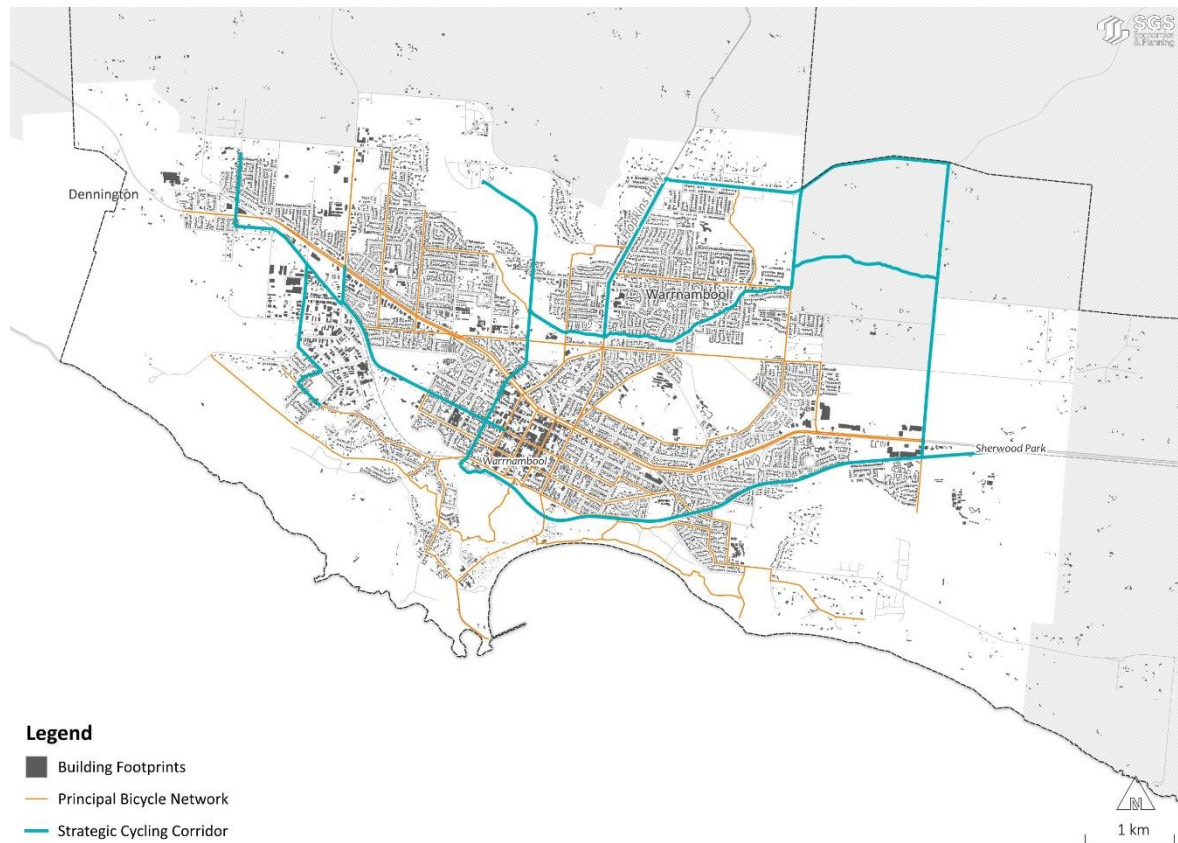
Figure 28: Regional rail network* and principal road network



Source: SGS Economics and Planning, 2025 *V-Line services terminate at Warrnambool, after Dennington, it continues as the Port Fairy-Warrnambool Rail Trail

While Warrnambool benefits from this access to road and rail infrastructure, there are recognised challenges with regards to connectivity within Warrnambool that continue to lead to high levels of private car usage. Within Warrnambool, there is scope for improvement in active transport connectivity between precincts, including through improved presentation and treatment of roads for pedestrians and cyclists. This notably includes the connection between the city centre and the railway station, and to schools and universities.

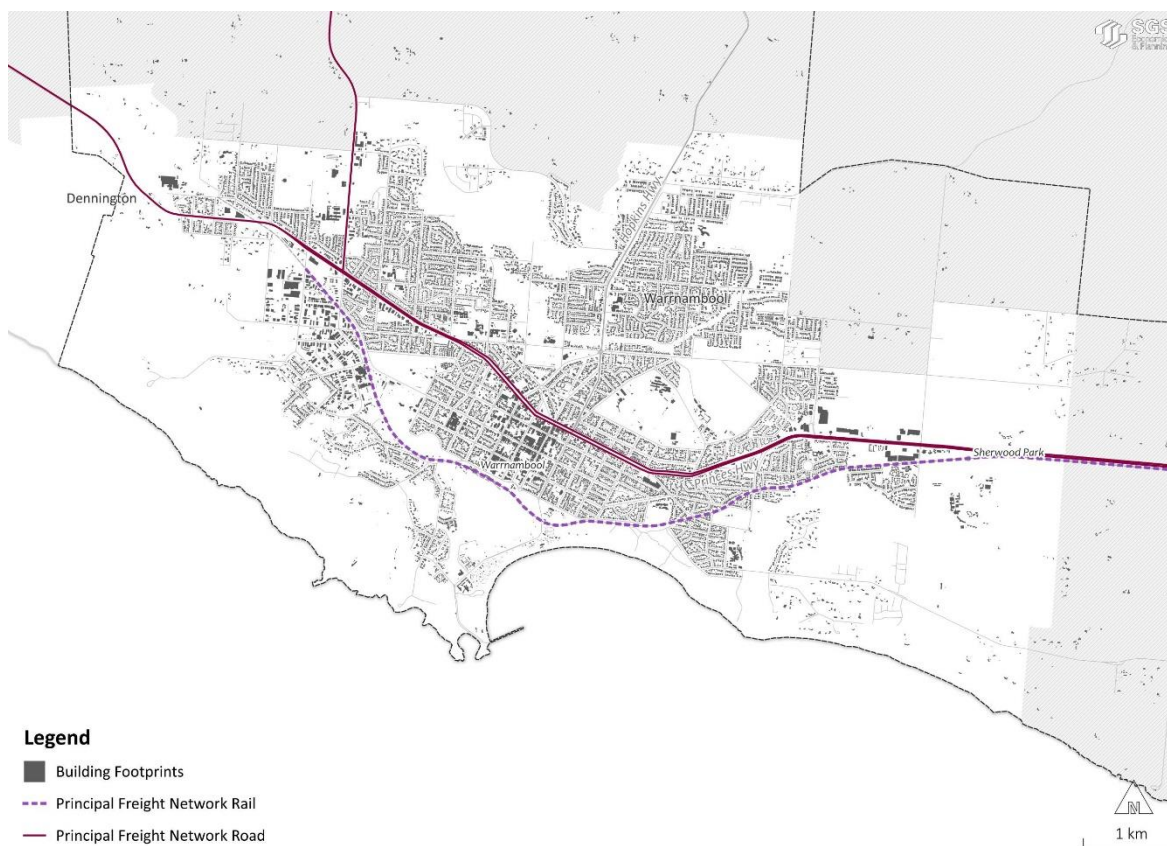
Figure 29: Strategic cycling corridors and principal bicycle network



Source: SGS Economics and Planning, Transport Victoria, 2025

The Princes Highway, Hopkins Highway (diverting via Bridge Road and Caramut Road), and railway line are all part of the Principal Freight Network (Figure 30).

Figure 30: Principal freight network



Source: SGS Economics and Planning, 2025

Warrnambool Airport is located to the north of the municipality, approximately 5km from the edge of the Warrnambool township and less than 3km from Woodford. This is identified in *Plan for Victoria* as a “regional employment project and precinct.” This signals an expectation that this precinct may expand.

7.2 Active transport

Active transport indicates the use of physical activity as a method of transport, such as walking, running, or cycling. ABS census data for 2021 shows that the mode share for how residents travel to work in Warrnambool is heavily tilted towards private vehicles, with less than 1 per cent of residents using public transport and around 5 per cent walking or cycling to work.

This is shown in Table 16 as a proportion of people who travelled to work (removing residents who either did not go to work or worked from home). In comparison to Greater Melbourne, significantly more people in Warrnambool use a private vehicle to get to work, and significantly fewer use public transport. However, active transport is much higher than the average for Greater Melbourne, with most of this increase coming from a greater proportion of Warrnambool residents walking to work.

Table 16: Journey to work Census 2021 data

Method of travel for residents who travelled to work	Warrnambool		Greater Melbourne	
	Number	%	Number	%
Private vehicle (car and truck as driver or passenger)	12,769	92.7%	1,247,446	50.4%
Public transport (train, bus, ferry, tram)	103	0.7%	131,734	5.3%
Active transport (walked, cycled)	767	5.6%	66,513	2.7%
Cycling	146	1.1%	18,187	0.7%
Walking	621	4.5%	48,326	2.0%

Source: ABS Census 2021

7.3 Open Space and Community Infrastructure

A key asset to liveability is having access to good quality community facilities and services. Council is often the provider of facilities such as community meeting spaces/centres, public open space, early years and maternal and child health, libraries, culture and tourism, and libraries. Many of these services are also commonly serviced by private providers, including community health, early years, primary and secondary schools, cultural, and aged care services.

Table 17 provides an overview of the current facilities in the LGA of Warrnambool. While there are fewer higher-order facilities, such as dedicated youth centres, regional arts centres, or large multi-purpose community centres that are home to multiple service providers, Warrnambool has a large number of facilities across most service categories that provide access to residents.

Table 17: Community facilities in Warrnambool

Community Meeting Spaces	
Allansford Mechanics Institute Hall	Breakwater: Foreshore Pavilion
Archie Graham Centre	Country Women's Association Club Rooms
Bushfield Recreation Reserve: Community Hall	Friendly Societies' Recreation Reserve: A. L. Lane Community Centre

Davidson Oval	Allansford Recreation Reserve - Social Club
Dennington Bowls Club	Dragon Boat Club / Ski Club
Dennington Oval: P. G. Kelson Pavilion	Fishing Club
Harris Street Reserve	Friendly Societies' Recreation Reserve: A. L. Lane Community Centre
Harris Street Reserve: Dog Obedience Pavilion	Gem Club
Harris Street Reserve: H. I. Stephenson Pavilion Building	Jetty Flat Reserve
Hopkins River Ski Club: Club Rooms	Pigeon Club
Merrivale Oval: W. A. Fairy Pavilion	Warrnambool Stadium: Basketball (ARC)
Reid Oval	West Warrnambool Neighbourhood House
Surf Club	Warrnambool Stadium: Basketball (ARC)
Warrnambool Lawn Tennis Bowls Club	Yacht Club
Warrnambool Lawn Tennis Club	

Culture and Tourism

Merri View Gallery (Old Scout Hall)	Warrnambool Art Gallery
Mozart Hall	History House
Lighthouse Theatre	Flagstaff Hill

Early Years

Allansford Kindergarten	Mahogany Kindergarten
Archie Graham Centre	Matron Kindergarten
Beamish Street Kindergarten	New Life Christian Church
Central Kindergarten	Sherwood Park Child Care Centre
Christ Church Playgroup	St Josephs Playgroup
City Kindergarten	Swan Reserve Buildings: Children's Services Centre
Dennington & District Preschool Centre	Uniting Church Child Care Centre Playgroup
Florence Collins Child Care Centre	Warrnambool East Kindergarten
Goodstart Early Learning Dennington	Warrnambool Playgroup
Honey Pot Childcare Centre	Warrnambool South Kindergarten

Kings College	Warrnambool Stadium: Basketball (ARC)
Lions/Hopkins Kindergarten	
Education	
Merrivale Primary School	King's College K-12
Warrnambool Primary School	Our Lady Help of Christians
Warrnambool West Primary School	St Johns Primary Catholic
Warrnambool East Primary School	St Josephs Primary School
Brauer College	Emmanuel College Secondary
Warrnambool College	South West TAFE
Merri River School	Deakin University Warrnambool Campus
Emergency	
Ambulance Victoria	Woodford Fire Brigade
Allansford CFA Fire Station	Warrnambool Police Station
FRV Fire Station 70	
Health	
Cambourne Clinic	Middle Island Medical Clinic
Deakin University Medical Centre	Ochre Medical Centre Dennington
Gunditjmara Health Clinic	Ochre Medical Centre Jamieson
Handbury / WRAD Medical Centre	Seaview Health
Hopkins Medical Centre	South West Medical Centre (Community Health Service)
King Street Medical Clinic	Warrnambool Urgent Care Clinic
Lumus Imaging Warrnambool	WPRS
Lyndoch Medical Hub	Headspace Warrnambool
Manse Medical Warrnambool	Warrnambool Dental
Library	
Warrnambool Library and Learning Centre	
Seniors and Aged Care	
Lyndoch Living Limited	Warrnambool Place Care Community

Mercy Place Warrnambool	Warrnambool Riverside Care Community
Themar Heights	
Sport and Recreation	
Allansford Recreation Reserve	Jetty Flat Reserve
Allansford Recreation Reserve	Jones Oval
AquaZone	Mack Oval
Brauerander Park	Merrivale Recreation Reserve
Brierly Recreation Reserve	Reid Oval
Bushfield Recreation Reserve	Walter Oval
Davidson Oval	Warrnambool Hockey Centre
Dennington Bowls Club	Warrnambool Lawn Tennis Bowls Club
Dennington Recreation Reserve	Warrnambool Lawn Tennis Club
Friendly Societies Park	Warrnambool Skate Park
Harris Street Reserve	Warrnambool Stadium: Basketball (ARC)
Hughes Oval - Deakin University	

Source: Warrnambool City Council (2025)

Benchmarking facility provision

Benchmarks based on population thresholds are a useful starting point, but they need to be placed within the context of the time and place they are being considered for. Local demand could be higher or lower than a particular benchmark allows for, can change over time, and will often reflect the demographics and/or cultural practices of the local community.

Equally crucial is an understanding of the capacity of existing infrastructure to appropriately service the needs of the community, taking into consideration the asset's condition, fitness for purpose, and accessibility. Some of the assets may need redevelopment, some may no longer be fit for purpose, and some may justify consolidation. For example, older, stand-alone facilities can often be costly to maintain and inefficient to run, and services may be better integrated into new multi-purpose facilities. For these reasons, the following high-level analysis provides a basis for further discussion, with more detailed analysis and consultation required going forward.

In particular, the provision of early years services requires a more complex analysis, even at a high-level. This is being undertaken by SGS as a separate piece of work for Warrnambool City Council. For this reason, a quantitative analysis of early years services including kindergarten and long day care is not included in the below high-level analysis (however playgroups and MCH facilities are included below).

Summary of results

Benchmarks used are sourced from Australian Social & Recreation Research (ASR) from 2008 which are still endorsed by the Victorian Government. The exception are residential aged care facilities, which reference the current benchmarks used by the Commonwealth Government. For population forecasts see Section 3.

- Considering the above, **most community facilities are provided in sufficient numbers** for the Warrnambool community both currently and for the forecast population in 2046, including schools, health services, libraries, and the majority of sport and recreation facilities.
- Facilities that appear to be **over supplied** based on population benchmarks include primary schools, medium sized community meeting spaces, sports pavilions and pavilions, and outdoor netball courts. The single community health service in Warrnambool is reinforced by a large number of private health services.
- **Notable supply shortfalls include multi-purpose community centres, Neighbourhood House services** (which can also be run out of multi-purpose community centres), **youth friendly spaces/centres, and residential care beds**. Council provides youth services and programming, however spaces that specifically accommodate youth services are not currently known. The supply of residential aged care beds indicates a current shortfall of approximately 70 beds and increasing to nearly 400 beds by 2046, however supply information is incomplete and this gap should decrease, but a significant supply gap will remain.
- **Some categories that indicate a supply shortfall may not be as bad as they appear** – for example, small and large meeting spaces are forecast to be in deficit, but medium sized spaces are over supplied which may offset this. Similarly, smaller scale tennis facilities and smaller indoor recreation centres indicate a small undersupply, but this is offset by larger facilities providing a surplus.

7.4 Key findings

Transport

- Though the principle freight network is not subject to flooding, other parts of the network such as Mortlake Rd, Wollaston Rd, Wangoom Rd, Whites Rd, Breton St, Daltons Rd/Ardlie St, and Gardon St are prone to flooding or inundation. All of this is likely to be exacerbated over time as climate change continues to intensify. New development should be directed to locations fit for development, with a focus on intensifying development in existing areas.
- As development intensifies, increased traffic from residents, industry, and tourism will require traffic studies and up to date strategies to manage this sustainably, including a shift to lower impact modes such as active transport. Ensure that routes for Heavy vehicles including V-Line buses are designed to avoid unsafe interactions with more vulnerable road users.
- Journey to work data shows a heavy reliance on private vehicles in Warrnambool, with more than 9 in 10 residents driving. With 8 in 10 residents working within the LGA, this suggests strong opportunities to encourage more active transport, with more people already walking and cycling to work than the Greater Melbourne average.

- Successfully encouraging the uptake of active transport requires a complete and comprehensive network of assets that are free of gaps and communicates to users and non-users alike that it is safe, convenient, and legitimate. It needs to consider not only the movement network but supporting infrastructure like suitable parking and other end-of-trip facilities.

Community Infrastructure

- Community services are generally well supplied across Warrnambool, with supply gaps showing for residential aged care beds, Neighbourhood House services, multi-purpose community centres, and potentially spaces for young people.
- Benchmarks for community facilities in Warrnambool should be reviewed to ensure that they are reflective of the local spatial and demographic context. These benchmarks should be adopted in policy to ensure early and clear triggers are in place when planning for infrastructure.
- Some facilities appear to be in over-supply, such as primary schools, community meeting spaces, sporting ovals and pavilions, and outdoor netball courts. Like other kinds of assets, ensuring convenient access in sprawled, low-density communities can result in low utilisation and high maintenance and renewal burdens on council. Any rationalisation of these assets to better align with Council resources will need to be evidence-based.
 - While the upfront investment in new, multipurpose and flexible community facilities can be significant, this can be more efficient and adaptable in the long run, both for diverse and changing community needs, and relative to the cost of maintaining a larger number of ageing stand-alone facilities that may not be well utilised.
 - For existing communities, transitioning services in older, unfit facilities to new multipurpose facilities can present challenges if user groups feel that they are 'losing their space', requiring strong justification and communication where maintaining old assets is unsustainable and of the benefits of new facilities. For new development in greenfield areas, community infrastructure needs to be delivered early and in partnership with potential service providers to ensure that the community is not left without needed services.

Appendix A: Existing Strategic Directions

The following strategic directions are included in the Municipal Planning Strategy, which forms part of the Warrnambool Planning Scheme.

Theme	Strategic Directions
Growth areas	<p>Directing urban growth to identified growth areas in order to protect productive rural areas and achieve a more compact sustainable urban area.</p> <p>Supporting increased residential densities in growth areas close to transport corridors, activity centres and open space.</p> <p>Facilitating infrastructure provision of roads, drainage, utilities and community infrastructure through structure planning and development contributions plans.</p>
Activity centres	<p>Supporting use and development that reinforces the Warrnambool activity centre hierarchy at Clause 11.03-1L-01.</p> <p>Directing core retail activities to the Warrnambool City Centre including the majority of major retail stores.</p> <p>Locating further regional level retailing, services, facilities and activities in the Warrnambool City Centre as a first preference.</p> <p>Ensuring the Eastern Activity Centre is developed as a secondary retail centre supporting the Warrnambool City Centre.</p>
Biodiversity	<p>Protecting and enhancing sites of biodiversity conservation significance.</p> <p>Providing wildlife habitat and corridors for vulnerable and threatened flora and fauna species in coastal reserves.</p> <p>Arresting the decline and fragmentation of native vegetation to minimise land and water degradation issues.</p>
Significant environments and landscapes	<p>Protecting coastal areas, waterways and sensitive ecosystems from the detrimental impacts of urban and rural development.</p> <p>Protecting significant landscapes and landforms from inappropriate development.</p>
Climate change	<p>Adapting to the impacts of a changing climate.</p> <p>Planning for the risks associated with possible sea level rise in areas of known vulnerability.</p> <p>Ensuring that the risks of sea level rise are mitigated or avoided where possible.</p>

Soil degradation	<p>Avoiding disturbance of coastal acid sulfate soils.</p> <p>Managing erosion and surface runoff and protecting vegetation in river and estuarine environments.</p> <p>Ensuring the ongoing protection of land susceptible to landslip.</p>
Floodplain management	<p>Protecting floodplains from development that would detrimentally impact their function.</p> <p>Protecting life, property and community infrastructure from flood events.</p>
Land use conflicts	<p>Prioritising separation distances to assist in the retention of existing employment generating activities.</p> <p>Protecting communities close to established industries from off-site impacts such as dust, odour, noise and air pollution.</p> <p>Managing land use conflicts at the urban/rural interface and development pressures at the edge of Warrnambool's settlement boundary.</p>
Bushfire	<p>Planning for and managing bushfire risk.</p>
Agricultural land	<p>Protecting rural areas to ensure agricultural uses remain viable.</p> <p>Ensuring the City's unique rural character is protected from urban development.</p> <p>Managing the urban-agricultural interface to protect farming operations.</p> <p>Maintaining a greenbelt around Warrnambool's settlement boundary.</p> <p>Limiting use or development that will be incompatible with the agricultural use of the land.</p>
Catchment planning	<p>Retaining the Hopkins and Merri River environs as natural drainage corridors with vegetated buffer areas.</p> <p>Facilitating enhancement of the riparian vegetation, in-stream rehabilitation and improvements in the quality of stormwater entering Russells Creek.</p> <p>Minimising the impact of use and development on water resources and waterways.</p>
Sustainable development	<p>Creating a sustainable City that allows people to walk or cycle to access their everyday needs and contributes to social interaction, community building and wellbeing.</p> <p>Promoting ecologically sustainable development.</p> <p>Supporting development that reduces energy and greenhouse gas emissions.</p>
Urban design	<p>Protecting and enhancing the quality of the built environment.</p> <p>Facilitating the sharing, rather than protection, of views from the public realm and private areas.</p> <p>Supporting signage that is effective and improves the public realm, having regard to the host building or site, and the role and interests of the specific area.</p>

	<p>Discouraging Major Promotion Signs at identified gateways and landscaped streetscapes.</p> <p>Providing for signs that are in context with the scale of development, the surrounding environment and the surrounding signage patterns.</p> <p>Promoting safety and the perception of safety in the design of buildings.</p> <p>Designing developments to maximise vehicle and pedestrian access between activity centres and surrounding neighbourhoods.</p> <p>Facilitating sensitive design solutions for Younger Street (west), Logans Beach, areas of South Warrnambool and the Coastal/Hopkins River Growth Area.</p>
Neighbourhood character	<p>Integrating infill development with the existing architectural, historic and landscape character of the neighbourhood.</p>
Heritage	<p>Protecting the importance of cultural heritage in the area.</p> <p>Conserving, maintaining and enhancing the character of heritage precincts, particularly individual listings and contributory elements.</p> <p>Managing signage in the City to maintain and enhance heritage places and precincts.</p>
Housing diversity	<p>Providing infill opportunities to accommodate residential development.</p> <p>Ensuring future populations have access to a diverse range of housing options including increasing the supply of housing for smaller households.</p>
Housing affordability	<p>Facilitating smaller lot sizes and housing for the ageing and student populations close to community services.</p> <p>Providing social housing in future growth area planning.</p>
Diversified economy	<p>Developing value-adding opportunities.</p>
Agriculture	<p>Protecting the significance of agriculture in the local economy.</p> <p>Preserving agricultural land in large areas to support those industries that rely on agricultural products for processing.</p> <p>Avoiding development that may compromise the dairy industry and its processing facilities.</p> <p>Facilitating opportunities for agricultural diversity.</p>
Industry	<p>Providing an adequate supply of land for industry.</p> <p>Managing the industrial/residential interface to ensure any off-site amenity impacts are minimised.</p> <p>Ensuring that industrial development meets standards for amenity and urban design that promotes the attractiveness of the municipality.</p>

Commercial	<p>Ensuring future development reinforces the primacy of the Warrnambool City Centre.</p> <p>Consolidating and strengthening the Warrnambool City Centre's retail and service functions, as the principal centre servicing the South West region of Victoria.</p> <p>Encouraging the consolidation of restricted and peripheral retailing in the Eastern Activity Centre.</p>
Tourism	<p>Balancing environmental impacts and pressure for development from a large influx of tourists.</p> <p>Protecting those assets on which tourism depends.</p> <p>Ensuring that linkages between Lake Pertobe and the foreshore are strengthened.</p>
Transport	<p>Providing an integrated transport network.</p> <p>Facilitating the use of sustainable transport modes.</p> <p>Prioritising pedestrian movements in the Warrnambool City Centre.</p>
Open space	<p>Facilitating high quality open space within walking distance for all residents.</p> <p>Improving access to waterways to provide important recreational opportunities.</p> <p>Improving connectivity between open spaces and access to off-road trails.</p>
Community infrastructure	<p>Providing community services and flexible spaces for activities supporting community health and wellbeing.</p> <p>Supporting health and education institutions due to the social and economic benefits they provide to the city.</p>
Development infrastructure	<p>Minimising stormwater runoff into the catchments by the use of water sensitive urban design and utilising open spaces to act as floodways.</p> <p>Providing for the sustainable planning, design and construction of infrastructure.</p>
Gaming	<p>Minimising the social and economic effects of gaming on the community.</p> <p>Discouraging further increases in gaming venues and machines.</p> <p>Giving preference to community based organisations rather than commercial premises when considering a replacement of gaming machines.</p>

Appendix B: Community infrastructure provisional supply and demand analysis

Benchmarks used are sourced from Australian Social & Recreation Research (ASR) from 2008 which are still endorsed by the Victorian Government, apart from residential aged care facilities, which reference the current benchmarks used by the Commonwealth Government.

Table 18: Community infrastructure supply and demand estimates

Facility/service	Existing supply	Total demand 2025	Net supply 2025	Total demand 2046	Net supply 2046
Education					
Primary School (Government and Non-Government)	8	3.9	4.1	4.4	3.6
Secondary School (Government and Non-Government)	3	1.3	1.7	1.4	1.6
Government Specialist Secondary School	1	0.7	0.3	0.8	0.2
TAFE/University campus	2	0.2	1.8	0.3	1.7
Early Years					
Playgroup	4	0.7	3.3	2.2	1.8
Maternal and Child Health (MCH)	3	2.2	0.8	2.5	0.5
Seniors and aged care					
Residential Aged Care (beds)	334 beds*	406.7	-72.7	727.1	-393.1

Health					
Community Based Health Care - Level 2	1	0.7	0.3	0.8	0.2
Emergency					
Ambulance Station	1	0.6	0.4	0.7	0.3
Fire Station	3	2.4	0.6	2.6	0.4
Police Station	1	0.9	0.1	1.1	-0.1
SES	1	0.4	0.6	0.4	0.6
Community Meeting Spaces					
Meeting Space - Small (1-20 people)	9	8.9	0.1	9.9	-0.9
Meeting Space - Medium (21-100 people)	21	4.4	16.6	4.9	16.1
Meeting Space - Medium to Large (101-200 people)	4	4.4	-0.4	4.9	-0.9
Neighbourhood House Service	1	2.4	-1.4	2.6	-1.6
Multi-Purpose Community Centre (Level 1)	1	3.9	-2.9	4.4	-3.4
Multi-Purpose Community Centre (Level 3)	0	0.8	-0.8	0.9	-0.9
Young people					
Youth-friendly space (as part of community centre)	0	4.4	-4.4	4.9	-4.9
Youth Centre (dedicated facility)	0	0.8	-0.8	0.9	-0.9
Libraries					
Library	1	0.8	0.2	0.9	0.1

Culture and tourism					
Community Arts Facility	4	3.9	0.1	4.4	-0.4
Community Arts Centre	0	0.7	-0.7	0.8	-0.8
Sport and Recreation Facilities					
Indoor Recreation Centre / Stadium (Hard Court) - Lower Order (2 courts)	0	1.4	-1.4	1.6	-1.6
Indoor Recreation Centre / Stadium (Hard Court) - Higher Order (4-6 courts)	1	0.7	0.3	0.8	0.2
Indoor Aquatic / Leisure / Fitness Centre (25m pool)	1	0.8	0.2	0.9	0.1
Outdoor Netball Facility – Overall Provision	24	10.1	13.9	11.3	12.7
Outdoor Netball Facility – Small (2 courts)	5	2.2	2.8	2.5	2.5
Outdoor Netball Facility – Large (8 courts)	1	0.7	0.3	0.8	0.2
Tennis Facility – Small / Low-Order (2 courts, no pavilion, free to public)	1	1.2	-0.2	1.3	-0.3
Tennis Facility – Higher Order (6-10 courts, with pavilion)	2	1.2	0.8	1.3	0.7
Lawn Bowls Facility	2	0.9	1.1	1.0	1.0
Synthetic Athletics Track	1	1.0	0.0	1.0	0.0
Pavilion - Level 1	14	5.9	8.1	6.6	7.4
Pavilion - Level 3	0	0.7	-0.7	0.8	-0.8
Active open space - Level 1	14	5.9	8.1	6.6	7.4

Active open space - Level 3	0	0.7	-0.7	0.8	-0.8
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* The number of Residential Aged Care beds available at Themar Heights is unknown, so the total beds and resulting supply gap will decrease but still remain undersupplied.

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