Tatura Retail Analysis

City of Greater Shepparton

Ethos Urban

Prepared by Ethos Urban
Submitted for City of Greater Shepparton

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'Dagura Buumarri'
Liz Belanjee Cameron

'Dagura Buumarri' – translates to Cold Brown Country. Representing Victoria.

The river system illustrated in this visual image is bound in greens and golds to acknowledge the warmth often felt in a colder climate. The rich earth hues of green, reds and browns reflect the local landscapes of this state while the extensive use of rhythmical patterning captures the unique landscapes of flat and mountainous areas. The use of earth colours imparts a sense of strength and serenity while contrasting greens throughout the image reminds us of the lushness of the natural world, where animals and humans once lived in harmony – it reminds us of the importance to protect the lands, waterways and skies and care for our localised environment. Scattered throughout the image are bold colours of oranges – a source of energy that continues to be felt as a life-giving source. The orange hues also portray the varying sunsets in which many Victorians enjoy seeing.

Ethos Urban acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We acknowledge the Wurundjeri Woi Wurrung people, of the Kulin Nation, the Traditional Custodians of the land where this document was prepared, and all peoples and nations from lands affected.

We pay our respects to their Elders past, present and emerging.

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2. Greater Shepparton City Council commenced planning and investigation works for the Tatura Structure Plan in 2020/2021. A draft Structure Plan was considered by Council in April 2021 and a public consultation period occurred in May and June 2021. The Structure Plan considers the areas to the north and east of the existing Tatura urban area and will guide the future urban development of this land. At capacity, the Tatura Structure Plan area is forecast to accommodate an additional 3,620 dwellings, amounting to approximately 8,330 additional residents for the town.

Tatura Town Centre

3. The Tatura town centre is located centrally within Tatura and primarily runs along Hogan Street, with the majority of the town centre located west of the rail line. A traditional high street town centre format supports a high degree of pedestrian and shopper amenity.

4. Under the City of Greater Shepparton Commercial Activity Centres Strategy the Tatura town centre is identified as a 'town centre' in the hierarchy. This is the same role as a 'neighbourhood centre' in urban Shepparton under the Strategy. Town centres provide a mix of large, diverse or popular retail and commercial uses that meet both local convenience needs as well as the needs of people from a surrounding rural area. These centres primarily provide convenience-oriented or day-to-day goods and do not support higher-order retail uses.

5. Currently the Tatura town centre contains approximately 8,560m^2 of shopfront floorspace, including 7,430m^2 of occupied retail floorspace or 87% of total shopfront floorspace. Approximately 650m^2 of shopfront floorspace in the town is occupied by office uses, with these being tenanted by uses such as accountants and psychologists. The town centre also includes 480m^2 of vacant shopfront floorspace, or 6% of total shopfront floorspace.

6. The Tatura IGA is currently being redeveloped and on completion will include a larger supermarket, attached drive through liquor, three specialty retailers facing on to Walshe Street, and a drive through convenience restaurant.

7. It is estimated that the Tatura town centre currently generates approximately $50.6m in retail sales, with over half of these sales, being $28.4m, within the Food, Liquor and Grocery (FLG) retail category. This dominance of grocery sales reflects the Foodworks and IGA supermarkets being the most highly visited retail locations within the town centre, operating as key anchor tenants that attract visitation which supports other businesses.

Trade Area Analysis

8. A trade area has been outlined for Tatura which defines the geographic region from which retail in the town generates significant and consistent levels of visitation and sales. The trade area extends furthest to areas south-west of Tatura, and includes localities such as Toolamba, Murchison, Rushworth and Stanhope.

9. Taking into account the Tatura Structure Plan areas, at full capacity the trade area is estimated to have a population of approximately 19,460 persons, an increase of +9,120 persons relative to the existing resident population of 10,340 persons.

10. In 2021, total retail expenditure for the trade area population is estimated at $159.6 million, including $73.8 million of Food, Liquor and Grocery (FLG) spending which is the most important spending category for supermarkets and basic convenience food shopping. At capacity, retail spending by trade area residents is projected to reach $300.4 million, including $138.9 million of FLG spending.

Competitive Context

11. Key competing retail locations to Tatura include the following:

- **Shepparton CBD** providing higher-order retail, commercial, administrative and community functions, being the main service centre for both urban Shepparton, the wider Greater Shepparton region, and significant areas beyond this.
- **Mooroopna CBD** which is recognised as a sub-regional centre, supporting a diverse range of retail and non-retail uses, with these of a scale and nature which does not directly compete with the higher-order role served by Shepparton CBD.
- **Kyabram town centre** located north-west of Tatura and providing a range of retail uses along with commercial and community facilities to support the convenience needs of residents north of the Midland Highway.
- **Township centres** including Toolamba and Murchison, which provide localised convenience retail to an immediate catchment. These are small centres meeting the most basic needs of local residents who might otherwise visit larger centres, including Tatura, for more comprehensive retail and other needs.

Market Assessment

12. It is estimated that Tatura is currently capturing 29% of the total retail spending market in the trade area. This includes a market share of 35% for food spending, 18% of non-food spending, and 53% for services.

13. In the future, an increased market share of spending can be expected to be achieved by Tatura reflecting population growth and the critical mass to attract additional retail formats and floorspace not currently provided.

14. As such, it is forecast that at population capacity in the trade area a total of approximately 23,100m^2 of retail floorspace can be supported in Tatura. Allowing for the additional floorspace associated with the current IGA development, Tatura is forecast to be able to support an additional 13,200m^2 of retail floorspace at population capacity.

15. Tatura is also forecast to be able to support in the order of 3,500m^2 of commercial floorspace, an increase of +2,800m^2 on current office shopfront floorspace. The forecast population growth will also create additional opportunities, including for uses such as childcare centres, medical centres, allied health facilities, and other uses often delivered in activity centres.

16. Retail is required in the growth areas identified in the Structure Plan to meet the needs of local residents, with a particular focus on convenience and other day-to-day needs. However, the primacy of the Tatura town centre is expected to be supported and enhanced over time as the town continues to grow.

17. An opportunity will emerge for significant growth in the non-food retail offer in the town. This is expected to include some restricted retail (bulky goods) and non-food retailers in activity centres. It is expected that opportunities for restricted retail will be unlikely in the town centre, and as such a site is required on a key road, such as the Tatura-Undera Road/Ross Street.

Structure Plan Recommendations

18. It is recommended that the Structure Plan supports the primacy of the Tatura town centre while also allowing for an appropriate range and scale of centres and floorspace meeting the basic needs of the residents in the identified growth areas. Any major retail developments should be limited to the town centre, with retail in the growth areas focussed on providing a convenience retail offer to surrounding residents.

19. Noting this, the following retail centres are recommended for inclusion in the structure plan:

    - A **local centre** in the Midland Highway Precinct, supporting Shop floorspace of up to 3,000m^2 (implemented with a Shop as-of-right floorspace cap) which may be anchored by a small to medium sized supermarket. This would require approximately 1 to 1.5 hectares of land with the preferred centre location being at the intersection of the Charters Street extension and Pyke Road.
    - A **local centre** in the Pyke Road Precinct, supporting Shop floorspace of up to 3,000m^2 (implemented with a Shop as-of-right floorspace cap) which may be anchored by a small to medium sized supermarket. This would require approximately 1 to 1.5 hectares of land. At present, the detailed road network within the Pyke Road Precinct remains uncertain. However, a preferred centre location is on a primary traffic route central to the precinct, preferably on a prominent corner intersection.
    - A small **restricted retail precinct** (assuming these uses can't be appropriately accommodated in the town centre) requiring 2 to 2.5 hectares of land ideally located on a major road leading into the town from the Midland Highway. A suggestion is the intersection of Tatura-Undera Rd and Pyke Road.

Introduction

Background

Greater Shepparton City Council is preparing the Tatura Structure Plan. This strategic project considers the potential for urban development to the north, north-east and east of the existing urban footprint of Tatura.

To inform the Structure Plan, Council is commissioning a number of background technical reports, including retail and activity centre analysis.

According to the Greater Shepparton Commercial Activity Centres Strategy of November 2015 (prepared by Essential Economics a predecessor firm to Ethos Urban), the following objectives are of specific relevance:

- **Objective 6** seeks *'to support the growth of existing centres and the development of new centres to meet urban growth'*.
- **Objective 7** seeks *'to support retail and commercial businesses in smaller towns so that they continue to serve as important focal points for their communities'*.

In this context, Council is seeking a review of the retail and commercial floorspace requirements of Tatura in the context of the Structure Plan project. This includes guidance on the location, scale and nature of any additional land to accommodate such development – where such a need is identified.

This Report

This report contains the following chapters:

Chapter 1: Project Background and Description

Chapter 2: Tatura Town Centre

Chapter 3: Trade Area Analysis

Chapter 4: Competitive Context

Chapter 5: Market Assessment

Chapter 6: Structure Plan Recommendations

1.0 Project Background and Description

This Chapter outlines the background relevant to Tatura, including an overview of Tatura's location, description of the Tatura Structure Plan project, and outline of the relevant policy context.

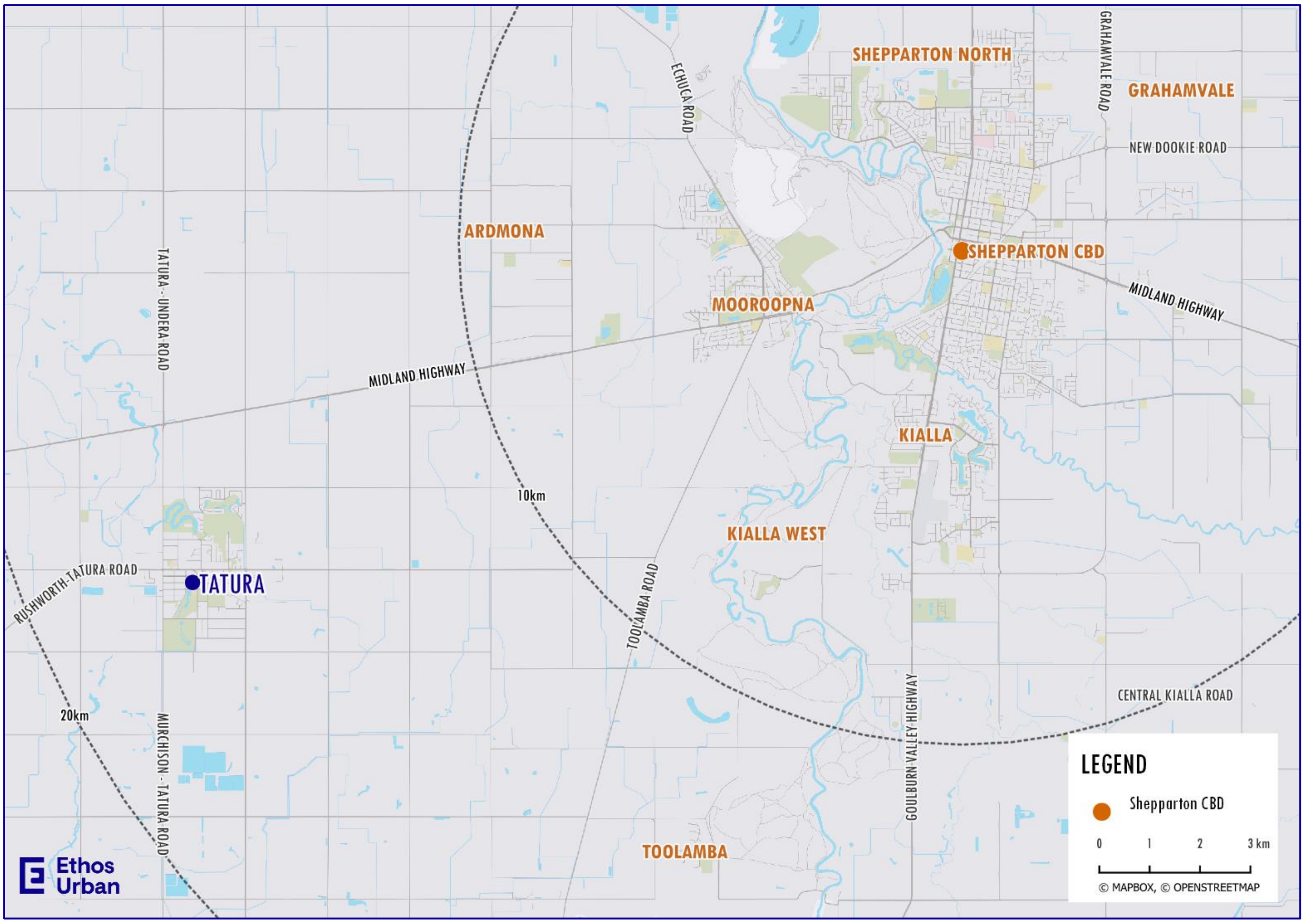
1.1 Tatura Location

Tatura is a town located within the City of Greater Shepparton Council, approximately 17km south-west of the Shepparton CBD and 154km north of Melbourne. Tatura is located to the south of the Midland Highway, and is accessible from Shepparton via the Highway and either Tatura-Undera Road or Dhurringile Road with an approximate 20-minute drive.

Shepparton is the key regional service centre for north and north-east Victoria. Urban Shepparton has a population of almost 50,000 persons and is a regional hub for retail, commercial, government, health, education, and community uses to towns including Tatura, Kyabram, Rushworth, Nagambie, Euroa, Violet Town, Dookie, and Numurkah.

The City of Greater Shepparton has experienced moderate rates of population growth over the past 20 years, with this growth forecast to continue in the future. As of June 2021, the municipality had a resident population of approximately 68,600 persons, up from 65,100 persons in 2016. The population of Tatura increased from 4,840 persons to 5,010 persons over the same period.

Figure 1.1 Tatura Location



Source: Ethos Urban

1.2 Tatura Structure Plan Project

Greater Shepparton City Council commenced planning and investigation works for the Tatura Structure Plan in 2020/2021, with a draft Structure Plan considered by Council in April 2021 and a public consultation period in May and June 2021.

The current draft Structure Plan is shown in Figure 1.2.

At completion, the Structure Plan will guide the future urban development of areas to the north and east of the existing Tatura urban area.

The Tatura Structure Plan applies to an area of approximately 656 hectares and identifies three distinct precincts:

- **Midland Highway Precinct** reaching north of the existing township to the Midland Highway, and bounded by Dhurringile Road to the east, existing Tatura to the south, and Tatura-Undera Road to the west.
- **Pyke Road Precinct** to the east of the existing township and bounded by Pyke Road to the north, Bayunga Road to the east, Ferguson Road to the south, and Dhurringile Road to the west.
- **Murton Road Precinct** to the east of the existing township and south of the Pyke Road Precinct, bounded by Ferguson Road to the north, Bayunga Road to the east, Murton Road to the south, and Dhurringile Road to the west.

A long-term growth opportunity to the north-east of Tatura is also identified in the Structure Plan, with the area east of the Midland Highway Precinct and north of the Pyke Road Precinct having the potential for growth in the more distant future. No specific guidance on the nature of urban development for this future development area is provided in the Structure Plan.

At capacity, the Tatura Structure Plan area is forecast to support approximately an additional 3,620 dwellings, reflecting the potential for approximately 8,330 additional people based on an average household size of 2.3 persons.

1.3 Policy Context

Land use policies and documents of importance to the future growth and operation of the retail sector in Tatura are summarised below, including their key recommendations and conclusions. Any significant changes since their release are also identified.

City of Greater Shepparton Commercial Activity Centres Strategy

The City of Greater Shepparton Commercial Activity Centres Strategy (CACS) was prepared by Essential Economics (a predecessor firm to Ethos Urban) in association with Spiire in November 2015. The CACS provides a detailed assessment of the demand for, and supply of, retail and commercial development in the municipality, and aims to guide the future development of Greater Shepparton's commercial activity centres.

The CACS considers the future population and spending of Greater Shepparton, as well as the retail performance for the region including the level of 'escape' spending. According to the analysis, in the period from 2015 to 2036 additional retail floorspace of between 35,700m^2 and 55,300m^2 will be supportable in the City of Greater Shepparton. This additional floorspace will be distributed across the hierarchy, and includes both new centres and growth in existing activity centres.

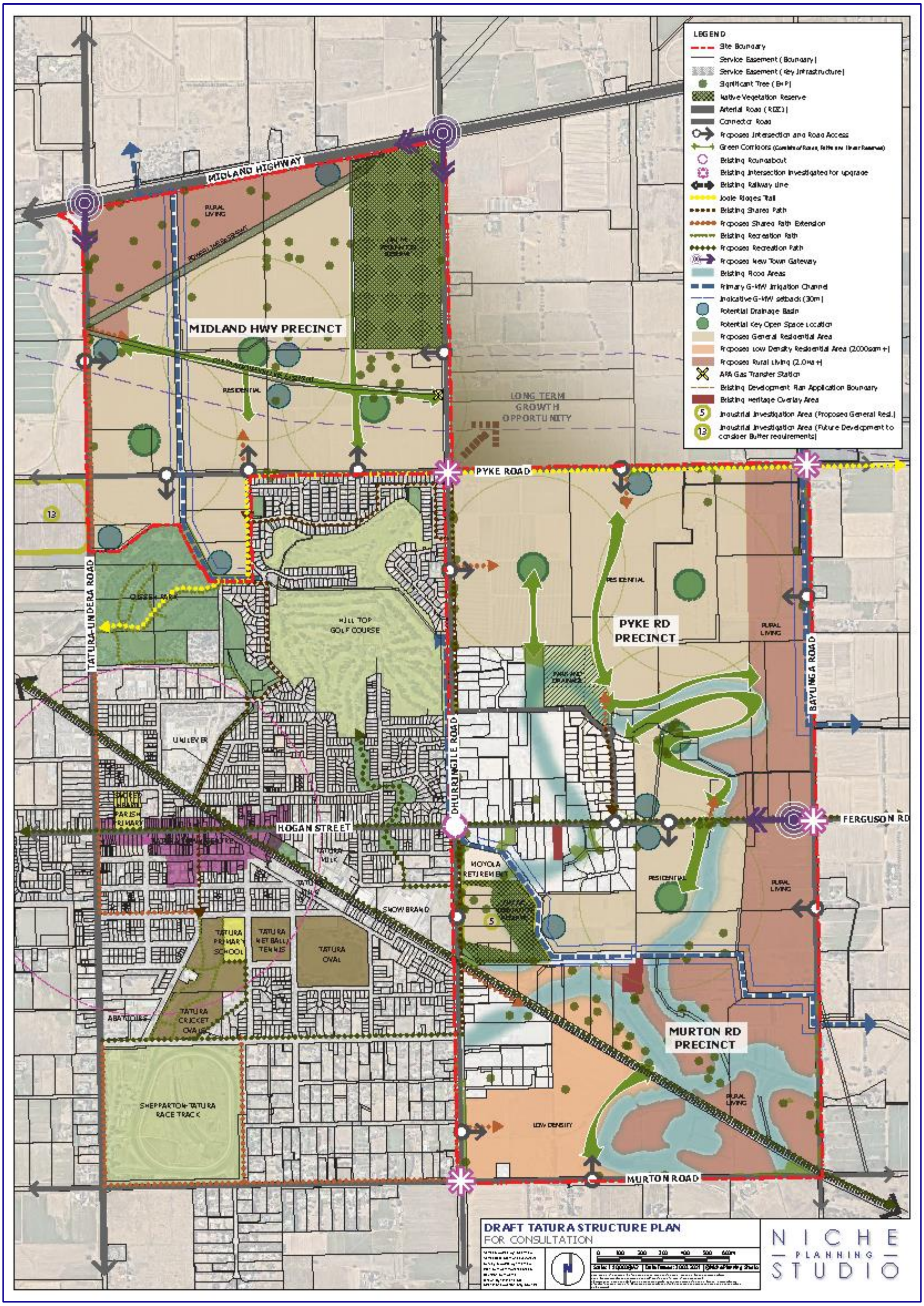
A set of objectives are outlined in the CACS. The most relevant to Tatura is **Objective 7: To support retail and commercial businesses in smaller towns so that they continue to serve as important focal points for their communities**.

Commentary for Objective 7 notes that towns in Greater Shepparton (and elsewhere) are facing various challenges over which Council has only limited influence. However, the Objective also notes that businesses in these centres are important for serving their local communities and thus should be supported where possible.

Since the implementation of the CACS, limited change to the centres hierarchy has occurred, with some additional centres identified only at the local level in growth areas on the fringe of urban Shepparton.

However, the CACS was undertaken prior to the Tatura Structure Plan and thus does not specifically consider the additional retail floorspace required to support this significant future population. As such, the Tatura Structure Plan needs to be informed by a specific assessment of activity centre demand.

Figure 1.2 Draft Tatura Structure Plan



Source: Niche Planning Studio

Greater Shepparton 2030 Strategy Plan

The Greater Shepparton 2030 Strategy Plan was developed by the Greater Shepparton City Council and adopted in October 2006. The plan highlights Council's vision for the municipality and provides a blueprint for building sustainable economic activity and maximising the quality of life.

The Strategy Plan includes township structure plans, including for Tatura. Under the Tatura township plan, the areas of the Tatura Structure Plan are not recognised, although the township plan does note that future township expansion should occur in all directions, including to the north, north-east, and east.

Greater Shepparton Housing Strategy

The Greater Shepparton Housing Strategy was prepared by David Lock Associates in conjunction with CAPIRE Consulting, Essential Economics (a predecessor firm to Ethos Urban), and GHD. The Strategy was updated in May 2011 by Greater Shepparton City Council, and guides the future long term identification and provision of residential land within the municipality.

Under the Strategy, the Tatura Structure Plan areas were identified for potential low density and rural living, with a growth management plan outlining the timing for these areas. Ten years have passed since the development of the Housing Strategy with the growth identified to eventuate around Tatura within that period in the Housing Strategy not occurring.

As such, the Tatura Structure Plan can be considered a natural progression by providing the detailed investigations for urban growth originally foreshadowed in the Housing Strategy.

Greater Shepparton Townships Framework Plan Review

The Greater Shepparton Townships Framework Plan Review was adopted by Greater Shepparton Council in October 2019, with the document providing an update to the 2018 Township Framework Plan Review. The review provides framework plans for townships within the Greater Shepparton municipality, and complements and builds upon the Greater Shepparton Housing Strategy.

The review identified limited appropriately zoned land in Tatura for residential development, notwithstanding the previous identification in the Strategy Plan and Housing Strategy of the potential for urban growth areas, and various potential low density and potential rural living areas.

In the updated Tatura framework plan, the growth areas considered in the Tatura Structure Plan are identified for a range of residential typologies. This includes standard density residential, potential low density, and potential rural living, with long term future growth to occur to the north-east of the township.

This framework plan identifies less general residential land than has been identified in the draft Tatura Structure Plan. As such, the current draft Structure Plan provides a framework for higher levels of housing development and population growth in Tatura than anticipated by the Framework Plan Review.

2.0 Tatura Town Centre

This Chapter outlines the role of the Tatura town centre and identifies the current floorspace scale and mix across occupied retail, shopfront office, and vacant shopfront categories. An assessment of the current retail performance of the town centre is also provided.

2.1 Town Centre Role

The Tatura town centre is located centrally within urban Tatura and primarily runs east-west along Hogan Street, with the majority of the town centre located west of the rail line. A traditional high street style town centre, the amenity for pedestrians is generally very good.

In the hierarchy adopted in the CACS a town centre (as the Tatura town centre is classified) serves the same role as a neighbourhood centre in urban Shepparton. Town centres are described as providing a mix of large, diverse or popular retail and commercial uses that meet both local convenience needs as well as the needs of people from a surrounding rural area.

These centres primarily provide convenience-oriented goods with limited higher-order retail uses.

2.2 Existing Floorspace

Tatura town centre currently serves its intended role in the CACS, supporting a range of convenience retail and commercial uses which serve the town and the wider rural and regional area south-west of urban Shepparton.

Approximately 8,560m^2 of shopfront floorspace is currently trading in the town centre, as shown in Table 2.1. This includes 7,430m^2 of occupied retail floorspace, or 87% of total shopfront floorspace.

Food, liquor and groceries (FLG) is the largest retail category, reflected in part by the Foodworks and IGA supermarkets within the town centre. Other food specialty tenants include two bakeries and two butchers, as well as some convenience stores.

Of significance is the range of non-food retailers, with a range of shops catering to residents of the town, surrounds, and visitors. Notable examples include five apparel stores, pharmacy, arts supplies, newsagent/lotto etc.

Approximately 650m^2 of shopfront floorspace in the town is occupied by office uses, with these primarily being tenanted by personal and professional services such as accountants and medical consulting rooms.

The town centre also includes 480m^2 of vacant shopfront floorspace, or 6% of total shopfront floorspace. This is within the 4% to 6% vacancy level generally considered acceptable for a town centre such as this, and is a general indicator of a reasonably strong overall trading performance.

Table 2.1 Tatura Town Centre Shopfront Floorspace Summary

Category	Count	Floorspace	Share
Food, Liquor and Groceries	10	2,920m^2	34%
Food Catering	9	840m^2	10%
Non-Food	16	2,910m^2	34%
Services	8	760m^2	9%
Total Retail	**43**	**7,430m^2**	**87%**
Shopfront Office	5	650m^2	8%
Total Occupied Shopfront	**48**	**8,080m^2**	**94%**
Vacant Shopfront	3	480 m^2	6%
Total Floorspace	**51**	**8,560m^2**	**100%**

Source: Ethos Urban (as of August 2022)

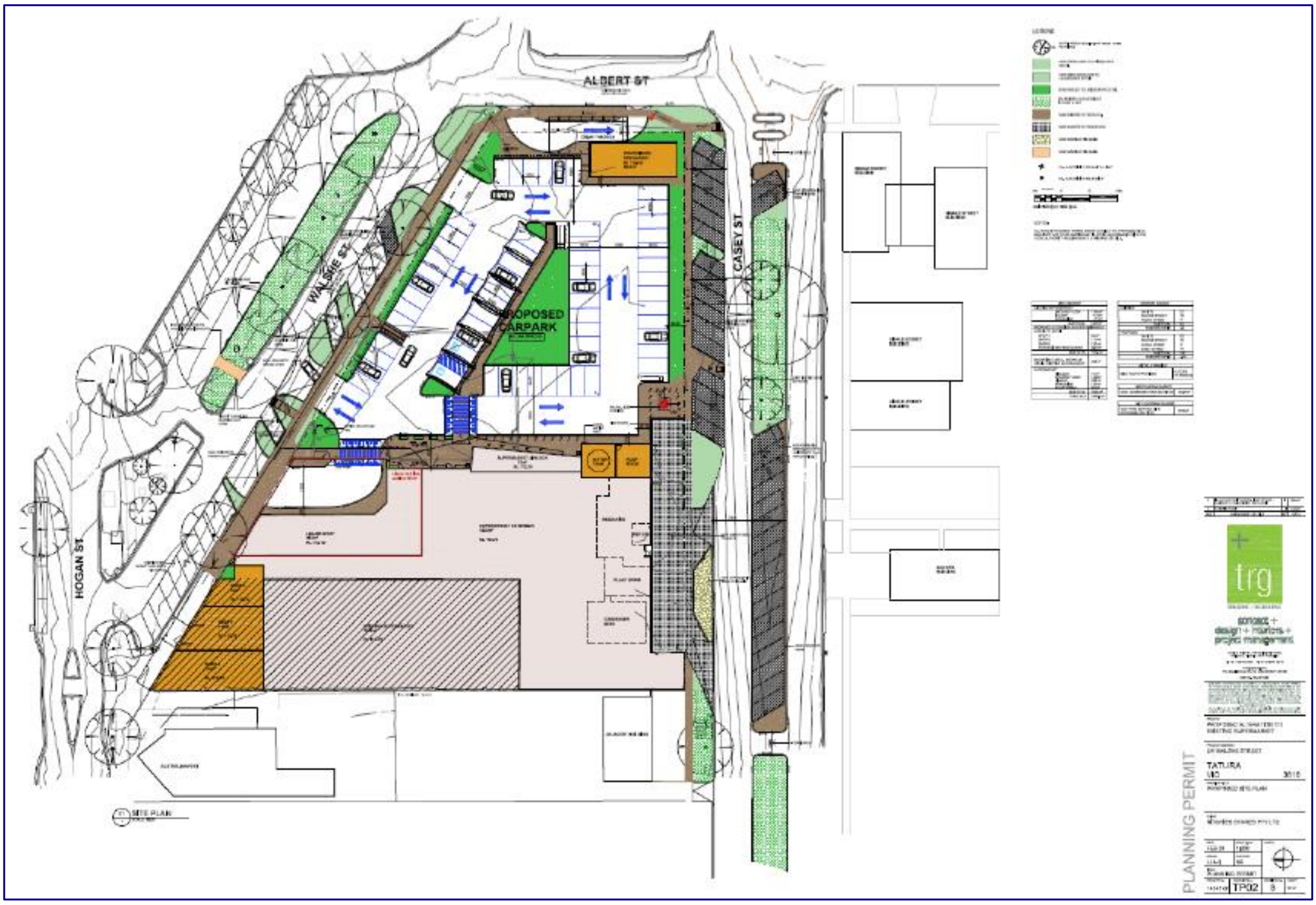
Additional retail development is also currently occurring in Tatura.

The Tatura IGA is being redeveloped to include a larger supermarket, attached drive through liquor, three specialty shops facing on to Walshe Street, and a drive through convenience restaurant. This is shown in Figure 2.1.

In total, this development is estimated to include 3,400m^2 of total retail floorspace, or 2,500m^2 of additional floorspace compared to the existing IGA.

The IGA redevelopment represents a significant investment in the Tatura town centre that reflects confidence in the future strength of trading levels, and is a tangible demonstration of the opportunity for the town centre to grow and evolve over time.

Figure 2.1 Tatura IGA Redevelopment Plan



Source: trg Architects

2.3 Centre Performance and Observations

Current sales performance for the Tatura town centre has been estimated by applying expected trading levels to the floorspace recorded in Table 2.1, as shown in Table 2.2.

It is estimated that the town centre currently generates approximately $50.6m in retail sales, with over half of these sales, being $28.4m, within the FLG category.

This reflects both the Foodworks and IGA supermarkets being the most highly visited retail locations within the town centre, and is relatively typical for a centre with a role and function meeting most day-to-day needs.

Based upon the site visit and floorspace survey, it is our view that the Tatura town centre:

- Presents attractively and is a high amenity shopping precinct
- Is successfully meeting its role as a town centre, as identified in the CACS.
- Has a good range of traders across various categories, with a notable number of non-food specialty tenants.

- The IGA expansion is a key investment that will retain and potentially enhance the role and function of the town centre.
- Some evidence exists of the opportunity for re-investment or redevelopment of some parts of the centre where tenancies appear either run down or no longer meet contemporary tenant expectations.
- Clearly serves a regional service function to surrounding townships and rural areas.

Table 2.2 Tatura Town Centre Estimated Retail Performance

Factor	Food, Liquor and Groceries	Food Catering	Non-Food	Services	Total Retail
Floorspace	2,920m^2	840m^2	2,910m^2	760m^2	7,430m^2
Average $/sqm	$9,720/m^2	$7,950/m^2	$4,290/m^2	$4,000/m^2	$6,810/m^2
Turnover Estimate	**$28.4m**	**$6.7m**	**$12.5m**	**$3.0m**	**$50.6m**

Source: Ethos Urban

3.0 Trade Area Analysis

This Chapter presents the trade area analysis for the subject site, including trade area definition, current and future population, socio-economic characteristics, and retail spending assessment.

3.1 Trade Area Definition

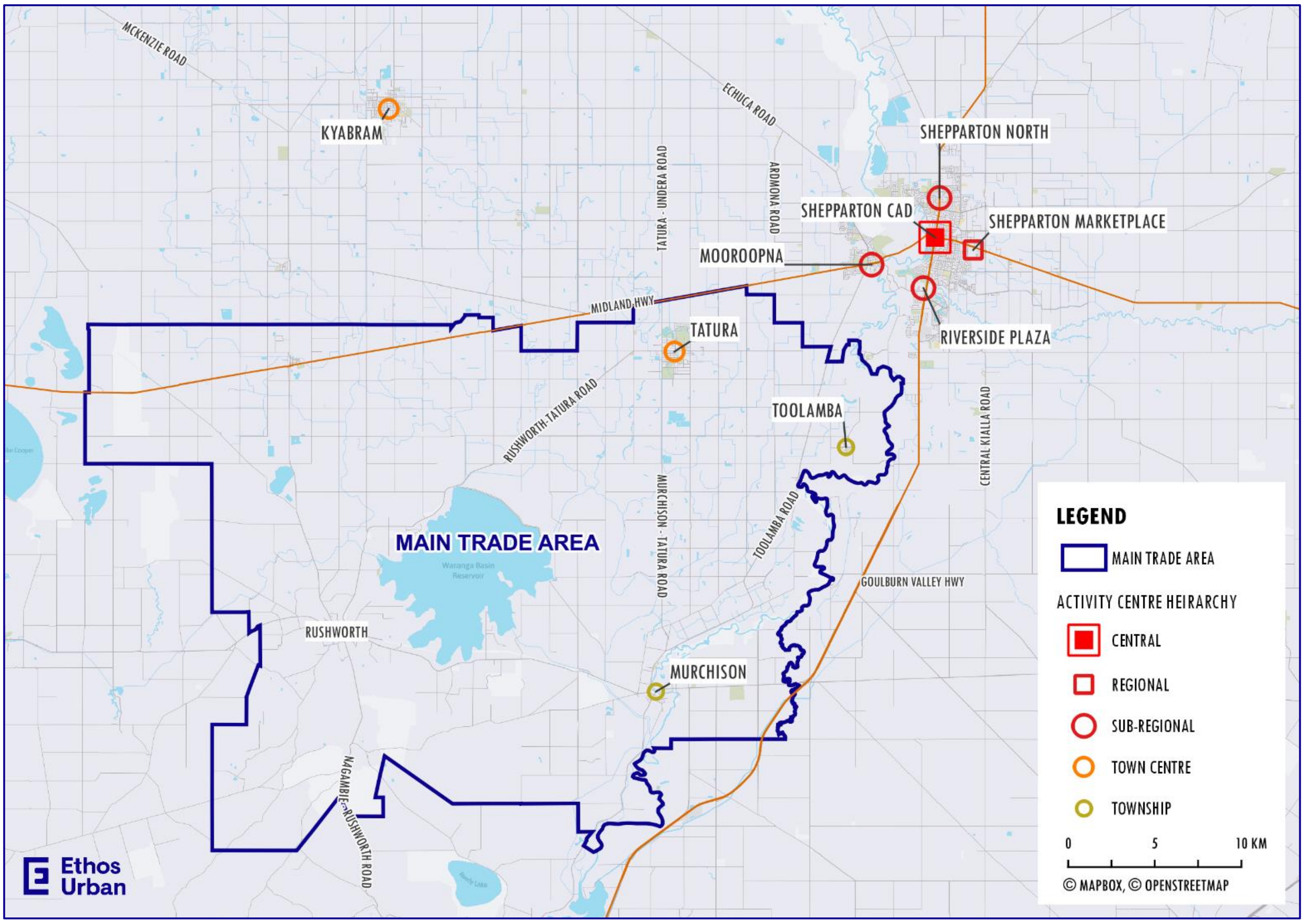
A trade area describes the geographic area from which a centre will draw consistent and significant levels of patronage and sales. In addition, the trade area reflects the overall size of the market that is to be served, also allowing for passing trade and other sales generated by non-trade area residents.

Factors that typically influence the likely trading extent of any retail development include the following:

- The relative attraction of the facility in question as compared with alternative facilities, including scale and composition, as well as ease of access.
- The surrounding competitive context, particularly the location, scale and quality of competing facilities.
- The available road network and public transport service, and how they operate to effect ease of use and access to the centre in question.
- Significant physical barriers which are difficult to cross, which can act to delineate the boundaries of a trade area.

The trade area for the Tatura town centre is shown in Figure 3.1. This trade area primarily extends south-west of Tatura, and includes localities such as Toolamba, Murchison, Rushworth and Stanhope.

Figure 3.1 Tatura Trade Area



Source: Ethos Urban

3.2 Population

This report provides guidance on the opportunity for additional retail floorspace development in Tatura allowing for full development of the Structure Plan.

The specific timing of development for the Tatura growth areas has not been forecast, as this will depend on a myriad of factors including residential development rates and the release of other competing residential areas around Shepparton.

A conservative estimate suggests that the Tatura growth areas may not reach capacity for the next 30 or so years, noting that at capacity the growth areas will more than double the population of the town from current levels.

Existing Population of the Trade Area

In 2021, the trade area had a resident population of approximately 10,340 persons, having increased by +400 persons since 2011, equating to a limited growth level of +0.4% per annum (see Table 3.1). Population growth in the trade area was strongest in the years 2011 to 2016, increasing at +0.6% per annum, with growth slowing down in recent years at +0.2% per annum.

Having regard for existing vacant lots and current subdivision developments, the trade area under current planning provisions could accommodate an additional +340 dwellings, equating to a residential capacity of 11,130 persons including the existing population. This reflects an additional +790 persons in the trade area compared to 2021 levels.

Table 3.1 Existing Trade Area Population, 2006 to 2021

Category	2006	2011	2016	2020	2021
Population	9,860	9,940	10,230	10,320	10,340
Average Annual Growth (no.)		+20	+60	+20	+20
Average Annual Growth (%)		+0.2%	+0.6%	+0.2%	+0.2%

Source: Ethos Urban; ABS ERP

Tatura Growth Areas

The draft Tatura Structure Plan identifies that the area is currently planned to yield approximately 3,620 dwellings.

Applying an average household size of 2.3 people per household, which is the average for both Tatura and Greater Shepparton, at capacity the urban growth area could accommodate approximately 8,330 persons.

Total Trade Area Population

Taking consideration of the established residential areas of the trade area and the Tatura Structure Plan areas, at full capacity the trade area is estimated to have a population of approximately 19,460 persons, an increase of +9,120 persons relative to the existing resident population. This is summarised in Table 3.2.

Table 3.2 Trade Area Population at Capacity

Category	2021	At Capacity	Change
Existing	10,340	11,130	+790
Tatura Structure Plan	-	8,330	+8,330
Total Trade Area	**10,340**	**19,460**	**+9,120**

Source: Ethos Urban; Nearmap; Greater Shepparton City Council; ABS ERP

3.3 Socio-economic Characteristics

The socio-economic features of the trade area are shown in Table 3.3 and are compared to the regional Victorian average. These figures have been derived from the 2021 ABS Census of Population and Housing, with the highlights of this data including the following:

- **Older age profile:** The trade area has a median resident age of 47.0 years, which is comparatively older than the regional Victorian average of 42.8 years.
- **Median household income is below the regional Victorian benchmark:** Median household incomes within the trade area are $67,000 per annum, -7.9% below the regional Victorian median of $72,730.
- **Family oriented household composition:** Family households comprise 67.2% of households in the trade area, which is consistent with the regional Victorian average of 67.7%. Couple families with children comprise 25.5% of trade area households, which is also consistent with the regional Victorian average of 26.3%.
- **Higher level of home ownership:** Within the trade area 44.6% of dwelling are owned outright, above the 40.3% observed for regional Victoria. In addition, 35.4% of trade area dwellings are owned with a mortgage, compared to 34.1% in regional Victoria. This data reflects greater levels of home ownership within the trade area.
- **Majority of occupied dwellings are separate houses:** The majority of dwellings in the trade area are separate houses, with this housing type comprising 92.6% of occupied dwellings. In comparison 90.2% of private dwellings are separate houses in regional Victoria. As such, the dominant housing stock of detached dwellings is anticipated to continue in the Tatura growth areas as a reflection of the lifestyle expectations of future residents.

It is our view that interpretation of small area data from the 2021 ABS Census – that is any geography smaller than a State - should have due consideration for potential outcomes arising from the COVID-19 pandemic. For example, at a small area level trend analysis relative to 2011 and 2016 Censuses should be treated with some degree of caution, as potential changes in demographics/behaviour may reflect temporary rather than structural changes as a result of COVID-19.

Table 3.3 Socio-Economic Characteristics, 2021

Category	Trade Area	*Regional Vic.*
Income		
Median individual income (annual)	$34,330	*$37,160*
Variation from Regional Vic. median	*-7.6%*	*n.a.*
Median household income (annual)	$67,000	*$72,730*
Variation from Regional Vic. median	*-7.9%*	*n.a.*
Age Structure		
0-4 years	4.7%	*5.4%*
5-19 years	16.7%	*17.8%*
20-34 years	15.6%	*16.9%*
35-64 years	38.9%	*37.7%*
65-84 years	21.6%	*19.6%*
85 years and over	2.4%	*2.7%*
Median Age (years)	47.0	*42.8*
Country of Birth		
Australia	91.0%	*88.2%*
Other Major English Speaking Countries	3.4%	*4.9%*
Other Overseas Born	5.6%	*6.9%*
% speak English only at home	*93.7%*	*93.0%*
Household Composition		
Couple family with no children	31.7%	*29.9%*
Couple family with children	25.5%	*26.3%*
Couple family - Total	57.1%	*56.2%*
One parent family	9.4%	*10.8%*
Other families	0.6%	*0.7%*
Family households - Total	67.2%	*67.7%*
Lone person household	30.5%	*29.4%*
Group household	2.3%	*2.9%*
Dwelling Structure (Occupied Private Dwellings)		
Separate house	92.6%	*90.2%*
Semi-detached, row or terrace house, townhouse etc.	4.7%	*7.2%*
Flat, unit or apartment	0.3%	*1.9%*
Other dwelling	2.3%	*0.7%*
Occupancy rate	*89.0%*	*86.0%*
Average household size	2.3	*2.4*
Tenure Type (Occupied Private Dwellings)		
Owned outright	44.6%	*40.3%*
Owned with a mortgage	35.4%	*34.1%*
Rented	17.4%	*23.6%*
Other tenure type	2.6%	*2.0%*
Housing Costs		
Median monthly mortgage repayment	$1,274	*$1,443*
Variation from Regional Vic. median	*-11.7%*	*n.a.*
Median mortgage as a share of median household income	22.8%	*23.8%*
Median weekly rents	$236	*$289*
Variation from Regional Vic. median	*-18.3%*	*n.a.*
Median rent as a share of median household income	18.3%	*20.7%*
Car Ownership per Dwelling		
None	3.3%	*4.7%*
One	29.9%	*33.7%*
Two	37.3%	*38.6%*
Three or more	29.4%	*22.9%*

Source: ABS, Census of Population and Housing, 2021

3.4 Retail Spending

Estimates of retail spending by trade area residents have been prepared with reference to the MarketInfo retail spending model. MarketInfo is a micro-simulation model which uses data from the ABS Household Expenditure Survey (HES), the ABS 2016 Census of Population and Housing, ABS Australian National Accounts, and other relevant sources.

The retail spending data is presented across four major spending categories:

- **Food, Liquor and Groceries (FLG)**, which includes fresh food, groceries and take-home liquor, including supermarkets.
- **Food Catering**, which includes cafes, restaurants and takeaway food.
- **Non-Food**, which includes apparel, homewares, bulky merchandise and general merchandise.
- **Retail Services**, including hairdressers, beauty salons and similar services.

Estimates of average per capita retail spending in 2022 for the trade area, compared with Regional Victoria, are shown in Table 3.4.

Average per capita retail spending by trade area residents is estimated at $15,580, which is in line with the Regional Victorian average. All spending estimates in this report are expressed including GST and in constant 2022 dollars.

Table 3.4 Average Per Capita Retail Spending, 2022 ($2022)

Category	FLG	Food Catering	Non-Food	Services	Total Retail
Trade Area	$7,180	$1,690	$6,200	$510	**$15,580**
Rest of Vic	*$6,970*	*$1,790*	*$6,420*	*$530*	***$15,700***
Variation from Rest of Vic average	3.0%	-5.6%	-3.4%	-3.8%	**-0.8%**

Source: MarketInfo; Ethos Urban

Estimates of total retail expenditure by trade area residents in 2022 and at capacity are detailed in Table 3.5 and have been calculated by applying average per capita spending levels to the current population and capacity population from Tables 3.1 and 3.2, respectively. Note, retail spending figures are expressed in constant 2022 dollar terms, excluding retail inflation and GST. Figures also do not include an allowance for real growth in per capita spending, due to the uncertainty around the timing of when the trade area will reach capacity.

In 2022, total retail expenditure for the trade area population is estimated at $159.6 million, including $73.8 million of FLG spending.

At capacity, retail spending by trade area residents is projected to reach $300.4 million, including $138.9 million of FLG spending, as shown in Table 3.5.

Table 3.5 Total Retail Expenditure, 2022 and at Capacity ($2022)

Category	FLG	Food Catering	Non-Food	Services	Total Retail
Trade Area	$73.8m	$17.4m	$63.3m	$5.2m	$159.6m
Trade Area @ Capacity	$138.9m	$32.7m	$119.1m	$9.8m	$300.4m

Source: MarketInfo; Ethos Urban

4.0 Competitive Context

This Chapter notes the existing competitive locations for retail floorspace under the Shepparton Retail Hierarchy, as relevant to the subject site, including the Shepparton CBD, Mooroopna Sub-Regional Centre, and various township centres.

4.1 Shepparton Retail Hierarchy

The City of Greater Shepparton Commercial Activity Centres Strategy sets out the Activity Centres Hierarchy, with the Strategy recognising the following levels in the hierarchy:

- **Central Activities District (CAD):** being the highest order activity centre and providing retail, commercial, administrative and cultural services to the Greater Shepparton region. Shepparton CBD is the only CAD in the Greater Shepparton region.
- **Regional Centre:** being activity centres providing a particular focus on retailing relevant to the surrounding region and complementing the higher order retail, commercial and community uses located in the CAD. The Strategy recognises Shepparton Marketplace as the only regional centre.
- **Sub-Regional Centre:** being a highly accessible centre supporting retail and commercial activity to an immediate residential catchment in the surrounding urban area, as well as a broader rural and regional hinterland. The Strategy identifies three sub-regional centres within the Greater Shepparton region being Riverside, Mooroopna CBD, and Shepparton North.
- **Neighbourhood/Town Centre:** referring to neighbourhood centres in the urban Shepparton area and town centres in the balance of Greater Shepparton, these centres primarily provide a basic range of convenience-oriented goods and services, meeting both localised convenience needs and serving people from a surrounding urban or rural hinterland. The Strategy identifies Echuca Road, Rowe Street East and Tatura town centre at this level of the hierarchy.
- **Local/Township Centre:** being small activity centres that serve localised convenience roles to the immediate surrounding locality. These centres may be as small as one or two stores. In total, 21 local and township centres are identified in the Strategy, although the Greater Shepparton Planning Scheme currently identifies 29 centres.
- **Enterprise Corridor:** the enterprise corridors recognised in the Strategy are not formal activity centres, but rather areas of mixed-business which include homemaker retail, showroom, and other commercial businesses which rely on significant exposure to passing traffic. The Strategy recognises enterprise corridors at Benalla Road, Gateway North, and Gateway South.

4.2 Shepparton CBD

The Shepparton CBD is located centrally to urban Shepparton, approximately 16km north-east of Tatura. As the highest order centre for the wider region, Shepparton CBD provides a wide range of retail, commercial, administrative and community functions. Many of the uses located within the CBD are not found elsewhere within Greater Shepparton.

Retail in the CBD is supported by various major brand tenants, with national retailers including Coles, ALDI, Kmart, Target, First Choice, Dan Murphy's, Harris Scarfe, Kathmandu, JB Hi-Fi, and Rebel. The CBD also fulfils an entertainment role, with this role supported by a Village Cinemas.

Various commercial and community services are also located in the CBD, strengthening its role as a centre for the entire Greater Shepparton region. These services include the Greater Shepparton City Council, Centrelink, Shepparton Library, and various employment and support services.

The role of the CBD in serving all of Greater Shepparton and beyond means that current and future residents of Tatura will visit the Shepparton CBD to undertake some of their higher order retail journeys. However, this is not expected to undermine the ability for the growth of retail in Tatura that better serves emerging local needs and is complementary to the regional function of the CBD.

The Shepparton Marketplace shopping centre in the east of urban Shepparton is also of some competitive relevance, containing a Big W, Woolworths and specialty shops.

4.3 Mooroopna CBD Sub-Regional Centre

Mooroopna CBD is located 13km north-east of the Tatura town centre and is recognised as a sub-regional centre in the CACS. It is the primary centre for Mooroopna as well as a broader rural and regional hinterland located to the west.

A street-based centre on both sides of the Midland Highway, Mooroopna CBD includes a diverse range of retail and non-retail uses, with these of a scale and nature which does not directly compete with the higher-order role served by Shepparton CBD. Anchored by a full-line Woolworths and ALDI supermarkets, a primary focus of the centre is to meet the food, grocery, and general convenience needs of local and surrounding residents.

It is considered that residents of the trade area are likely to visit Mooroopna CBD on a semi regular basis to access the full range of convenience and everyday retail which is supported in the centre, compared to the more limited offer in the Tatura town centre.

The expansion of the Tatura IGA reduces the need for Tatura residents to visit Mooroopna for supermarket and related shopping, and reflects the expectation that over time Tatura will be more self-sufficient in terms of retail needs.

4.4 Kyabram Town Centre

Kyabram town centre is located 21km north-west of the Tatura town centre within the Shire of Campaspe. The town centre serves the Kyabram urban residential population of approximately 7,600 persons, along with the surrounding rural population.

Focused around Allan Street, Kyabram town centre is a traditional high street retail centre. The centre supports an extensive range of retail uses, anchored by Woolworths and Ritchies IGA supermarkets, and a Kmart 'KHub' discount department store. These retail uses along with supporting commercial and community functions, support the day-to-day needs of the surrounding local and regional population.

Kyabram primarily serves a catchment reaching south to the Midland Highway. However, this Kyabram catchment is unlikely to have significant overlap with the Tatura trade area.

4.5 Township Centres

A number of township centres are identified under the Activity Centres Strategy which provide localised convenience retail to an immediate catchment. The township centres which are relevant to Tatura are as follows, with these centres shown in Figure 3.1:

- **Toolamba** located 12km south-east of the Tatura town centre, adjacent the Goulburn River. Toolamba township consists of a pub/hotel and general store/newsagents/post office.
- **Murchison** located 20km south of the Tatura town centre, also adjacent the Goulburn River. Murchison township consists of a wider range of retail, including a small supermarket/grocery store, post office, pub/hotel, bakery, service station, and gift store.

The limited size of these township centres reflects the limited catchment they each serve, and that they provide only a basic local convenience offer to the surrounding community.

5.0 Market Assessment

This Chapter assesses the forecast demand for retail floorspace in Tatura, considers other opportunities such as commercial floorspace, and considers centre planning for Tatura and the future growth areas.

5.1 Existing Market Shares

At present, it is estimated that the Tatura town centre is achieving a market share of 29% of trade area retail spending. This is based on estimated sales as outlined in Table 2.2 and assumes 10% of sales in Tatura come from areas beyond the trade area, including from the balance of Greater Shepparton or from other visitors.

By category this includes a market share of 35% in both FLG and food catering, 18% in non-food, and 53% in services.

Typically, retail services achieve strong market shares with residents undertaking their retail services purchases, such as haircuts and dry cleaning, closer to home.

Conversely, customers often travel to undertake non-food retail purchases at larger national retailers, with many of the residents in the Tatura trade area likely to be travelling to Shepparton for much of their non-food retail needs.

Overall, the current market share of 29% reflects an acceptable overall trading performance. This again demonstrates that at present the town centre is providing a scale and type of retail offer that meets most of the basic day-to-day needs of the population.

Table 5.1 Tatura Town Centre Current Market Shares

	FLG	Food Catering	Non-Food	Services	Total
Occupied Floorspace	2,920m^2	840m^2	2,910m^2	760m^2	7,430m^2
Average Turnover per m^2	$9,720/m^2	$7,950/m^2	$4,290/m^2	$4,000/m^2	$6,810/m^2
Estimated Turnover	$28.4m	$6.7m	$12.5m	$3.0m	$50.6m
Share of Turnover from Outside Trade Area	10%	10%	10%	10%	10%
Turnover Attributed to Trade Area Residents	$25.5m	$6.0m	$11.2m	$2.7m	$45.5m
Trade Area Spending 2022	$73.8m	$17.4m	$63.3m	$5.2m	$159.6m
Current Market Share	**35%**	**35%**	**18%**	**53%**	**29%**

Source: Ethos Urban

5.2 Retail Floorspace Capacity Assessment

An assessment of the potential demand for retail floorspace in Tatura when population capacity in the structure plan areas is achieved, taking into consideration the trade area for the town and the competitive context, is presented in Table 5.2.

This assessment is based on the following assumptions:

- Trade area population capacity as outlined in Section 3.2 of this report.
- Trade area retail spending capacity as outlined in Section 3.4 of this report.
- Market shares to increase from current levels due to the growth of Tatura's population and the growth in the associated retail offer as the critical mass to support additional uses is achieved. This includes the market share increasing to:
  - 60% for FLG retail (35% currently)
  - 60% for food catering retail (35% currently)
  - 30% for non-food retail (18% currently)
  - 70% for retail services (53% currently).
- An estimated 10% of retail turnover to continue to come from residents beyond the trade area.
- An average supportable trading level in line with current trading levels, reflecting a healthy retail offer with a range of quality retailers.

Based on this analysis, the demand for approximately 23,100m^2 of retail floorspace in Tatura is expected at full development capacity of the structure plan.

Accounting for current retail floorspace and the additional floorspace currently under construction due to the IGA development, Tatura is expected to be able to support an additional +13,200m^2 of retail floorspace at capacity.

Table 5.2 Retail Floorspace Demand at Capacity

	FLG	Food Catering	Non-Food	Services	Total
Trade Area Spending @ Capacity	\$138.9m	\$32.7m	\$119.1m	\$9.8m	\$300.4m
Spending Retained (%)	60%	60%	30%	70%	48%
Spending Retained (\$m)	\$83.3m	\$19.6m	\$35.7m	\$6.9m	\$145.5m
Share of Sales from Beyond Trade Area	10%	10%	10%	10%	10%
Retail Sales Available for Trade Area Retailers	\$92.6m	\$21.8m	\$39.7m	\$7.6m	\$161.7m
Average Supportable Trading Level	\$10,000/m^2	\$8,000/m^2	\$4,300/m^2	\$4,000/m^2	\$6,990/m^2
Retail Floorspace Demand	**9,260m^2**	**2,720m^2**	**9,230m^2**	**1,900m^2**	**23,110m^2**
Current Retail Floorspace	2,920m^2	840m^2	2,910m^2	760m^2	7,430m^2
IGA Development Additional Floorspace*	2,100m^2	120m^2	280m^2	0m^2	2,500m^2
Retail Floorspace Surplus (+)/Shortfall (-)	**-4,240m^2**	**-1,760m^2**	**-6,040m^2**	**-1,140m^2**	**-13,180m^2**

Source: Ethos Urban
* IGA development specialty floorspace uses are unconfirmed and based on assumptions

The majority of this floorspace falls within the non-food category, with the growth in population meaning the town will be able to support a more substantial non-food retail offer, being an additional 6,040m^2 which may include apparel, homewares, bulky merchandise or general merchandise. In particular, the potential may exist for some non-food mini major tenants or some restricted retail (bulky goods).

Approximately 4,240m^2 of additional FLG floorspace will also be supported, which may include a full-line supermarket or multiple smaller convenience supermarkets.

5.3 Other Opportunities

In addition to retail floorspace, activity centres also accommodate a range of non-retail shopfront businesses, with examples of these including real estate agents, travel agents, banks, solicitors, accountants, tax agents, financial advisers, health facilities, gyms, and the like.

As a general guide, supportable commercial floorspace for an activity centre is generally 10% to 20% of total shopfront floorspace. Allowing for 15% of floorspace to be non-retail, Tatura could support in the order of 3,470m^2 of commercial floorspace, an increase of +2,820m^2 on current office shopfront floorspace, as shown in Table 5.3. Note that this floorspace does not include uses such as childcare centres, medical centres, or dedicated office uses.

Table 5.3 Commercial Floorspace Demand at Capacity

	Current	Capacity	Difference
Retail Floorspace	7,430m^2	23,110m^2	+15,680m^2
Office Shopfront as Share of Occupied Retail	8.7%	15.0%	-
Office Shopfront Floorspace	**650m^2**	**3,470m^2**	**+2,820m^2**

Source: Ethos Urban

Beyond this, the growth in the population will also create additional opportunities, including for uses such as childcare centres, medical centres, allied health facilities, and other such uses that are often located within or on the fringe of an activity centre.

5.4 Tatura Centre Planning Considerations

In considering the appropriate framework for activity centres in Tatura, the following is relevant:

- The need to ensure that future residents of the growth areas identified in the Structure Plan are appropriately served by a convenient and accessible range of retail and commercial functions that support their contemporary lifestyle requirements
- Ensuring that the role and function of the Tatura town centre is retained and that the town centre also grows and evolves to meet emerging demand driven by development of the growth areas
- Delivering retail and commercial development that supports local employment growth, business development and economic opportunity.

Retail by Type

Supermarket

Significant future demand for approximately 4,200m^2 of additional FLG floorspace is forecast for Tatura, as identified in Table 5.2.

In the future, demand will exist for a full line major brand supermarket, such as a Coles or a Woolworths in Tatura given an urban population of approximately 13,000 persons at development capacity. When a major supermarket is attracted to Tatura, this represents a significant outcome in terms of both retaining expenditure and visitation locally, and other traders benefitting from the 'retail anchor' effect that full-line supermarkets provide.

In terms of supporting the centres hierarchy, a major brand full-line supermarket would preferably locate in the town centre rather than a new centre in the structure plan area. However, at present limited opportunities exist for a development of this type and size in the town centre.

As such, a planning intervention will be required to ensure that the Tatura town centre is 'built for growth'. That is, as demand grows for additional retail floorspace in Tatura appropriate uses should be able to find appropriate locations in the town centre in a timely manner and supported by relevant policies. In particular, ensuring a full-line supermarket site attractive to major traders can be delivered in the town centre is of most importance in this regard, although the opportunity for the more general physical growth and intensification of the town centre is also important.

Non-Food

An opportunity also exists for significant growth in the non-food retail offer in Tatura. This could include restricted retail, non-food specialty retailers, mini-major tenants or a mix of all three.

It is expected that restricted retail is unlikely to be delivered in the town centre. As such, an opportunity to plan for restricted retail combined with some selected non-retail showroom and other general business uses may be required on a key arterial road, such as the Tatura-Undera Road/Ross Street.

Within the town centre, the provision of non-food retail will include new specialty shops. However, more significantly the town centre may attract some larger so-called mini major traders such as a discount variety store (e.g. Reject Shop or similar) or home entertainment (e.g. JB Hi-Fi etc).

Convenience Retail

The new population of the structure plan growth areas will require convenient and easy access to basic convenience retail in order to ensure that their basic needs can be met in a timely and efficient manner.

If full-line supermarkets were to be prioritised to the town centre, these centres in the structure plan would operate at a local or township centre level in the hierarchy, providing a limited range of convenience retail to an immediate surrounding residential catchment.

6.0 Structure Plan Recommendations

The following key recommendations are provided in relation to the current structure planning process and resultant structure plan for Tatura.

Primacy of the Town Centre

The significant growth to occur in Tatura associated with the structure plan area provides an opportunity for the town centre to grow and evolve as the towns dominant retail, commercial and administrative centre. Although some retail must be delivered in the growth areas to meet basic convenience and day-to-day needs of future residents, the town centre remains the focus for major supermarkets and other uses consistent with serving the town and surrounding rural areas.

For this reason, the structure plan must balance the legitimate needs of future structure plan residents for localised services and employment opportunities with the need to retain the role and function of the Tatura town centre. Consequently, the use of Shop floorspace caps are recommended at centres identified in the structure plan to provide a mechanism for demonstrating to the market this intention of policy, and providing Council with the ability to assess any application carefully which seek to exceed those caps.

Further, the recommendation to support the primacy and growth of the Tatura town centre must be supported by an appropriate land use and planning framework that delivers such an outcome. That is, as the additional population growth delivered by the structure plan emerges, the town centre should be well-positioned to quickly and cohesively respond to growth in demand by supporting appropriate development.

As such, it is recommended that a separate or associated structure planning process be undertaken focussing on the Tatura town centre. This would include identifying the opportunities for growth in the footprint of the town centre over time, including the potential to deliver large retailers such as a major supermarket or (if possible and appropriate) a restricted retail precinct.

Without the ability of the town centre to demonstrate a clear pathway for future growth, pressure will emerge over time for development at other locations in Tatura which may be less preferred in terms of the centres hierarchy.

Retail in Growth Areas

With a focus on the Tatura town centre as the primary focus for retail growth and development, the focus for retail in the structure plan growth areas is on ensuring access to basic convenience needs. This can be delivered through supporting the development of local centres that include retail and are co-located with other community infrastructure.

Two local centres are proposed:

- Midland Highway Precinct
- Pyke Road Precinct.

Prior to more detailed precinct planning, it is difficult to determine the precise locations of these centres. However, it is recommended a location on a primary local traffic route is identified, preferably at the intersection of two such roads. A centralised location to the precinct is less important than identifying a site that is highly accessible and can deliver an integrated development combining retail and other complementary uses.

Based on the draft structure plan (noting this is currently in draft format) the following locations for the local centres are recommended:

- Midland Highway Precinct: intersection of the extension of Charters Street and Pyke Road.
- Pyke Road Precinct: will depend on the detailed road network within the precinct and potential vehicle crossings across the green corridor, however a preferred centre location is on a primary traffic route central to the precinct, preferably on a prominent corner intersection.

As per the existing local centres operating within the City of Greater Shepparton, it is envisioned that these centres would consist primarily of basic convenience retailing.

Although in Greater Shepparton local centres often consist of only a handful of shops and a floorspace typically no higher than around 1,000m^2, for the structure plan the flexibility to allow a higher than typical floorspace for the identified local centres is appropriate.

This allows for maximising local jobs and service delivery in the growth areas, without undermining the role and function of the Tatura town centre,

As such, a Shop floorspace cap of 3,000m^2 for each local centre can be applied which allows for a small to medium sized supermarket to be delivered if supported by market demand at the appropriate time. A supermarket of this scale is consistent with an ALDI, IGA, or Foodworks style store. We also expect these centres to include non-retail uses such as childcare, medical or community services.

Large Format Retail Opportunities

The forecasts of future retail demand for Tatura identified significant growth in non-food retail demand. This is due to the scale of population growth supported by the structure plan that means the town will likely achieve a 'critical mass' of demand able to support retailers and retail formats currently provided in other centres in Shepparton.

A key policy choice will be where is the appropriate location to support a small restricted retail/showroom precinct, generally consistent with the Enterprise Corridor (also called Enterprise Area) classification in the CACS hierarchy. An option is within or more likely on the fringe of the Tatura town centre, or alternatively in a new precinct identified in the structure plan area.

The primary focus for growth and development in the Tatura town centre should be for traditional centre-based uses and activities. Therefore, an Enterprise Area should only be delivered in the town centre where an appropriate site is identified for such uses that is commercially attractive to potential tenants, and where this is not at the expense of achieving other objectives related to the growth of traditional centre activities.

If restricted retail is delivered outside the town centre the preferred location is on a major road. A suggested location subject to more detailed investigation is the intersection of Tatura-Undera Road and Pyke Road, or alternatively another suitable high-profile location. This location context reflects the tendency for these types of large format retail uses to locate on the fringe of regional towns where larger, competitively priced and suitably high-profile sites are often available.

We expect that appropriate land use controls will be applied to ensure the large format retail precinct is complementary to, and not competitive with, the town centre.

Land Area Requirements

Local Centres

For the two local centres in the structure plan areas, a land area allocation in the order of 1 to 1.5 hectares is appropriate in initial structure planning. This allows for a retail component of up to 3,000m^2 (implemented with a Shop as-of-right floorspace cap), plus other uses such as childcare, medical, community facility, bistro etc.

Experience in growth areas across Victoria highlights that at the time of development some flexibility can be provided which allows, where demand is demonstrated to be not available at this scale, for an appropriate reduction in centre land. This is typically achieved through some higher density residential uses over the excess land allocation.

Town Centre

It is reasonable to expect retail floorspace growth in the Tatura town centre of at least 5,000m^2, with additional growth in commercial floorspace in the order of 2,500m^2.

The land requirements for this floorspace will depend on the uses which meet this demand. For example, a major brand supermarket may require a land budget of approximately 1.2 to 1.5ha, while smaller retailers will be better placed to locate on smaller infill sites.

To ensure the town centre can readily accommodate future growth requirements, a genuine ‘go for growth’ approach is recommended that supports a long-term vision to almost double the size of the existing town centre, including 7,500m^2 plus of additional retail and commercial floorspace (not including any restricted retail).

Restricted Retail

As identified previously, a preferred location for restricted retail is within or on the fringe of the Tatura town centre. If demand for these uses cannot be adequately met by the growth of the town centre in the future, a dedicated restricted retail precinct will be required.

A restricted retail precinct in the order of 2 to 2.5 hectares will be appropriate to accommodate both retail and non-retail showroom type uses. This is ideally located on a major road leading into the town from the Midland Highway. A suggestion is the intersection of Tatura-Undera Rd and Pyke Road.