

Mildura Rural City Council

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Revised Final Report: Review of the Mildura  
Retail Strategy 2000

Amendments to Text, November 2003

Revised Final Report

**JUNE 2004**

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## Revised Final Report: Review of the Mildura Retail Strategy 2000 Amendments to Text, November 2003

### Revised Final Report

Revision	Revision Date	Details	Authorised	
			Name/Position	Signature
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## Table of Contents

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<b>Executive Summary</b>	<b>5</b>
<b>1 Introduction</b>	<b>9</b>
<b>2 Review of Retail Strategy</b>	<b>13</b>
2.1 Reasons for Reviewing the Retail Strategy	14
2.2 Mildura Retail Strategy 2000	14
<b>3 Findings of Review</b>	<b>16</b>
3.1 Methodology	17
3.2 Existing Retail Provision in Mildura	17
3.2.1 Retail Hierarchy	17
3.2.2 Retail Floor space	20
3.2.3 Land Zoned for Retail Purposes	23
3.2.4 Representation of Store Types	24
3.3 Market Structure	24
3.3.1 Trade Area	25
3.3.2 Population	25
3.3.3 Role of Tourism	28
3.4 Demand Analysis	29
3.4.1 Available Retail Expenditure and Sustainable Floor space	29
3.4.2 Escape Expenditure	33
3.4.3 Mildura's Share of Future Retail Activity	33
3.5 Allowance for Future Activity	36
3.5.1 Means of Accommodating Retail Activity	36
3.5.2 Possible Locations for Future Retail Development	37
3.5.3 Business Zone Implications	38
<b>4 Consultation</b>	<b>42</b>
<b>5 Issues</b>	<b>44</b>
5.1 Retail Hierarchy Policy	45
5.2 Amendment C18 Vidovich Land	46
5.3 Fifteenth Street Precinct	48
5.4 Mildura Urban Design Framework	49
5.5 Mildura Industrial Land Use Strategy (2003)	50
5.6 Mildura & Irymple Residential Strategy	51
5.7 Infrastructure	51
5.8 Calculation of Demand	52
5.9 Redevelopment	52
5.10 Sturt Highway truck route re-alignment	53
<b>6 Current Planning Policy</b>	<b>54</b>
6.1 State Planning Policy Framework	55
6.2 Mildura Municipal Strategic Statement (MSS)	56
6.3 Zones	60
<b>7 Strategies</b>	<b>61</b>
7.1 Vision and Objectives	62
7.2 Formulation of Strategies	63

## Table of Contents - cont

---

7.2.1	Co-ordinated and Collaborative Approach	63
7.2.2	Management of Retail Concentrations	63
7.2.3	Infrastructure Planning and Provision	63
7.2.4	Location and Distribution of Retail Activity	64
7.2.5	Strategies for Main Activity Concentrations	64
7.2.6	Implementation Procedures	68
7.2.7	Marketing and Promotion	68
7.2.8	Retail Training	68
7.2.9	Financial Provision	69

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## Executive Summary

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## Executive Summary

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The key issues considered by the Review are listed as follows:

- The existing retail hierarchy needs to be maintained and each component to be the focus of future retail expansion.
- Since the preparation of the Mildura Retail Strategy 2000 the only effective floor space change has been a small increase in the City Heart, as well as approval for Mildura Centre Plaza to expand its retail floorspace to 21,000 square metres.
- There is a total of 130 hectares of land commercially zoned, which can accommodate retail activity. The main zones are Business 1 (48 hectares) and Business 4 (45 hectares), with the Business 2 and 5 Zones containing 25 and 12 hectares respectively.
- The latest revised population forecasts indicate a very significant increase in the estimates of future population compared to the 2000 Strategy. By 2016 the Mildura trade area population could range from 104,000 to 107,000 persons and by 2021 from 106,000 to 112,000. Almost all of the expected growth is likely to occur in the Mildura Township area.
- Tourism is expected to be a steadily growing contributor to the retail market.
- Having regard to recent retail expenditure data, as well as the increased population forecasts, the retail share of personal expenditure forecasts has increased considerably since the 2000 Strategy. It is therefore anticipated that by 2021 an amount of 35,280 to 58,070 square metres of additional retail floor space could be sustained in Mildura.
- In terms of land area, to accommodate the increase in Business 1 and 4 Zones an additional 10 to 17 hectares of land area will be required. However, due to the occupancy of a considerable amount of Business 4 land by non-retail uses, provision of an additional 15 hectares of largely unused land is desirable.
- Whilst a high priority is still being placed on strengthening specialty retailing in the City Heart, the practicality of ensuring sufficient land area to cater for demand means that consideration has to be given to increasing the area of the Business 1 Zone in the Centre Plaza vicinity.
- It is recommended that an additional area of land be rezoned to Business 4. Consideration should be given to deepening the existing zoned land area along Fifteenth Street as well as extending along it and also into Benetook Avenue, subject to the development of suitable infrastructure to support the use and development.
- Implications for retail policy and statutory measures to cater for future land demand include an emphasis on providing adequate land capacity, supplying the necessary service infrastructure, encouraging effective redevelopment in the City

## Executive Summary

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Heart as well as satisfying car parking demands, and revisiting the Business 2 and 5 zones for smaller scale peripheral sales activities.

- This Review has considered the findings of the Panel Hearing for Amendment C18 regarding the future development of land adjacent to Mildura Centre Plaza for business type retailing. It appears that if the rezoning application is to increase its chances of success, priority actions will need to include improving the performance and capability of the City Heart, providing a strategic context for the additional Business 1 zoned land, an integrated design concept for the current and potential intensive retail land and an expectation that Council would play a stronger leadership role.
- Consideration has been given to the implications of previous and current planning strategy and policy formulation, including those related to industry, housing, parking and urban design. Of particular direct relevance are recommendations contained in the Urban Design Framework report.
- Requiring specific attention is the provision of the appropriate service infrastructure especially where previously undeveloped land is involved.

## Recommendations

- As an outcome of the research and analysis undertaken, the study team has made the following strategy recommendations:
  - *It is recommended that a coordinated and collaborative approach be adopted in order to effectively organise and implement retail development programs.*
  - *It is recommended that management plans be prepared for the City Heart and the Fifteenth Street precinct to maintain and enhance their roles and to facilitate the attraction and accommodation of retail activities.*
  - *It is recommended that Council coordinate the planning and provision of support infrastructure in response to retail development opportunities in the context of efficiently servicing other activity categories.*
  - *It is recommended that the location of future retail development focus on the three existing major retail concentrations, with any future residential development areas served at a local level by large corner stores rather than new centres.*
  - *City Heart: It is recommended that the policy of maintaining the City Heart as the primary retail centre be amended so that it be sustained as the primary activity centre, encompassing strong retail, commercial, financial, community service and recreation and entertainment components.*
  - *Mildura Centre Plaza Precinct: It is recommended that the Mildura Centre Plaza continue to enhance its sub-regional role and that the adjoining Vidovich*

## Executive Summary

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*land be rezoned to Business 1 since it is supportable in terms of retail demand. Actions are proposed to foster the future performance of the City Heart, subject to an integrated design concept being prepared for the whole precinct.*

- *Fifteenth Street Precinct: It is recommended that the Fifteenth Street precinct continue to be promoted as a bulky goods location and that the Business 4 zone be extended by 15 to 20 hectares along the western side of Benetook Avenue north of the intersection with Fifteenth Street.*
- *It is recommended that some form of business plan be prepared to add a strong imperative to the implementation of strategies and actions.*
- *It is recommended that a co-ordinated approach be adopted to the marketing and promotion of retail activity in Mildura with particular reference to the City Heart and the Fifteenth Street precinct. It is desirable that the Council appoint a retail liaison officer to facilitate retail development, attraction of appropriate operators and be a common point contact for retailers, property owners and Council.*
- *It is recommended that opportunities be provided for those involved in retail business operations and property ownership to improve their understanding of retail markets, business operations and investment priorities.*
- *It is recommended that Mildura Rural City Council ensure that financial support is provided in accordance with a budget in the future to adequately fuel retail development as recommended. The sole source of this funding need not be the Council, but should also involve other government agencies and the private sector.*

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# 1 Introduction

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# 1 Introduction

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In June 2003, Mildura Rural City Council commissioned a review of the Mildura Retail Strategy 2000. The key purposes of the review were to:

- Provide an up-to-date retail activity audit for the City Heart, Mildura Centre Plaza and the Fifteenth Street Precinct.
- Determine the future roles and opportunities for each centre, taking into account current development proposals.
- Assess the amount of additional floor space that will be required to accommodate the demand for retail activity to 2021.

In November 2003 a final report was presented to Council without an opportunity to obtain wider community input to a draft version. Since that time some new documentation has come to hand, together with some constructive comments as to how to make the report easier to appreciate.

Amongst the additional information to come to hand was the confirmation of the Workingman's Club being available, for redevelopment for retail purposes, a possibility which had been alluded to in the November report. Advice was provided by the Consultant Team to Council as to the suitability of rezoning the site to Business 1.

Council requested MacroPlan Australia to undertake a *Retail Strategy Review*, the report of which was presented in April, 2004.

Given what has occurred in the last six months, it is appropriate that the November 2003 report be revised and updated.

The outcomes of this review are intended to provide Council with a revised Retail Strategy that will enable it to proactively meet the forecasted retailing demand.

The methodology for the Strategy Review adopted by the project team has been guided by a set of principles developed in consultation with Council officers and takes into account the outcomes of a consultation process undertaken with focus groups. The guiding principles are as follows:

- Ensuring that there is adequate **capacity** made for future retail activity and development rather than imposing definitive constraints.
- Placing a high priority on **accommodating a broad range of store types and retail forms** and their space and location requirements.
- Encouraging **consolidated and managed development** rather than dispersed and disconnected retail activity.
- Allowing for **variations in the factors and determinants** over time, expressed as alternative scenarios.
- **Looking well into the future** in catering for retail needs.

In the prediction of future retail growth, it is recognised that the accuracy of the forecast is largely dependent on a set of assumptions that may have regard to changes in retail technology, consumer preference and behaviour. It is anticipated that significant variations can occur to long-term projections due to factors such as

# 1 Introduction

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lifestyle changes, or the development of new retail practices such as technical advancements. For example, 25 years ago it would have been difficult to predict with any degree of certainty the size of particular retail outlets as they are today, the advent of e-retailing, the emphasis on recreational retailing in response to lifestyle changes and seven day a week trading. Therefore, while quantitative estimates are important in providing necessary guidelines for Council, they should not be taken as rigid determinants.

In accordance with the Project Brief, Stage1 of the Strategy addressed the following topics:

- Existing retail provision in Mildura;
- Market structure;
- Demand analysis;
- Allowance for future activity; and
- Implementation Implications.

Stage 1 concentrated on the fundamental documentation, analysis and findings. Detailed information about this review is included in the appendices to this report.

Stage 2 is concerned with:

- Issues arising from the Review that need to be addressed; and
- Formulation of policies and strategies.

Whilst elaborated in the main text, to assist with appreciation of the Review as a whole the key assumptions are identified here.

Among the general assumptions adopted are the following:

- Ensuring that there is **adequate development capacity available to accommodate the maximum potential demand.**
- Emphasising that the sustainable floor area estimates are **guidelines rather than determinants**, to be used as providing competitive opportunity rather than restraining development.
- Building on **existing retail concentrations and business designated precincts**, including the City Heart, Mildura Centre Plaza and Fifteenth Street.

Trade area, market growth and supply assessments include the following:

- **Using the most recent household expenditure data.**
- **Adopting the same trade area definitions used in the 2000 Strategy.**
- Calculating alternative population growth scenarios and **selecting the high growth scenario as best representative of the allowing the optimum scenario.**
- To estimate the present floorspace supply, **updating the field data used in the 2000 Strategy.**
- Using the years 2011, 2016 and 2021 as representing short, medium and long term respectively.
- Adopting a **1.6% growth rate for tourism numbers**, in line with the rate determined by the Tourism Forecasting Council.

## 1 Introduction

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Among the calculation procedures are the following:

- Adopt threshold turnover levels updated from 2000.
- Separately assess the amount of bulky goods which is sustainable from the non-food category using the latest household expenditure data.
- Estimate the total gross land areas required in terms of hectares, assuming that retail floor area generally represents 35% of gross land area

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## 2 Review of Retail Strategy

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## 2 Review of Retail Strategy

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### 2.1 Reasons for Reviewing the Retail Strategy

The motivation for reviewing and updating the 2000 Strategy was derived from a range of concerns that include the following:

- Population growth is moving faster than had been taken into consideration in the 2000 Strategy.
- Resolution of matters which had arisen from the Industrial Land Use Strategy with specific regard to the future of retailing and manufacturing in the vicinity of the intersection of Fifteenth Street and Benetook Avenue.
- Actions need to be developed to assist in the implementation of strategies.
- The need to maintain an up to date audit of the retail provision since the field work for the 2000 strategy was completed about four years ago.
- Some community stakeholders felt that not enough was happening as a result of the Retail Strategy and that Council should be more proactive in this regard.

### 2.2 Mildura Retail Strategy 2000

The Mildura Retail Strategy 2000 was completed by Essential Economics in association with the Research Planning Design Group in October 2000. The strategy was commissioned by the City of Mildura in order to *guide the ongoing development of the retail sector in urban Mildura* (Mildura Retail Strategy 2000, p 1)

The study included an assessment of the existing planning policy framework and conditions of retailing in Mildura. The study also assessed likely future demand for retail floor space in Mildura in order to provide Council with a retail strategy that would provide guidance in the provision of new retail floor space.

The study described the existing retail areas in Mildura as a retail hierarchy consisting of the following elements.

1. The **Mildura Central Business District or 'City Heart'** – the regional centre and a traditional retail focus for Mildura and a principal location for a variety of retail and non-retail facilities and services.
2. The **Mildura Centre Plaza** – a sub-regional centre accommodating weekly grocery shopping functions and comparison shopping at the Target discount department store.
3. The **Fifteenth Street precinct** – comprising an array of bulky goods outlets and peripheral sales stores to serve the wider Mildura Region.
4. **Small town centres** – small-scale grocery facilities and a range of convenience retailing serving the needs of local populations such as Irymple, Merbein, Red Cliffs, Ouyen and Wentworth.
5. **Neighbourhood / local centres**
6. **Local shops**

Having identified expected future population growth in the region it is anticipated that much of this growth would occur in Mildura. The retail strategy was therefore concerned to ensure that *community requirements for retail goods and services are met and that appropriate retail development can be achieved.*

## 2 Review of Retail Strategy

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A range of issues were identified by the retail strategy. Of particular importance was that any new development in Mildura should not jeopardise the dominance of the City Heart as the primary location for retail activity. The study also recognised:

- The emerging importance of the Fifteenth street development and its evolving nature reflecting a changing retail scene; and
- The need to maintain the retail hierarchy.

Therefore, the Strategy focussed on opportunities to improve and expand the role of the City Heart, including the potential to improve the range of retail services, to enhance its 'outdoor shopping' environment and to make the centre more attractive. The Strategy also identified the need to consolidate the role of the Centre Plaza as a sub-regional shopping centre and to upgrade facilities.

The Mildura Retail Strategy 2000 identified key issues requiring action, particularly the need to:

- Maintain the hierarchy of centres to provide certainty for stakeholders;
- Capture retail spending by introducing new types of development that are in demand, but not yet in Mildura;
- Consolidate and rationalise the existing retail zones to better reflect the existing or preferred future land uses in parts of the City Heart;
- Improve parking and accessibility;
- Respond to retail trends, particularly tourism and peripheral sales; and
- Maintain the Mildura – Irymple break by not allowing commercial development along Fifteenth Street beyond Benetook Avenue.

The Strategy envisaged that:

- There will be opportunities to accommodate an estimated 25,600 square metres of additional retail floor space by 2015.
- A greater focus on retaining a greater share of escape expenditure.
- New development be encouraged in all three commercial locations for regional level retail facilities.
- Centre Plaza be limited to 20,000 square metres of gross leaseable floor space.
- Future demand for peripheral sales facilities at Fifteenth Street would be for 12,000 square metres of retail floor space. Additional land was rezoned on the south side of Fifteenth Street to accommodate that level of demand.
- New shopping centres should be discouraged.

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## 3 Findings of Review

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## 3 Findings of Review

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### 3.1 Methodology

Key tasks undertaken in Stage 1 included:

- A review of existing relevant documentation.
- Field surveys of retail activity in the Mildura City Heart, Mildura Centre Plaza and the Fifteenth Street Precinct as defined in the 2000 Strategy Plan.
- Collation and analysis of the field data.
- Focus group discussions with representatives of City Heart traders, commerce representatives, general industry representatives and also with five Councillors.
- Interviews with a range of stakeholders.
- A review of population data and projections.
- Securing more up-to date retail expenditure data.
- Revising the calculation of available retail expenditure.
- Preparation of estimates of the accommodation areas required for retail growth.

### 3.2 Existing Retail Provision in Mildura

The existing retail provision in Mildura is characterised by the following retail elements:

- The hierarchy of retail concentrations;
- The extent of occupied and unoccupied floor space;
- The amount of land zoned for retail purposes and unused areas within those zones; and
- The representation of store types.

Each of these is described in the following sections.

#### 3.2.1 Retail Hierarchy

There has been no change in the retail hierarchy since the 2000 Retail Strategy was prepared and effectively it remains as follows:

- **Regional centre:** Mildura City Heart or CBD;
- **Sub-regional centre:** Mildura Centre Plaza;
- **Peripheral sales:** Fifteenth Street Precinct;
- **Town centres:** Red Cliffs, Wentworth, Merbein, Dareton, Irymple;
- **Neighbourhood centres:** small centres of up to 15 shops dispersed throughout urban Mildura; and
- **Local shops:** convenience outlet serving daily needs.

A retail hierarchy tends to be measured by the scale or area of centres, and the presence of major magnet stores (e.g. department stores, discount department stores, supermarkets, bulky goods outlets).

Usage patterns are also meaningful in determining the retail hierarchy. Regional centres often absorb lower order centre functions and are commonly used for both regular and also less frequent visits. They contain the main concentration of business, financial, administrative, entertainment and leisure activities, as well as

### 3 Findings of Review

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visitor accommodation facilities. Sub-regional centres, in a country context, are visited very regularly, meeting both weekly and monthly shopping needs. Peripheral sales precincts are less frequently visited, usually for specific purposes by residents.

In the light of the documentation and analysis undertaken thus far, the **future roles** of the three main retail concentrations are considered to be as follows:

- **City Heart:** Whilst the centre is likely to retain the largest quantum and range of retail activity, its relative trading performance may not advance to the extent of the other two retail activity concentrations centres unless specific strategies are adopted and associated actions that facilitate its ongoing development and growth are implemented. Factors contributing to its existing situation include its strip shopping layout, perceived parking difficulties, land ownership patterns (that present obstacles to lot consolidation allowing for comprehensive redevelopment), vacant or undeveloped land parcels not readily available in the core area and the absence of a quality retail identity. Unless these matters are addressed, the retail attraction of the centre will not be significantly enhanced. A particular influence on its future retail development is most likely to be the expansion of specialty shopping opportunities in the Mildura Centre Plaza.

To sustain its position of activity centre pre-eminence the City Heart will rely not only on retailing but also on the growth of non-retail activities such as offices, recreation, entertainment and tourism services. Enhancing links with the riverfront will also be of benefit. The Marina development including its limited retail component is considered positive in that context.

- **Mildura Centre Plaza:** An expansion of retail floor space at the Plaza to 21,000 square metres has been approved which will consolidate its sub regional role. Most of the extra floor area will be in the form of specialty outlets. This has been achieved through the reduction in the floor area of the Target store and the likely postponing of the supermarket addition. It is likely that the Centre Plaza will compete with the City Heart for specialty stores, its position strengthened by the fact that it is owned and managed by a single operator who has the ability to organise the stores in an orderly and themed fashion. The nodal attraction of the Plaza would be further strengthened by the rezoning of the Vidovich land to Business 1, but in the view of the Study Team not to extent that the City Heart's trading status would be significantly damaged. This is due to the dominance of its discount department and other discount store components in the City Heart. In the longer term, it is unavoidable that Mildura Centre Plaza would seek to upgrade and expand in order to remain a competitive shopping presence and should be encouraged to do so.
- **Fifteenth Street Precinct:** Peripheral sales retailing in effect is display based providing low density retailing that requires larger floor areas in order to display its range of products involved.

This type of cluster retailing is commonly developed on the periphery of more traditional retail locations and/or along major roads. Quite often these are of a

### 3 Findings of Review

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bulky nature but may also be smaller in scale such as in hardware stores. Increasingly, they are becoming more specialised versions of discount priced mainstream retail operations but at a larger scale, examples being fabric stores and the “Brandsmart” type of retail complex. The main distinction thus far is the emphasis on non-food goods and the requirement for larger, lower rent spaces. Often they are associated with auto related activities. Development trends indicate a strengthening demand for large space retail areas focussed on floor display of goods. Fifteenth Street is the logical focus for the future development of such activity.

It is worth noting that a significant proportion of the land included in the Business 4 Zone on Fifteenth Street remains undeveloped for retail purpose especially on the southern side of the Street.

- **Other Categories:** The hierarchical status of town centres, neighbourhood centres and local shops remains unchanged and this is likely to continue. It is doubtful that new neighbourhood centres will be developed and be viable due mainly to improved transport accessibility to higher order centres. The consequent uncertain investment viability of neighbourhood centres suggests that it is more likely that new enlarged corner stores will be established, often in association with service stations. This situation does not apply to town centres where the weekly shopping function could be augmented by appropriate store additions or enlargement by such uses as supermarkets, provided there is sufficient B1 zoned land.

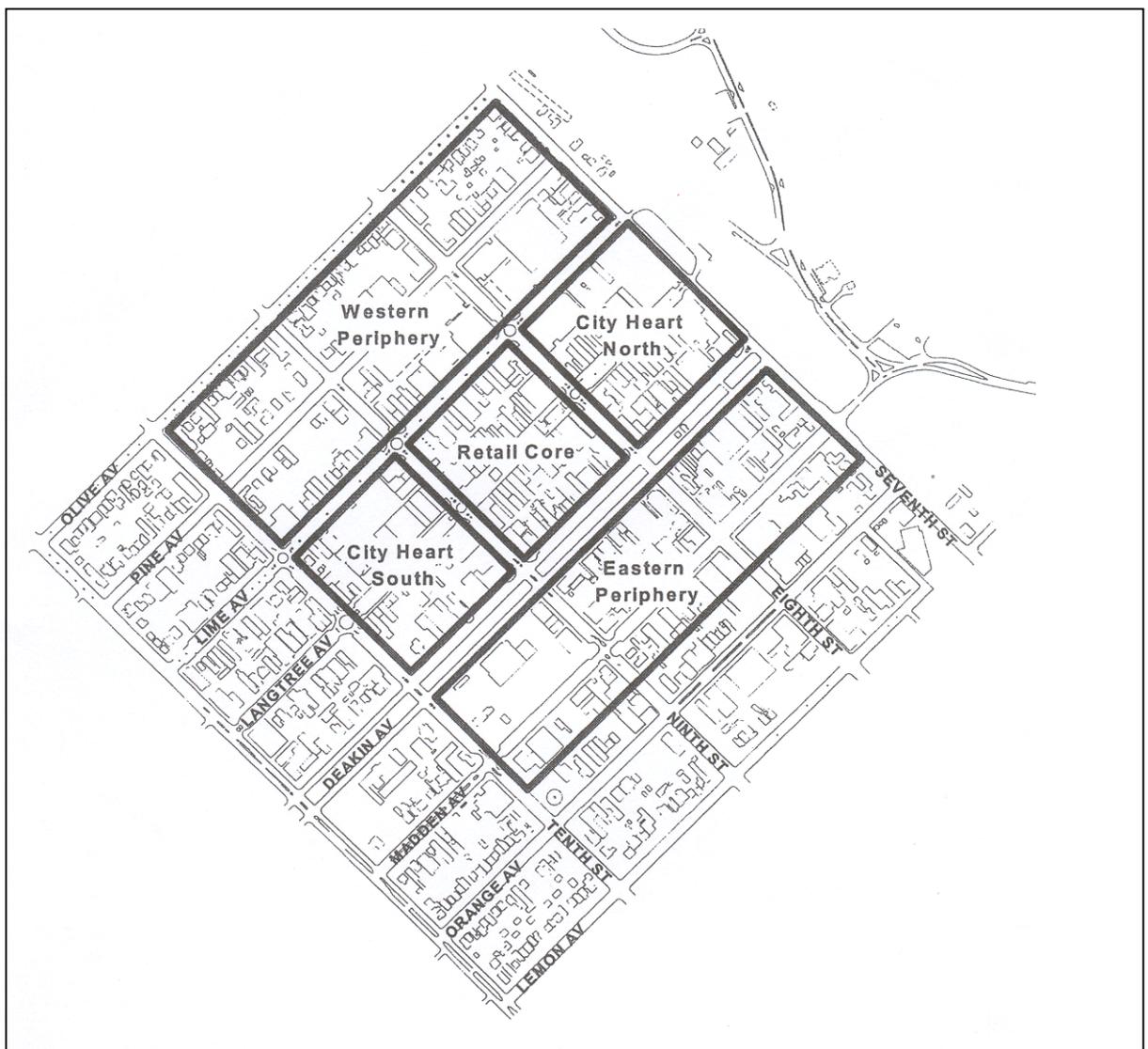
### 3 Findings of Review

#### 3.2.2 Retail Floor space

The outcomes of the audit of the three main nominated centres are as follows:

**City Heart:** Figure 3.1 shows the location of local precincts used in the 2000 Strategy. Table 3.1 summaries the results of the floorspace survey and analysis conducted in August 2003, which involved a field survey of all zoned areas using the previous field sheets as a basis.

Figure 3.1: Precincts at Mildura City Heart



### 3 Findings of Review

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The main variations to retail activity since the audit carried out for the 2000 Strategy are as follows:

- An increase in the occupied retail floor space of 2,875 square metres to 64,775 square metres has occurred, due mainly to the occupation of previously vacant space and the conversion of premises previously used for non-retail purposes.
- There has been a decline in the amount of vacant floor area by 1,390 square metres to 2,265 square metres, which is down to a rate of 3.4% from 5.6%.
- Non-food floor space has increased by 4,905 square metres, whilst Food floor space decreased by 660 square metres and retail services by 1,270 square metres.
- The main increases in occupied retail floor space were located in the retail and business core and the western periphery.
- There is very little of the zoned retail area that is not occupied by buildings that accommodate permitted uses. Undeveloped sites are very limited, a prominent one being used for car parking designated for use by patrons of the Grand Hotel on Seventh Street.

### 3 Findings of Review

**Table 3.1 City Heart: Retail Floor Space by Precinct (August 2003)**

	Retail and Business Core	City Heart North	City Heart South	Western Periphery	Eastern Periphery	Total City Heart
<b>Food</b>						
Floor space m2	1,215	850	5,135	3,610	110	10,920
Number of premises	11	9	4	4	2	28
<b>Non-Food</b>						
Floor space m2	13,365	5330	7,980	14,900	4,175	45,750
Number of premises	67	13	24	39	8	151
<b>Services</b>						
Floor space m2	2,510	3,455	645	1,340	155	8,105
Number of premises	22	22	8	11	2	65
<b>Total Occupied Floor Space</b>						
<b>Floor space m2</b>	17,090	9,635	13,760	19,850	4,440	64,775
<b>Number of premises</b>	100	44	36	54	12	246
<b>Vacant Built Floor Space</b>						
<b>Floor space m2</b>	250	1,265	480	60	210	2,265
<b>Number of premises</b>	4	10	4	1	3	22
<b>Vacancy rate %</b>	1.4	11.6	3.4	0.3	4.5	3.4

**Source:** Update by field survey of base data for Retail Strategy 2000.

With regard to the amount of vacant shops, a separate property industry source has recorded about 3,000 square metres of vacant floor area in 22 shop premises for the same area surveyed in 2000 and 2003. However, for consistency in comparisons the surveyed data has been adopted.

As measured in terms of vacant premises, the current overall rate is 8.9% compared to 12.0 % as reported in the 2000 Strategy report. Notably the number of retail premises had increased by 12 from 234 to 246, with number of vacant premises decreasing by 6 from 28 to 22. Caution has to be exercised in taking such information at face value in terms of indicating retail performance, since most premises are interchangeable between shop and office (non-retail). The largest proportion of vacant space to total premises is in the City North Precinct, with only a slight decline between 2000 and 2003. Store closures and turnover of tenants is a distinct characteristic of the hospitality type activities concentrated in this precinct.

**Mildura Centre Plaza:** Over the last 3 to 4 years the main occurrences affecting the Plaza have been as follows:

- The current occupied retail floor area is 15,570 square metres representing very little change from the 2000 survey.
- Most significant is that approval has been given for an increase in the total floor space limit to 21,000 square metres, an increase of almost 30%. There will be a reduction in the area devoted to the Target store and a major expansion in specialty store space.

### 3 Findings of Review

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- Vacant floor area is almost non-existent with any unused space committed to future tenancies.
- The notable non-retail support for the centre is the presence of three banks.

**Fifteenth Street Precinct:** Features of the current situation are as follows:

- An occupied retail floor area in the order of 25,000 square metres, representing a drop of 500 square metres since 2000 due to non retail uses occupying premises previously used for retail purposes.
- A very large proportion of the land included in the Business 4 Zone is not used for peripheral sales purposes, much of which is on the southern side of Fifteenth Street.

It is noted that Council has granted a permit for the development of the vacant land on the south western corner of Benetook Avenue and Fifteenth Street. The permit allows for:

- 13 peripheral sales premises ranging in size from 500 to 3000 square metres;
- a service station and ancillary take-away food premises; and
- 445 cars.

The permit has not been enacted at this time.

When the balance of the trade area, as defined in the 2000 Strategy, is taken into account, there has been very little change in the aggregate amount of occupied retail floor space. This amount increased by only 2,375 square metres, an increase of approximately 3.0%, most of which is located in the City Heart.

#### 3.2.3 Land Zoned for Retail Purposes

The main zones applicable for the accommodation of retail activity are:

**Business 1 Zone**, which focuses on intensive retail activity concentration along with support activities such as offices, community services and entertainment and hospitality; and **Business 4 Zone**, which provides opportunities for larger scale activities, often termed bulky goods, related services and manufacturing as well as visitor accommodation.

The **Business 2 and 5 Zones** concentrate on catering for offices and various commercial activities and, in the case of **Business 5**, medium density residential development. These zones tend to cluster around or are extensions to Business 1 Zones. However, both zones are capable of providing retail development opportunities, including smaller scale low density retail or peripheral sales activity.

The Mildura urban area has approximately 48 hectares of land included in a Business 1 Zone, most of which is concentrated in the City Heart, with another concentration at Mildura Centre Plaza. In both locations, almost all of the zoned area is occupied by buildings and car parks. Other Business 1 areas are a limited to a number of shops on Deakin Avenue between 12<sup>th</sup> and 13<sup>th</sup> Streets, serving a local convenience market, and a small area on the south side of Fifteenth Street at the intersection with Deakin Avenue

### 3 Findings of Review

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Fifteenth Street, between Deakin Avenue and Benetook Avenue, contains most of the 45 hectares of land included in a Business 4 zone. Apart from about 2 hectares, most of this area is devoted to some form of activity of which a considerable proportion is of a retail or services nature. However, a very large proportion is occupied by visitor accommodation and hospitality uses, which could be redeveloped for retail type activity.

There are 25 hectares of land devoted to the Business 2 Zone, which is mostly found on the fringes of the Business 1 Zone in the City Heart to the east and the south, where it accommodates a variety of offices, business service activities, lower order retail activities, community services and isolated pockets of residential. In this zone there are areas potentially available for development or redevelopment. Currently there is approximately 12 hectares of land zoned Business 5, much of it located along Fifteenth Street where it is mostly used for office and visitor accommodation as well as some residential. There is another pocket of the zone east of Madden Avenue.

Overall there appears to be limited retail zoned land available for new development without undertaking redevelopment of existing sites, that are currently accommodating non-retail uses. Some Business 4 zone land, such as the Vidovich property in Fifteenth Street adjacent to Mildura Centre Plaza, is well located to become an extension of a Business 1 zone.

#### 3.2.4 Representation of Store Types

While recognising that the availability of a requisite amount of retail floor space is critical to sustainable retail development, it is important to note that the presence of a variety of store types is another imperative for healthy retailing, since these are the main attractors of retail expenditure.

Given its market scale, Mildura is well represented by the major store types and shopping forms. Operations not represented or under-represented include:

- Full-line department stores, such as Myer and David Jones, which require a large market population threshold, (although some have performed below expectation in regional centres in recent years).
- A fresh food market, usually operated on selected weekdays (which are not commonplace in regional centres).
- Some higher quality specialty store types, although almost all specialty retail merchandise is available in one form or another.

With regard to major attractors or magnet stores, there are two of the three major discount stores present, all mainstream supermarket operations and major hardware and household goods outlets, such as Bunnings, Mitre 10 and Harvey Norman.

### 3.3 Market Structure

The market structure is discussed in terms of the assumed trade area, the current and future population in this trade area and the role of tourism.

## 3 Findings of Review

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### 3.3.1 Trade Area

The trade area definitions adopted are the same as those used in the 2000 Strategy. These are based on previous research among shoppers and households and about which there has been little challenge in other relevant market assessments since they were completed.

Accordingly,

- The primary trade area consists of urban Mildura and the townships of Irymple, Merbein, Red Cliffs and also Wentworth in NSW; and
- A secondary trade area incorporating the balance of the Rural City of Mildura and the areas extending to Broken Hill in NSW and the Riverland in SA.

### 3.3.2 Population

Customarily, reliance for population analysis and projections has been based on the Australian Bureau of Statistics (ABS) Population Censuses, carried out at five-year intervals with the last one being in 2001. Various agencies such as the ABS and the Department of the Environment and Sustainability in Victoria take into account the population trends, age and family structure characteristics, selected economic factors and land availability to determine likely population sizes in the future. Sources such as these were used in the population analyses and projections contained in the 2000 Strategy.

As recorded in ABS Population Census Data, the number of people in the Rural City of Mildura (urban) increased by 3550 persons (8.7%) to 44,194 between 1996 and 2001. The 2000 Strategy assumed a total population of 44,250 persons, which is above the 2001 Census count and suggests a slightly lower growth rate since 1996. Annual growth rates assumed to arrive at the year 2000 estimate were either 1.8% or 1.9%. To predict the growth to 2015, the annual rates used were 1.2% in the first five year period and 1.0% thereafter to arrive at a 2015 total of 51,940 persons, which further extrapolated to year 2020 suggests a population of about 54,600.

However there is reasonable evidence to indicate that a higher growth rate could be achieved, since the same influencing factors are still in play. These factors include continuing growth in the wine and grape production industry as well as in other horticultural products, a strengthening tourism sector and the advent of new fields of enterprise such as the mining and processing of mineral sands despite the temporary closure of the Murray Basin Titanium plant. Furthermore, the overall role of Mildura as a regional node is being reinforced due to its current level of services provision and its relative remoteness from similar order cities.

As already indicated, the population estimates used here for the Rural City of Mildura were developed in conjunction with the preparation of a Residential Strategy for Mildura and Irymple. The actual processes used in arriving at the adopted estimates are contained in a separate working paper. Succinctly, the forecast future growth scenarios are based on annual growth rates between 1991 and 1997 (0.7% or low rate), growth between 1991 and 2003 (1.26% or middle rate) and growth between 1997 and 2003 (1.73% or high rate). These result in the following alternative projections:

### 3 Findings of Review

Year	Persons		
	Low Projection	Medium Projection	High Projection
2006	52,405	53,280	54,030
2011	54,260	56,725	58,870
2016	56,190	60,390	64,135
2021	58,185	64,290	69,880

These projections or forecasts form the basis for a “capacity” planning approach. This means that adoption of the low estimate provides a bare minimum calculation of the land requirement for retailing in the forecast period, the medium estimate caters for possibly the most likely requirement, whilst the high estimate virtually ensures that any feasible requirement is satisfied. The last two estimates also allow for greater choice as to location options.

A simple way of illustrating the variation in the amount of growth is in terms of persons per annum, which is estimated to be 385 persons for the low estimate, 735 for the medium estimate and 1,055 for the high estimate.

With regard to the remainder of the trade area, the 2000 Strategy predicted an overall average growth decline of 0.3% to 0.5% per annum, which may be realistic for most of the localities involved, except for the catchment area for Wentworth Shire where there is evidence of increased dwelling development in towns other than Wentworth township itself. Nevertheless it has been assumed that the 2000 Strategy growth assumptions for the balance of trade area still apply for the alternative growth scenario.

Against this background, the following table sets out the total trade area population growth levels. The projection contained in the 2000 Strategy is included for comparison.

Year	2000 Strategy	Persons		
		Low Projection	Medium Projection	High Projection
2006	97,465	98,070	98,945	99,695
2011	98,610	98,765	101,290	103,375
2016	99,280	99,510	103,740	107,485
2021	100,910	100,970	106,420	112,010

It should be noted that the estimates from the 2000 Strategy have been adjusted to coincide with future Census years and to be comparable with the years used in the Residential Strategy.

There is a very close relationship between the estimated population in the 2000 Strategy and the low projection, suggesting that both are conservative and minimalist.

The MacroPlan Retail Strategy Review found that it could not reconcile the population projections used in the November 2003 Review, and preferred to rely on

### 3 Findings of Review

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the rate of growth contained in the DSE interim population forecasts, allowing for no alternative scenarios.

At the outset and reinforced during the course of the 2003 Review, Council sought outcomes which took into account a range of population growth scenarios. This was done in the interests of ensuring that there would be **adequate capacity** of land and support infrastructure in place for both residential and retail development.

The Macroplan population projections are based on the latest DSE interim population projections, which suggest a Mildura population growth rate of approximately 1.0%. Added to this is the growth rate for the balance of the trade area, which resulted in an assumed overall trade area growth rate of 0.6%, with a decline in growth anticipated for the non-Mildura component of the trading sphere of influence.

The November 2003 Review did not assume a common growth rate for the whole trade area but treated Mildura and the balance of the trade area separately. This is justified on the basis of imbalance in the contributions of both components to retailing in Mildura. Nevertheless the low growth scenario in the 2003 Strategy Review does allow for an annual rate of 0.7% for Mildura, which is not much different from 0.6% per annum. Along with the 2000 Retail Strategy, the 2003 analysis took into account the overall average growth decline of 0.3% to 0.5% in the balance of the trade area.

The combination of the two components of the total trade area population provided the results shown in this Report. The low projection in the 2003 analysis is almost the same as that in the 2000 analysis, e.g. 100 910 and 100,970 persons in 2021, allowing for the extrapolation of the 2015 estimate in the 2000 Strategy analysis to 2021.

**In effect, the difference in the approach adopted in this Report and that by MacroPlan is the respective emphasis on capacity as opposed to more minimalist planning.**

Pertinent features of the population structure include the following:

- The age structure is generally consistent with that for Country Victoria, with the proportion of persons over 60 years expected to progressively increase over the next 20 or so years. This is a consequence of both local population trends and the choice of persons now living outside of the region of Mildura as a retirement location. Nevertheless the age structure is expected to remain fairly well balanced as new families are formed. In these circumstances there will be a broad spectrum of shopping needs to be satisfied.
- At the time of the 2001 Population Census, the average household size was 2.59 persons. A feature of the household structure at that time was that 58% of all households comprised one and two persons which included a high proportion of over 60's and the relatively low proportion of persons in the 18 to 24 years age bracket.
- Mildura has relatively low personal and household incomes. This may account at least in part for the relatively high number of discount shopping outlets.

### 3 Findings of Review

- Motor vehicle ownership is high with only 8% of households having no motor vehicles and 51% possessing two or more vehicles. This significant level of independent transport mobility facilitates an ability to visit a range of retail facility locations.

#### 3.3.3 Role of Tourism

The contribution of tourism to the economy of the Mildura region is strong, based on its climate, riverine environment, historical background, wineries and events. It attracts both day-trippers and overnight visitors.

It is no easy task to keep accurate up-to-date estimates of the level of visitation to tourism regions due to specific detailed surveys and accompanying analyses usually being carried out at irregular intervals. Constant reviews take place as more data becomes available. By way of example, during the hearing conducted for Amendment C6 to the Mildura Planning Scheme, the Consultants who prepared the 2000 Strategy provided a revised table showing estimated visitor numbers and spending, based on the receipt of better information.

Care has to be taken not to be misled by possibly confusing definitions of tourist product areas. Historically the Mildura retail trade area has been generally regarded as correlating with the Mallee tourism sub-region. Since 1998 the Mallee sub-region figures are not published in their own right but are combined with the Wimmera sub-region to become the Murray Outback tourism product region. Consequently, adopting the Murray outback as representing the Mildura tourist area significantly exaggerates the actual situation. To arrive at a more accurate assessment of visitor numbers, use has been made of previous data for the Mallee sub-region, projected accordingly.

Against this background, a fairly conservative approach has been adopted in estimating the future contribution of tourism to retailing in Mildura. For the purposes of this analysis, the revised visitor numbers for the year 2000 have been chosen as a base, with future growth in numbers based on a 1.6% growth per annum as determined by the Tourism Forecasting Council.

The resultant estimates of visitors to the Mildura Tourism sub-region are as follows:

Year	Number of Visitors	
	Overnight Visitors	Day Trippers
2006	626,000	542,000
2011	677,000	587,000
2016	733,000	636,000
2021	794,000	688,000

These estimates have been utilised in the retail expenditure calculations.

## 3 Findings of Review

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### 3.4 Demand Analysis

The demand analysis takes into account the extent of available retail expenditure, the issue of escape spending and the land and floor space area required to meet future demand.

As far as has been possible the methodology has sought to follow that in the 2000 Strategy, with some variations to facilitate comparison of the findings. Also the years selected for future estimates coincide with planned Population Census years to assist in future monitoring.

An important data source has been the very recently available upgrades of household and personal retail expenditure details to 2002. This material was provided by Marketinfo.

To help understand the following estimation process and associated analysis, the methodology for estimation of the amount of floor space, which can be sustained by expenditure by residents, is expressed as follows:

- |        |   |
|--------|---|
| Step 1 | Prepare the population forecasts.   |
| Step 2 | Select the average personal expenditure on retail goods by Mildura residents, based on the data provided by Marketinfo.                                     |
| Step 3 | Multiply the outcome of step 1 by that of step 2 to determine the notional total amount of expenditure available for spending on retail goods and services. |
| Step 4 | Select turnover levels or an average sale per square metre representing what net square metre return is required for the retail operation to be viable.     |
| Step 5 | Divide the outcome of step 3 by that of step 4 to determine the amount of sustainable retail floor space.   |

For estimating the floor area that maybe sustainable by visitor expenditure a similar process is followed, where the anticipated number of visitors is substituted for population numbers.

#### 3.4.1 Available Retail Expenditure and Sustainable Floor space

The available retail expenditure has been calculated for residents and for visitors to Mildura from beyond its trade area, utilising the already outlined population estimates, the currently available expenditure data and tourism expenditure estimates from a variety of sources similar to those used in the 2000 Strategy. Expenditure data is expressed in 2002 dollars.

A crucial factor affecting the demand calculations for the future sustainable floor area is the amount of retail spend per person. In this instance it is particularly important since the same data source is used in the 2000 Strategy and in this analysis, namely Marketinfo. Since the 2000 Strategy was prepared Marketinfo has significantly revised their estimates in the light of additional data becoming available. This has had the effect of revising upward the aggregate amount of retail spend per person by over

### 3 Findings of Review

20%. Earlier availability of the revised estimates could well have generated different results for the 2000 Strategy. Of course this is conditioned by other factors, such as any variation in the scope of commodities or services included in the various retail categories and the turnover ratios or spend per square metre adopted in the calculations. For example the revised retail services category has a significantly increased spend per person that may be influenced by activities that are included. Table 3.1 contains estimates of the available residential retail expenditure.

**Table 3.1 Estimates of available retail expenditure by residents, 2006 to 2021**

Year	Category	Population Scenarios (\$million)		
		Low	Medium	High
2006	Food	411.4	415.1	418.2
	Non-food	299.4	302.1	304.4
	Services	95.6	96.5	97.2
	<b>Total</b>	<b>806.4</b>	<b>813.7</b>	<b>819.8</b>
2011	Food	424.7	435.6	446.1
	Non-food	309.1	317	323.6
	Services	98.8	101.3	103.4
	<b>Total</b>	<b>832.6</b>	<b>853.9</b>	<b>873.1</b>
2016	Food	438.7	457.4	473.9
	Non-food	319.3	332.9	344.9
	Services	102.1	106.3	110.1
	<b>Total</b>	<b>860.1</b>	<b>896.6</b>	<b>928.9</b>
2021	Food	456.5	481.1	506.4
	Non-food	332.2	350.1	368.5
	Services	106.1	111.9	117.7
	<b>Total</b>	<b>894.8</b>	<b>943.1</b>	<b>992.6</b>

These estimates are generally higher than those in Strategy 2000 due not only to larger population growth anticipated especially in the medium and high scenarios, but also to the greater expenditures per capita.

Table 3.2 shows the selected turnover rates applied to the available residential expenditures and therefore the estimates of sustainable floor space. These turnover rates are derived on a similar basis to those used in the 2000 Strategy.

### 3 Findings of Review

**Table 3.2 Turnover thresholds and estimates of floorspace sustainable by residential expenditure**

Year	Category	2006 to 2021			
		Turnover \$/m2	Population Scenarios (square metres)		
			Low	Medium	High
2006	Food	7,060	58,270	58,800	59,240
	Non-food	2,230	134,260	135,460	136,490
	Services	2,000	47,780	48,230	48,600
	<b>Total</b>		<b>240,310</b>	<b>242,490</b>	<b>244,330</b>
2011	Food	7,240	58,660	60,170	61,620
	Non-food	2,280	135,580	139,050	141,910
	Services	2,050	48,180	49,410	50,430
	<b>Total</b>		<b>242,420</b>	<b>248,630</b>	<b>253,960</b>
2016	Food	7,420	59,120	61,640	63,870
	Non-food	2,340	136,450	142,260	147,400
	Services	2,100	48,610	50,630	52,460
	<b>Total</b>		<b>244,180</b>	<b>254,530</b>	<b>263,730</b>
2021	Food	7,610	61,520	64,840	68,250
	Non-food	2,400	138,410	145,880	153,550
	Services	2,150	49,360	52,360	54,750
	<b>Total</b>		<b>244,290</b>	<b>263,080</b>	<b>276,550</b>

The MacroPlan Review has adopted a different set of turnover threshold rates, which are approximately 8% higher than those used in this analysis. Use of these rates has the effect of reducing the amount of sustainable retail floor area, although this effect is somewhat modified by the adoption of a 1.0% compared to 0.5% applied in this analysis for growth in real retail expenditure.

Bulky goods are part of the non-food category and so should not be added onto the aggregate of the main three merchandise categories to avoid double counting. They do have specific locational requirements and require larger floor areas for display purposes. Increasingly they are becoming part of Business 4 Zone activities.

As a separate exercise, the amount of bulky goods or peripheral sales floorspace that is anticipated to be required was also calculated. This will assist in assessing the desirable location for this type of activity, such as in the Fifteenth Street precinct. These calculations are contained in Table 3.3.

### 3 Findings of Review

**Table 3.3 Estimates of the sustainable bulky goods floor space required 2006 to 2021**

Year	Turnover \$/m2	Projection Scenarios (square metres)		
		Low	Medium	High
2006	1,580	67,220	67,820	68,340
2011	1,620	67,730	69,460	70,900
2016	1,660	68,280	71,180	73,750
2021	1,700	69,370	73,120	76,960

In concept form, these estimates suggest need for 20 hectares of land for bulky goods in the future, making allowance for some redevelopment of existing Business 4 land not currently used for retailing or some peripheral sales development. It is appropriate to make another 15 to 20 hectares of Business 4 land available.

Utilising the estimated visitor numbers in Section 3.3, together with selected tourist spend estimates per person, the calculated amount of available expenditure for the forecast years are as follows:

Year	Overnight Visitors		Day Trippers		Total Amount Spent \$m
	Spend per visitor \$	Amount Spent \$m	Spend per visitor \$	Amount Spent \$m	
2006	78	48.8	37	20.1	68.9
2011	80	54.2	38	22.3	76.5
2016	82	60.1	39	24.8	84.9
2021	84	66.3	40	27.5	94.2

On a similar basis as used in Strategy 2000, the distribution of this total expenditure by merchandise category is as follows:

Year	\$ million			Total
	Food	Non-food	Services	
2006	24.1	40.0	4.8	68.9
2011	26.8	44.4	5.3	76.5
2016	29.7	49.2	6.0	84.9
2021	33.0	54.6	6.6	94.2

Applying these results to the turnover thresholds already employed, the resultant estimates of required floor spaces are as follows:

Year	Square Metres			
	Food	Non-food	Services	Total
2006	3,410	17,940	2,400	23,750
2011	3,700	19,470	2,590	25,760
2016	4,000	21,030	2,860	27,890
2021	4,340	22,750	3,070	30,160

### 3 Findings of Review

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The MacroPlan Review has used different source material from both the 2000 Strategy and the November 2003 Review, which estimate 2002 tourism expenditure in the Rural City of Mildura at \$121.1 million which is almost twice the order of estimates in the other two analyses. It also assumes a per annum visitor growth rate of 0.5% compared to 1.6%. The end result is a MacroPlan estimate of total retail expenditure by visitors of \$133.1 million in 2021 matched against \$94.2 million, which indicates that the estimates contained in this Review are conservative and that as a consequence more visitor oriented retail activity could be sustained.

#### 3.4.2 Escape Expenditure

Traditionally, retail analysis places considerable emphasis on the influence of escape expenditure on retail trading performance. Quite often less attention is paid to the capture of expenditure from outside the defined trade area, which should be balanced against what expenditure escapes. Theoretically, and quite simply, if there were no escape expenditure there would be none captured, which is totally unrealistic. Residents may well shop outside their local centres' trade areas because they cannot find the product or standard of product they are looking for locally. However much of this external shopping occurs in association with trips for other purposes. By the same token, the relative isolation of Mildura away from other similar or larger centres means that residents in abutting regions are likely to come to Mildura to shop. The 2000 Strategy assumed that there was an expenditure escape of 27% from the trade area.

Given the compensating effect of expenditure capture, it may be misleading to set targets of reducing escape expenditure. Rather it is perhaps more realistic to use the estimated retail expenditure capacity to encourage existing operators to work towards offering the range and quality of goods and services which may persuade local residents to buy locally. Competitive pricing is a major issue that can be addressed by reinforcing the travel cost savings by not having to make a specific purpose shopping trip outside the trade area.

Consequently, no estimates of escape expenditure are included here.

#### 3.4.3 Mildura's Share of Future Retail Activity

Because Mildura is the dominant growth area within the total trade area, it is assumed that by far the greater amount of future retail development will be located within its urban areas.

The 2000 Strategy proposed that the percentage allowance for the accommodation of additional floor space sustained by residential spending was 85% for food, 90% for non-food and 80% for services. These allowances are considered realistic and are adopted in this analysis.

Table 3.4 contains the calculations for the additional floor space which could be sustained by residential spending and could be located in Mildura.

### 3 Findings of Review

**Table 3.4 Estimation of Mildura's Share of Additional Floor space Based on Resident Expenditure 2003 to 2021 in Trade Area**

	Food	Category Non-food	Services	Total
Available Floorspace 2003 (Square metres)	59,590	129,010	17,880	206,480
<u>Low Scenario</u>				
Sustainable Space	61,520	138,410	49,360	249,290
Difference to Supply	1,930	9,400	31,480	42,810
Sustainable Proportion (Square metres)	1,640	8,460	25,180	35,280
<u>Medium Scenario</u>				
Sustainable Space	64,840	145,880	52,360	263,080
Difference to Supply	5,250	16,870	34,480	56,600
Sustainable Proportion (Square metres)	4,460	15,180	27,580	47,220
<u>High Scenario</u>				
Sustainable Space	68,250	153,550	54,750	276,550
Difference to Supply	8,660	24,540	36,870	70,070
Sustainable Proportion (Square metres)	7,360	22,010	29,500	58,870

The notable features of the above calculations include the following:

- The estimates of the amount of sustainable food retail space suggests that Mildura is relatively well off in this respect, given that there are four mainstream supermarkets in Mildura township alone. Previous estimates based on an historical trend extrapolation generated relatively low turnover ratios for food hence suggesting a significant unmet demand. However, later data has been obtained which shows much higher turnover ratio or sales per square metre for food which has resulted in a substantial reduction in the food space requirement
- With regard to non-food retailing, there is a steady growth in demand over time, but this could actually under-estimate the actual aggregate of space which is justifiable. The relatively high estimates of required food space which is contributed to the significantly higher expenditure on food as revealed in the 2002 spend estimates. This is based on 1998-1999 Household Expenditure Survey by the ABS, rather than on the 1993-1994 Survey which was the basis for the origin of the estimates used in the 2000 Strategy.
- By contrast the relatively low level of additional non-food space required is attributable to the amount of existing space in this category. This exposes one of the weaknesses of relying on total floor space estimates to assess future demand, in that it does not take into account the quality of the space, how well it is utilised,

### 3 Findings of Review

where it is located in terms of market access and whether its format is redundant. A clear example of this is the emergence of the “big box” stores such as Bunnings and Harvey Norman.

- Retail services contain mostly personal services and include cafes and restaurants, hardware stores, film processors and household goods. The estimated requirements are comparatively higher than would have been specified in the past. This could be a reflection of greater use, especially with regard to cafes and restaurants, and to their location in higher profile retail areas.

In summary, the additional amounts of retail floor and land area which could be sustained in Mildura are as follows:

Category	Range from Low to High Estimates	
	Floor space Square Metres	Land Area Hectares
Food	1,640 to 7,360	0.5 to 2.1
Non-food	8,460 to 22,010	2.4 to 6.2
Services	25,180 to 29,500	7.1 to 8.3
<b>Total</b>	<b>35,280 to 58,870</b>	<b>10.0 to 16.6</b>

Empirical evidence shows that in any new retail development the actual floor space area represents about 35% of the total land area in order to allow for car parking areas. If not directly associated with the retail premises, the land required for car parking needs to be supplied elsewhere in the locality or shopping precinct. While multi-deck parking reduces the overall land requirement it is a more expensive development option.

Turning now to the share of retail floor space and land area required to accommodate tourist expenditure, the 50% share of total trade area space adopted in the 2000 Strategy is applied. The results are that by the year 2021 the Mildura urban area could justify the provision of a total of 16,190 square metres of floor space, made up of 3,280 square metres of food space, 11,380 of non-food and 1,530 of retail services. A total land area of 4.5 hectares would be required.

The overall estimated additional sustainable retail activity space up to the year 2021 in urban Mildura is summarised as follows:

#### Combined Residential and Tourism Sustained Space

Category	Range from Low to High	
	Floor Space Square Metres	Land Area Hectares
Food	3,350 to 10,640	0.9 to 2.9
Non-food	19,840 to 33,390	6.6 to 9.4
Services	26,710 to 31,030	7.5 to 8.7
<b>Total</b>	<b>49,900 to 75,060</b>	<b>15.0 to 21.0</b>

### 3 Findings of Review

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It should be kept in mind that the bulky goods category is not confined to any one commodity grouping although it predominantly consists of non-food and retail services.

At present the amount of Business 4 zoned land which is occupied by some form of retail activity is in the order of 7 hectares, excluding motor vehicle and caravan sales display areas. The actual land area required for bulky goods based on the floorspace analysis is in the order of 20 hectares. This leaves a shortfall of about 13 hectares. Taking into account that about 2 hectares of Business 4 zoned land is as yet unoccupied by any activity, this suggests that an additional 11 hectares of largely undeveloped land should be zoned Business 4. However, if the 3 hectares of land alongside the Mildura Centre Plaza is rezoned to Business 1, then the additional amount of fairly undeveloped land required for Business 4 activity should be around 15 hectares.

Making further allowance for the likes of motor vehicle and caravan sales, factory sales outlets, associated warehousing, it may be prudent for a total of about 20 hectares of Business 4 zoning.

As already indicated, the outcome of the floor area analysis is not the sole consideration in determining the nature of the future retail activity supply and location policy and distribution. This is considered in the next Section.

Overall the comparison of the analysis outcomes in this Review with those in the MacroPlan Review shows that the large variation in sustainable floorspace estimates is mostly attributable to the variations in the population forecast assumptions and to a lesser extent the turnover threshold assumptions. With regard to the population assumptions in this analysis, they are geared to ensuring adequate capacity is provided for future retail and residential development in accordance with Council policy indications. MacroPlan do address the crucial nature of threshold turnover assumptions, but at the same time point to these being “the most difficult to accurately measure” in retail floorspace analysis.

#### 3.5 Allowance for Future Activity

The following section of this report gives consideration, firstly, how to accommodate the future demand for retail activity and, secondly, where the location opportunities are sited.

##### 3.5.1 Means of Accommodating Retail Activity

While the estimation process has determined the notional future demand for additional floor space in terms of merchandise groupings or divisions, in essence the critical consideration in a practical sense is what are the appropriate land use designations or zones.

Both food and retail services are customarily found in a Business 1 Zone, whilst non-food is spread between Business 1 and 2 zones. Peripheral sales or bulky goods are

### 3 Findings of Review

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mostly concentrated in the Business 4 Zone. Business 2 and 5 Zones also contain a mix of most retail categories.

In this context, approximately 12 hectares of additional land may need to be included in a Business 1 Zone to accommodate the notional demand described in the previous section.

It is assumed that there is no further land required in the Business 2 and 5 Zones for future retail purposes.

Of the 45 hectares of land currently contained in a Business 4 Zone, only about 7 hectares is occupied by this type of activity, with the greater part of the remainder devoted to non-retail activities and a limited amount that is vacant. The floor space demand estimates suggests a requirement for a further 15 hectares be provided for bulky goods. This amount may be absorbed within the existing Business 4 Zone provided that a considerable proportion of the existing land used for non-retail uses is redeveloped for retail purposes. Therefore it may be prudent to make allowance for an additional 15 hectares of land in a Business 4 Zone which would be more immediately available for new development rather than relying on redevelopment.

It is quite likely that further growth in bulky goods could lead to an apparent oversupply in the aggregate of sustainable retail floorspace, since bulky goods outlets tend to replace space already used for retailing in so far as it is a different form of retail technology. It combines a wide range of choice among goods in one integrated space. Again, floorspace estimates should be regarded as a guide rather than as rigid determinates.

#### 3.5.2 Possible Locations for Future Retail Development

There is very little land in the **City Heart** which is unused and therefore unable to currently accommodate new retail developments, especially in the City Core and its immediately adjacent areas. Proposed opportunities have mainly focused on building on or over at grade car parks. Other opportunities will depend on redevelopment of existing built areas which in turn is reliant on consolidation of existing landholdings. An alternative is to facilitate mainstream retail development in relevant parts of other business zones in the City Heart or to create new Business 1 zones elsewhere. However, the City Heart will continue to accommodate the largest amount of Business 1 type activity due to its having double the retail floor area of any other retail precinct and its overall central activity area attraction. The MacroPlan Review estimates that the City Heart could sustain another 16,000 square metres in 2004 and 32,000 square metres in 2021.

**Mildura Centre Plaza** and its environs already has approval to expand its retail component with further 8,000 square metres seeking approval, i.e. the Big W project, although its progress has been halted by the findings of the Panel for Amendment C18. Given the desirability of consolidating Business 1 Zone activities it is appropriate that some of the adjoining or nearby land included in a Business 4 Zone be rezoned

### 3 Findings of Review

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to Business 1. Apart from the estimated demand for more such zoning in general, it is considered inevitable that the Centre Plaza will want to expand in the future to remain contemporary and competitive. The same would apply to the Big W project if it were approved.

The **Fifteenth Street precinct** has only limited unencumbered land to accommodate additional Business 4 zone activity. This has implications for creating more such land. One opportunity for new land is the “deepening” of land blocks to permit subdivision of lots especially to cater for the smaller end of the peripheral sales category. Another is extending the zoned area along Benetook Avenue as has already been proposed, or further along Fifteenth Street towards Irymple. Both would be subject to appropriate infrastructure, notably drainage, being in place.

Outside the Mildura Township there is scope for accommodating more Business 1 Zoned activity in **Irymple**. Already plans are in hand for a new supermarket development.

#### 3.5.3 Business Zone Implications

The estimates of both floor space and site areas have been in an aggregate form without assessing what is sustainable in a specific locality. Such a precise estimation is difficult insofar as allowance has to be made for choice amongst retailers and consideration has to be given to the opportunities for redevelopment. What is further complicating this analysis is accounting for land, primarily in the City Heart, where much of it was developed before parking requirements had to be satisfied. As a consequence the traditional ratios to convert floor area to land requirements are difficult to apply.

Factors to be taken into account in assessing the location distribution of potential retail space include

- The need to provide **adequate capacity to accommodate the potential** rather than applying restraints.
- The role of a particular concentration of retail activity.
- Assessment of the opportunities for assembling built areas for viable redevelopment.
- Proximity to growth in trade area population.
- The suitability of existing zoned areas for change of zoning.

The focus of the allocations of areas to specific localities is on Business Zones 1 and 4, with the remaining zones unchanged except for rezoning to Business 1 or Business 4. This is facilitated by the ability of Business 1 being able to also absorb Business 2 activities. Likewise, the three main areas of attention are the City Heart, Mildura Centre Plaza and environs and the Fifteenth Street Precinct.

Specific measurements of the land areas of the respective Business Zones have been undertaken for each of the main retail concentrations.

### 3 Findings of Review

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Without extending the boundaries of the **City Heart Precinct**, reliance for additional retail floor area has to be placed on redeveloping existing built areas, which may involve some rezoning. The Urban Design Strategy has identified potential areas, all of which are dependent on ownership economic feasibility considerations. One site which has recently proposed for conversion to retail activity is the Working Mans Club in Deakin Avenue.

The amount of Business 1 Zone land in the City Heart is 19.4 hectares, whilst there are 15.8 hectares in the Business 2 Zone which is a combined total of 35.2 hectares. These two Zones accommodate the predominant area of retail floor space of 64,774 square metres of occupied retail floor space which approximates 18 hectares in land area terms. If these two zones are viewed as mutual land providers for retail activity, with scope to rezone Business 2 to Business 1 where appropriate, this leaves a considerable capacity for conversion to retail activity.

In view of its built out nature and its role as the primary activity centre, **it is proposed that no limit be placed on the retail provision in the City Heart , with the merits of any development applications be assessed on other than market factors.**

With regard to the **Workingman's Club site**, this is currently zoned Business 2 and according to those directly associated with the projects represents a site area of 1.7 hectares and a developable area of 1.0 hectares, capable of accommodating 3,570 square metres of retail floor area in the nominated developable area. It is understood that up to 6,500 squares of retail floor is being considered.

The following points summarise the direct relevance of the subject site to a revised retail strategy:

- The site is in a Business 2 Zone where retail development is allowed but the primary purpose is to foster office and related commercial activity. Importantly no space limitations prevail.
- Although not in the retail core, the site is in the City Heart which is designated for the encouragement of additional retail activity development.
- Although not part of a Business 4 Zone, the site is still capable of being redeveloped for peripheral sales type activity. One possibility in keeping with a central city location is a “Brandsmart” type operation, with another opportunity being some form of retail market.
- In a City Heart environment where it is difficult to assemble large sites for retail activity development, this does present a rare opportunity.

Also to be taken into account are the following considerations:

- The separation of the site from the main retail activity concentration by Deakin Avenue does present an actual and perceived ease of access problem, in terms both of pedestrian convenience and the necessity to repark .
- The size of the available site area will be a factor in the capacity to accommodate a large magnet store operation.

### 3 Findings of Review

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Consequently, **it is recommended that the Working Mans Club site be considered appropriate for future integrated retail redevelopment. Also to be noted is that it would provide an opportunity to further strengthen the retail viability of the City Heart.**

The amount of Business 1 Zone land in the **Mildura City Plaza environs** is 10.4 hectares which includes the approved additions to Centre Plaza.

Adjacent to the Plaza is the Vidovitch land, 1.95 hectares of which is proposed for Business 1 but is yet to receive approval. This Review recommends the rezoning of the balance of this land for Business 1 (3.3 hectares) in order to provide choice of location by retailers, with the other main retail concentration the City Heart not being suitable and dependent on redevelopment. Furthermore the Plaza environs is quite proximate to the main population growth area to its south.

The enlarged Business 1 Zone would provide a land area of about 15 hectares, capable of sustaining 18,000 square metres of retail floor

The Fifteenth Street Precinct consists mainly of Business 4 Zone land, totalling 48.4 hectares (an increase of about 3 hectares on previous measurements), of which approximately 7 hectares which is used for retail purposes at present

This retail proportion of the Business 4 Zone represents less than 20% of the total Zoned area, which implies that a relatively small share of any additional Business 4 zoned land would be allocated to retail. Given the thrust of the retail policy to encouraging suitable retail activity in this Zone in future, it is conceivable that a larger than normal space area could house retail activity, say 50% to 70% of the zoned area.

The calculations of the demand for additional retail land indicate that these be shared amongst the Zones as follows:

- Business 1: 12 hectares
- Business 2: no additional land is required although some rezoning to Business 1 may be convenient.
- Business 4: an amount of 15 to 20 hectares based on a requirement of 20 hectares for bulky goods, less the 7 hectares already occupied and allowing for rezoning of the Vidovitch land to Business 1.
- Business 5: no additional land required although some reductions may occur to allow for rezoning to Business 1.

### **3 Findings of Review**

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Of the 12 hectares of additional Business 1 Zone land required, this could involve the rezoning of the Vidovitch land and some of the Business 2 zone in the City Heart, including the Working Mans Club site. To be kept in mind is that there should not be a cap on future retail development in the City Heart. It is not desirable to provide caps on retail floor area in land already zoned for that purpose.

All of the additional Business 4 Zone land should be as recommended in the expansion of the Fifteenth Street Precinct along Benatook Avenue.

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## 4 Consultation

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## 4 Consultation

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A number of focus group meetings were held on 20 August 2003 to discuss the Mildura Retail Strategy. Focus groups were held with the following:

- City Heart Traders forum
- Commerce Focus Group
- Councillors Focus Group
- General Community Group

The purpose of these discussion groups was not so much to repeat the information seeking group sessions conducted for the 2000 Strategy, but to obtain reactions and suggestions in the light of the market analysis and possible strategy directions that had been determined at that stage in this Review and Update.

Whilst the first three seminars were targeted at specific interest groups, the general group was open to the community at large to make a contribution and it was advertised accordingly.

Some of these groups identified greater linkages to the Marina development as desirable. Concerns raised in relation to car parking, including the issue of paid parking and the desirability of having at least 2 hour periods available. Many felt that there was adequate parking in the City Heart apart from the entertainment and hospitality areas at night. City Heart traders indicated that they would be more amenable to paid parking if it were applied over all areas, and not just the City Heart. Other issues raised at the focus groups included:

- A strong perception that the official statistics were significantly underestimating the amount and rate of population growth in Mildura;
- City Traders believe that the City Heart has peaked and now sense a downturn in retailing;
- Traders' assessment that while persons up to the age of 25 years are relatively well catered for, but the 25-40 years age group are seeking access to better quality specialities and the 40 plus category seeking known quality and boutique stores, as well as entertainment and lifestyle outlets which are currently under-supplied;
- The freight line being an inhibitor to further retail growth to the north;
- The opportunity to develop a car parking area opposite the Grand Hotel;
- Actively attracting retailers to North side – Marina end;
- Landholders along Fifteenth Street between Benetook and Cowra Avenues oppose the restriction on retail growth east of Benetook Avenue;
- The need for Benetook Avenue to be protected as a future transport bypass.

A range of discussions were held with individuals in the City Council and in the business and development community.

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## 5 Issues

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## 5 Issues

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### 5.1 Retail Hierarchy Policy

Reference has been made to Mildura's retail hierarchy in Section 2 of this report. There is no valid reason to change the structure of this hierarchy, although the relative relationship between elements in the hierarchy needs to be clarified.

The regular use of the term "hierarchy" implies that one centre is superior to another, rather than each having a particular role to play and serving certain retail needs. To this effect, it is recommended that the policy of preserving the retail primacy of the City Heart should be replaced by one that treats the City Heart as a strong regional retail centre that combines with other activities to be the primary activity centre.

The policy of maintaining the City Heart as the primary retail centre implies that it needs to be protected and that other desirable and appropriate development should be constrained, even if the City Heart is unable to satisfy the development and requirements of a retail facility.

Mildura Rural City Council has prepared a number of strategies that contribute to the continuing development of the City Heart. These strategies will continue to facilitate and maintain the prominence of the city centre.

These strategies include:

- Car parking Strategy
- Mildura Urban Design Framework (discussed in Section 5.4)
- Riverfront Masterplan

#### **Car Parking Strategy**

The Car Parking Strategy is a plan of action to improve car parking in Mildura's city centre. The recommendations made by the strategy include:

- Upgrade lighting;
- Maximise off street parking provisions;
- Improve pedestrian connections; and
- Improve efficiency of existing parks.

The strategy will assist the development of the City Heart by providing additional spaces, by consolidating and improving off-street parking to best serve local business and the community and by improving safety.

#### **Mildura Riverfront Masterplan**

The Masterplan will guide the development of the waterfront in order to create a greater connection between the river and the city. The development of the riverfront will encourage pedestrian access and attractive views to the river with an emphasis on the connection with the Mildura CBD. It states:

*As a part of the City, the connections back to the Mildura CBD are a key component of the success of the Waterfront Park.*

## 5 Issues

*It is intended to allow a visual (and in some cases accessible) continuation of the grid of Mildura to the river.*

The principal urban design objectives for the Mildura Riverfront are:

- To ensure the progressive improvement of the riverfront as an integrated whole that reads visually and physically as one design.
- To exhibit an identity as a 'City by the River', ensuring consistency of scale, built form, material selection, landscape elements, and access requirements.
- To create opportunities for safe and varied habitation of open space areas, accommodating the needs of residents and visitors for passive and active recreation.

It is anticipated that the development of the riverfront in this way will lead to increased investment in the City Heart in both civil works and buildings, increased employment due to construction and on-going employment in retail, visitor accommodation, restaurants etc and will contribute to Mildura's economic base, through investment, business and new jobs creation.

### ***Implications for the Mildura Retail Strategy***

That the retail hierarchy be maintained but that the policy of retaining the retail primacy of the City Heart be revised. The policy emphasis is to be shifted towards the City Heart continuing to function as a regional centre in its own right with a composition of a wide range of activities.

That the Centre Plaza and Fifteenth Street precinct be able to develop at sustainable levels.

## 5.2 Amendment C18 Vidovich Land

### **Planning Permit Application PO2/565 Vidovich Land Report of The Panel**

The Amendment and Planning Permit Application called for the rezoning of a portion of the Vidovich land located on Fifteenth Street to the east of the Centre Plaza from a Business 4 Zone to Business 1 Zone so as to accommodate a Big W store.

The panel report completed in October 2003 acknowledged that *current planning policy places a limit of 21,000 square metres on shop floor space unless it can be demonstrated that any additional floor area will be consistent with the role of the plaza as a sub-regional centre.*

## 5 Issues

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In its report, the panel reinforced the importance of maintaining the retail hierarchy referred to in the Mildura Retail Strategy 2000. The report stressed that the primacy of the Mildura CBD be retained.

The Panel accepted that a Big W store would provide a facility currently not available to residents in the Mildura Trade area. However, it felt that such a facility should be incorporated into the City Heart as a priority, even though it was *unlikely that a suitable site for a Big W is likely to be found in the City Heart in the short to medium term*.

The Panel found that while in principle, there was no reason why a Big W store should not be added to the facilities at Mildura Centre Plaza (provided that *ongoing improvements, promotion and encouragement* are undertaken to ensure the pre-eminence of the City Heart), it found that there was no satisfactory method of ensuring that a Big W would be developed on the land, i.e. if the land was rezoned to Business 1 Zoning. This left open the possibility other shop uses being established as of right. For this reason, the Panel felt that the rezoning of the Vidovich land to Business 1 zoning *has the potential to undermine the primacy and perhaps the viability of the Mildura CBD*. It therefore did not support the Amendment.

The Panel expressed its reservations about approving changes to the Mildura Planning Scheme in the absence of the findings of this Review. The Panel found that: *As no evidence was produced to support an additional 6653 square metres of retail floor space for other than a Big W store ... a decision in this rezoning should surely await the outcome of the current Mildura Retail Strategy Review*.

The Panel strongly emphasised a need for clear strategic thinking and analysis, and that simple statements in the Local Planning Policy Framework were insufficient to protect the pre-eminence of the City Heart. There was also a need for stronger leadership from Council.

The Panel requested that the Mildura Retail Strategy Review should examine the long term potential and zone options for the whole of the Vidovich land – *There is perhaps an opportunity for the Retail Strategy Review to revisit the role and function of the two main retail areas to determine if there is any need for changes as a result of the likely future development of Mildura Centre Plaza*.

Another desirable pre-requisite for allowing rezoning of all or part of the Vidovich land is the preparation of an integrated design for it and Mildura Centre Plaza.

## 5 Issues

### ***Implications for the Mildura Retail Strategy***

That the study team supports the rezoning of the land to Business 1 subject to the Council continuing to enact a range of strategies and actions that will facilitate the ongoing development and improvement of the retail activities in the City Heart that ensures it remains as an attractive viable and efficient regional activity centre.

This Review supports the rezoning of the Vidovich land to Business 1, subject to the adoption of an integrated concept plan for Mildura Centre Plaza and Vidovich properties.

### 5.3 Fifteenth Street Precinct

In general the Fifteenth Street Precinct is available to accommodate Business 4 type activity. Since very little of the current Business 4 Zone is undeveloped, most substantial new development would require a large parcel of land to be redeveloped from another use. Since there is no guarantee that such a viable opportunity will be available when required, it is appropriate that more undeveloped land be rezoned, more or less in "in reserve". Although the demand assessment for bulky goods indicates up to 8 hectares over approximately the next 20 years, case study experience with the scale of such operations, indicates that an appropriate provision of an additional 15 to 20 hectares of Business 4 land be made available. It is understood that there are a number of development proposals being considered by Council that could be accommodated in the Fifteenth Street precinct.

In terms of land suitability, the most appropriate location for this additional land provision would appear to be along the western boundary of Benetook Avenue, north of the intersection with Fifteenth Street. In this location it could easily interface with existing peripheral sales uses or with future selected manufacturing activity, and be more readily updated in terms of service infrastructure.

Longer term consideration may be given to the area of Fifteenth Street, east of Benetook Avenue to Cowra Avenue.

The study team were advised that on 26 July 2001, Council had resolved to amend its Planning Scheme to rezone land on the south side of Fifteenth Street between San Mateo and Deakin Avenues and that the Business 4 zone be extended along Fifteenth Street to Cowra Avenue. To date, no action has been taken in relation to this resolution.

In light of the findings of this Strategy it is recommended that this resolution should be rescinded.

## 5 Issues

### ***Implications for the Mildura Retail Strategy***

That 15 to 20 hectares of land on the western side of Benetook Avenue north of Fifteenth Street be rezoned to Business 4.

That land on both sides of Benetook Avenue between Fourteenth and Fifteenth Streets be identified for retail development in the longer term subject to strategic justification.

### 5.4 Mildura Urban Design Framework

The Urban Design Framework was produced in July 1999 with the purpose of providing direction for the future development of the City Heart for the foreseeable future. The Framework identified possible development opportunities such as relocating existing ground level car parks to basements or decked parking to better utilise the ground floor space, and ways of providing pedestrian links to the Mall.

The third strategy, *Creating a positive development climate* lists a number of strategies, which in summary are the need to:

1. Gain Council commitment through supporting policies for the development of the City Heart, and restricting development in other locations;
2. Identify development opportunities and prepare promotional briefs;
3. Facilitate development through Right-Of-Way closures and compulsory acquisition for site assembly;
4. Waive car parking where appropriate;
5. Target potential new retailers; and
6. Encourage the development of a new department store in the City Heart

The Study Team generally endorses these strategies, apart from the policy of assisting the growth of the City Heart by restricting development elsewhere.

The framework also provides guidance on a range of issues in order to improve the City Heart. The Urban Design Framework in particular outlines necessary actions to promote appropriate riverside development, in order to provide better links between Mildura CBD and the river.

In summary:

*The Framework is intended to provide a clear direction for the development of central Mildura within the foreseeable future. In particular, it establishes a capital works program for the area covering the next ten years, and identifies key development opportunities to be promoted.*

## 5 Issues

### ***Implications for the Mildura Retail Strategy***

That Council actively further pursues the recommendations and actions of the Urban Design Framework such that the on going operation and continued development of the City Heart as the regional activity centre is assured.

### **5.5 Mildura Industrial Land Use Strategy (2003)**

The purpose of this recently prepared Strategy was to facilitate appropriate industrial land use and development in Mildura while identifying industrial opportunities in the area. The strategy made recommendations in relation to various policy aspects in that context, one of which was that peripheral sales and commercial uses be encouraged to establish either side of Benetook Avenue between Fourteenth and Fifteenth Streets.

The Strategy stated that:

*The proposed rezoning of properties along the northern and southern side of Benetook Avenue between Fifteenth and Fourteenth Streets from Rural to Business 4 should proceed only if it can be strategically justified.*

The strategy emphasised the need for any planning scheme amendments to show clear links to the Municipal Statigic Statement and the Local Planning Policy.

The Strategy recommended that the rezoning:

- *... is premature at this stage and would be problematic as the strategic land use policy justification required for supporting such a rezoning has not been developed.*

It also recommended that:

- *There is increasing demand for the peripheral sales/commercial uses along Benetook Avenue and it is recommended that the focus for additional development be directed towards commercial/peripheral sales type development*

Nevertheless, Council has expressed its strong desire for the land to be earmarked as an area for future retail expansion.

## 5 Issues

### ***Implications for the Mildura Retail Strategy***

See implications under the Fifteenth Street precinct.

### 5.6 Mildura & Irymple Residential Strategy

The aim of the *Review of the Mildura and Irymple Residential Strategy* was to review the existing residential strategies for the townships as described in the Local Planning Policy Framework in order to provide for the residential needs of the townships to the year 2030.

The key findings from the demand/supply analysis contained in the strategy state that the baseline population for Mildura City is 51,320. The estimated resident population in 2030 will be between 65,800 and 86,000 based on an average annual growth rate of 0.9% 1.9%. In order to achieve the ambitious projection, up to 496 new dwellings will need to be constructed annually in the study area. Most of the anticipated residential development is to be directed in Mildura South either side of Sixteenth Street. A substantial increase in residential population is therefore expected to occur in proximity to the Centre Plaza and Fifteenth Street. The ambitious expected population growth is supported by Council and lends support for a higher retail floor space growth rate than was anticipated by the 2000 Retail Strategy

### ***Implications for the Mildura Retail Strategy***

That the anticipated population growth identified by the residential strategy lends support to further retail development in all activity centres at greater levels than anticipated by the 2000 Strategy.

### 5.7 Infrastructure

The study team is advised by Council's infrastructure managers that each of the retail centres are well serviced by existing infrastructure. While the redevelopment of sites particularly in the City Heart may give rise to some challenges, there is no impediment to redevelopment presented by infrastructure provision in that location. Additional drainage works would be required to enable any further expansion of retail activity along Benetook Avenue between Fourteenth and Fifteenth Streets. It was recommended that these works be undertaken as a matter of priority by the Mildura and Irymple Residential Land Strategy 2003 to facilitate the development of adjacent land for residential use. The lack of reticulated infrastructure in the non urban area between the townships of Mildura and Irymple is an impediment to the extension of retail and commercial activities along Fifteenth Street east of Benetook Avenue.

## 5 Issues

### ***Implications for the Mildura Retail Strategy***

That Council ensures that appropriate infrastructure be provided to accommodate on-going development of its retail concentrations.

### 5.8 Calculation of Demand

The procedures and base data used in the 2000 strategy estimated that in 2015 an additional 35,100 square metres of retail floorspace could be sustained in Mildura. This was composed of Food 8,600 square metres, Non-food 23,000 square metres and Services 3,500 square metres.

The current analysis, using upgraded expenditure data in particular along with a range of population growth scenarios, found that a total of an additional 49,000 to 74,030 square metres of retail floor area could be sustained between 2003 and 2021, made up of Food 3,350 to 9,530 square metres, Non-food 19,840 to 33,470 square metres and Services 26,910 to 31,030 square metres.

Irrespective of the years being compared, the main comparative outcomes are:

- A similar amount of food, with the expenditure capacities and population estimates, but nullified by a large increase in turnover ratio.
- Greater Non-food requirements due mainly to the population factor
- Greater Services requirements due mainly to the marked increase in spend per person and influenced by lifestyle patterns and priorities.

### ***Implications for the Mildura Retail Strategy***

The aggregate increase in expenditure, over that determined by the Retail Strategy 2000, lends support for an increase in sustainable retail activity.

### 5.9 Redevelopment

Property redevelopment in the City Heart is desirable on several counts, including improving aesthetic appearance, creating theme or niche shopping areas and catering for more or updated retail activity in the absence of unused land. Key factors influencing the prospects of achieving such development are the ability to assemble development parcels, co-operation among land owners and facilitation of acceptable financial feasibility.

## 5 Issues

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Similarly, redevelopment of non-retail activity areas in the Fifteenth Street Precinct could assist more consolidated Business 4 retail activity. This will require processes and factors similar to the City Heart.

***Implications for the Mildura Retail Strategy***

Council must actively pursue and facilitate suitable redevelopment opportunities in both the City Heart and Fifteenth Street precincts.

### 5.10 Sturt Highway truck route re-alignment

The relocation of the Sturt Highway through Mildura was investigated in 2000. The study concluded that Deakin Avenue and Seventh Street should be retained as the Sturt Highway in the short term. However it was recommended that a heavy vehicle bypass be developed in the future from on the Bridge along 7<sup>th</sup> Street and down Benetook Avenue to 17<sup>th</sup> Street. Importantly, the study found that if the heavy vehicle bypass was to be implemented, the development of land abutting Benetook Avenue for sensitive land uses such as Residential development should be discouraged.

Due to the likelihood of Benetook Avenue becoming a designated heavy vehicle bypass, the study recommended that sensitive land uses should be avoided along either side of Benetook Avenue (from 7<sup>th</sup> Street to 17<sup>th</sup> Street).

***Implications for the Mildura Retail Strategy***

The truck route re-alignment lends support to the development of commercial activities either side of Benetook Avenue.

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## 6 Current Planning Policy

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## 6 Current Planning Policy

### 6.1 State Planning Policy Framework

Clause 11 of the SPPF contains seven principles of land use and development planning, namely settlement, environment, management of resources, infrastructure, economic well-being, social needs and regional co-operation.

Clause 11.02 states that:

*The State Planning Policy Framework seeks to ensure that the objectives of planning in Victoria (as set out in Section 4 of the Planning and Environment Act 1987) are fostered through appropriate land use and development planning policies and practices which integrate relevant environmental, social and economic factors in the interests of net community benefit and sustainable development.*

Clause 17 deals with Economic Development, and in particular Clause 17.01 deals with Activity centres, the objective of which is:

*To encourage the concentration of major retail, commercial, administrative, entertainment and cultural developments into activity centres (including strip shopping centres) which provide a variety of land uses and are highly accessible to the community.*

The general implementation measures at Clause 17.01-2 indicate that activity centres should be, planned to:

*Provide a range of shopping facilities in locations which are readily accessible to the community.  
Incorporate and integrate a variety of land uses, including retail, office, education, human services, community facilities, recreation, entertainment and residential uses where appropriate.  
Provide good accessibility by all available modes of transport (particularly public transport) and safe pedestrian and cycling routes, and to encourage multi-purpose trip-making to such centres.  
Facilitate ease of pedestrian movement between components of centres, public transport interchanges and parking areas.....*

Clause 18 relates to Infrastructure. Clause 18.02 deals with car parking, and public transport access to development where the key issue is to provide for adequate car parking for new developments, and to promote public transport accessibility.

Design and built form is dealt with at Clause 19.03, with the objectives being to achieve high quality urban design and architecture that:

*Reflects the particular characteristics, aspirations and cultural identity of the community.  
Enhances liveability, diversity, amenity and safety of the public realm.  
Promotes attractiveness of towns and cities within broader strategic contexts.*

## 6 Current Planning Policy

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Clause 19.03 further notes that development should achieve architectural and urban design outcomes that contribute positively to local urban character and enhance the public realm and should minimising detrimental impacts on neighbouring properties. In this regard it promotes ten design principles for non-residential development, these being context; the public realm; landmarks, views and vistas; pedestrian spaces; heritage; consolidation of sites and empty sites; light and shade; energy and resource efficiency; architectural quality; and landscape architecture.

### 6.2 Mildura Municipal Strategic Statement (MSS)

The Mildura Municipal Strategic Statement (MSS) contains the vision and strategy for the future development of Mildura. The MSS sets out strategic planning, land use and development objectives for the municipality as well as strategies and actions for achieving these objectives.

#### 21.04 Strategic Directions

Clause 21.04 contains the Strategic Directions for the municipality, one of which is Commercial and Retail Development (Clause 21.04-6).

##### 21.04-2 Settlement

Clause 21.04-2 includes a Structure Plan for the Mildura Township, which notes that in the vicinity of the subject land, retail activities should be contained to present sites.

##### 21.04-6 Commercial and Retail Development

Clause 21.04-6 relates to Commercial and Retail Development. The clause identifies the relevant aspects of the retail hierarchy for the Mildura Region, and describes the role and importance of each of the retail precincts in the hierarchy:

**Mildura CBD (City Heart):** *comprises an estimated 62,000 square metres in retail floor space, with around 230 shops, is the regional shopping centre serving the region, and the principal location for a wide variety of retail and non-retail facilities and services.*

**Mildura Centre Plaza:** *located on the corner of Fifteenth Street and Deakin Avenue this retail precinct operates as a sub-regional centre in the hierarchy; has a total provision of approximately 16,000 square metres in retail floor space, with around 40 tenants; provides a convenient location for a range of weekly grocery shopping functions and comparison shopping.*

**Fifteenth Street Precinct:** *supports the regional status of Mildura's shopping offer by providing an array of bulky goods outlets and other restricted retail stores to serve the wider Mildura Region; comprises around 20 locations categorised as retail outlets, with floor space of approximately 25,000 square metres; also has a range of trade-related outlets and accommodation establishments.*

## 6 Current Planning Policy

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The MSS also identifies a range of small town centres, neighbourhood/local centres and local shops.

The clause provides an overview of the findings of the Mildura Retail Strategy 2000. Particularly, that there is likely to be retail floor space potential of 25,600 square metres for Mildura from 2000 to 2015 comprising:

- food-related floor space of 6,300 square metres;
- non-food related floor space of 16,900 square metres; and
- services related floor space of 2,400 square metres.

Clause 21.04-6 then provides an overview of the role and importance of the various components of the retail hierarchy in Mildura.

### **City Heart**

The MSS identifies potential development areas in the City Heart as follows:

- **City Heart North** – dining and entertainment precinct
- **City Heart South** – office precinct
- **Retail Core** – redevelopment and consolidation area
- **Western periphery** – some consolidation and redevelopment. It is noted here that “*Development in this area should not shift the retail focus away from the existing retail core at Langtree Mall and Eighth and Ninth Streets*”.
- **Eastern periphery** – mixed use precinct

The MSS notes that the role in providing regional-level facilities to tourists and residents should be encouraged at City Heart as the primary centre serving the wider region.

### **Mildura Centre Plaza**

The Retail Strategy assessment of retail demand indicates that the population growth in the vicinity of the Mildura Centre Plaza will lead to demand for some expansion of shopping facilities.

The Retail Strategy supports retail development at Mildura Centre Plaza where:

- It promotes the existing role of the centre as a sub-regional location for convenience shopping and a limited amount of specialty shopping;
- Retail expansion is supported by demand for retail facilities in its catchment;
- Retail development at this location should not involve a shift in the function or role that Centre Plaza serves in the wider retail hierarchy. Such a shift may occur where:
  - Significant levels of entertainment-related activity are provided to serve the tourism market, or
  - The Centre Plaza attracts a range of key retail specialty tenants, which would otherwise assist in supporting the on-going development of City Heart.

### **Fifteenth Street**

The MSS states that:

## 6 Current Planning Policy

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*The Fifteenth Street precinct offers the greatest potential to accommodate new retail development, particularly those types of facilities, which do not require co-location with traditional retail outlets. Aggregation of these facilities at Fifteenth Street has been an important factor in establishing a regional profile for restricted retailing at Mildura.*

The strategy was introduced to the Mildura Planning Scheme via Amendment C6. On 26 July 2001 Council resolved to adopt Amendment C6 with modifications to limit the floor space of Mildura Centre Plaza to 21,000 square metres. The Mildura Retail Strategy was listed as a Reference Document in the Mildura Planning Scheme.

The MSS identifies a series of objectives and supporting strategies for retail development in Mildura.

The relevant objectives include the following:

### **Objective 1**

*Facilitate the development of Mildura City Heart as the primary retail, commercial and cultural centre for the region.*

### **Objective 2**

*Provide a sub-regional retail centre at Mildura Centre Plaza on Fifteenth Street, which also serves the convenience needs of residents in Mildura South, and which provides limited retail specialties.*

### **Objective 3**

*Designate and promote Fifteenth Street east of Mildura Centre Plaza as being the major regional location for the provision of bulky goods retailing.*

### **Objective 4**

*Provide small-scale convenience centres throughout residential areas and in the surrounding townships, where supported by local residential catchments*

The supporting strategies emphasise the need to maintain the primacy of the Mildura City Heart with Mildura Centre Plaza in a sub-regional role.

### **22.04-6 Fifteenth Street Retail Policy**

Clause 22.06-1 applies to all land on Fifteenth Street between Deakin Avenue and Benetook Avenue. The clause states the following policy objectives:

- *To encourage the Mildura Centre Plaza to operate as a successful sub-regional shopping centre in the retail hierarchy.*

## 6 Current Planning Policy

- *To ensure that any expansion of Mildura Centre Plaza does not have any detrimental affect on the role or operation of City Heart as the main focus for specialty retail and entertainment related activity in the retail hierarchy.*
- *To encourage the Fifteenth Street precinct to develop as the regional focus for peripheral sales activity.*

The policy encourages retailing at Mildura Centre Plaza provided it that maintains its role as a sub-regional centre, and encourages bulky goods retail development along the remainder of Fifteenth Street.

*Mildura Centre Plaza be restricted to a maximum gross leasable floor area for shop of 21,000 square metres, unless it can be demonstrated that additional floor space to be used for shop will be consistent with the role of the Plaza as a sub-regional retail centre.*

*Bulky goods retailing is encouraged along Fifteenth Street between Deakin Avenue and Benetook Avenue.*

### ***Implications for the Mildura Retail Strategy***

That the City Heart be maintained and supported as a viable and prosperous regional activity centre.

The study team is of the view that the Centre Plaza should be afforded the opportunity to develop and organise its own tenancies without it being obligated to ensure that there is on-going development in the City Heart.

That modifications to current Planning Policy be made to allow for an extension of peripheral sales along Benetook Avenue.

That modifications be made to the MSS objectives and supporting strategies for retail development in Mildura to *refer to the City Heart as the primary activity centre for the region.*

## 6 Current Planning Policy

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### 6.3 Zones

The purpose of the business zones is:

*To implement the State Planning Policy Framework and the Local Planning Policy Framework, including the Municipal Strategic Statement and local planning policies.*

In addition to this general purpose, each of the business zones sets out specific purposes and requirements that must be met. The purposes of each zone are outlined below:

#### **Business 1 Zone**

The purposes of the Business 1 Zone include:

*To encourage the intensive development of business centres for retailing and other complementary commercial, entertainment and community uses.*

#### **Business 2 Zone**

The purposes of the Business 2 Zone include:

*To encourage the development of offices and associated commercial uses.*

#### **Business 4 Zone**

The purposes of the Business 4 Zone include:

*To encourage the development of a mix of bulky goods retailing and manufacturing industry and their associated business uses.*

#### **Business 5 Zone**

*To encourage the development of offices or multi-dwelling units with common access from the street.*

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## 7 Strategies

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## 7 Strategies

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A revised vision for retailing in Mildura is provided, along with a series of objectives and associated considerations. The strategies are presented in the form of recommendations, together with a brief discussion of the rationale involved and possible implementation actions.

### 7.1 Vision and Objectives

Due to concerns about the interpretation and implications of the terms of “hierarchy” and “primary” in the 2000 Strategy, as well as the expression of a vision as an expectation rather than as a direction, the following revised vision statement is recommended:

**That retail activity in Mildura is sufficient to serve the needs of its residents and visitors. To that end there must be sufficient land to ensure an adequate supply of goods and services, a range of choice and a diversity and quality of outlets at all times. Planning for retail development must ensure that there is adequate capacity to cater for growth and that retail activity is easily accessible. Infrastructure to support and facilitate opportunities for viable retail operation and growth must be provided.**

Arising from this vision are the following practical objectives:

- To ensure that adequate retail provision is made in terms of commodities and services, store forms, variety of choice and range of quality.
- To ensure that adequate land or property is available in advance of the demand for additional activity space and to accommodate expansion of existing retail concentrations.
- To put in place the necessary conditions to facilitate the accommodation or restructuring of retail activity with specific reference to appropriate zoning, developable areas and support service infrastructure.
- To consolidate like retail activity in locations which suitably service retail needs with regard to transport access and ease of shopping.
- To maximise the capture of retail expenditure from both residents and visitors by encouraging a broad range of retailing on offer.
- To provide attractive shopping environments.

Attention is focussed on the main existing retail concentrations, namely the City Heart, Mildura Centre Plaza and environs and the Fifteenth Street precinct.

Implicit in the pursuit of these objectives are the consideration of:

- The depth, quality, range and affordability of the retail offer.
- Consolidating the overall appeal of shopping in Mildura to its trading catchments.
- Seeking a better understanding of escape expenditure.
- Addressing the issue of retail centre management, particularly for the City Heart and the Fifteenth Street precinct.
- Council adopting an integrated approach in providing infrastructure support for all activity categories including retailing, manufacturing, entertainment and residential activity.
- Fostering the interaction of retailing and tourism hospitality and attraction facilities.

## 7 Strategies

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### 7.2 Formulation of Strategies

The formulation of strategies in this report takes full account of what is contained in the 2000 Strategies, but tends to organise the expression of them with regard to satisfying the objectives. They are also combined with policy considerations and pertinent actions are included.

#### 7.2.1 Co-ordinated and Collaborative Approach

**It is recommended that a coordinated and collaborative approach be adopted in order to effectively organise and implement retail development programs. At the same time the existing retail hierarchy should be maintained.**

This requires a greater emphasis on cooperation rather than competition among shopping concentrations. Implicit in this approach is the involvement of the key stakeholders, which may include retail traders, property owners, representative organisations such as Mildura City Traders and Centre managers, media with reference to marketing cooperation, shoppers and Council. This could take the form of a retail board such as that which operates in Ballarat.

#### 7.2.2 Management of Retail Concentrations

**It is recommended that management plans be prepared for the City Heart and the Fifteenth Street precinct to maintain and enhance their roles and to facilitate the attraction and accommodation of retail activities.**

A proactive approach is recommended to foster the future health and coordinated growth of these retail concentrations which do not have the centralised control possessed by Mildura Centre Plaza. Importantly it should incorporate a link between the retailers, property owners and Council. This is likely to require the dedication of Council resources in the form of a retail liaison officer acting as a common point of contact. This does not mean that there will not be a liaison with Mildura Centre Plaza, but it has its own corporate structure to manage its overall operation. Nor would the role of the executive of the City Traders be usurped, but rather become a significant player.

#### 7.2.3 Infrastructure Planning and Provision

**It is recommended that Council coordinate the planning and provision of support infrastructure in response to retail development opportunities in the context of efficiently servicing other activity categories.**

The scope of this strategy relates not only to the basic supply of water, drainage, gas and electricity and roads, but also the structure planning of centre layouts and operation, such as delivery of goods to City Heart retailers, the creation of estate formats for peripheral sales, the allocation of personnel to oversee this responsibility, although not necessarily on a full time basis, as well as the use of specialist

## 7 Strategies

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consultant input. Already there is design framework prepared for the City Heart which should be used as a starting point.

### 7.2.4 Location and Distribution of Retail Activity

**It is recommended that the location of future retail development focus on the three existing major retail concentrations, with any future residential development areas be served at a local level by large corner stores rather than new centres.**

Due to improving access to shopping concentrations and the difficulty of operating small centres on a viable footing, the emphasis should be placed on sustaining the existing major shopping foci, whilst not neglecting those local facilities which are already present.

There are no suggested major departures from the preferred uses of the main concentrations of retail activity outlined in the 2000 Retail Strategy. One variation is probably more attention to the siting of retail forms in the area immediately to the east of Deakin Avenue in the City Heart.

Within the City Heart, there are eight nominated locations which are suitable for retail redevelopment in the Urban Design Framework report. To these could be added the Workingman's Club site.

In the context of business and or management plan for the City Heart these opportunities could be reviewed with a possible retail board and retail liaison officer involved.

### 7.2.5 Strategies for Main Activity Concentrations

**City Heart: It is recommended that the policy of maintaining the City Heart as the primary retail centre be amended to that it be sustained as the primary activity centre, encompassing strong retail, commercial, financial, community service and recreation and entertainment components. It is further recommended that the Working Man's Club Site is suitable for rezoning to Business to allow for Integrated retail development.**

This is desirable in order to place greater emphasis of promoting the City Heart in its own right rather than by restricting other retail growth in order to protect the retail primacy of the City Heart. Actions to support this strategy include those mentioned elsewhere in the strategies and include further implementing the Urban Design Framework recommendations, preparing a management plan and employment of a retail liaison and development officer. Important considerations are the linkage to the Marina project and the imposition of parking charges and time allowances.

**Mildura Centre Plaza Precinct: it is recommended that the Mildura Centre Plaza continue to enhance its sub-regional role and that the adjoining Vidovich land be rezoned to Business 1 since it is supportable in terms of retail demand,**

## 7 Strategies

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**there are actions proposed to foster the future performance of the City Heart and subject to an integrated design concept being prepared for the whole precinct.**

As indicated in the Amendment C18 Panel report the area is suitable for further development of intensive retailing, subject to appropriate design integration and positive action to assist the City Heart. The extent of the proposed Business 1 zoning is shown in Figure 7.1.

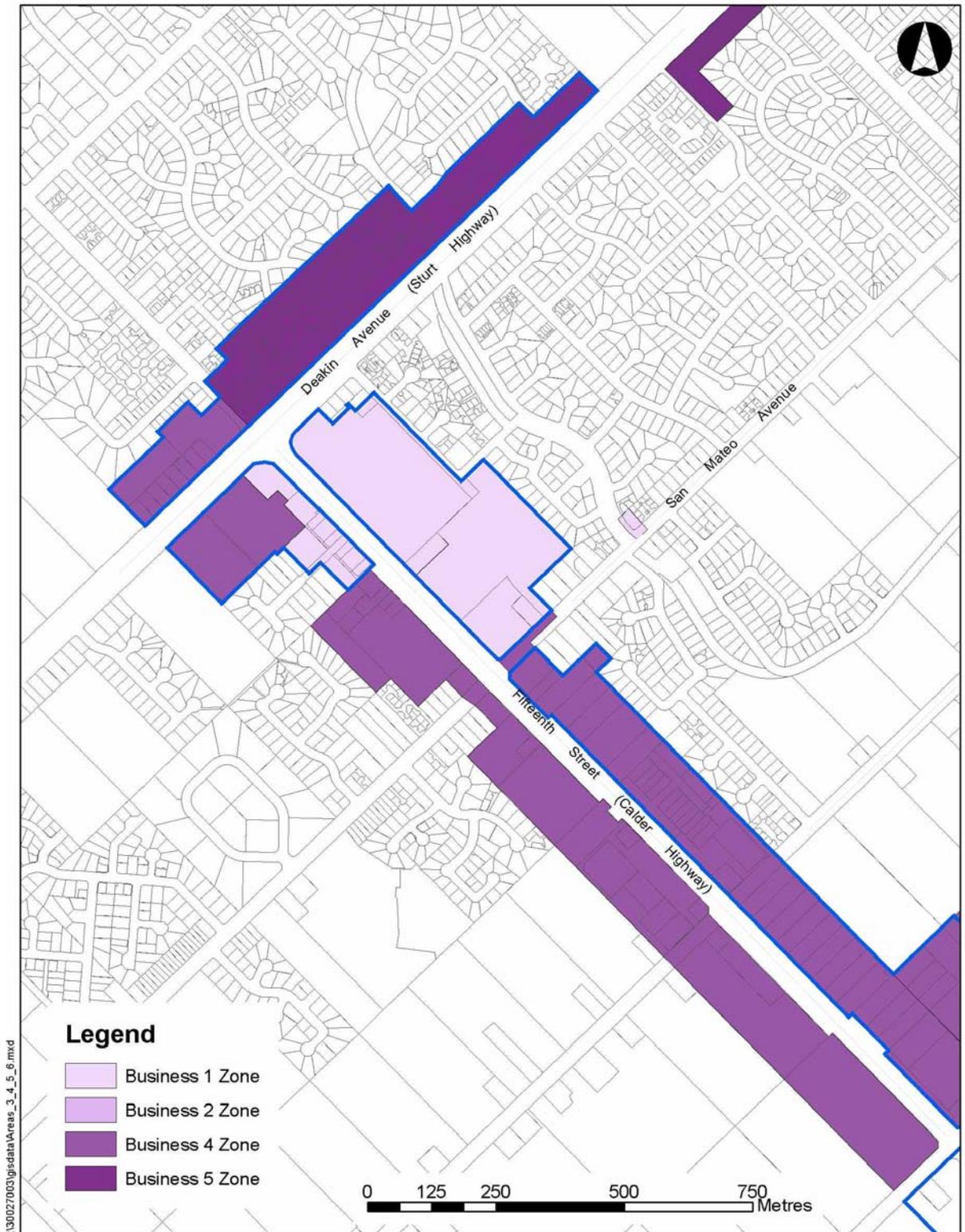
**Fifteenth Street Precinct: It is recommended that the Fifteenth Street precinct continue to be promoted as a bulky goods location and that the Business 4 zone be extended by 15 to 20 hectares along the western side of Benetook Avenue north of the intersection with Fifteenth Street.**

This location is supported by the relative ease of augmenting the service infrastructure and the possible re-aligned truck route along Benetook Avenue.

In order to not rely solely on redevelopment of Business 4 zoned land to cater for retail expansion, the additional zoning is desirable and justified by the demand analysis. It is illustrated in Figure 7.2.

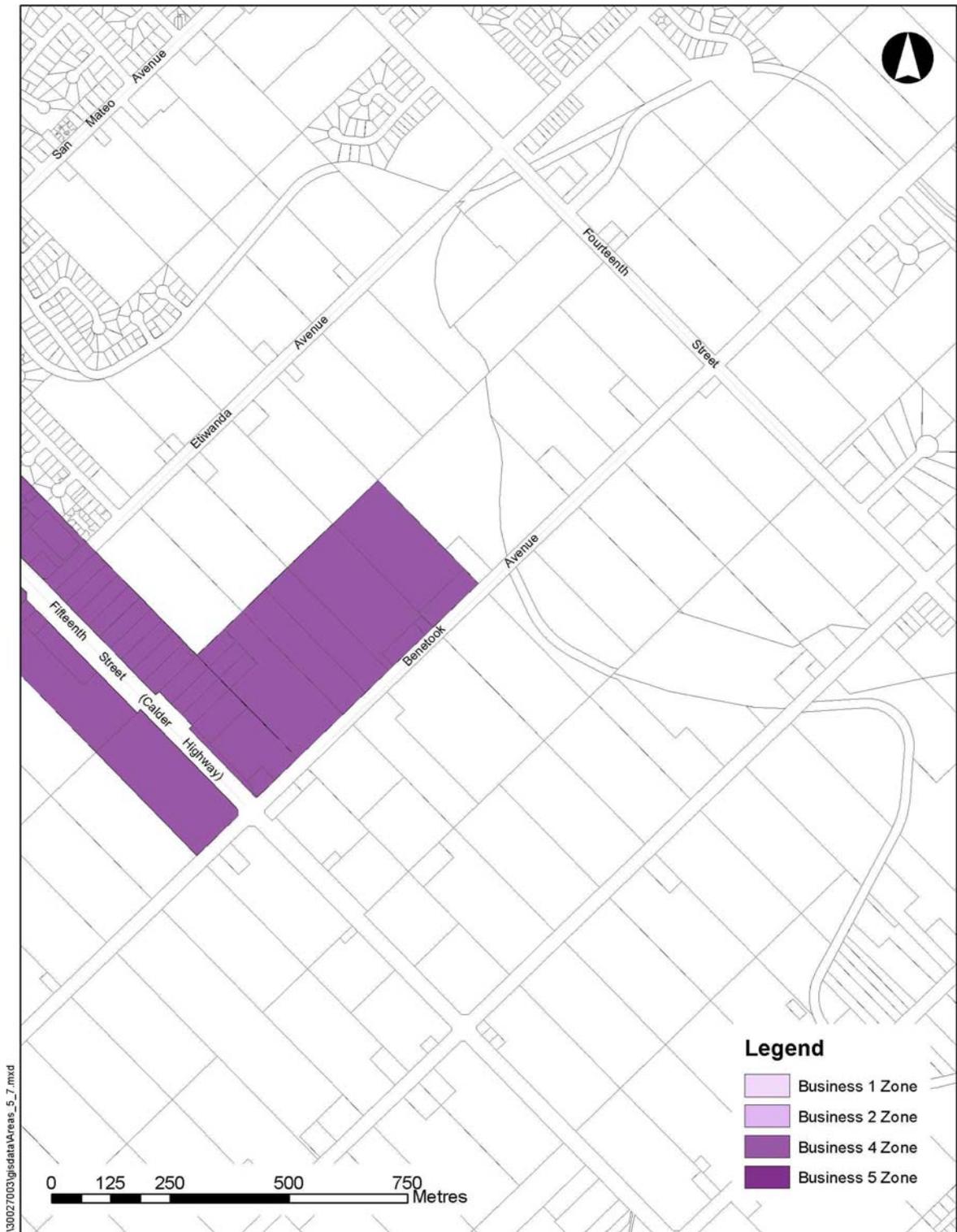
## 7 Strategies

**Figure 7.1 Proposed Business 1 rezoning Mildura Centre Plaza**



## 7 Strategies

**Figure 7.2 Recommended extension of Business 4 Zone along Benetook Avenue**



## 7 Strategies

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### 7.2.6 Implementation Procedures

**It is recommended that some form of business plan be prepared to add a strong imperative to the implementation of strategies and actions.**

It is important that the recommendations contained in this report, once Council has assessed their suitability for adoption, be structured in a form which is amenable to effective implementation. Preparation of business plan or the like is highly desirable to provide a set of priorities, a schedule for actioning items, allocation of responsibilities to undertake each task, provide a financial assessment which determines the costs involved and identifies a funding program and incorporates a monitoring process. This project could be allocated to a retail board as suggested or prepared in house under the auspices of a retail liaison officer.

### 7.2.7 Marketing and Promotion

**It is recommended that a coordinated approach be adopted to the marketing and promotion of retail activity in Mildura with particular reference to the City Heart and the Fifteenth Street precinct.**

It is highly desirable that a marketing and promotional plan be developed, for the City Heart and Fifteenth Street in particular, keeping in mind that Mildura Centre Plaza has its own marketing strategy due to the nature of its single ownership. This is not to say that marketing strategies are not in place but that they should become an integrated part of the future retail development strategy. Such plans should be focussed on improving shopper awareness of the retailing opportunities that are available, in order to discourage shoppers from going outside the region. Similar promotions should also extend to tourism. It is recommended that responsibility be allocated to a retail board or special committee involving private sector representation. Council should be prepared to be a one of a number significant contributors to funding this work.

### 7.2.8 Retail Training

**It is recommended that opportunities be provided for those involved retail business operations and property ownership to improve their understating of retail markets, business operations and investment priorities.**

Whilst the provision of retail training and educational programs is often regarded as frustrating due often those persons in most need of them are the least prepared to be involved, the opportunities should still be provided. What is important is that the programs be practical rather than academic. These could be linked to a local educational facility or involved specialists in this field. This could be a joint venture responsibility between the Council and an educational agency.

## 7 Strategies

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### 7.2.9 Financial Provision

**It is recommended that Mildura Rural City Council ensure that financial support is provided in accordance with a budget in the future to adequately fuel retail development as recommended. The sole source of this funding need not be the Council, but should also involve other government agencies and the private sector.**

This is an unavoidable requirement, recognising that the Council has to set its own priorities.