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WIMMERA RIVER PRECINCT AND CENTRAL ACTIVITIES DISTRICT

TECHNICAL REPORT

HORSHAM RURAL CITY COUNCIL | MAY 2019 | FINAL

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Transforming HORSHAM

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ACRONYMS

AAGR – Average Annual Growth Rate

ABS – Australian Bureau of Statistics

ANZSIC – Australian New Zealand Standard Industry Classification

AVPCC – Australian Valuation Property Classification Code

C1Z – Commercial 1 Zone

C2Z – Commercial 2 Zone

CAD – Central Activities District

CBD – Central Business District

DELWP – Department of Environment, Land, Water and Planning

EMT – Executive Management Team

EO – Executive Office

ERP – Estimated Resident Population

FLG – Food Liquor Groceries

FO – Flood Overlay

GDP – Gross Domestic Product

GWM – Grampians Wimmera Mallee

HRCC – Horsham Rural City Council

IVS – International Visitor Survey

LGA – Local Government Area

LQ – Location Quotient

LSIO – Land Subject to Inundation Overlay

MCH – Maternal Child Health

MTA – Main Trade Area

NSW – New South Wales

NVS – National Visitor Survey

PPRZ – Public Park and Recreation Zone

RDV – Regional Development Victoria

SEIFA – Socio Economic Index For Areas

SRV – Sport and Recreation Victoria

TRA – Tourism Research Australia

VIC – Visitor Information Centre

VPA – Victorian Planning Authority

WCMA – Wimmera Catchment Management Authority

WDA – Wimmera Development Authority

WIFT – Wimmera Intermodal Freight Terminal

WSMP – Wimmera Southern Mallee Partnership

GLOSSARY OF TERMS

Apparel/Homewares/Leisure (AHL) – includes clothing stores, shoes stores, gift stores, pharmacies, optometrists, homewares stores, sports and fitness stores, and outdoor living and camping stores.

Backward Linkages - The industry sectors which spend the most on locally sourced intermediate goods and services per dollar of output. These industry sectors may not necessarily make the largest contributions to the region's economy at present however due to well-developed local supply chains these sectors have a significant capacity to deliver broad based economic benefits for the region.

Bulky Goods (BG) – generally includes furniture, hardware stores, and whitegoods.

Domestic day trip visitor - Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

Domestic overnight visitor - People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

Food Catering (FC) – includes cafes, restaurants and takeaway food premises.

Food/Liquor/Groceries (FLG) – includes supermarket, deli, bakery, convenience store, bottle shop and shops selling food that is not ready-to-eat.

Gross Regional Product - The total value of final goods and services produced in the region over the period of one year.

Horsham – Horsham is defined as the locality (suburb) and generally includes the Horsham CAD and surrounding residential areas. The area is shown in Appendix A of Technical Report B (Existing Situation Analysis).

Horsham (RC) – Horsham Rural City (RC) Council is defined as the Horsham Local Government Area.

International visitor - A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.

Local Expenditure - Represents the value of intermediate goods and services purchased by local industry sectors within the region. A high level of local expenditure on intermediate goods and services proportionate to total output is indicative of well-developed local supply chains and also that any expansion in this sector would typically deliver broad based benefits for the region's economy.

Output - Represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

Propulsive Industry - Key drivers of the Horsham economy in terms of regional exports, employment, value-added and local expenditure on goods and services (backward linkages)

Regional Exports - Represents the value ($) of goods and services exported outside of the defined region that have been generated by businesses / organisations in each of the industry sectors within the region.

Retail Services (RS) – generally includes services such as beauty salons, hairdressers and dry cleaning stores.

Value-Added - represents the marginal economic value that is added by each industry sector in a defined region. Value-Added can be calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector, or alternatively, by adding the Wages & Salaries paid to local employees, the gross operating surplus and taxes on products and production.

1. INTRODUCTION

This Technical Report provides the supporting evidence for the Wimmera River Precinct and Central Activities District Vision & Masterplan Background Report.

The technical work provides research and analysis relevant to the objectives and recommendations made for the study area. This Technical Report includes the following Parts.

PART A – STRATEGIC CONTEXT

Part A includes an overview and assessment of strategic work that has been undertaken for the study area. This includes work relating to the public realm, transport and connectivity, property & land use, economic development, sport, recreation and tourism.

PART B – EXISTING SITUATION

Part B includes robust research and analysis for Horsham's existing situation having regard to population and housing, economic profile, tourism industry and visitor market, as well as community and sport and recreation infrastructure.

PART C – RETAIL AND COMMERCIAL LAND SUPPLY AND DEMAND

Part C provides a high-level assessment of commercial and retail uses in the study area including the current land use mix and floorspace provision. This assessment also projects the estimated level of floorspace that will be supportable in the study area in the future having regard to the existing provision of floorspace and retail mix, population growth, Horsham's retail catchment and expenditure per capita, as well as current and future trading performance.

PART D – CONSULTATION SUMMARY

Part D provides an overview of the consultation process including a summary of stakeholders that were engaged and consulted and a summary of the key outcomes.

The consultation process helped inform the preparation of the emerging issues and opportunities and strategic objectives for the study area.

PART A:
STRATEGIC CONTEXT

Part A provides an overview and assessment of the suite of strategic work that has been undertaken for Horsham Rural City Council in the past. This includes work relating to the public realm, transport and connectivity, land use, economic development, sport and recreation and tourism.

2. LITERATURE REVIEW

2.1. INTRODUCTION

A detailed review of existing work has been undertaken to summarise the relevant technical work and views expressed by community, industry and Government in relation to the study area.

The strategies, technical assessments and other documents that were reviewed and used to inform this section are summarised in Table 1. The following sections summarise the individual documents and how they relate to the revitalisation of the study area, with particular focus on the Wimmera River Precinct and Central Activities District.

TABLE 1 SUMMARY OF LITERATURE REVIEW

AREA OF FOCUS	DOCUMENT
CENTRAL ACTIVITIES DISTRICT (STREETSCAPE, PUBLIC REALM, TRANSPORT, CONNECTIVITY)	• Horsham CAD Revitalisation Strategy, MR Cagney (2017); • Horsham CAD Strategy, Essential Economics / Meinhardt Infrastructure & Engineering, Urban Initiatives (2013) • Imagine Horsham, Community and Stakeholder Engagement – Key Findings Summary, Village Well (2016); • Horsham Municipal Bicycle & Shared Path Plan 2012 to 2016, Driscoll Engineering Services (2012); • Horsham Municipal Parking Strategy, MRCagney (2017); • Horsham CBD Urban Design Framework, (2001)
WIMMERA RIVERFRONT PRECINCT & RIVER CORRIDOR	• Horsham Wimmera Corridor Plan (draft), HRCC and VPA (2018); • Wimmera River Project Report, Regional Leadership Skills Project Group Members (2018);
SPORT AND RECREATION	• Sport and Recreation Strategy 2013-18 (draft), SGL Consulting Group (2013); • Wimmera Sports Stadium Business Case and Concept Design, William Ross Architects (2017); • Horsham Health and Wellbeing Plan 2017-2021, HRCC (2017).
TOURISM, PROPERTY & LAND USE (RESIDENTIAL, COMMERCIAL, RETAIL, INDUSTRIAL)	• Horsham Tourism Master Plan 2016 to 2020, HRCC (2018 review); • Horsham Economic Development Strategy 2017 – 2021, Urban Enterprise (2017); • Horsham Rural City Council Plan 2018-22, HRCC (2018); • Horsham Growth Management Framework, Meinhardt Infrastructure & Environment (2012); • Wimmera Southern Mallee Regional Growth Plan, Vic State Government (2014);

HORSHAM RURAL CITY COUNCIL PLAN 2018-22

The Horsham Rural City Council Plan 2018-22 (Council Plan) seeks to position Horsham as a regional economic, tourism and cultural centre and build a vibrant, diverse, resilient, safe and healthy community.

The Council Plan includes five community goals:

- Goal 1 – Community and Cultural Development
- Goal 2 – Sustaining the Economy
- Goal 3 – Asset Management
- Goal 4 – Governance and Business Excellence
- Goal 5 – Natural and Built Environment

The Council Plan identifies a suite of objectives, strategies and/or programs in order to deliver the goals. Those relevant to the Wimmera River Precinct and Central Activities District are as follows:

- Implement urban design provisions with an aim to improve visitors' experience in the Horsham CAD.
- Develop and progressively implement a plan for the redevelopment of the Horsham City Oval precinct.
- Encourage redevelopment of community facilities at the Horsham Showgrounds.
- Implement outcomes from the multipurpose/indoor sports and community facility feasibility study.
- Activate the Wimmera River Precinct for the community and visitors (including lights and greater presentation).
- Encourage the development of a riverside café.
- CBD Revitalisation Project –improved urban design / town square.
- Support future operations and opportunities for the Wimmera Business Centre through the Committee of Management to reinforce its ongoing viability and effectiveness in fostering new business enterprises.
- Promote and attract conferences to Horsham.
- Facilitate the attraction of major sporting events.
- Promote and encourage safe bicycle use as a sustainable alternate mode of transport, including provision of bicycle parking facilities.
- Confirm and undertake design and planning for the relocation of the municipal depot including potential co-location of Tech Services planning and delivery staff.

2.2. CENTRAL ACTIVITIES DISTRICT

HORSHAM CAD REVITALISATION STRATEGY (2017)

The Horsham CAD Revitalisation Strategy was prepared by MRCagney in May 2017. The Strategy aims to *"strengthen the economic performance of the region, improve social outcomes, including health and community wellbeing and future proof infrastructure by adapting to climate change."*

The Strategy seeks to build on the urban design improvements recommended for Horsham's CAD, as identified in the Central Activity District (CAD) Strategy (2013).

The key principles for revitalising the CAD are as follows:

- Prioritise place function over movement function;
- Maintain a compact CBD;
- Prioritise walkability;
- Connect the CBD with its surrounds;
- Focus on the main streets; and
- Celebrate heritage.

The Strategy identifies a range of public work interventions that are planned or under investigation, along with recommendations to satisfy the revitalisation principles.

Initiatives under consideration by Council for improving the CAD include:

- Upgrade footpaths;
- Introduce water sensitive urban design principles into Council planning to ensure low water-use street trees, garden beds and other landscaping elements;
- Upgrade power supply to improve power supply resilience;
- Install energy efficient public lighting systems;
- Roll-out free wifi in the CAD.

Public Realm Improvements

Public realm improvements currently in planning or investigation phase for the Horsham CAD include:

- A town square;
- Pavement modifications;
- Tree plantings and landscaping in median car parking areas, incorporating water harvesting and reuse;
- Provision of shade and shelter.

Transport Improvements

Transport improvements draw on findings from the Horsham Integrated Transport Strategy and the Horsham Municipal Parking Strategy.

The Parking Strategy identified that the current parking supply is plentiful and caters for current and forecasted demands. Historically, the town centre has been influenced by traffic engineering approaches that supported the addition of roundabouts in the CAD, wider road widths and increases in car parking. Future interventions will need to adopt an alternative approach if revitalisation objectives are to be achieved.

The following Transport improvements should be considered:

- Intersection upgrades:
  - Tightening intersection geometries to slow traffic, improve safety and ensure more direct paths for pedestrian crossings;
  - Reduce road widths;
  - Install raised pedestrian crossings at intersections to slow traffic, improve pedestrian safety and increase accessibility for all users;
  - Reconsider the use of roundabouts at key intersections.
  - Propose signalisation of Wilson Street and Darlot Street.
- New mid-block crossings:
  - Mid-block zebra or wombat crossings should be introduced in areas with high pedestrian activity (e.g. Roberts Avenue).
- Providing for bikes:

- Priority lanes for on-street bicycles;
- Reduce traffic speeds to 30 km/hr and ensure one lane of traffic per direction;
- Removal of on-street parking or replacement of angle-parking with parallel parking on selected cycle routes.

- Car Parking:
  - Introduce a parking overlay to reduce the standard car parking rates for new CBD development;
  - Commit to initiatives to reduce car dependence in Horsham;
  - Manage CBD time restrictions to encourage parking in peripheral areas;
  - Defer any plans to increase CBD parking supply;
  - Make Horsham the 'world's most walkable rural city'.

This strategy is considered paramount to the preparation of the Framework Plan as this strategy included a series of appropriate interventions that can be further developed in developing the Framework Plan, for example public realm and transport network improvements.

IMAGINE HORSHAM, COMMUNITY AND STAKEHOLDER ENGAGEMENT – KEY FINDINGS SUMMARY (2016)

In 2017, Village Well delivered a series of engagement activities with the Horsham community and stakeholders over two phases to identify projects that would revitalise Horsham's CAD.

The engagement process focused on the concept of a town square, streetscape upgrades, town entrances and local economic development opportunities to attract people to stay, enjoy and return to Horsham's CAD.

Residents, members of the business community, State and Local Government and agencies were invited to put forward their ideas, which were then prioritised (in a format of quick wins, medium and long-term projects) and presented back to the participants.

Five core objectives were identified by participants, including:

1. A vibrant main street – distinct and beautiful, offering all the services you need, delicious food and boutique retail offerings;
2. Events & activities all year round – wander the night markets, listen to buskers in the main street, admire local art in the laneways, enjoy the twilight buzz while sipping a wine before the show;
3. A friendly place – where the locals are proud, and visitors feel welcome, from the entrance to the town to the warm people you meet in the main street;
4. Explore the river – take an afternoon stroll along the river walk, stop for a coffee and take in the view, and relax while the kids play along the promenade; and
5. Experience the remoteness – stay for a few nights under the big sky, go fishing in the lakes, climb Mt Arapiles or ride a bike through this vast, beautiful landscape.

Important factors for success of the ideas proposed were subsequently identified, including the capacity building of the community and business to contribute to revitalisation projects, as well as the need for courageous governance.

Specific locations for potential public realm improvements were formulated, along with a list of priority actions.

Town Square

The concept for of a town square emerged and the most appropriate location for this square was near Roberts Place and Ward Street, providing a link between Firebrace Street, the Town Hall and the Plaza, as well as linking May Park, the Botanic Gardens and the River.

Physical features of a town square in Horsham should include the following:

- Greenery;
- Seating
- Shelter;
- A large screen for films, promotion and games;
- Retail and cafés on the periphery;
- A play space for children;
- Public toilets;
- Interpretive content celebrating and documenting local and indigenous history.

Streetscape Improvements

Recommendations in regard to streetscapes in the CAD are as follows:

- Lighting upgrades;
- Shade and shelter;
- Greenery;
- Develop laneways and side streets with murals and artwork;
- Al-fresco dining;
- Improved signage – wayfinding, attractions and promotional;
- Protect heritage buildings;
- More seating and meeting places;
- Access for all abilities and age friendly infrastructure;
- Encourage walkability – prioritise pedestrian activity.

Town Entrances

There was strong consensus for upgrading all entrances. Recommendations included:

- Attract passing travellers;
- Promote the town and what's on;
- Be reflective of Horsham's identity;
- Attractive, bold and distinctive.

The River

The River was identified as an important asset that was underutilised. Ideas for activating the River included:

- Pop-up café, function centre, restaurant;
- Attractive promenade and cycling track;
- More events, activities and films for all ages, including at the soundshell;
- Passive water recreation, such as paddle boats and fishing;
- Better connection to the Botanic Gardens and the Town Centre; and
- Playgrounds and family activities.

Other Location Specific Opportunities

- Two north south pedestrian access routes were identified to improve connectivity to key nodes (i.e. May Park, the River and the Horsham Botanic Gardens) – one along Firebrace Street and the second one generally along Ward Street (extending further north and south across surface car parking areas). Part of the Ward Street route could be designed to be safe shared space.
- The section of Roberts Avenue between Firebrace Street and Darlot Street was required to be improved / redesigned to give priority to pedestrians by introducing priority pedestrian spaces and safe shared spaces.
- Specific locations for activities / streetscape improvements to occur to improve connections between the Horsham CBD, the Botanic Gardens and the River.

A list of priority actions has been developed as quick wins, medium- or long-term actions. Priority actions are summarised in the table (overleaf).

DESCRIPTION	WHAT	WHERE
Quick Wins – Now – April 2018		
Regular Markets	Produce and craft market, Night food market (combined with Friday night shopping), complimentary to other local markets	Roberts Place, Ward Street (create a temporary shared zone during market times) River precinct
Activate Vacant Shops	Displaying local photography or art in vacant shop windows, uplifting 'tired' facades	Vacant shops in the CBD, particularly on Firebrace Street
Outdoor Cinema	Events for all ages, free or affordable	Events for all ages, free or affordable
Pop–Up Café on the River	A temporary cafe with areas to sit and enjoy the surrounds	Sawyer Park, Weir Park, Angling Club, Rowing Club, Showgrounds
Action Group	Community members, traders and organisations that are interested in assisting in planning and delivering Placemaking projects	Advertise for Expressions of Interest through websites, social media, local paper and radio
Medium Term – Year 2018		
Signage	Improve connections within the CBD and to surrounding areas including the River, Gardens, Roberts Place, May Park, etc. through wayfinding and informative signage	Throughout CBD and surrounding areas
Cohesive Identity and Distinct Branding	Continue to develop a cohesive identity and branding for Horsham, with community input and awareness	
Town Entrance Upgrades	Upgrade all town entrances, based on Horsham's identity and branding (a sign trail promoting features; character or identity bollards; acknowledging Aboriginal land and culture; build interest from 5 kilometres out and continue promotion until turn off	All town entrances
Marketing Campaign	Promoting Horsham regionally, drawing in travellers, making locals proud, align with identity and branding	Television, Social media, Gazettes, Magazines
Long Term – Year 2019+		
Town Square or New Public Space		Roberts Place, Ward Street carpark, Darlot Street carpark, Several sites in the central CBD
River Facilities	Restaurant, cafe, function centre, community facilities	Riverbank, Soundshell, Showgrounds
Street Improvements		Main streets in the CBD

HORSHAM CAD STRATEGY (2013)

The Horsham CAD Strategy (the Strategy) was prepared in 2013 by Essential Economics, Meinhardt Infrastructure and Engineering, and Urban Initiatives. The Strategy was adopted by Council in 2013. The Strategy was prepared:

- To provide a framework for future development of the CAD;
- To provide a clear understanding of the current supply and projected demand for retail and commercial floor space in the Horsham CAD; and
- To provide Council with the planning tools to manage and direct development and potential future growth of the CAD.

The following actions/recommendations were provided in the CAD Strategy (2013):

- Identify opportunities to enhance the commercial, cultural and administrative facilities and amenities in the CAD, consistent with its important role as a regional service centre and the recommendations provided in this Strategy.
- Encourage, where appropriate, a greater intensity of development in the central part of the CAD bounded by Baillie Street to the north, Firebrace Street to the east, Darlot Street to the west, and Wilson Street to the south.
- Develop an urban design framework which provides for improved pedestrian, vehicular and bicycle linkages between the different areas of the CAD.
- Continue to invest in improvements to the streetscape, amenity and public realm which meet best practise urban design outcomes.
- Provide support for development proposals which encourage mixed-use development in the CAD, consisting of residential or accommodation uses above ground floor and an increase in residential density in surrounding areas.
- Encourage a mix of community and social infrastructure development in the Horsham CAD.
- Support the continued development of this area as a light industrial/business location for service-related businesses which would preferably not locate in the CAD and which do not impact adversely on the amenity of surrounding areas.
- Identify a preferred location for an 'entertainment' precinct in the Horsham CAD.
- Maintain and enhance north/south connectivity between the existing CAD and the Wimmera River and Botanical Gardens.

HORSHAM MUNICIPAL PARKING STRATEGY (2017)

The Horsham Municipal Parking Strategy (Parking Strategy) was prepared in December 2017 by MRCagney and adopted by Council in December 2017. The Parking Strategy evaluates the current parking environment and provided recommendations to manage car parking efficiently and sustainably in the Horsham CAD.

The Parking Strategy concluded that there were no current demand pressures for car parking in the Horsham CAD. Key findings were:

- 30% of parking spaces were vacant at all times;
- Peak period occupancy in the Horsham CAD was considered significantly lower than the best practice benchmark level in a regional setting;
- There was a shortage of 4P parking spaces;

The Parking Strategy provided an evidence-based approach to manage car parking provisions in planning and deliver the Horsham CAD revitalisation projects and re-development of the Wimmera Riverfront. The key recommendations of the Strategy include the following:

- Retain current paid parking rates and locations.
- Commit to strategies and initiatives to reduce car dependence in Horsham.
- Enable the development of residential dwellings and/or re-use of CAD buildings for residential purposes to improve activity and residential density in the CAD.
- Improve amenity by increasing shade through street planting, verandas and shade in Council owned car parks.
- Improve and streamline signage and wayfinding.
- Consider covered walkways and incentives to encourage a high rate of pedestrian activity.

HORSHAM MUNICIPAL BICYCLE & SHARED PATH PLAN 2012-16

The Municipal Bicycle & Shared Path Plan (MBSP Plan) was prepared by Driscoll Engineering Services in September 2012. This MBSP Plan aimed to update the previous strategic bicycle plan for Horsham completed in 2004 and further support Council in the future planning of cycling and pedestrian infrastructure.

The MBSP Plan provides a number of recommendations in relation to upgrading key cycling routes and an increase in maintenance on existing routes as a way to promote cycling and walking as a more attractive and common mode of travel.

A list of priority projects with estimated project costs were recommended, including:

- Increase maintenance of the existing bicycle network to remove hazards, provide surfaces fit for use, and improve delineation and signage;
- Remove hazards on the on-road network and provide improved bicycle lane facilities at intersections;
- Provide 'end of trip' and en-route facilities to encourage greater participation in cycling; and
- Improve advisory and directional signage and bicycle route information.

HORSHAM CBD URBAN DESIGN FRAMEWORK (2001)

The Horsham CBD Urban Design Framework (UDF) was prepared in 2001 by TTM Consulting Pty Ltd, David Lock Associates and Tract Consultants.

The UDF guides future development of the Horsham CAD and surrounds, with a strong emphasis on Firebrace Street. The key recommendations for the CAD include:

- Consolidate Horsham's urban core, confining retail and commercial development to precincts that are currently used for those purposes, and use infill development to intensify where appropriate.
- Encourage a major retail centre on the eastern side of Firebrace Street.
- Develop retail on the periphery of the CAD core.
- Encourage office space above ground floor retail to intensify activities.
- Encourage medium density residential development close to the CBD, including the Saleyards site and other underutilised sites.
- Develop strong pedestrian linkages between the CAD and key assets such as the Botanic Gardens and Riverfront.
- Repair and enhance the footpath network to improve pedestrian amenity and safety.

2.3. WIMMERA RIVERFRONT PRECINCT & RIVER CORRIDOR

DRAFT WIMMERA RIVER CORRIDOR PLAN (2018)

The draft Wimmera River Corridor Plan was prepared by the Victorian Planning Authority in partnership with Horsham Rural City Council in January 2018. Through its vision, objectives, strategies and actions, the Plan provided strategic direction to inform use and development of the Wimmera River and its immediate environs. The Plan provides strategic direction to inform future planning scheme amendments for the river corridor including land acquisitions, cultural heritage management, recreation uses and development opportunities. The Plan builds on the strengths of the river corridor to promote city growth while preserving the natural environment and amenity of the area.

The six main themes that underpin the plan are:

- Biodiversity and River Health
- Cultural Heritage
- Access and Connectivity
- Recreation
- Economy
- Governance

The Plan also provides core objectives to guide decision making in relation to the Wimmera River corridor. The core objective are:

- To support the biodiversity and health of the Wimmera River Corridor
- To ensure ongoing recognition of the cultural significance of the Wimmera River corridor
- To improve access and connectivity to and around the Wimmera River corridor
- To promote the Wimmera River corridor as a key community recreational asset
- To utilise the Wimmera River corridor to contribute to Horsham's economy
- To ensure coordinated governance of the Wimmera River Corridor

Specific actions that are relevant to an activated and revitalised riverfront precinct and improved integration with the CAD are as follows:

- Recognise and promote the river's character, culture and history.
  - Engage with the Barengi Gadjin Land Council to identify, protect and manage Wotjobaluk Peoples' cultural elements along the river corridor.
  - Identify, protect and manage post contact significant cultural elements along the river corridor.
  - Develop and implement appropriate education and interpretative materials along the river corridor.
- Improve access opportunities to the river from surrounding areas of Horsham.
  - Plan and develop a network of connected urban trails incorporating the river corridor.
- Establish new linkages across the river to better connect north and south Horsham.
  - Incorporate universal design principles in any proposed bridges or river crossings.
- Ensure inclusive and equitable recreational and social use of the river corridor through provision of appropriate infrastructure and programs.
  - Encourage events that are appropriate to the river corridor.
  - Deliver public realm design outcomes which encourage and support recreational activity.
- Provide opportunities for improved integration of activities in the Horsham Central Activities District with the river corridor.
  - Create linkages between the Central Activities District and river corridor as identified through the Horsham Central Activities District revitalisation project.
- Ensure commercial activities within the Wimmera river corridor are compatible with the primary use of the corridor for environmental and recreation purposes.
  - Support the development of riverside catering/dining venues.
- Activate areas fronting the river to attract patronage and stimulate activity around the river corridor.
  - Develop and implement a plan for the redevelopment of the Horsham City Oval precinct.

- Investigate the redevelopment of community facilities at the Horsham Showgrounds.

The Plan also identifies a number of development sites due to their location within the Wimmera River corridor and close proximity to the Wimmera River. The potential development sites are:

- O'Callaghan's Parade – current business zoned site – prominent location at city gateway
- Baillie Street/Trinity Drive – prominent, accessible vacant site opposite Horsham Primary School and existing river parklands.

WIMMERA RIVER PROJECT REPORT (2018)

The Wimmera River Project Report was prepared by the regional leadership skills project group members (community group). The Report provides an audit and assessment of a community survey of river usage and facilities.

The Report provides a range of public realm recommendations, particularly in relation to:

- Tracks and trails;
- Signage;
- Public toilets;
- BBQs and Shelters;
- Seating;
- Car Parking;
- Playgrounds;
- Access Points;
- Drinking Fountains;
- Rubbish Bins and Dog Waste Bags; and
- Local Interest Points.

Recommendations are generally focussed around upgrading existing infrastructure and services along the riverfront in respect of the above.

The community survey results provide a number of suggestions for the riverfront. These include:

- Cafes and restaurants;
- Improved lighting and signage;
- Extended walking/cycling tracks/trails;
- Increase in playground and BBQ/picnic areas;
- Increase in fishing and recreational boating infrastructure/facilities; and
- Increase in designated swimming areas.

2.4. SPORT AND RECREATION

DRAFT SPORT AND RECREATION STRATEGY 2013-18

The Sport and Recreation Strategy (draft) was prepared by SGL Consulting Group in August 2013, with an aim to identify and evaluate existing sports and recreation needs and service gaps in sport and recreation provision in the Horsham municipality.

Major factors with significant impact on the provision of recreation, sport and physical activities were summarised in the Strategy, including:

- Potential to increase sport and recreation tourism and events;
- Many sport and recreation facilities are due for re-development or upgrading, including the basketball stadium precinct, City Oval precinct and existing network of multipurpose trails within the urban area of Horsham;
- Additional or new recreation facilities may be accommodated at old ambulance station at City Oval;
- Participation in non-organised physical activity is approximately twice as high when compared with organised and team based sports. This is partly a result of the lesser commitments required to engage in non-organised physical activity but also the aging resident demographic in Horsham.
- Sport and recreation clubs are confronted with some significant management issues.

The Strategy recommended that "*Council take a stronger, more strategic leadership role in the provision of sport and recreation opportunities, particularly regarding the management and use of its sport and recreation assets.*"

The Strategy recommended the following:

- Proceed with plans to develop a multipurpose indoor sport and recreation centre, located as close as possible to the existing Basketball Stadium, either adjacent to, or on the Showgrounds.
- Give priority to funding the capital and ongoing maintenance of a multipurpose, multiuser venue, over a single purpose facility.
- Reduce use of City Oval by restricting football training sessions.

HORSHAM MULTI-USE INDOOR SPORTS STADIUM PLAN – PHASE ONE: FEASIBILITY (2016)

The *Horsham Multi-Use Indoor Sports Stadium Plan-Phase One: Feasibility* was prepared by Insight Leisure Planning. The report assessed the demand for new indoor facilities, including the ability to continue to service and increase regional scale sport events, activities and uses.

In relation to demand for new indoor sporting facilities, the report noted the following key points:

- Demand for new, or additional, indoor stadium facilities in Horsham is not being driven by increases in local participation demand or requirements to address anticipated demand associated with future population growth.
- There is an adequate number of indoor courts currently available to address the indoor sport needs for local standard participation.
- Existing facilities do not meet contemporary standards or recommended facility guidelines in terms of playing areas and support amenities.
- Existing facilities (i.e. Basketball Stadium, squash courts, table tennis and gymnastics) are all over 40 years old.
- New facilities will be required in order to meet the contemporary needs of the community, including recommended facility standards and guidelines, in order to continue to service the needs and expectations of the community for the next 50+ years.
- Current facilities are used for a variety of regional and even State level events/activities despite current limitations, however it can be expected that such uses will not be supported in these venues in the longer-term if the facilities continue to fall below contemporary standards and expectations.
- New facilities are being planned for construction in other regional centres (i.e. Ballarat, Bendigo, Geelong and Mildura) over the next five years that will further increase competition for hosting of such activities.
- Demand for new facilities is being driven by requirements to provide appropriate facilities that are capable of maintaining (and enhancing) current levels of

participation, including the capacity to continue to host a range of regional and state standard events, uses or activities over the next fifty years.

- Contemporary facilities will be required to cater for basketball, netball, volleyball, badminton, table tennis, squash and to a lesser extent gymnastics.

WIMMERA SPORTS STADIUM BUSINESS CASE AND CONCEPT DESIGN REPORT (2017)

This Wimmera Sports Stadium Business Case and Concept Design Report was prepared by Williams Ross Architects in partnership with Communityvibe in December 2017. The need for such a facility was initially reiterated in the *Sport and Recreation Strategy 2013-18*. Further work was undertaken in 2018 to investigate the feasibility of the multi-use indoor sports facility.

The development of the proposed stadium would result in the closure of McBryde Street, along with planning permit applications and rezoning the north western corner of the existing Showgrounds from Special Use Zone to Public Park and Recreation Zone.

The key findings of the report include:

- Regionally, the closest indoor multi-use stadiums with more than 2 courts are Hamilton (130Km), Ballarat (187km), Bendigo (215km), Warrnambool (228km) and Mildura (310km).
- The facility is proposed to attract a wide variety of different uses, including basketball, badminton, volleyball, squash, netball, as well as Regional Sports Assembly, sports organisations, clubs and associations office space;
- The facilities proposed included:
    - Sports Hall with 3 new indoor sports courts designed to competition standards. Each court to be line marked for netball, basketball, volleyball, badminton.
    - Space for 12 x table tennis tables;
    - 6 x squash courts;
    - 6 x squash courts and support facilities;
    - 5 x outdoor netball courts to bring total courts compliant with Netball Victoria requirements to 8, which is the minimum number required for Association Championships and other Netball Victoria events;
    - Fixed spectator seating for 400, an increase on the approximate 350 existing capacity of the existing Stadium at McBryde Street
    - Space for further temporary tiered spectator seating
    - Large meeting room, to also provide a small function space
    - 2 x Consulting Suites, available to allied sports and other services
    - Additional shared office space for local sporting clubs and associations
    - Additional player amenities to accommodate the multisport nature of the venue.

HORSHAM HEALTH AND WELLBEING PLAN 2017-2021

The Municipal Health and Wellbeing Plan was prepared by HRCC and provides a 5-year Plan to protect, improve and promote public health and wellbeing within Horsham Rural City.

The strategic prioritises for health and wellbeing are as follows:

- Increasing healthy eating and active living;
- Reducing harmful alcohol and drug use;
- Improving mental health;
- Preventing family violence;
- Improving sexual and reproductive health;
- Improving early years outcomes; and
- Strengthening education and economic development.

Specific actions that are relevant to the revitalisation of the study area include:

- Develop and maintain footpaths and walking and bike trails with particular focus on key precinct linkages to promote active living options and supporting infrastructure such as seats, signage, water, lighting and shade.

- Support recreation activities in natural environment spaces including rivers, lakes and major trails across municipality (e.g. Grampians Peak Trail).
- Develop, maintain and promote facilities and open spaces as a venue for social connection for all including delivering on the CBD revitalisation project.
- Implement HRCC Economic Development strategy and ensure health and wellbeing priorities are reflected.
- Develop and promote the municipality's key tourism and events attractions with particular focus on unique natural and cultural offerings.

2.5. TOURISM, PROPERTY & LAND USE

TOURISM MASTER PLAN 2016-20 (REVIEWED 2018)

The Tourism Master Plan 2016-20 (TMP) was prepared by Horsham Rural City Council in 2016 and reviewed in 2018.

The TMP review identifies a number of priority marketing and promotional actions to build on existing and emerging tourism strengths in Horsham and continue to improve the awareness of the Horsham as a tourist destination.

The actions are specifically relevant to marketing and promotion. However, the Plan identifies the following tourism strengths that should be focus areas:

- Arts and culture (Horsham Regional Art Gallery, Silo Art Trail, Botanic Gardens, events);
- Horsham as a base to tour the region;
- Regional nature-based attractions (Grampians National Park, Mt Arapiles, Rivers and Lakes); and
- Outdoor and adventure (recreational boating on the Wimmera River, cycling, rock climbing).
- Modify Firebrace Street to include improved pedestrian access at intersections.

HORSHAM ECONOMIC DEVELOPMENT STRATEGY 2017-21

The Horsham Economic Development Strategy 2017-21 (EDS) was prepared by Urban Enterprise and adopted by Council in 2017. The EDS aims to strengthen, enhance and further diversify the economic, tourism and industrial base to promote sustainable growth and improve the wealth and wellbeing of the community.

This EDS identifies the priorities, objectives and opportunities for economic development in the region. The strategies and actions relevant to the CAD and Riverfront Precinct are as follows:

- Deliver and implement the findings from the Horsham CAD Revitalisation Strategy.
- Investigate the establishment of a central public plaza or square as the focal point for Horsham.
- Deliver the multi-use indoor sports facility.
- Ensure Horsham's CAD is considered the prime location for future development in retail, commercial office, entertainment and community land uses. Identify fringe areas to the south of the CAD as long term areas for commercial growth. Future CAD development should align with CAD Revitalisation Strategy.
- Deliver and implement findings from the Horsham Car Parking Strategy.
- Deliver and implement the findings from the Wimmera River Corridor Masterplan, ensuring CAD's connection to the River is addressed.
- Improve wayfinding and promotion signage at the town's main entrances to encourage the capture of passing trade.
- Improve the public realm at Horsham's main entrances. Streetscaping, tree plantings and road upgrades should be the areas of focus.
- Encourage the development of office accommodation in the CAD.
- Investigate the potential to redevelop and expand the Wimmera Business Centre to meet contemporary business needs.
- Leverage greater benefit from the Horsham Town Hall precinct by exploring:
  - Establishing a pedestrian and performance zone opposite the Town Hall theatre in Ward Street;
  - Attraction of entertainment and dining businesses to the precinct; and
  - Business/conference market.
- Develop a destination brand for Horsham.
- Explore the establishment of the Wimmera River Art Trail.

HORSHAM GROWTH MANAGEMENT FRAMEWORK 2012

This Horsham Growth Management Framework (HGMF) was prepared by Meinhardt Infrastructure & Environment Pty Ltd in 2012. This HGMF was adopted by Council in November 2013.

The HGMF served as a planning tool that would help deliver the long term vision for the future urban growth and development of Horsham and its environs.

This HGMF provides Council with broad strategic directions in relation to settlement and land use planning to inform future changes to the Horsham Planning Scheme.

Key strategic directions relevant to the Central Activities District include:

- Short to medium term urban growth opportunities for Horsham should be focused in Town Centre (Horsham CAD), existing urban area (Outside of CAD), strategic infill sites, which may include open space sites;
- Encourage retail and business activities within the Horsham CAD;
- Consider alternative uses for surplus industrial land;
- Encourage the development of strategic infill sites identified in the Horsham CAD Strategy and existing residential land which is yet to be developed;
- Establish and improve pedestrian and cycling routes in strategic locations;
- Improve connectivity between the Horsham CAD and surrounding urban area;
- Establish new linkages across the Wimmera River to improve connectivity between Horsham and communities to the south;
- Encourage opportunities for mixed use development;
- Provide a range of lots sizes within new subdivisions to cater for variety of dwelling types and sizes;
- Encourage medium density residential development within a 400 metre radius of the Horsham CAD;

- Improve connectivity between the Horsham CAD and surrounding urban area; and
- Encourage compact urban forms and infrastructure.
- Encourage light industrial businesses to continue to locate outside of the Horsham CAD.
- Encourage the location of State Government Departments within Horsham.
- Encourage opportunities for home-based businesses and enterprises.
- Support the on-going growth and development of the retail and commercial sectors within Horsham CAD.

Key strategic directions relevant to the Wimmera River Precinct and Showgrounds Precinct include:

- Investigate the establishment of new walking and cycling linkages, including:
  - A connection between Firebrace Street and the southern bank of the Wimmera River.
  - Showgrounds and land to the south east of the Wimmera River.
- Encourage the master planning of new development in infill and growth areas open space in areas where population growth could likely to occur in future, including:
  - Showgrounds
- Encourage recreation opportunities along the Wimmera River corridor.
  - Consider small scale restaurant/café uses in the Wimmera River corridor that are subordinate to the dominant use of the corridor as passive open space
- Prepare a Masterplan for the Wimmera River trail to examine ways to accommodate uses such as:
  - Additional recreation opportunities.
  - Walking and Cycling.
  - Small scale business that supports the recreational aspects of the corridor.

The Framework Plan identifies a number of strategic infill sites that present opportunities for future development. A relevant site to the study area includes:

- The Showgrounds Precinct – Consider a variety of uses including residential and ensure active frontages to the Western Highway given that it is a gateway site.

WIMMERA SOUTHERN MALLEE REGIONAL GROWTH PLAN (2014)

This Wimmera Southern Mallee Regional Growth Plan ('the Regional Growth Plan') was authorised by the Victorian Government in May 2014.

The regional growth plan provides a regional approach to land use planning in the Wimmera Southern Mallee. It covers the municipalities of Hindmarsh, Horsham, Northern Grampians, West Wimmera and Yarriambiack and identifies opportunities for encouraging and accommodating growth and managing change over the next 30 years.

The plan identifies:

- Where future development will be supported, assessed at a regional scale;
- Environmental, economic, community and cultural assets and resources of regional significance that should be preserved, maintained or developed; and
- Key regional priorities for future infrastructure planning and investment to support growth.

Key direction relevant to Horsham and opportunities for the study area are as follows:

- Encourage diversification of the regional economy through building on the region's assets, particularly agriculture, energy, mining and tourism.
- Support liveable communities through the development of a range of housing, quality urban design and access to community facilities.

2.6. SUMMARY OF ACTIONS/PROJECTS

There has been a significant amount of recent strategic work undertaken relevant to Horsham's long-term future, particularly relating to the economic development, property and land use, the public realm and streetscape environment (CAD), the Wimmera riverfront precinct/river corridor, sport, recreation and open space.

Table 2 summarises the suite of relevant actions/projects to the study area that have been identified in existing strategic and technical work. The actions / projects are categorised by focus areas identified in Section 2 and will be used to inform the vision and masterplan for the study area.

There are also a number of projects underway, which will be used to inform the vision and masterplan for the study area including:

- Horsham Transport Strategy;
- Horsham Open Space Strategy; and
- Horsham Sporting Facilities Demand Assessment.

TABLE 2 SUMMARY OF ACTIONS / PROJECTS – EXISTING STRATEGIC WORK

FOCUS AREA	ACTION / PROJECT	SOURCE

CENTRAL ACTIVITIES DISTRICT
(STREETSCAPE, PUBLIC REALM, TRANSPORT & CONNECTIVITY)
	• Upgrade footpaths;
	• Introduce water sensitive urban design principles into Council planning to ensure low water-use street trees, garden beds and other landscaping elements;
	• Upgrade power supply to improve power supply resilience;
	• Install energy efficient public lighting systems;
	• Roll-out free wifi in the CAD;
	• A town square;
	• Pavement modifications;
	• Tree plantings and landscaping in median car parking areas, incorporating water harvesting and reuse;
	• Provision of shade and shelter;
	• Intersection upgrades:
	  ◦ Tightening intersection geometries to slow traffic, improve safety and ensure more direct paths for pedestrian crossings;
	  ◦ Reduce road widths;
	  ◦ Install raised pedestrian crossings at intersections to slow traffic, improve pedestrian safety and increase accessibility for all users;
	  ◦ Reconsider the use of roundabouts at key intersections.
		• Horsham CAD Revitalisation Strategy, MR Cagney (2017);
		• Horsham CAD Strategy, Essential Economics, Meinhardt Infrastructure & Engineering, Urban Initiatives (2013);
		• Imagine Horsham, Community and Stakeholder Engagement – Key Findings Summary, Village Well (2016);
		• Horsham Municipal Bicycle & Shared Path Plan 2012 to 2016, Driscoll Engineering Services (2012);
		• Horsham Municipal Parking Strategy, MRCagney (2017);
		• Horsham Growth Management Framework, Meinhardt Infrastructure & Environment (2012).

	• Propose signalisation of Wilson Street and Darlot Street.
	• New mid-block crossings:
	  • Mid-block zebra or wombat crossings should be introduced in areas with high pedestrian activity (e.g. Roberts Avenue).
	• Providing for bikes:
	  • Priority lanes for on-street bicycles;
	  • Reduce traffic speeds to 30 km/hr and ensure one lane of traffic per direction;
	  • Removal of on-street parking or replacement of angle-parking with parallel parking on selected cycle routes.
	• Car Parking:
	  • Introduce a parking overlay to reduce the standard car parking rates for new CBD development;
	  • Commit to initiatives to reduce car dependence in Horsham;
	  • Manage CBD time restrictions to encourage parking in peripheral areas;
	  • Defer any plans to increase CBD parking supply.
	• Make Horsham the 'world's most walkable rural city';
	• Short to medium term urban growth opportunities for Horsham should be focused in Town Centre (Horsham CAD), existing urban area (Outside of CAD), strategic infill sites, which may include open space sites;
	• Establish and improve pedestrian and cycling routes in strategic locations;
	• Improve connectivity between the Horsham CAD and surrounding urban area.	

WIMMERA RIVER PRECINCT / WIMMERA RIVER CORRIDOR	• Activate the Wimmera River Precinct for the community and visitors (including lights and greater presentation);
	• Encourage the development of a riverside café;
	• Recognise and promote the river's character, culture and history:
	  • Engage with the Barengi Gadjin Land Council to identify, protect and manage Wotjobaluk Peoples' cultural elements along the river corridor;
	  • Identify, protect and manage post contact significant cultural elements along the river corridor;
	  • Develop and implement appropriate education and interpretative materials along the river corridor.
	• Improve access opportunities to the river from surrounding areas of Horsham:
	  • Plan and develop a network of connected urban trails incorporating the river corridor.
	• Establish new linkages across the river to better connect north and south Horsham:
	  • Incorporate universal design principles in any proposed bridges or river crossings.
	• Ensure inclusive and equitable recreational and social use of the river corridor through provision of appropriate infrastructure and programs:
		• Horsham Rural City Council Plan 2018-22, HRCC (2018);
		• Horsham Economic Development Strategy 2017 – 2021, Urban Enterprise (2017);
		• Horsham Wimmera Corridor Plan (draft), HRCC and VPA (2018);
		• Wimmera River Project Report, Regional Leadership Skills Project Group Members (2018).

	• Encourage events that are appropriate to the river corridor; • Deliver public realm design outcomes which encourage and support recreational activity. • Provide opportunities for improved integration of activities in the Horsham Central Activities District with the river corridor: • Create linkages between the Central Activities District and river corridor as identified through the Horsham Central Activities District revitalisation project. • Ensure commercial activities within the Wimmera river corridor are compatible with the primary use of the corridor for environmental and recreation purposes: • Support the development of riverside catering/dining venues. • Activate areas fronting the river to attract patronage and stimulate activity around the river corridor; • Investigate the establishment of new walking and cycling linkages, including: • A connection between Firebrace Street and the southern bank of the Wimmera River; • Showgrounds and land to the south east of the Wimmera River. • Encourage recreation opportunities along the Wimmera River corridor: • Consider small scale restaurant/café uses in the Wimmera River corridor that are subordinate to the dominant use of the corridor as passive open space; • Prepare a Masterplan for the Wimmera River trail to examine ways to accommodate uses such as: • Additional recreation opportunities; • Walking and Cycling; • Small scale business that supports the recreational aspects of the corridor.	
SPORT AND RECREATION	• Proceed with plans to develop a multipurpose indoor sport and recreation centre, located as close as possible to the existing Basketball Stadium, either adjacent to, or on the Showgrounds; • Give priority to funding the capital and ongoing maintenance of a multipurpose, multiuser venue, over a single purpose facility; • Develop and progressively implement a plan for the redevelopment of the Horsham City Oval precinct; • Encourage redevelopment of community facilities at the Horsham Showgrounds; • Reduce use of City Oval by restricting football training sessions.	• Sport and Recreation Strategy 2013-18 (draft), SGL Consulting Group (2013); • Wimmera Sports Stadium Business Case and Concept Design, William Ross Architects (2017); • Horsham Rural City Council Plan 2018-22, HRCC (2018).

TOURISM, PROPERTY & LAND USE: STUDY AREA (RESIDENTIAL, COMMERCIAL, INDUSTRIAL, RETAIL)	• Encourage the development of strategic infill sites identified in the Horsham CAD Strategy and existing residential land which is yet to be developed;
	• Encourage medium density residential development within a 400 metre radius of the Horsham CAD;
	• Encourage opportunities for mixed use development;
	• Encourage compact urban forms and infrastructure;
	• Encourage light industrial businesses to continue to locate outside of the Horsham CAD;
	• Encourage the location of State Government Departments within Horsham;
	• Encourage opportunities for home-based businesses and enterprises;
	• Support the on-going growth and development of the retail and commercial sectors within Horsham CAD;
	• Encourage retail and business activities within the Horsham CAD;
	• Consider alternative uses for surplus industrial land;
	• Encourage the development of office accommodation in the CAD;
	• Investigate the potential to redevelop and expand the Wimmera Business Centre to meet contemporary business needs.
	• Promote and attract conferences to Horsham;
	• Facilitate the attraction of major sporting events;
	• Leverage greater benefit from the Horsham Town Hall precinct by exploring:
	  ◦ Establishing a pedestrian and performance zone opposite the Town Hall theatre in Ward Street;
	  ◦ Attraction of entertainment and dining businesses to the precinct; and
	  ◦ Business/conference market.
	• Develop a destination brand for Horsham;
	• Explore the establishment of the Wimmera River Art Trail;
	• Encourage diversification of the regional economy through building on the region's assets, particularly agriculture, energy, mining and tourism.
		• Horsham Growth Management Framework, Meinhardt Infrastructure & Environment (2012);
		• Horsham CAD Revitalisation Strategy, MR Cagney (2017);
		• Horsham Economic Development Strategy 2017 – 2021, Urban Enterprise (2017).

PART B:

EXISTING SITUATION

- **POPULATION AND HOUSING**
- **THE ECONOMY**
- **TOURISM**
- **COMMUNITY / SPORT & RECREATION**

Part B provides research and analysis for Horsham's existing situation having regard to population and housing, economic profile, tourism industry and visitor market, as well as community, sport and recreation infrastructure.

3. POPULATION & HOUSING

3.1. INTRODUCTION

This section provides an overview and assessment of Horsham's demographic and housing profile having regard to historical and projected changes and the implications for the study area.

A range of indicators have been assessed including:

- Population growth;
- Age profile;
- Socio-economic profile;
- Education attainment;
- Dwelling type;
- Household composition;
- Median property values;
- Building permits.

The data areas adopted for this assessment are shown in Appendix A.

3.2. KEY FINDINGS

POPULATION & DEMOGRAPHICS

Horsham is forecast to experience low to moderate population growth.

Since 2001, Horsham's population has grown at an average rate of 0.5% per annum, which is well below the regional Victorian average (1.1%).

This level of growth is forecast to continue into the future, with Victoria in Future projecting that Horsham will grow at an average rate of 0.6% per annum to 2031; increasing from 19,887 in 2016 to 21,793 in 2031.

The low to moderate population growth that has occurred and is forecast to continue in Horsham suggests that the opportunities for the study area should consider the needs of existing residents and cater to the differing needs of the community demographics as they change over time.

Whilst the proportion of senior and elderly cohorts are projected to increase, there is a replenishment of young and middle-aged families that is forecast to occur in Horsham.

Forecasts for Horsham's residents indicate that there will be notable growth in young to middle aged families, as well as senior and elderly cohorts.

20% of the increase in residents is forecast to occur in children aged between 0 and 14 years. A further 30% of growth in residents is projected to occur in persons aged between 30 and 44 years. This indicates that young to middle aged families are projected to account for approximately half of the growth across all cohorts.

Overall, Horsham's resident population is forecast to move into older age cohorts, with a projected 46% growth in cohorts aged over 70 years. The notable increase in seniors and elderly will have implications for demand and accessibility of housing, infrastructure, services and amenity in the study area.

The population of the Wimmera Southern Mallee region in declining. This trend is forecast to continue.

The population of the Wimmera Southern Mallee region is declining, partially due to an ageing workforce in the farming sector and population movements to larger regional centres to be closer to supporting infrastructure and services such as health, medical and retail.

Horsham continues to attract residents from surrounding Council areas, highlighted by the large proportion of rural migration that has occurred from nearby municipalities including Yarriambiack, West Wimmera, Northern Grampians and Hindmarsh.

Horsham's community is relatively disadvantaged.

Horsham has a relatively high level of socio-economic disadvantage when compared with other areas in Regional Victoria. This is consistent with the higher proportion of low-income earning households and the lower proportion of persons attaining higher education qualifications (Bachelor Degree or higher).

This could also be attributed to the more limited access to high-quality education, community and sporting infrastructure and services compared with other regional centres in Victoria.

HOUSING

Horsham's housing stock is characterised by detached, homogenous dwellings.

The housing stock in the municipality is characterised by detached, homogenous dwellings, indicated by the fact that separate houses account for 87% of all dwellings in the Council area.

The number of dwellings in Horsham (RC) increased by 329 between 2011 and 2016; growing at an average rate of 66 per annum. This level of growth (0.7% p.a.) is not significant but indicates that dwellings and development activity is occurring in Horsham; notably in Horsham East (Waterlink Estate), Horsham South (southbank) and Horsham West (Dumesny Street).

Approximately two thirds of Horsham households are families and one third are lone person households.

The housing market in Horsham is primarily being driven by families and older adult couples.

According to local agents, demand for dwellings in Horsham's growth areas is being driven by the family market seeking large, new dwellings. Housing in the study area, however, is generally sought by a different buyer profile. Demand for dwellings in the study area is being driven by older cohorts, notably semi-retirees, retirees and second and third home buyers seeking to be closer to the amenity of the CAD.

Demand for future housing stock in the CAD will primarily be for smaller, single storey dwellings that are lower maintenance and have good access to the CAD. There is a current lack of rental housing stock and high rents due to high volume of short term construction workers based in the region.

Horsham is a relatively affordable place to live.

As at 2017, Horsham's median house price was $265,000. This is significantly less when compared with Victoria ($533,000) and Regional Victoria ($343,000). House prices in Horsham Rural City and surrounding council areas are the most affordable in the State.

The affordable nature of Horsham could be attractive to prospective new residents, particularly given the affordability challenges in larger regional and capital cities.

Horsham's annual dwelling growth is forecast to accelerate.

Dwelling requirements are expected to increase over the next 20 years in Horsham. According to Victoria in Future (VIF), average dwelling growth in the Council area is projected to increase to an estimated 94 dwellings per annum.

Given that the age profile is forecast to experience notable change over the next 20 years with an increase in senior and elderly cohorts in particular, there will be a need for additional residential uses and aged care in the study area. Parts of the CAD have attractive attributes such as access and proximity to retail, open space, transport, community services and amenity that will be highly attractive to future residents.

The demand for housing in the study area in the short to medium term is expected to be for semi-detached and detached dwellings on smaller allotments due to the lesser requirements for property maintenance and the more efficient use of land.

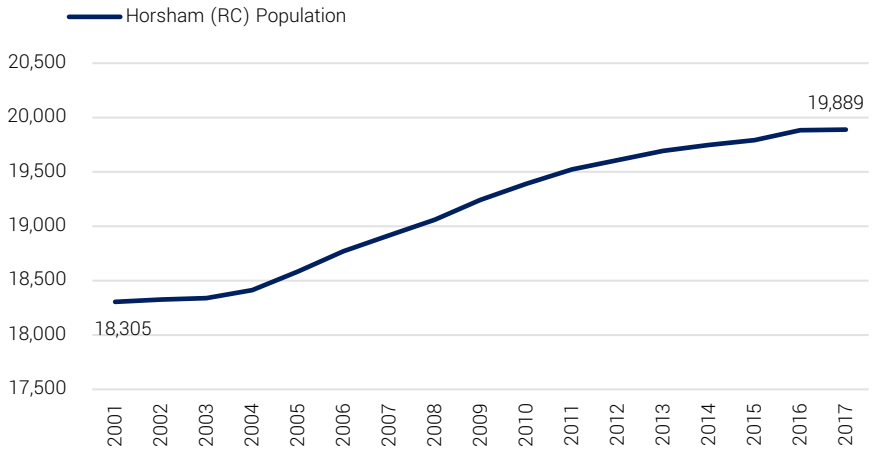
Given the lack of suitably zoned residential land in the CAD, there is potential to explore infill urban renewal opportunities at strategic locations to meet this demand.

3.3. DEMOGRAPHIC PROFILE

HISTORICAL POPULATION GROWTH

Between 2001 and 2017, the population of Horsham (RC) experienced average growth of 0.5% per annum increasing from 18,305 residents in 2001 to 19,889 residents in 2017 as shown in Figure 1. The historic rate of growth is less than the regional Victoria average of 1.1% per annum and the Victorian average of 1.8% per annum.

FIGURE 1 HISTORICAL POPULATION GROWTH – HORSHAM (RC) – 2001 TO 2017 (ERP)



Source: Population, Australian Bureau of Statistics (ABS) 2001 to 2017 (ERP)

PROJECTED POPULATION GROWTH

Horsham's historically low rate of population growth is forecast to continue. Horsham (RC) is projected to experience an average annual growth rate of 0.6% per annum between 2016 and 2031 increasing from 19,887 people in 2016 to 21,129 residents in 2031 as identified in Table 3.

All of Horsham's growth is projected to occur in the urban area, whilst the population in rural areas is forecast to decline.

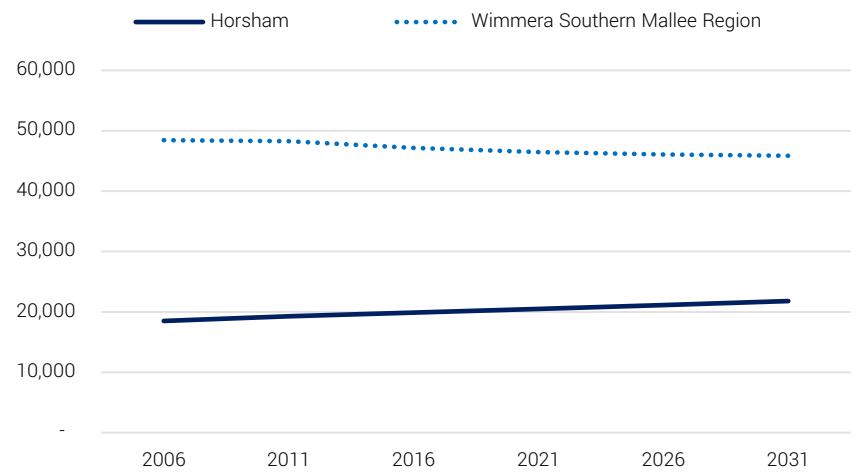
Figure 2 shows the forecast population growth of HRCC compared with the Wimmera Southern Mallee region. The figure shows that whilst Horsham Rural City's population is projected to increase, the population of the Wimmera Southern Mallee is expected to decline.

TABLE 3 FORECAST POPULATION GROWTH – HORSHAM (RC) – 2016 TO 2036

	2016	2021	2026	2031	CHANGE	AAGR%
Horsham Township	16,606	17,347	18,061	18,761	+ 2,155	0.8%
Horsham Rural Area	3,281	3,144	3,068	3,032	-249	-0.5%
Horsham (RC)	19,887	20,492	21,129	21,793	+1,906 (10%)	0.6%

Source: Population projections, Australian Bureau of Statistics (ABS) 2001 to 2017 (ERP)

FIGURE 2 POPULATION GROWTH IN HRCC / WSMR – 2006 TO 2031



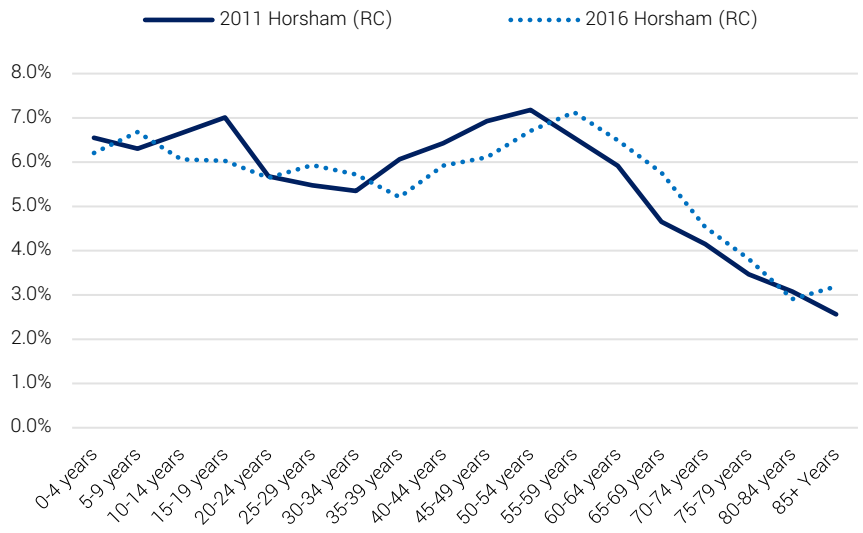
Source: Census of Population & Housing, Australian Bureau of Statistics (ABS) 2006, 2011 / Forecast Population, Victoria in Future 2017

AGE PROFILE

The historic change in age profile of Horsham residents between 2011 and 2016 is provided in Figure 3. The most common age cohorts in Horsham (RC) are 55 to 59 years (7.1%), 50 to 54 years (6.7%) and 5 to 9 years (6.7%).

A notable increase in the number of older residents including elderly residents (85+ years) and residents aged 65 to 69 years occurred between 2011 and 2016. Over the same period, there was decline in the number of residents aged 35 years to 44 years, middle aged residents (45 years to 54 years) and residents aged in their mid to late teens.

FIGURE 3 HISTORICAL AGE PROFILE – HORSHAM (RC) – 2011 TO 2016



Source: Age Profile, Australian Bureau of Statistics (ABS) 2011 to 2016 (ERP)

PROJECTED AGE PROFILE

Table 4 summarises the forecast change in age profile of Horsham residents between 2016 and 2031. The most notable changes in resident age profile is forecast to occur in young to middle aged families, as well as seniors and elderly cohorts.

20% of the increase in residents is forecast to occur in persons aged between 0 and 14 years. A further 30% of growth in residents is projected to occur in persons aged between 30 and 44 years. This indicates that young to middle aged families are projected to account for approximately half of the growth across all cohorts.

A proportion of Horsham's resident population is forecast to get older; with a projected 46% growth in cohorts aged over 70 years. The notable increase in seniors and elderly people will likely have implications on the demand for and accessibility of infrastructure, services and amenity in the study area.

TABLE 4 PROJECTED AGE PROFILE – HORSHAM (RC) – 2016 TO 2031

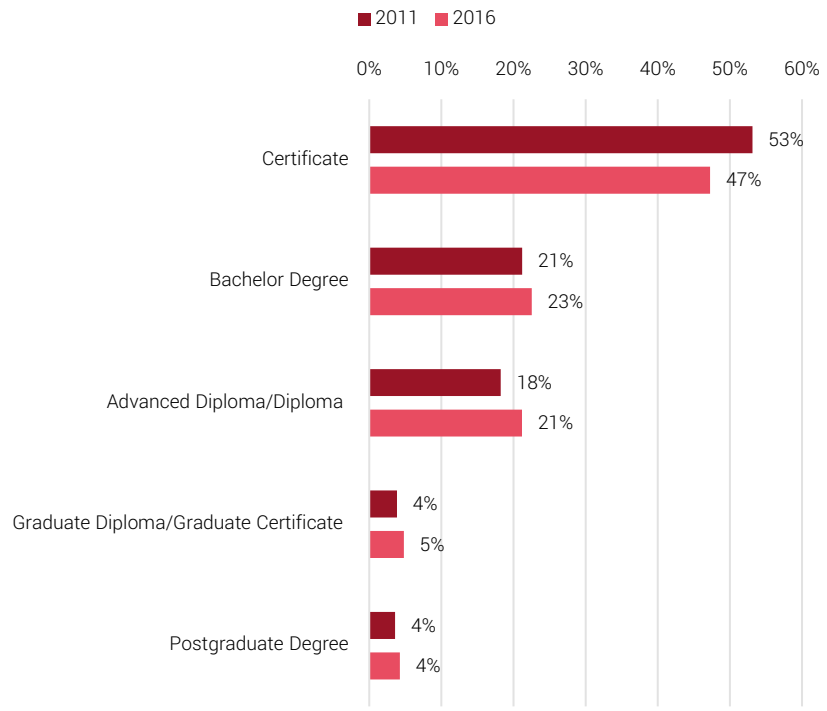
	2016	2021	2026	2031	CHANGE (RAW)	CHANGE (%)
0-4 years	1,298	1,359	1,412	1,419	121	9%
5-9 years	1,308	1,310	1,378	1,433	125	10%
10-14 years	1,230	1,293	1,299	1,370	140	11%
15-19 years	1,261	1,239	1,301	1,312	51	4%
20-24 years	1,291	1,222	1,219	1,285	-6	0%
25-29 years	1,177	1,338	1,263	1,275	98	8%
30-34 years	1,153	1,228	1,387	1,312	159	14%
35-39 years	1,096	1,195	1,262	1,421	325	30%
40-44 years	1,204	1,146	1,240	1,305	100	8%
45-49 years	1,306	1,277	1,215	1,313	7	1%
50-54 years	1,310	1,289	1,260	1,200	-110	-8%
55-59 years	1,338	1,257	1,232	1,208	-130	-10%
60-64 years	1,174	1,284	1,206	1,186	12	1%
65-69 years	1,030	1,116	1,224	1,153	123	12%
70-74 years	822	966	1,048	1,156	333	41%
75-79 years	714	753	884	965	251	35%
80-84 years	572	600	640	757	184	32%
85+ years	602	620	658	724	122	20%
Total	19,887	20,492	21,129	21,793	1,906	10%

Source: Age projections, Victoria in Future (VIF) 2016

EDUCATION ATTAINMENT

The most common level of education qualification attained by Horsham residents is certificate level, accounting for 47% of all education attainment. The proportion of residents who have attained a bachelor's degree or higher increased between 2011 and 2016.

FIGURE 4 EDUCATION ATTAINMENT – HORSHAM (RC) – 2011 TO 2016



Source: Place of Usual Residence, Census of Population and Housing, 2011 and 2016.

JOURNEY TO WORK

As identified in Table 5, 90% of Horsham (RC) residents also work within in the municipality. Of the limited number of residents working outside of Horsham (RC), locations include Yarriambiack Shire (3%), Hindmarsh (1%) and Northern Grampians Shire (1%).

TABLE 5 JOURNEY TO WORK – EMPLOYED RESIDENTS – 2011 TO 2016

	HORSHAM (RC)			
	2011		2016	
Horsham (RC)	7,738	87%	8,077	90%
Yarriambiack (S)	171	2%	226	3%
Hindmarsh (S)	108	1%	128	1%
Northern Grampians (S)	50	1%	68	1%
West Wimmera (S)	27	0.3%	56	1%
Ballarat (C)	13	0.1%	21	0.2%
Southern Grampians (S)	29	0.3%	18	0.2%
Ararat (RC)	3	0.0%	14	0.2%
Buloke (S)	6	0.1%	14	0.2%
Melbourne (C)	6	0.1%	13	0.1%
Greater Geelong (C)	8	0.1%	10	0.1%
Wyndham (C)	3	0.0%	7	0.1%
Greater Bendigo (C)	0	0.0%	6	0.1%
Hume (C)	0	0.0%	5	0.1%
Warrnambool (C)	4	0.0%	5	0.1%

Source: Place of Work, Census of Population and Housing, 2011 and 2016.

LABOUR FORCE STATUS

The current unemployment rate of Horsham (RC) residents is 3.4% (September 2018), which is lower than the Victorian average (4.3%).

The number of employed Horsham (RC) residents decreased by 0.7% (67 jobs) between 2011 and 2016. Further, the number of unemployed residents increased by 37% (127 jobs).

TABLE 6 LABOUR FORCE STATUS – HORSHAM (RC) – 2011 TO 2016

	HORSHAM (RC)					
	AAGR%	2011	2016	Growth 2011 to 2016 (#)	Growth 2011 to 2016 (%)	AAGR%
Employed	-0.32%	9174	9,107	-67	-0.7%	-0.15%
Unemployed	5.89%	348	475	+127	+36.5%	+6.42%
Not in the Labour Force	0.69%	5,242	5,419	+177	+3.4%	+0.67%
Total	**0.25%**	**14,766**	**15,002**	**+236**	**+1.6%**	**+0.32%**

Source: Place of Usual Residence, Census of Population and Housing, 2011 and 2016.

OCCUPATION

Occupations held by Horsham (RC) employed residents did not experience material change between 2011 and 2016.

Of the employed Horsham (RC) residents, 17% are professionals, 16% are managers, 14% are technicians and trades workers and 12% are clerical and administrative workers.

TABLE 7 OCCUPATION – HORSHAM (RC) – 2011 TO 2016

	HORSHAM (RC)		
	2011	2016	Growth 2011 to 2016
Managers	17%	16%	-1%
Professionals	17%	17%	+0.2%
Technicians and trades workers	15%	14%	-0.5%
Community and personal service workers	10%	11%	+2%
Clerical and administrative workers	12%	12%	-1%
Sales workers	11%	11%	+0.3%
Machinery operators and drivers	7%	6%	-1%
Labourers	10%	11%	+1%
Inadequately described	2%	1%	-1%

Source: Place of Usual Residence, Census of Population and Housing, 2011 and 2016.

HOUSEHOLD INCOME

Table 8 shows the weekly income for Horsham households. A large proportion (31%) of households are lower income earning households (i.e. $300-$799). Further, 33% of households are median income earning households (i.e. $1,000 to $1,999).

The proportion of households earning higher incomes (i.e. $2,500+) experienced a minor increase between 2011 and 2016.

TABLE 8 AVERAGE HOUSEHOLD INCOME (PER WEEK) – HORSHAM (SUBURB AND RC) – 2011 TO 2016

	HORSHAM (SUBURB)			HORSHAM (RC)		
	2011	2016	CHANGE	2011	2016	CHANGE
Negative income	0%	0%	0%	0%	0%	0%
Nil income	1%	1%	0%	1%	1%	0%
$1-$299	6%	3%	-3%	6%	3%	-2%
$300-$799	37%	33%	-4%	35%	31%	-4%
$800-$999	11%	10%	-1%	11%	10%	-1%
$1000-$1499	19%	20%	+1%	19%	20%	+1%
$1500-$1999	12%	13%	+1%	12%	13%	+1%
$2000-$2499	7%	9%	+2%	8%	10%	+2%
$2500-$2999	3%	4%	+1%	4%	5%	+1%
$3000-$3499	2%	2%	0%	3%	3%	0%
$3500-$3999	0%	2%	+1%	1%	2%	+1%
$4000-$4999	1%	2%	+1%	0%	2%	+1%
$5000+	1%	1%	0%	1%	1%	0%

Source: Place of Enumeration, Census of Population and Housing, 2011 and 2016.

MIGRATION

Between 2011 and 2016, 2,600 new residents migrated to Horsham (RC). Of the new residents attracted to Horsham (RC), 260 migrated from Yarriambiack, 211 migrated from Hindmarsh and 104 migrated from Ballarat.

Whilst the majority of new residents migrated from surrounding Council areas, there was a notable attraction of residents from overseas (225 persons) and interstate: South Australia (216 persons), Queensland (137 persons) and New South Wales (107 persons).

TABLE 9 PLACE OF RESIDENCE (MIGRATED) – HORSHAM (RC) – 2011 - 2016

	2011	2016
Yarriambiack (S)	301	260
Hindmarsh (S)	214	211
Ballarat (C)	97	104
West Wimmera (S)	117	103
Northern Grampians (S)	68	76
Greater Geelong (C)	75	66
Wyndham (C)	32	54
Southern Grampians (S)	56	53
Mildura (RC)	45	51
Buloke (S)	64	43
Glenelg	46	31
New South Wales	138	107
Queensland	146	137
South Australia	220	216
Western Australia	78	55
Tasmania	21	13
Northern Territory	28	39
Australian Capital Territory	3	5
Overseas	266	225
Other Victoria	909	751
Total New Residents	2,924	2,600

Source: Place of Usual Residence, Census of Population and Housing, 2011 and 2016.

SEIFA INDEX

The Socio Economic Index for Areas (SEIFA) measures the relative level of advantage (or disadvantage) of a Local Government Area (LGA). SEIFA is measured based on a range of ABS indicators such as rate of unemployment, average income and education attainment. Horsham (RC) has a SEIFA of 958 as identified in Table 10.

Horsham is ranked the 24th (out of 48) most disadvantaged Council area and 27th (out of 70) most disadvantaged in Victoria.

TABLE 10 HORSHAM (RC) - SEIFA - 2016

LGA	SEIFA INDEX	RANK IN REGIONAL VICTORIA	RANK IN VICTORIA
South Gippsland (S)	965	29	33
Wangaratta (RC)	962	28	31
Greater Bendigo (C)	961	27	30
Warrnambool (C)	961	26	29
Corangamite (S)	959	25	28
Horsham (RC)	**958**	**24**	**27**
Strathbogie (S)	957	23	26
Wodonga (C)	957	22	25
Wellington (S)	954	21	24
Buloke (S)	949	20	23
Hume (C)	947	n/a	22

Source: SEIFA Index of relative socio-economic advantage and disadvantage, ABS, 2011 and 2016.

3.4. HOUSING

DWELLING PROJECTIONS

On average, dwelling growth projections for Horsham (RC) are in the order of 94 additional dwellings per annum. The number of dwellings in the Council area are forecast to increase from approximately 9,200 in 2016 to 11,110 in 2036.

TABLE 11 DWELLING PROJECTIONS – HORSHAM (RC) – 2016 TO 2036

	2016	2021	2026	2031	2036	GROWTH (2016 – '36)	AAGR
Dwellings	9,232	9,956	10,490	11,000	11,110	+1,878 (20%)	1%

Source: Census of Population and Housing, ABS 2016 / Dwelling projections, Victoria in Future (VIF) 2016

DWELLING STRUCTURE

The majority of housing stock in Horsham (RC) is characterised by single detached dwellings, accounting for 87% of dwellings in Horsham (RC).

TABLE 12 DWELLING STRUCTURE – HORSHAM (RC) – 2011 TO 2016

	2011	2016	GROWTH 2011 TO 2016		
	Horsham (RC)		#	%	AAGR%
Separate house	7,643	8,008	+365	+5%	+0.9%
Flat, unit or apartment	623	513	-110	-21%	-4%
Semi-detached, row or terrace house, townhouse etc	455	577	+122	+21%	+5%
Other dwelling	131	38	-93	-245%	-22%
Not stated or not applicable	41	93	+52	+56%	+18%
Total	**8,903**	**9,232**	**+329**	**+4%**	**+0.7%**

Source: Place of Enumeration, Census of Population and Housing, 2011 and 2016.

DWELLING TYPE

The majority of dwellings in Horsham (RC) are occupied private dwellings as identified in Table 13. In total, there were 9,232 dwellings in Horsham (RC). The number of dwellings in Horsham (RC) increased by 329, at an average growth rate of 66 dwellings per annum.

TABLE 13 DWELLING TYPE – HORSHAM (RC) – 2011 TO 2016

	HORSHAM (RC)		
	2011	2016	CHANGE 2011 to 2016
Occupied private dwellings	7,906	8,079	173
Unoccupied private dwellings	951	1,104	153
Non-private dwellings	41	46	5
Total	8,903	9,232	329

Source: Place of Enumeration, Census of Population and Housing, 2011 and 2016.

TENURE TYPE

In Horsham (suburb) 34% of dwellings are owned outright and 30% are owned with a mortgage. In Horsham (RC), 33% of dwellings are owned outright and 30% are owned with a mortgage.

29% of dwellings in Horsham (suburb) and 28% in Horsham (RC) are rented. There was no material increase in rental housing available in Horsham (RC) between 2011 and 2016, indicating a potential under provision of rental properties.

TABLE 14 TENURE TYPE – HORSHAM (SUBURB AND RC) – 2011 TO 2016

	2011				2016			
	Horsham (suburb)		Horsham (RC)		Horsham (suburb)		Horsham (RC)	
Owned outright	2,092	34%	2,962	37%	2,068	33%	2,956	37%
Owned with mortgage	1,847	30%	2,478	31%	1,892	30%	2,559	32%
Rented	1,730	29%	1,899	24%	1,748	28%	1,901	24%
Other tenure type	114	2%	186	2%	101	2%	162	2%
Not stated	283	5%	389	5%	408	7%	512	6%
Total	6,069		7,913		6,219		8,079	

Source: Place of Enumeration, Census of Population and Housing, 2011 and 2016.

HOUSEHOLD COMPOSITION

The majority of households in Horsham are one family households, with the composition accounting for 60% of households in Horsham (suburb) and 63% in Horsham (RC) as identified in Table 15. Lone person households are also common, accounting for 33% of households in Horsham (suburb) and 30% in Horsham (RC), which is slightly higher when compared with the regional Victorian average (29%). This could potentially be attributed to the higher proportion of elderly persons.

TABLE 15 HOUSEHOLD COMPOSITION – HORSHAM (SUBURB AND RC) – 2011 TO 2016

	HORSHAM (SUBURB)			HORSHAM (RC)		
	2011	2016	Change 2011 to 2016	2011	2016	Change 2011 to 2016
One family household	61%	60%	-2%	65%	63%	-2%
Two family household	0%	0%	0%	1%	0%	0%
Three family household	0%	0%	0%	0%	0%	0%
Lone Person Household	32%	33%	1%	29%	30%	1%
Group Household	3%	3%	0%	3%	2%	0%
Other	3%	5%	2%	3%	4%	1%
Total	6,069	6,219	150	7,913	8,079	166

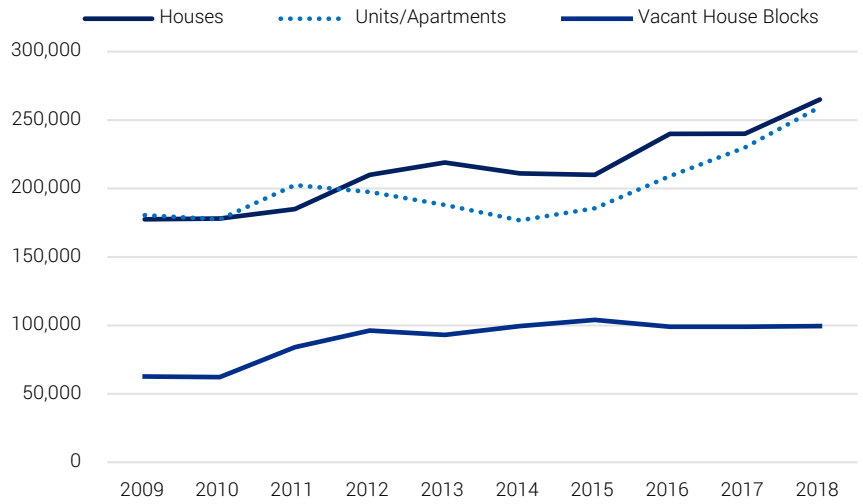
Source: Place of Enumeration, Census of Population and Housing, 2011 and 2016.

PROPERTY VALUES

Between 2009 and 2018, the median house price has grown by 49% (4.1% p.a.), increasing from $177,500 in 2009 to $265,00 in 2018. The historic growth in house prices in Horsham (RC) is higher when compared to the regional Victorian average of 43%. The median value of units / apartments also experienced strong growth; increasing from $180,500 in 2009 to $259,500 in 2018 (however, represent a smaller proportion of sales).

The median value of vacant house blocks also experienced growth, increasing from $62,675 in 2009 to $99,500 in 2018.

FIGURE 5 MEDIAN PROPERTY VALUES ($) – HORSHAM (RC) – 1988 TO 2018.



Source: A Guide to Property Values, Valuer General, 2018.

RENTALS

Table 16 provides an overview of the median rental prices for 1 and 2-bedroom flats and 2 and 3-bedroom houses in Horsham for the December quarter (2018) and provides comparisons with the previous year.

The table shows that the median rental price for 2-bedroom houses is in-line with the average for other regional centres across Victoria ($250/week). The median rental for a 2-bedroom house in Horsham increased by 6.4% compared with the previous year.

The median rental price for a 3-bedroom house in Horsham ($280/week) is slightly less than average for regional centres across Victoria ($300/week). However, the median price in Horsham did experience a 3.7% increase compared with the previous year.

The median rental price for 1 and 2-bedroom flats in Horsham has decreased since last year. For 1-bedroom flats, the median rental price in Horsham ($180/week) is slightly higher than the average for other regional centres ($170/week). However, the median rental price experienced a 21% decline compared with the previous year.

For 2-bedroom flats, the median rental price in Horsham ($210/week) is slightly less than the average for other regional centres ($230/week). The median rental price experienced a 1.9% decline compared with the previous year.

TABLE 16 RENTAL REPORT – HORSHAM AND OTHER REGIONAL CENTRES

LGA	1 BED FLAT			2 BED FLAT			2 BED HOUSE			3 BED HOUSE		
	Count	Median	Annual % change	Count	Median	Annual % change	Count	Median	Annual % change	Count	Median	Annual % change
Other Regional Centres												
Horsham	**43**	**$180**	**-21.70%**	**156**	**$210**	**-1.90%**	**42**	**$250**	**6.40%**	**306**	**$280**	**3.70%**
Hamilton	39	$150	3.40%	45	$200	5.30%	46	$230	12.20%	154	$260	4.00%
Mildura	79	$200	11.10%	298	$220	7.30%	113	$260	4.00%	589	$310	3.30%
Warrnambool	83	$200	5.30%	324	$250	4.20%	77	$290	3.60%	426	$330	3.10%
Wodonga	50	$175	1.20%	321	$235	2.20%	65	$275	10.00%	567	$320	3.20%
Ave Other Regional Centres Total[1]	958	$170	3.00%	2,875	$230	4.50%	1,078	$250	0.00%	5,972	$300	3.40%

Source: Rental Report, Department of Health and Human Services, December Qtr 2018

Note 1: Table 16 only includes a sample of other regional centres. Other regional centres exclude major centres such as Bendigo, Ballarat, Geelong and Mornington Peninsula

BUILDING APPROVALS

Table 17 summarises the number of building approvals for residential buildings in Horsham (RC) between 2012/13 and 2017/18. In that time, there has been an average of 103 building approvals for new residential buildings per annum. The highest number of approvals for new dwellings occurred in 2015/16 (123) and 2014/15 (102).

TABLE 17 NUMBER OF RESIDENTIAL BUILDING APPROVALS - HORSHAM (RC) – 2013 TO 2018

YEAR	RESIDENTIAL BUILDINGS
2012/13	99
2013/14	105
2014/15	102
2015/16	133
2016/17	88
2017/18	93

Source: Building Approvals, ABS 2012-2018.

Table 18 summarises the total value of building approvals in Horsham (RC) between 2012/13 and 2017/18. The total value of building approvals in 2012/13 was $67.5 million, followed by 2016/17 ($64.4 million) and 2015/16 ($63.0 million)

TABLE 18 VALUE OF BUILDING APPROVALS - HORSHAM (RC) – 2013 TO 2018

YEAR	VALUE OF TOTAL RESIDENTIAL BUILDING ($M)	VALUE OF NON-RESIDENTIAL BUILDING ($M)	TOTAL VALUE OF BUILDING APPROVALS ($M)
2012/13	$30.64	$36.85	$67.49
2013/14	$32.17	$26.27	$58.44
2014/15	$36.92	$7.11	$44.03
2015/16	$43.99	$18.97	$62.95
2016/17	$30.67	$33.77	$64.44
2017/18	$32.42	$18.16	$50.58

Source: Building Approvals, ABS, 2012 to 2018.

4. ECONOMIC PROFILE

4.1. INTRODUCTION

This section of the report provides an economic profile of the Horsham (RC) economy having regard to key economic indicators such as output, employment, export value and local supply chain networks across the 19 ANZSIC industry sectors.

Appendix A provides a map of the region's referred to in this section.

4.2. KEY FINDINGS

Horsham's economy is largely driven by primary, industrial and public sector industries.

Horsham Rural City's economy is largely driven by Agriculture; both dry land broadacre farming (grain and pulse production) and livestock grazing, Manufacturing; specifically cleaning, food, metal and transport products and equipment, Construction, as well as public sector industries including Health, Education and Public Administration and Safety. These industries are vital to the local economy in terms of employment, wages and salaries and local supply chain networks.

Given Horsham's role in servicing the broader Wimmera Southern Mallee region, population-led service industries are also critical, particularly in supporting a labour force. Retail Trade, Accommodation and Food Services, Other Services and Arts and Recreation Service account for a quarter of total employed persons in Horsham.

Horsham experienced a decline in jobs between 2011 and 2016.

Horsham experienced a 1% decline in employment between 2011 and 2016. This was mainly due to the decline in employment across the Manufacturing (-161 jobs), Wholesale Trade (-99 jobs) and Retail Trade (-88 jobs) sectors.

The notable decline in employment across these sectors was partially offset by growth in employment across the Education and Training (+104 jobs), Health Care and Social Assistance (+93 jobs), Professional Service (+55 jobs), Arts and Recreation (+36 jobs), Accommodation and Food Service (+35 jobs) sectors. Employment growth across these sectors is a good indication of sector growth overall and could potentially highlight specialisations for the local economy in the future.

Retail has recently experienced a minor decline in employment and businesses.

Whilst the Retail Trade sector remains a critical industry to the health of Horsham's economy, particularly in supporting business and employment in the CAD, the sector has experienced a minor decline in business and employment in recent years.

Between 2015 and 2017, the number of local retail businesses declined by 7%; decreasing by 11 businesses. Further, the sector experienced an 8% decline in jobs between 2011 and 2016; decreasing by 88 jobs.

This is a consistent trend across much of the state as online retailing becomes more prevalent and continues to disrupt traditional forms of retailing. The changing nature of retail and the changing preferences of buyers / shoppers may have implications for the sector in Horsham.

There are three main pillars of the local and regional economy.

Figure 6 shows the three main pillars of the Horsham and Wimmera Southern Mallee regional economy. These include:

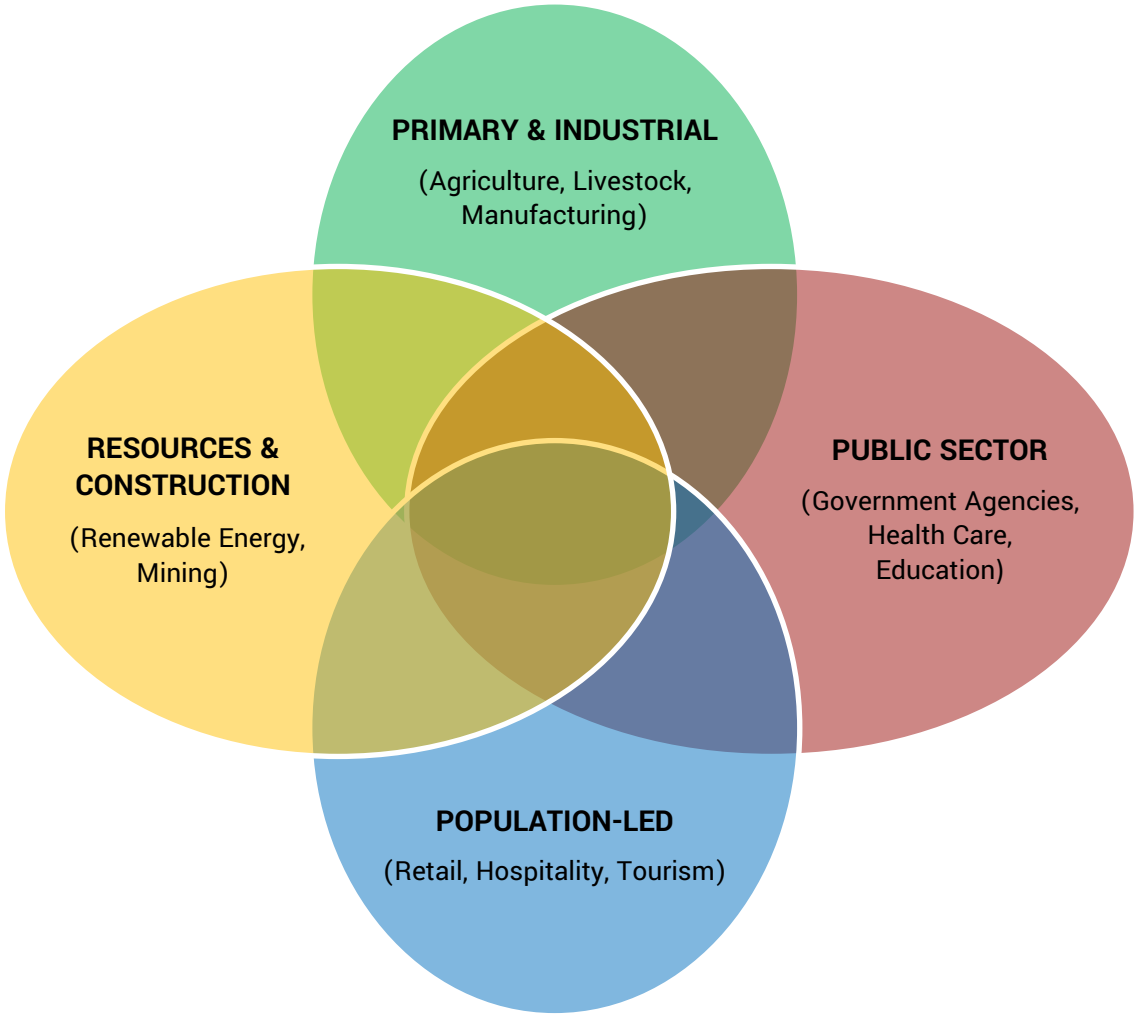
- Primary and Industrial – Agriculture, Livestock, Manufacturing;
- Public Sector – Government Agencies, Health Care and Education;
- Population-Led Industries – Retail, Hospitality, Tourism; and

Primary, industrial, public-sector and population-led industries have traditionally underpinned the local and regional economy.

The Resources and Construction sector is emerging as a considerable economic opportunity for the region, linked to the large-scale renewable energy and mining projects that are underway or planned in the region. These projects are attracting temporary labour force to service these projects, which is driving demand for housing, accommodation, retail and other services in Horsham.

Population retention and attraction will be important to service the existing and growth sectors into the future.

FIGURE 6 DRIVERS OF HORSHAM'S ECONOMY



4.3. ECONOMIC INDICATORS

GROSS REGIONAL PRODUCT

The Gross Regional Product (GRP) of Horsham is $1.28 billion.

TABLE 19 GROSS REGIONAL PRODUCT – HORSHAM (RC) - 2017

GROSS REGIONAL PRODUCT ($M)	$1,278.97
Population	19,641
Per Capita GRP ($'000)	$65.12
Per Worker GRP ($'000)	$136.63

Source: Horsham REMPLAN profile, 2017.

OUTPUT

In 2017, the Horsham (RC) economy generated an economic output of $2.4 billion as identified in Table 20. The highest performing sectors in terms of generating output are Construction ($385 million), Rental, Hiring and Real Estate Services ($226 million), Agriculture, Forestry and Fishing ($205 million), Manufacturing ($200 million) and Health Care and Social Assistance ($197 million).

TABLE 20 OUTPUT BY INDUSTRY – HORSHAM (RC) - 2017

INDUSTRY SECTOR	$M	%
Construction	385.1	16.0%
Rental, Hiring, Real Estate Services	226.0	9.4%
Agriculture, Forestry and Fishing	205.3	8.6%
Manufacturing	199.7	8.3%
Health Care and Social Assistance	196.5	8.2%
Electricity, Gas, Water and Waste Services	156.4	6.5%
Retail Trade	121.2	5.1%
Wholesale Trade	115.4	4.8%
Financial and Insurance Services	114.1	4.8%
Public Administration and Safety	113.9	4.7%
Professional, Scientific and Technical Services	96.4	4.0%
Accommodation and Food Services	88.0	3.7%
Transport, Postal and Warehousing	79.5	3.3%
Administrative and Support Services	78.7	3.3%
Education and Training	78.4	3.3%
Other Services	59.4	2.5%
Information Media and Telecommunications	46.5	1.9%
Arts and Recreation Services	29.0	1.2%
Mining	10.0	0.4%
Total	2399.5	

Source: Horsham REMPLAN profile, 2017.

VALUE ADDED

The total value added to the Horsham (RC) economy is $1,189.6 billion, as identified in Table 21. The industries with the greatest value add are Rental, Hiring and Real Estate Services ($162.2 million), Health Care and Social Assistance ($141.4 million) and Construction ($119.3 million).

TABLE 21 VALUE ADDED BY INDUSTRY – HORSHAM (RC) - 2017

INDUSTRY SECTOR	$M	%
Rental, Hiring and Real Estate Services	$162.2	13.6%
Health Care and Social Assistance	$141.4	11.9%
Construction	$119.3	10.0%
Electricity, Gas, Water and Waste Services	$90.2	7.6%
Agriculture, Forestry and Fishing	$80.4	6.8%
Financial and Insurance Services	$74.5	6.3%
Retail Trade	$74.0	6.2%
Public Administration and Safety	$65.7	5.5%
Education and Training	$59.7	5.0%
Wholesale Trade	$57.4	4.8%
Professional, Scientific and Technical Services	$45.2	3.8%
Administrative and Support Services	$41.4	3.5%
Accommodation and Food Services	$38.8	3.3%
Manufacturing	$38.4	3.2%
Transport, Postal and Warehousing	$36.3	3.1%
Other Services	$30.3	2.5%
Information Media and Telecommunications	$20.5	1.7%
Arts and Recreation Services	$10.3	0.9%
Mining	$3.4	0.3%
Total	$1,189.6	

Source: Horsham REMPLAN profile, 2017.

VALUE OF WAGES AND SALARIES

The total value of wages and Salaries paid to Horsham (RC) workers in 2017 was $614.6 million. The sectors with the highest wages and salaries were Health Care and Social Assistance ($118.5m), Construction ($62.5m), Public Administration and Safety ($54.5m), Education and Training ($52.4m) and Retail Trade ($48.5m).

Given that almost 20% of wages and salaries value is generated by the Health Care sector, this sector drives and supports much of the higher value employment.

TABLE 22 VALUE OF WAGES AND SALARIES BY INDUSTRY – HORSHAM (RC) - 2017

INDUSTRY SECTOR	$M	%
Health Care and Social Assistance	$118.5	19.3%
Construction	$62.5	10.2%
Public Administration and Safety	$54.5	8.9%
Education and Training	$52.4	8.5%
Retail Trade	$48.5	7.9%
Administrative and Support Services	$36.8	6.0%
Wholesale Trade	$35.6	5.8%
Professional, Scientific and Technical Services	$30.6	5.0%
Electricity, Gas, Water and Waste Services	$24.7	4.0%
Accommodation and Food Services	$24.6	4.0%
Financial and Insurance Services	$24.1	3.9%
Manufacturing	$23.7	3.8%
Other Services	$20.4	3.3%
Transport, Postal and Warehousing	$18.5	3.0%
Agriculture, Forestry and Fishing	$16.3	2.7%
Information Media and Telecommunications	$7.6	1.2%
Rental, Hiring and Real Estate Services	$7.6	1.2%
Arts and Recreation Services	$6.2	1.0%
Mining	$1.6	0.3%
Total	$614.6	

Source: Horsham REMPLAN profile, 2017.

LOCAL SALES (VALUE)

The total value of local sales in Horsham (RC) is $727.7 million. The Construction industry accounts for 21% of local sales.

TABLE 23 LOCAL SALES BY INDUSTRY – HORSHAM (RC) - 2017

INDUSTRY SECTOR	$M	%
Construction	$149.5	20.5%
Professional, Scientific and Technical Services	$77.5	10.6%
Manufacturing	$75.4	10.4%
Financial and Insurance Services	$64.9	8.9%
Administrative and Support Services	$55.4	7.6%
Wholesale Trade	$51.4	7.1%
Transport, Postal and Warehousing	$42.5	5.8%
Rental, Hiring and Real Estate Services	$40.1	5.5%
Agriculture, Forestry and Fishing	$39.0	5.4%
Electricity, Gas, Water and Waste Services	$36.6	5.0%
Information Media and Telecommunications	$22.8	3.1%
Retail Trade	$17.3	2.4%
Other Services	$16.5	2.3%
Public Administration and Safety	$13.5	1.8%
Accommodation and Food Services	$12.9	1.8%
Arts and Recreation Services	$4.7	0.6%
Mining	$4.0	0.6%
Health Care and Social Assistance	$2.6	0.4%
Education and Training	$1.3	0.2%
Total	$727.665	

Source: Horsham REMPLAN profile, 2017.

REGIONAL EXPORT VALUE

The Horsham (RC) economy exported $673 million worth of goods and services, with the highest exporting industries being Agriculture, Forestry and Fishing ($155.6 million) and Electricity, Gas, Water and Waste services ($100 million) as identified in Table 24.

TABLE 24 REGIONAL EXPORTS VALUE BY INDUSTRY – HORSHAM (RC) - 2017

INDUSTRY SECTOR	$M	%
Agriculture, Forestry and Fishing	$156.6	23.3%
Electricity, Gas, Water and Waste Services	$100.3	14.9%
Manufacturing	$78.4	11.7%
Construction	$75.9	11.3%
Health Care and Social Assistance	$62.3	9.3%
Public Administration and Safety	$26.5	3.9%
Retail Trade	$24.2	3.6%
Accommodation and Food Services	$20.1	3.0%
Wholesale Trade	$20.0	3.0%
Administrative and Support Services	$16.9	2.5%
Other Services	$16.4	2.4%
Education and Training	$15.3	2.3%
Transport, Postal and Warehousing	$14.5	2.2%
Financial and Insurance Services	$13.2	2.0%
Information Media and Telecommunications	$8.4	1.2%
Professional, Scientific and Technical Services	$7.9	1.2%
Arts and Recreation Services	$6.0	0.9%
Rental, Hiring and Real Estate Services	$5.2	0.8%
Mining	$4.9	0.7%
Total	$673.1	

Source: Horsham REMPLAN profile, 2017.

LOCAL EXPENDITURE

The Horsham (RC) economy spent a total of $727.7 million in local expenditure, as identified in Table 25. Industry sectors with the highest local expenditure are Construction ($191.8 million) and Agriculture, Forestry and Fishing ($79.4 million), indicating a strong local supply chain.

TABLE 25 LOCAL EXPENDITURE BY INDUSTRY – HORSHAM (RC) - 2017

INDUSTRY SECTOR	$M	%
Construction	$191.8	26.4%
Agriculture, Forestry and Fishing	$79.4	10.9%
Electricity, Gas, Water and Waste Services	$47.8	6.6%
Manufacturing	$47.4	6.5%
Rental, Hiring and Real Estate Services	$44.5	6.1%
Wholesale Trade	$35.8	4.9%
Health Care and Social Assistance	$33.8	4.6%
Professional, Scientific and Technical Services	$32.9	4.5%
Public Administration and Safety	$31.3	4.3%
Retail Trade	$30.5	4.2%
Transport, Postal and Warehousing	$28.5	3.9%
Administrative and Support Services	$24.6	3.4%
Financial and Insurance Services	$23.3	3.2%
Accommodation and Food Services	$20.3	2.8%
Other Services	$16.8	2.3%
Information Media and Telecommunications	$11.9	1.6%
Education and Training	$11.8	1.6%
Arts and Recreation Services	$11.7	1.6%
Mining	$3.5	0.5%
Total	$727.7	

Source: Horsham REMPLAN profile, 2017.

REGIONAL IMPORT VALUE

The Horsham (RC) economy imported goods and services with a total value of $482 million. The breakdown of regional imports by industry sector in Horsham (RC) is provided in Table 26.

TABLE 26 REGIONAL IMPORT VALUE BY INDUSTRY – HORSHAM (RC) - 2017

INDUSTRY SECTOR	$M	%
Manufacturing	$113.9	23.6%
Construction	$74.0	15.3%
Agriculture, Forestry and Fishing	$45.5	9.4%
Accommodation and Food Services	$28.9	6.0%
Wholesale Trade	$22.1	4.6%
Health Care and Social Assistance	$21.4	4.4%
Rental, Hiring and Real Estate Services	$19.3	4.0%
Electricity, Gas, Water and Waste Services	$18.4	3.8%
Professional, Scientific and Technical Services	$18.3	3.8%
Public Administration and Safety	$16.9	3.5%
Retail Trade	$16.6	3.5%
Financial and Insurance Services	$16.3	3.4%
Transport, Postal and Warehousing	$14.8	3.1%
Information Media and Telecommunications	$14.1	2.9%
Administrative and Support Services	$12.7	2.6%
Other Services	$12.3	2.5%
Arts and Recreation Services	$7.0	1.4%
Education and Training	$6.9	1.4%
Mining	$3.0	0.6%
Total	$482.2	

Source: Horsham REMPLAN profile, 2017.

KEY PROPULSIVE SECTORS

A propulsive industry refers to an industry which is a key driver of a region's economy, in terms of regional exports, employment, value-added and local expenditure on goods and services (backward linkages).

Table 27 provides a summary of the key propulsive industries in Horsham (RC) in terms of exports, employment, value added and backward linkages. The key propulsive industries in Horsham (RC) are Agriculture, Forestry and Fishing, Construction and Health Care and Social Assistance.

TABLE 27 KEY PROPULSIVE SECTORS

INDUSTRY SECTORS	BACKWARD LINKAGES	EXPORTS	EMPLOYMENT	VALUE-ADDED	TOTAL
Agriculture, Forestry, Fishing	✓	✓	✓	✓	**4**
Construction	✓	✓	✓	✓	**4**
Health Care, Social Assistance		✓	✓	✓	**3**
Electricity, Gas, Water, Waste Services		✓		✓	2
Mining	✓				1
Manufacturing		✓			1
Retail Trade			✓		1
Transport, Postal, Warehousing	✓				1
Rental, Hiring, Real Estate Services				✓	1
Education, Training			✓		1
Arts, Recreation Services	✓				1
Wholesale Trade					0
Accommodation, Food Services					0
Information Media, Telecommunications					0
Financial, Insurance Services					0
Professional, Scientific, Technical Services					0
Administrative, Support Services					0
Public Administration, Safety					0
Other Services					0

Source: Horsham REMPLAN profile, 2017.

4.4. EMPLOYMENT

EMPLOYMENT BY INDUSTRY - HORSHAM (SUBURB)

As of 2016, there were 6,443 employed residents in Horsham's urban area. The highest employing sectors are Health Care and Social Assistance (1,151), Retail Trade (863) and Construction (569).

The total number of employed Horsham (suburb) residents decreased by 103 people between 2011 and 2016. Manufacturing (-132 jobs), Wholesale Trade (-76 jobs), Transport, Postal and Warehousing (-72 jobs) and Retail Trade (-70 jobs) experienced the most notable loss of jobs. Public sector industries such as Health Care and Social Assistance (+74 jobs) experienced the highest employment growth.

TABLE 28 RESIDENTS INDUSTRY OF EMPLOYMENT – HORSHAM (SUBURB) – 2011 TO 2016

	2011	2016	GROWTH 2011 TO 2016 (#)	GROWTH 2011 TO 2016 (%)	AAGR%
Health Care and Social Assistance	1,077	1,151	+74	+7%	1%
Retail Trade	933	863	-70	-8%	-2%
Construction	558	569	+11	+2%	0%
Education and Training	445	516	+71	+16%	3%
Accommodation and Food Services	471	485	+14	+3%	1%
Public Administration and Safety	393	392	-1	0%	0%
Other Services	356	296	-60	-17%	-4%
Agriculture, Forestry and Fishing	269	279	+10	+4%	1%
Transport, Postal and Warehousing	317	245	-72	-23%	-5%
Professional, Scientific and Technical Services	208	240	+32	+15%	3%
Inadequately described or not stated	114	237	+123	+108%	16%
Manufacturing	356	224	-132	-37%	-9%
Wholesale Trade	286	210	-76	-27%	-6%
Administrative and Support Services	186	202	+16	+9%	2%
Electricity, Gas, Water and Waste Services	127	136	+9	+7%	1%
Financial and Insurance Services	149	122	-27	-18%	-4%
Arts and Recreation Services	80	103	+23	+29%	5%
Information Media and Telecommunications	91	88	-3	-3%	-1%
Rental, Hiring and Real Estate Services	74	69	-5	-7%	-1%
Mining	56	22	-34	-61%	-17%
Total	**6,546**	**6,443**	**-103**	**-2%**	**0%**

Source: Place of Usual Residence, Census of Population and Housing, 2011 and 2016.

EMPLOYMENT BY INDUSTRY - HORSHAM (RC)

The highest employing sectors of Horsham (RC) residents are Health Care and Social Assistance (1,517 jobs), Retail Trade (1,074 jobs) and Agriculture, Forestry and Fishing (836 jobs).

The total number of Horsham (RC) residents employed decreased by 61 over the 5-year period between 2011 and 2016, from 9,171 to 9,110. The industry sectors which experienced the greatest decline were Manufacturing (-161 jobs), Wholesale Trade (-99 jobs) and Retail Trade (-88 jobs) as identified in Table 25.

TABLE 29 RESIDENTS INDUSTRY OF EMPLOYMENT – HORSHAM (RC) – 2011 TO 2016

	2011	2016	GROWTH 2011 TO 2016 (#)	GROWTH 2011 TO 2016 (%)	AAGR%
Health Care and Social Assistance	1,424	1,517	+93	7%	1%
Retail Trade	1,162	1,074	-88	-8%	-2%
Agriculture, Forestry and Fishing	871	836	-35	-4%	-1%
Construction	775	809	+34	+4%	+1%
Education and Training	585	689	+104	+18%	+3%
Accommodation and Food Services	588	623	+35	+6%	+1%
Public Administration and Safety	544	536	-8	-1%	-0.3%
Other Services	457	410	-47	-10%	-2%
Transport, Postal and Warehousing	432	361	-71	-16%	-4%
Professional, Scientific and Technical Services	286	341	+55	+19%	+4%
Inadequately described or not stated	161	335	+174	+108%	+16%
Manufacturing	482	321	-161	-33%	-8%
Wholesale Trade	401	302	-99	-25%	-6%
Administrative and Support Services	244	262	+18	+7%	+1%
Electricity, Gas, Water and Waste Services	175	174	-1	-1%	-0.1%
Financial and Insurance Services	188	170	-18	-10%	-2%
Arts and Recreation Services	108	144	+36	+33%	+6%
Information Media and Telecommunications	106	103	-3	-3%	-1%
Rental, Hiring and Real Estate Services	78	85	+7	+9%	+2%
Mining	78	38	-40	-51%	-13%
Total	**9,171**	**9,110**	**-61**	**-1%**	**-0.1%**

Source: Place of Usual Residence, Census of Population and Housing, 2011 and 2016.

EMPLOYMENT BY INDUSTRY – HORSHAM WORKERS

There are 8,538 people working in Horsham (RC) as identified in Table 30. The sectors that support the highest proportion of employment are Health Care and Social Assistance (18%) and Retail Trade (13%).

Between 2011 and 2016 the total number of workers in Horsham (RC) increased by 2%. Industry sectors which experienced the highest growth in employees are Arts and Recreation Services (+40%), Administrative and Support Services (+20%) and Education and Training (+16%).

Sectors which experienced a decline in the number of workers included Mining (-67%), Manufacturing (-33%) and Wholesale Trade (-20%).

TABLE 30 INDUSTRY OF EMPLOYMENT (WORKERS) - HORSHAM (RC) – 2011 TO 2016

	YEAR				GROWTH		
	2011		2016		#	%	AAGR%
Health Care and Social Assistance	1,414	17%	1,570	18%	156	8.7%	2.1%
Retail Trade	1,135	14%	1,104	13%	-31	-4.8%	-0.6%
Agriculture, Forestry and Fishing	720	9%	720	8%	0	-2.1%	0.0%
Construction	577	7%	663	8%	86	12.5%	2.8%
Education and Training	547	7%	647	8%	100	15.8%	3.4%
Accommodation and Food Services	583	7%	639	7%	56	7.3%	1.9%
Public Administration and Safety	537	6%	550	6%	13	0.2%	0.5%
Other Services	448	5%	416	5%	-32	-9.1%	-1.5%
Professional, Scientific and Technical Services	295	4%	354	4%	59	17.5%	3.7%
Wholesale Trade	380	5%	311	4%	-69	-19.9%	-3.9%
Manufacturing	446	5%	304	4%	-142	-33.3%	-7.4%
Transport, Postal and Warehousing	339	4%	299	4%	-40	-13.7%	-2.5%
Administrative and Support Services	213	3%	260	3%	47	19.5%	4.1%
Electricity, Gas, Water and Waste Services	189	2%	199	2%	10	3.1%	1.0%
Financial and Insurance Services	194	2%	176	2%	-18	-11.2%	-1.9%
Arts and Recreation Services	96	1%	137	2%	41	39.7%	7.4%
Information Media and Telecommunications	109	1%	103	1%	-6	-7.5%	-1.1%
Rental, Hiring and Real Estate Services	80	1%	84	1%	4	2.8%	1.0%
Mining	41	0%	14	0%	-27	-66.6%	-19.3%
Total	**8,357**		**8,538**		**181**	**2%**	**0.4%**

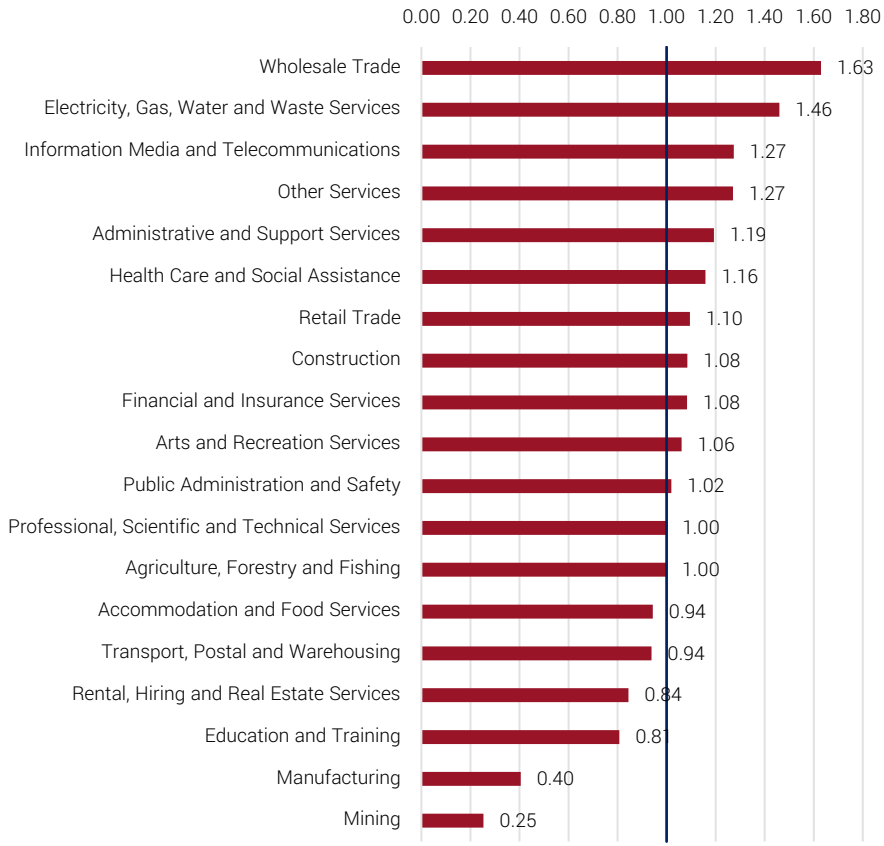
Source: Place of Work, Census of Population and Housing, ABS, 2011 and 016.

LOCATION QUOTIENT

To understand the economic strengths and industry specialisations in Horsham (RC), relative employment comparisons can be made using the Location Quotient (LQ) technique. The LQ measures the proportion of employment in a particular industry relative to proportions in another region. The following LQ analysis compares Horsham (RC) with regional Victoria. An industry value of 1 indicates a low proportion of employment within that industry compared with regional Victoria. A value greater than 1 represents a higher proportion of employment and indicates a competitive advantage in that industry sector compared with regional Victoria.

The LQ analysis in Figure 6 shows that the industry strengths of Horsham (RC) are Wholesale Trade, Electricity, Gas, Waste and Water Services, Information Media and Telecommunications, Other Services, Administrative and Support Services, Health Care and Social Assistance, Retail Trade, Construction, Financial and Insurance Services, Arts and Recreation Services and Public Administration and Safety

FIGURE 7 LOCATION QUOTIENT



Source: Place of Work, Census of Population and Housing, ABS, 2016.

BUSINESSES IN HORSHAM (RC)

Table 31 and Table 32 identify the number of business in Horsham (RC) categorised by size (number of employees).

In total, there are 2,159 businesses operating within the municipality (as of 2017), which was a reduction of 8 businesses from 2015.

The industry sectors with the largest number of businesses included Agriculture, Forestry and Fishing (640 businesses), Construction (292) and Rental, Hiring and Real Estate Services (191).

The majority of businesses (1,244) are non-employing. There are 3 large businesses with 200 or more employees, which all operate in the Administrative and Support Services sector.

TABLE 31 COUNT OF BUSINESSES – HORSHAM (RC) – 2015 TO 2017

INDUSTRY	NON EMPLOYING		1-19 EMPLOYEES		20-199 EMPLOYEES		200+ EMPLOYEES		TOTAL	
	2015	2017	2015	2017	2015	2017	2015	2017	2015	2017
Agriculture, Forestry and Fishing	415	410	261	224	0	3	0	0	676	640
Construction	145	147	122	139	6	6	0	0	268	292
Rental, Hiring and Real Estate Services	171	171	19	19	0	0	0	0	190	191
Financial and Insurance Services	107	111	31	31	0	0	0	0	141	148
Retail Trade	53	52	92	86	6	4	0	0	152	141
Professional, Scientific and Technical Services	58	65	55	60	3	0	0	0	114	119
Other Services	46	45	62	69	0	0	0	0	100	110
Transport, Postal and Warehousing	53	54	58	54	0	0	0	0	110	100
Accommodation and Food Services	27	24	64	55	8	5	0	0	94	89
Manufacturing	33	24	37	40	4	3	0	0	75	71
Wholesale Trade	34	38	31	31	0	3	0	0	67	69
Health Care and Social Assistance	33	29	27	33	0	3	0	0	67	68
Administrative and Support Services	20	16	19	14	3	3	3	3	47	41
Currently Unknown	16	19	0	3	0	0	0	0	17	22
Arts and Recreation Services	15	15	10	6	0	0	0	0	20	19
Education and Training	7	7	4	4	3	0	0	0	11	13
Information Media and Telecommunications	6	8	3	0	0	0	0	0	5	10
Mining	3	3	0	3	0	0	0	0	3	4
Electricity, Gas, Water and Waste Services	3	3	0	3	0	0	0	0	4	3
Public Administration and Safety	3	0	3	3	0	0	0	0	4	3
Total	1,243	1,244	894	880	34	26	3	3	2,167	2,159

Source: Count of Australian Businesses, ABS, June 2015 to June 2017.

TABLE 32 COUNT OF BUSINESSES – CHANGE - HORSHAM (RC) – 2015 TO 2017

	CHANGE 2015 TO 2017									
INDUSTRY	Non employing		1-19 Employees		20-199 Employees		200+ Employees		TOTAL	
Construction	2	1%	17	14%	0	0%	0	No change	+24	9%
Other Services	-1	-2%	7	11%	0		0	No change	+10	10%
Financial and Insurance Services	4	4%	0	0%	0		0	No change	+7	5%
Information Media and Telecommunications	2	33%	-3	-100%	0		0	No change	+5	100%
Professional, Scientific and Technical Services	7	12%	5	9%	-3	-100%	0	No change	+5	4%
Currently Unknown	3	19%	3		0		0	No change	+5	29%
Wholesale Trade	4	12%	0	0%	3		0	No change	+2	3%
Education and Training	0	0%	0	0%	-3	-100%	0	No change	+2	18%
Mining	0	0%	3		0		0	No change	+1	33%
Rental, Hiring and Real Estate Services	0	0%	0	0%	0		0	No change	+1	1%
Health Care and Social Assistance	-4	-12%	6	22%	3		0	No change	+1	1%
Electricity, Gas, Water and Waste Services	0	0%	3		0		0	No change	-1	-25%
Public Administration and Safety	-3	-100%	0	0%	0		0	No change	-1	-25%
Arts and Recreation Services	0	0%	-4	-40%	0		0	No change	-1	-5%
Manufacturing	-9	-27%	3	8%	-1	-25%	0	No change	-4	-5%
Accommodation and Food Services	-3	-11%	-9	-14%	-3	-38%	0	No change	-5	-5%
Administrative and Support Services	-4	-20%	-5	-26%	0	0%	0	No change	-6	-13%
Transport, Postal and Warehousing	1	2%	-4	-7%	0		0	No change	-10	-9%
Retail Trade	-1	-2%	-6	-7%	-2	-33%	0	No change	-11	-7%
Agriculture, Forestry and Fishing	-5	-1%	-37	-14%	3		0	No change	-36	-5%
Total	**1**	**0%**	**-14**	**-2%**	**-8**	**-24%**	**0**	**No change**	**-8**	**0%**

Source: Count of Australian Businesses, ABS, June 2015 to June 2017.

4.5. INVESTMENT ACTIVITY

INVESTMENT ENQUIRIES

Table 33 provides an overview of Council's historical investment enquiries for the CAD and the broader Council area.

The table shows that there have been limited investment enquiries in the past five years. However, there was a notable spike in hospitality enquiries for the CAD across 2018, including a large proportion of food retail enquiries. This lends support to the notion that there is a higher level of business confidence across food retailing in the CAD when compared with traditional retailing.

TABLE 33 INVESTMENT ENQUIRIES – THE STUDY AREA – 2014 TO 2018

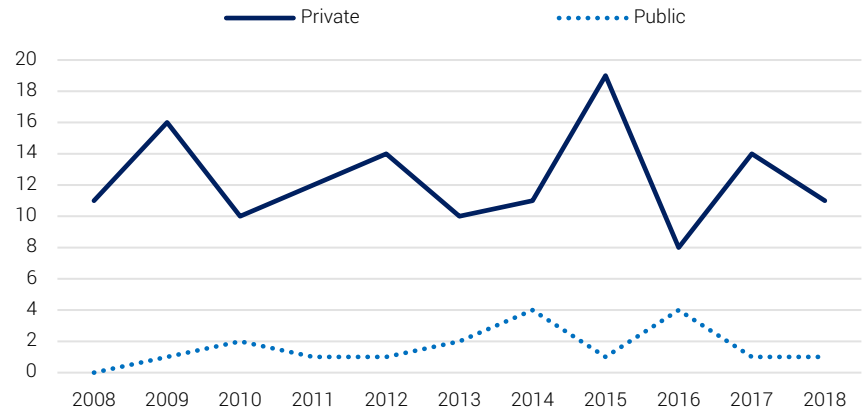
	ECONOMIC DEVELOPMENT ENQUIRIES (CAD)	COMMENTS
2014	Retail	
2018	Serviced apartments (visitor accommodation)	
2018	Retail (food catering)	
2018	Wimmera Business Centre Review	Identified need for collaborative work spaces
2018	Retail (Food take-away)	Roberts Avenue
2018	Retail (Food restaurant renovations)	Darlot Street
2018	Retail (Food Restaurant	Roberts Avenue
2018	Commercial (office/branch)	Firebrace Street
	OTHER ECONOMIC DEVELOPMENT ENQUIRIES	**COMMENTS**
2015	Artist in residence	Wimmera River - Pearsons Road
2016	Mineral sands	WIFT Precinct
2016	Service centre	Burnt Creek Estate
2017	Hay processing	WIFT
2017	Stock Feed / breeding centre	Burnt Creek
2017	Fuel and Food outlets	Darlot and Wilson Street, Dimboola Rd
2018	Solar Farm	Rassmussen Road
2018	Wind Farm	Jung (3 turbines)
2018	Starch/Ethanol	WIFT
2018	Compost / green waste	Burnt Creek - Composting/green waste
2018	Grain processing	WIFT Grain processing
2018	Grain processing	WIFT Grain processing
2018	Pulse Protein facility	Enterprise Estate

Source: Economic Development Enquiries, Horsham Rural City Council, 2018

BUILDING PERMIT APPROVALS

Figure 8 shows that building permit activity from the private sector has generally averaged around 12.4 permits per annum over the previous 11 years.

FIGURE 8 BUILDING PERMIT ACTIVITY (PUBLIC & PRIVATE OWNERSHIP) – STUDY AREA – 2008 TO 2018



Source: Building Permit Data, Horsham Rural City Council, 2018

5. TOURISM

5.1. INTRODUCTION

This section provides a snapshot of Horsham's tourism industry including the value of the industry in terms of annual output generated and employment supported, as well as an overview of Horsham's tourism product strengths and competitive advantages.

This section also quantifies domestic and international visitation to Horsham and assesses the visitor market having regard to the following indicators:

- Purpose of visit;
- Travel group;
- Average length of stay;
- Activities undertaken; and
- Visitor origin.

Data has been collected using Tourism Research Australia's (TRA) National Visitor Survey (NVS) and International Visitor Survey (IVS). Data has been collected for the 10-year period between 2008 and 2017. A 10-year average has been adopted for certain data sets to eliminate irregularities with sample sizes and provide more certainty of results.

5.2. KEY FINDINGS

Horsham has a small tourism industry relative to comparable regional centres.

The tourism industry in Horsham generates $91.3m in economic output per annum and supports 582 jobs. For comparison purposes, the tourism industry in Mildura Rural City generates an economic output of $259m.

Horsham's tourism industry is small relative to comparable regional centres. This is partly attributed to its relatively isolated location and distance from metropolitan areas (i.e. capital cities) but could indicate a shortfall in tourism product and supporting infrastructure.

Domestic overnight has experienced negligible growth in a decade.

Domestic overnight visitation to Horsham grew by 0.4% between 2008 and 2017, which is low compared with overall trends in regional Victoria.

The proportion of domestic holiday/leisure travellers visiting Horsham (34%) is significantly lower than the Regional Victorian average (53%). Horsham is typically recognised as a stopover destination for self-drive visitors due to its location approximately halfway between Melbourne and Adelaide.

Horsham has a strong business / corporate market and caravan / touring market.

Horsham performs well in attracting business and corporate travellers which are critical to the local visitor economy.

The significant business base across the government, Agricultural, Health Care and Construction industries attracts a large proportion of business travellers to Horsham, providing local commercial accommodation operators with strong mid-week occupancy.

At present, construction projects in the region are driving very high demand for short term accommodation, especially serviced rooms with kitchens.

Tourism product development opportunities.

Horsham's under representation of holiday/leisure domestic overnight visitors could be attributed to a number of factors including the relatively isolated location/distance from major metropolitan markets, as well as a potential lack of investment into new tourism product, attractions and infrastructure.

The Horsham Economic Development Strategy (2017) identifies three key focus areas for Horsham to develop as a destination an increase visitation and include:

- Further leverage the success of the Horsham Town Hall;
- Increase sports tourism through development of sport and recreation infrastructure and events; and
- Ensure development of the Wimmera riverfront precinct considers tourism uses.

Other opportunities that could be considered for tourism development include:

- Food and beverage - The most common and popular activity for domestic overnight visitors in Regional Victoria is eating out at a restaurant and/or café, with 58% participating in the activity.

  In order to further develop Horsham as a destination in its own right, the development and provision of high quality food and beverage product presents a key opportunity to achieve this, particularly given the regional produce strengths in agriculture (e.g. grain/pulse product and livestock).

  High quality dining options such as cafés, a gastronomic pub/hotel, provedore, microbrewery and/or wine bar should be considered for Horsham's CAD and riverfront to provide an anchor attraction and contribute to a vibrant precinct.

  Horsham's strengths in regional product sees it well placed to strengthen this market segment.
- Strengthen the overnight touring market - A key visitor market to Horsham is the holiday / leisure self-drive, caravan and touring market. Typically, this market uses Horsham as a base to tour the broader region including the Grampians, Mount Arapiles, the Silo Art Trail and Pink Lake.

  The investment in regional tourism product such as the Grampians Peaks Trail is expected to increase the number of domestic and overnight visitors to the region, providing opportunities for Horsham to attract more visitors, particularly for accommodation, food and beverage.

  During consultation, the Horsham Riverside Caravan Park indicated that they attract strong occupancy from this market and are not affected by seasonality. This presents opportunities for a potential expansion of the Park.
- Attract investment into the accommodation sector and address accommodation gaps - Much of the existing stock is standard hotel/motel (3 to 3.5 star) and there is an under provision of high-quality accommodation establishments (i.e. 4+ star) when compared with regional Victoria.

  There is an opportunity to diversify the accommodation supply and improve the offering to meet the need and preferences of the business/corporate market, as well as segments of the holiday/leisure market. Based on the consultation findings and a review of existing strategies, the current accommodation gap in Horsham is a high quality serviced apartment and/or hotel establishment.

5.3. VALUE OF THE TOURISM INDUSTRY

The tourism industry is recognised as a collection of activities across various industry sectors such as retail, accommodation, cafes & restaurants, cultural & recreational services.

The Remplan model utilises Tourism Satellite Account (TSA) data sourced from the Australian Bureau of Statistics to provide estimates of the value of industry sectors' contributions to total tourism product output.

In the TSA, tourism is defined as:

"Comprising the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited."

Table 34 provides a summary of economic indicators for the tourism industry in Horsham Rural City and includes output, employment, wages and salaries and value add.

The tourism industry in Horsham generates $91.3m in economic output and supports 583 (FTE) jobs. For comparison purposes, the tourism industry in Mildura Rural City generates an economic output of $259m.

TABLE 34 HORSHAM'S TOURISM INDUSTRY

TOURISM	2017
Economic Output ($M)	$91.3
Employment (FTE Jobs)	583

Source: Remplan 2017

5.4. TOURISM PRODUCT STRENGTHS

Horsham's tourism strengths include outdoor and adventure, water-based, arts and culture, and sport and recreation.

NATURE BASED / OUTDOOR AND ADVENTURE

An abundance of natural assets including lakes, rivers, National & State parks are within a 50-kilometre radius of Horsham. Major assets such as the internationally renowned climbing destination; Mount Arapiles-Tooan State Park, as well as Mount Stapylton and Mount Zero in the Grampians National Park attract a significant level of annual visitation.

The internationally renowned rock climbing destination; Mount Arapiles is located in Mount Arapiles-Tooan State Park, approximately 7 km from Natimuk and 30 km from Horsham. This natural asset is a major draw card for domestic and international visitors as it caters to differing levels of climbing abilities. The Mountain is estimated to attract 90,000 visitors per annum.1

Mt Arapiles

Source: Onsight Photography

[1] Arapiles Climbing Guides, 2017

The Council area and broader region is home to many lakes and rivers. Wimmera River, Green Lake, Taylors Lake, Natimuk Lake, Lake Toolondo, Lake Wartook and Rocklands Reservoir provide opportunities for locals and visitors to undertake water-based activities such as swimming, fishing, water-skiing, wind surfing and recreational boating.

Another natural area of significance is the Wartook Valley, located to the west of the Grampians mountain range. Attractions in this area include bushwalking, 4WD, horse riding, rock climbing, abseiling, fishing, mountain biking and quad bike tours.

The Laharum area, to the north of the Wartook Valley, is known for its olive groves and organic farming.

Green Lake

Source: Grampians Point

ARTS AND CULTURE

The Horsham Town Hall underwent a redevelopment and was officially completed in January 2016. The revitalised facility incorporates the original Town Hall, a 500 seat Theatre and the Regional Art Gallery.

The Town Hall provides world-class performance, visual arts and conferencing facilities. Performances, events and exhibitions attract visitors from across the Wimmera region.

Natimuk is recognised as a hub for community arts and culture. The township's flagship facility is the Goat Gallery; a privately-owned art gallery showcasing works from local and regional artists.

The Natimuk Frinj Festival is the township's signature boutique visual performance and arts event. The Festival provides an avenue for local artists and attracts visitors looking for a rural community art experience.

Horsham Regional Art Gallery

Source: Visit Victoria

FESTIVALS AND EVENTS

According to TRA, between 2012 and 2016, and average of 4% of domestic overnight visitors to Horsham visited for the purpose of attending an event. This is marginally higher than the average for Regional Victoria (2%).

Tourism events are an effective method of attracting visitors from outside of the region that wouldn't ordinarily visit.

The annual event calendar in Horsham supports a proportion of visitation to the Council area. The existing event calendar predominantly consists of music, performing arts, art and cultural events. This is largely due to the emergence of arts and culture as a result of the Horsham Town Hall redevelopment.

The Cultural Department and the management team at the Town Hall indicated that events held at the Town Hall capture audiences that extend beyond the Council area, attracting visitors from Ballarat, Warrnambool and townships along the Victorian and South Australia border.

The Wimmera Event Centre is a purpose-built large-scale event venue, located on approximately 23 hectares of land. The venue includes two large scale pavilions, a number of smaller pavilions, meeting rooms, facilities for on-site camping, catering areas, sheds and outbuildings.

The Centre has the capacity to accommodate a range of large-scale events, from music concerts and festivals to conferences, shows and exhibitions. The Centre can also accommodate smaller functions and events such as seminars, meetings, and social functions. An existing major event held at the Centre is the Wimmera Machinery Field Days.

5.5. VISITOR MARKET ASSESSMENT

VISITATION

Table 35 shows the total annual visitation to Horsham (RC) between 2008 and 2017. On average, there were 379,302 visitors to Horsham (RC) per annum, with visitation increasing at an average growth rate of 7% per annum. The number of domestic day trip visitors has experienced the greatest growth when compared to other visitor types, growing at an average annual rate of 12%. The number of domestic overnight visitors has not experienced significant growth, increasing at an average annual rate of 0.4%. In comparison, the number of international visitors declined at an average rate of 3% per annum.

TABLE 35 TOTAL VISITORS - HORSHAM (RC) - 2008 TO 2017

	DOMESTIC DAY	DOMESTIC OVERNIGHT	INTERNATIONAL	TOTAL
2008	118,949	158,929	5,209	283,087
2009	270,915	106,576	4,064	381,555
2010	159,790	144,873	3,094	307,757
2011	148,074	133,005	3,863	284,942
2012	162,351	135,865	4,542	302,758
2013	214,140	150,970	4,412	369,522
2014	235,921	147,907	2,485	386,313
2015	249,760	186,579	4,059	440,398
2016	317,533	161,913	4,993	484,438
2017	383,024	165,336	3,886	552,246
Average	**226,046**	**149,195**	**4,061**	**379,302**
Change (2008 – 17)	**264,075**	**6,407**	**-1,323**	**269,159**
AAGR%	**12%**	**0.4%**	**-3%**	**7%**

Source: National and International Visitor Surveys, TRA, 2008 to 2017.

VISITOR AGE PROFILE

The visitor age profile of visitors to Horsham (RC) per year by visitor type is shown in Table 36. The most common age group of visitors are aged 60 to 64 years, with the age group accounting for 10% of domestic day trips, 9% of domestic overnight visitors and 13% of international visitors to Horsham (RC), followed by visitors aged 25-29 years, with the age group accounting for 9% of domestic day trips, 9% of domestic overnight and 13% of international visitors.

TABLE 36 VISITOR AGE PROFILE – HORSHAM (RC) – 2008 TO 2017 (AVE)

AGE (YEARS)	DOMESTIC DAYTRIPS	DOMESTIC OVERNIGHT	INTERNATIONAL
15-19	3%	7%	2%
20-24	5%	5%	13%
25-29	9%	9%	13%
30-34	9%	8%	6%
35-39	5%	9%	7%
40-44	8%	9%	6%
45-49	5%	10%	9%
50-54	11%	8%	9%
55-59	11%	9%	7%
60-64	10%	9%	13%
65-69	12%	7%	6%
70+	11%	10%	8%

Source: National and International Visitor Surveys, TRA, 2008 to 2017 (10 year average).

AVERAGE LENGTH OF STAY

On average, domestic overnight visitors to Horsham (RC) stayed 2 nights and international visitors stayed 9 nights.

PURPOSE OF VISIT

The most common purpose of visit for all visitor types to Horsham (RC) is for a holiday, accounting for 43% of domestic day trips, 35% of domestic overnight and 64% of international visitation. Visiting friends and relatives is also a common purpose of visit, accounting for 34% of overnight visitors, 24% of international visitors and 20% of day trippers to Horsham (RC) as identified in Table 37.

35% of domestic overnight visitors to Horsham visit for holiday / leisure purposes. This is significantly less when compared with the average for Regional Victoria (54%). This could be attributed to a number of factors including Horsham's relatively isolated location and significant distance from major metropolitan markets (i.e. capital cities), however, could also be a result of a lack of tourism product, infrastructure and attractions.

Horsham performs well across the business / corporate market, indicated by the 19% of domestic overnight travellers visiting for business purposes. This is considerably higher when compared with the Regional Victorian average (10%) and indicates a potential competitive advantage, particularly in generating strong mid-week occupancy across the commercial accommodation sector.

Horsham is also a popular stopover destination, as it sits approximately halfway between Melbourne and Adelaide. Horsham's popularity as a key stopover location is highlighted by the 6% of domestic overnight visitors whose main purpose of visit is 'in transit'. This is much higher when compared with the regional Victorian average (1%).

TABLE 37 PURPOSE OF VISIT – DOMESTIC DAY / OVERNIGHT AND INTERNATIONAL – 2008 TO 2017 (AVE)

	HORSHAM (RC)			REGIONAL VICTORIA		
	Daytrip	Overnight	International	Daytrip	Overnight	International
Holiday	43%	35%	64%	52%	54%	67%
Visiting friends and relatives	20%	34%	24%	30%	33%	28%
Business	14%	19%	7%	9%	10%	6%
Other reason	23%	5%	1%	10%	3%	5%
No other reason	0%	0%	0%	0%	0%	0%
In transit	0%	6%	3%	0.0%	1%	1%

Source: National and International Visitor Surveys, TRA, 2008 to 2017 (10 year average).

ACTIVITIES

The most common activities undertaken by domestic visitors include eating out (46% of overnight visitors, 43% of day visitors) and visiting friends and relatives (38% of overnight visitors and 27% of day trippers) as identified in Table 38.

Other activities undertaken include going to a pub, club, disco etc. (19% of overnight visitors, 7% of day trippers), sightseeing (18% of overnight visitors and 7% of day trippers) and going shopping for pleasure (38% day trippers and 13% of overnight visitors).

There are a proportion of domestic overnight activities that are underrepresented in Horsham when compared with Regional Victoria, including:

- General sightseeing (18% in Horsham / 28% in Regional Victoria);
- Bushwalking (10% in Horsham / 14% in Regional Victoria);
- Fishing (4% in Horsham / 7% in Regional Victoria); and
- Cycling (1% in Horsham / 3% in Regional Victoria).

TABLE 38 DOMESTIC VISITOR ACTIVITIES – HORSHAM (RC) – 2007 TO 2008 (AVE)

	HORSHAM (RC)		REGIONAL VICTORIA	
	Daytrip	Overnight	Daytrip	Overnight
Eat out / dine at a restaurant and/or cafe	43%	46%	45%	53%
Visit friends & relatives	27%	38%	35%	44%
Pubs, clubs, discos etc	7%	19%	7%	21%
Sightseeing/looking around	7%	18%	19%	28%
None of these	16%	14%	11%	6%
Go shopping for pleasure	38%	13%	18%	21%
Bushwalking / rainforest walks	2%	10%	5%	14%
Visit national parks / state parks	2%	10%	5%	12%
Other outdoor activities nfd	4%	9%	2%	4%
Picnics or BBQs	1%	5%	5%	7%
Fishing	2%	4%	3%	7%
Exercise, gym or swimming	1%	3%	1%	5%
Go to markets	2%	3%	3%	8%
Visit botanical or other public gardens	1%	3%	3%	3%
Visit farms	0%	3%	1%	2%
Attend an organised sporting event	3%	3%	3%	3%
Go on a daytrip to another place	0%	3%	0%	6%
Visit history / heritage buildings, sites or monuments	0%	2%	2%	5%
Play other sports	3%	2%	3%	5%
Attend movies/cinema	1%	2%	1%	1%
Attend festivals / fairs or cultural events	0%	2%	2%	3%
Attend theatre, concerts or other performing arts	0%	2%	1%	2%
Visit museums or art galleries	2%	2%	3%	5%
Visit wildlife parks / zoos / aquariums	0%	1%	1%	1%
Go to the beach	1%	1%	15%	25%
Other activities	0%	1%	1%	1%
Cycling	1%	1%	1%	3%
Golf	1%	1%	1%	3%
Visit industrial tourist attractions / mines / breweries (breweries excl 2016 onwards)	0%	1%	1%	2%
Not asked	1%	1%	0%	0%

Source: National Visitor Survey, TRA, 2008 to 2017 (10 year average).

Table 39 shows the activities undertaken by international visitors to Horsham (RC). The most common activities undertaken include eating out (91%), sightseeing (77%) and visiting national parks / state parks (71%).

TABLE 39 INTERNATIONAL VISITOR ACTIVITIES –HORSHAM (RC) – 2008 TO 2017 (AVE)

	INTERNATIONAL	
	HORSHAM (RC)	REGIONAL VICTORIA
Eat out / dine at a restaurant and/or cafe	91%	93%
Sightseeing/looking around	77%	81%
Visit national parks / state parks	71%	65%
Go to the beach	69%	73%
Go shopping for pleasure	68%	79%
Pubs, clubs, discos etc	57%	54%
Visit history / heritage buildings, sites or	54%	46%
Bushwalking / rainforest walks	54%	45%
Go to markets	53%	59%
Visit botanical or other public gardens	51%	52%
Visit museums or art galleries	49%	47%
Visit wildlife parks / zoos / aquariums	42%	45%
Charter boat / cruise / ferry	37%	34%
Other outdoor activities nfd	27%	12%
Experience aboriginal art / craft and cultural displays	27%	21%
Visit farms	26%	23%
Visit wineries	23%	27%
Go on guided tours or excursions	22%	27%
Tourist trains	21%	24%
Visit art / craft workshops / studios	21%	15%
Attend festivals / fairs or cultural events	20%	19%
Visit the outback (2005-2015)	20%	15%
Attend Movies/Cinema (2007 onwards)	19%	24%
Snorkelling	16%	17%
Go whale or dolphin watching	16%	13%
Visit an aboriginal site / community	16%	12%
Attend theatre, concerts or other performing arts	12%	16%
Surfing	10%	10%
Visit casinos	10%	18%
Attend an organised sporting event	9%	13%
Fishing	9%	8%
Visit amusements / theme parks	7%	11%
Play other sports	7%	10%
Cycling	7%	9%
Scuba diving	6%	7%
Visit or stay on an island (2016 onwards)	5%	6%
Golf	4%	5%
Visit a reef (2016 onwards)	4%	4%
Sailing, windsurfing, kayaking	4%	9%
None of these	3%	1%
Visit a health spa / sanctuary / well-being centre	3%	6%
Visit breweries or distilleries (2016-2017)	3%	3%
Attend aboriginal performance	2%	5%
Other activities (2009 onwards)	1%	0%
Short educational course	1%	2%

Source: International Visitor Surveys, TRA, 2008 to 2017 (10 year average).

VISITOR ORIGIN

On average the majority (96%) of domestic day visitors to Horsham (RC) are from Victoria, with the remaining 4% of visitors from South Australia. The majority (72%) of domestic overnight visitors to Horsham (RC) are also from Victoria, followed by South Australia (18%), New South Wales (5%) and Queensland (3%) as identified in Table 40.

TABLE 40 DOMESTIC VISITOR ORIGIN – HORSHAM (RC) – 2008 TO 2017 (AVE)

	DOMESTIC DAY	DOMESTIC OVERNIGHT
Victoria	96%	72%
South Australia	4%	18%
New South Wales	0%	5%
Queensland	0%	3%
Western Australia	0%	1%
Tasmania	0%	1%
Northern Territory	0%	1%
ACT	0%	0.3%

Source: National Visitor Survey, TRA, 2008 to 2017 (10 year average).

Table 41 identifies the country of origin of international visitors to Horsham. On average, 14% of international visitors are from New Zealand, 14% are from the United Kingdom, 13% are from United States of America and 12% are from Germany.

TABLE 41 INTERNATIONAL VISITOR ORIGIN – HORSHAM (RC) – 2008 TO 2017 (AVE)

COUNTRY	COUNTRY OF ORIGIN
New Zealand	14%
United Kingdom	14%
United States of America	13%
Germany	12%
Scandinavia	8%
Netherlands	6%
Switzerland	6%
Other Europe	5%
Canada	4%
France	4%
China	3%
India	2%
Indonesia	2%
Malaysia	1%
Other Asia	1%
Japan	1%
Hong Kong	1%
Singapore	0.5%
Italy	0.1%
Thailand	0.1%

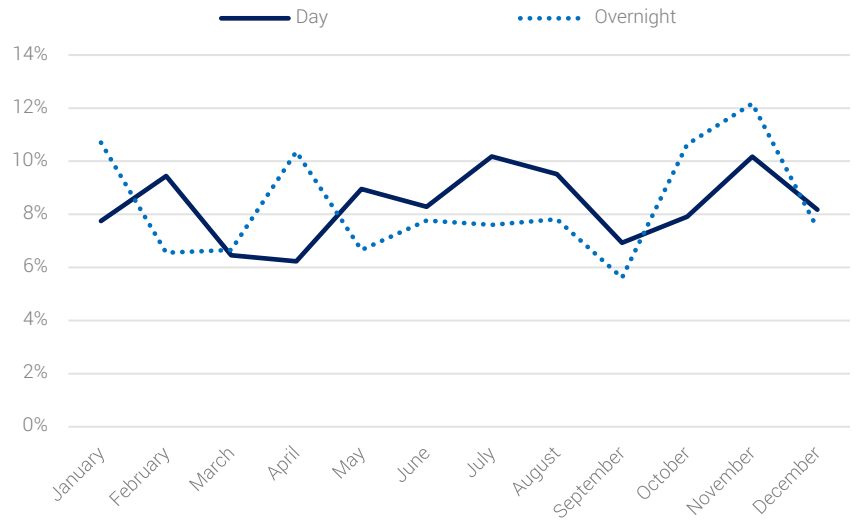
Source: International Visitor Surveys, TRA, 2008 to 2017 (10 year average).

SEASONALITY

Given Horsham's dependence on the business / corporate market and the caravan / touring and stopover market, Horsham is less affected by seasonality when compared with other visitor destinations in Regional Victoria.

On average, months that attract the highest number of domestic overnight visitors are November (12%), October (11%) and January (11%). September attracts the lowest number of overnight visitors.

FIGURE 9 DOMESTIC VISITOR SEASONALITY – HORSHAM (RC) - 2008 TO 2017 (AVE)



Source: National Visitor Survey, TRA, 2008 to 2017 (10 year average).

TRAVEL PARTY

For overnight visitors, the primary travel party type is adult couples (31%), followed by those travelling alone (25%) and family groups (19%).

For international visitors, the primary travel party is people travelling alone (51%), followed by adult couples (30%) and friends or relatives travelling together (12%).

TABLE 42 TRAVEL PARTY – DOMESTIC OVERNIGHT / INTERNATIONAL – HORSHAM (RC) – 2008 TO 2017 (AVE)

	DOMESTIC OVERNIGHT	INTERNATIONAL
Adult couple	31%	30%
Travelling alone	25%	51%
Family group - parents and children	19%	5.3%
Friends and/ or relatives travelling together	18%	12%
Business associates travelling together with or without spouses	5%	2%
Other	3%	0.5%

Source: National and International Visitor Surveys, TRA, 2008 to 2017 (10 year average).

ACCOMMODATION STAYED IN

The accommodation typologies stayed in by domestic overnight and international visitors to Horsham (RC) is identified in Table 43.

For both overnight and international visitors, the primary accommodation stayed in is hotels, resorts, motel or motor inn (37% of overnight and 36% of international). Staying at a friend or relatives property is also a common type of accommodation stayed in by overnight (34%) and international (26%) visitors.

TABLE 43 VISITOR ACCOMMODATION – DOMESTIC OVERNIGHT / INTERNATIONAL – HORSHAM (RC) - 2008 TO 2017 (AVE)

	DOMESTIC OVERNIGHT	INTERNATIONAL
Hotel/resort/motel or motor Inn	37%	36%
Friends or relatives property	34%	26%
Caravan park or commercial camping ground	13%	16%
Caravan or camping - non commercial	11%	15%
Rented house/apartment/flat or unit	2%	1%
Other Private Accommodation	1%	1%
Other Accommodation	1%	0%
Own property	1%	1%
Guest house or Bed & Breakfast	1%	1%
Backpacker or hostel	0%	3%

Source: National and International Visitor Surveys, TRA, 2008 to 2017 (10 year average).

6. SPORT, RECREATION AND COMMUNITY ASSETS

6.1. INTRODUCTION

This section provides a high-level assessment of the existing sport and recreation assets, areas of open space and community assets in the study area having regard to current location, function and role, as well as condition relevant to on-site infrastructure.

This section also includes reference to the *Horsham Sports Facilities Demand Assessment* report, including the sporting facilities context and summary of demand for the provision of sporting facilities.

6.2. KEY FINDINGS

SPORT AND RECREATION ASSETS & INFRASTRUCTURE

There is a lack of passive open space in the core of the CAD.

Most open space areas and sport and recreation assets/facilities in the study area are concentrated to the southern portion of the CAD, particularly the riverfront precinct and Showgrounds precinct.

With the exception of May Park, which is the key area of open space in the northern portion of the study area, there is an absence of passive open space in the core of the CAD.

Sporting facilities and open space areas in the study area are disparate, inefficient and poorly integrated with other sports and land uses.

Whilst Horsham is generally well supplied in terms of the number of sport and recreation facilities, the current sporting facilities and open space areas in the study area are disparate; with very limited examples of consolidation and co-location of infrastructure that can cater to multiple sports and users. This is particularly the case with City Oval, which includes high perimeter fencing and is not inviting for use by the general public and visitors for public use. Given its strategic and favourable location in the riverfront precinct, City Oval does not integrate well with Sawyer Park and the Botanic Gardens precinct.

City Oval and Horsham Lawn Tennis and Croquet have facilities which do not meet current standards and as a result cannot host certain events or accommodate participation from a broad cross section of the community.

City Oval is currently limited in its scope to host regional events, issues/constraints identified for the facility include:

- No universally accessible clubroom or pavilion;

- The size of the field is too small to host premier regional events;
- The field is poorly orientated for cricket matches resulting in short straight boundaries;
- Insufficient number of publicly accessible toilets on site;
- There is only one netball court;
- The spectator grandstand is orientated to the south and can be subject to cold southerly winds;
- There are issues with the gravel embankment surrounding the field, including the quality of the surface and in providing universal access;
- The club pavilion is not currently accessible to all clubs and users;
- Generally, there is limited access available to the public (perception of private facility).

Horsham lawn tennis (and croquet) is also a key sport facility within the study area. There are 24 grass courts, however, only 16 are maintained. The tennis facility is not currently capable of hosting regional level tennis events.

The facility also does not have lighting, has no formal licence in place and the pavilion has no accessible toilets. Its future position within the precinct should be considered having regard to future opportunities for tennis facilities noted in the *Horsham Sports Facilities Demand Assessment*.

There is a pressing need to develop a multi-purpose indoor sporting facility in Horsham.

Although there is an adequate number of indoor courts in Horsham to support local indoor sports needs, existing facilities are generally non-compliant, ageing, do not meet contemporary facility standards, do not cater to all demographics and cannot host regional events.

Previous work[2] has determined that there is a pressing need to develop a multi-purpose indoor sporting facility in Horsham. A number of sites were assessed for this facility, with the McBryde street site identified as the preferred location. Centrally located sites, close to existing businesses would be beneficial for an indoor sports stadium for a number of reasons, including:

- Enabling the consolidation of regional sporting infrastructure within the central area, producing spin off benefits for existing businesses within the town centre when events are hosted in town;
- Providing an equitable location from an access point of view for residents;
- Providing access to existing infrastructure and services such as accommodation, cafes and restaurants for events visitors;
- Consolidating and enhancing the role and primacy of the CAD;
- Providing the opportunity to showcase modern infrastructure to both visitors and residents (existing and potential).

COMMUNITY ASSETS & INFRASTRUCTURE

Although the CAD contains a number of important community assets, there are few examples of multi-use and integrated facilities.

Horsham's community facilities are predominantly concentrated in the CAD, with the exception of the Kalkee Integrated Children's Hub in Horsham North. Many of the community facilities in the CAD are disparate and are not well integrated.

There are limited examples of a co-location of community uses in the study area. Community uses are shifting towards a co-location model, whereby a multitude of uses are provided within the one facility (or Hub). This can encourage greater utilisation, as well as help realise efficiencies in management, operations and achieve economies of scale. Successful examples of co-located community hubs can be seen throughout Regional Victoria including the Echuca Library/Community Hub, Civic Hall Ballarat and the Tallangatta Integrated Community Centre.

Whilst the Kalkee Integrated Children's Hub and the Horsham Town Hall are successful examples of integrated models for community uses, there is an opportunity to improve and strengthen this in Horsham, particularly in the CAD.

[2] *Horsham Multi-Use Indoor Sports Stadium Plan-Phase One: Feasibility (2016)* and *Wimmera Sports Stadium Business Case and Concept Design Report (2017)*

6.3. CONTEXT

Horsham is the only designated regional City in the Wimmera Southern Mallee Region. Its growth and development as a regional city is supported by both *Plan Melbourne* (2017) and the *Wimmera Southern Mallee Regional Growth Plan* (2014). As a regional city Horsham is expected to be the principal centre for higher order goods and services, including social and community infrastructure.

Horsham is the only municipality within the Wimmera Southern Mallee region that is forecast to experience population growth[3]. This population growth is also expected to only occur in the central area of Horsham, supporting the need for Horsham to provide services and facilities that cater to a growing local population, whilst servicing other outlying regional and rural towns within Horsham Rural City and surrounding municipalities.

Table 44 and Figure 10 provide a summary of the sport and recreation assets and open space areas in the study area. The majority of open space areas and sport and recreation assets/facilities are concentrated to the southern portion of the CAD, particularly the riverfront precinct and Showgrounds precinct.

With the exception of May Park, which is the key area of open space in the northern portion of the study area, there is an absence of passive open space in the core CAD, as shown in Figure 10.

Whilst Horsham is well supplied in terms of the number of sport and recreation facilities, the current facilities and open space areas in the study area are disparate; with very limited consolidation and co-location of infrastructure that can cater to multiple sports and users.

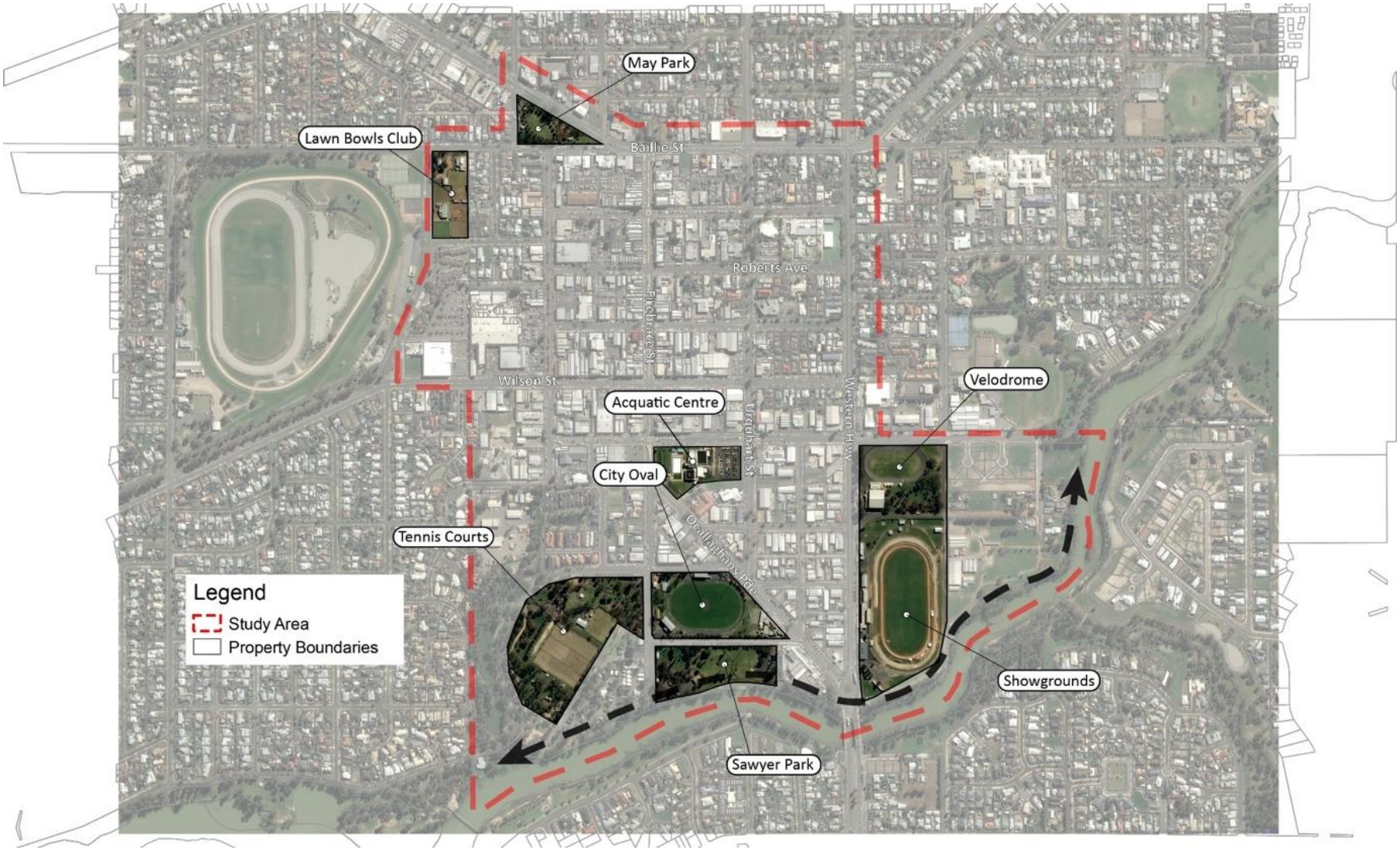
[3] Victoria in Future, 2016

TABLE 44 LOCATION AND TYPES OF SPORT AND RECREATIONAL ASSETS AND INFRASTRUCTURE (HORSHAM STUDY AREA)

NAME	CATEGORY	LOCATION	DESCRIPTION
Horsham Aquatic Centre	Sport and Recreation	53 Hamilton St	A multi-purpose facility that offers childcare programs, gym classes, crèche and swimming pool and aquatics.
City Oval Reserve	Sport and Recreation	Baker Street	One oval and one netball court. Oval used for AFL (football) and cricket. A public facility that has a low level of use based on permitter fencing and management by existing user groups (sporting clubs).
Horsham Velodrome	Sport and Recreation	Hamilton Street	Cycling velodrome that is co-located with the existing basketball stadium. The velodrome is low quality with no complementary facilities on-site.
Lawn Bowls	Sport and Recreation	Park Drive	X4 Bowls Rinks (Horsham City) - 3X Grass / 1X Synthetic X1 Bowls Rink (Horsham West) – Grass Clubrooms
Horsham Botanic Gardens / Lawn Tennis & Croquet	Open Space (Recreation) / Sport and Recreation	Firebrace Street	An 8-acre landscaped garden dating back to the late 1800's with rose gardens, picnic & play areas. X24 Courts - grass (approx. 16 courts maintained) X1 Croquet Court
Sawyer Park	Open Space (recreation)	Firebrace Street (Riverfront)	An area of passive open space on the riverfront. Sawyer Park is the key open space area on the riverfront, in close proximity to the CAD. Is utilised for unorganised physical activity and is also used as an open air event space.
May Park	Open Space (Recreation)	Baillie Street, Horsham	May Park is located at the northern edge of the CAD on Baillie Street. The Park has an all abilities play space and is a popular stopover/rest stop for traveller passing through.

Source: Urban Enterprise, 2019

FIGURE 10 MAP OF SPORT AND RECREATIONAL ASSETS AND INFRASTRUCTURE (HORSHAM STUDY AREA



Source: Urban Enterprise, 2019

6.4. SPORT FACILITIES

INDOOR SPORTS FACILITIES IN HORSHAM

Horsham Sports Facilities Demand Assessment included a peer review of work relating to indoor sports in Horsham including the *Horsham Multi-use Indoor Sports Stadium Plan– Phase One Feasibility Study* (2016) and the *Wimmera Sports Stadium Business Case and Concept Design* Report (2017).

Generally, there is an adequate number of indoor courts to support the needs for local standard provision, however, existing facilities are generally non-compliant, ageing, do not meet contemporary facility standards, do not cater to all demographics and cannot cater to regional events.

Previous work[4] has determined that there is a pressing need to develop a multi-purpose indoor sporting facility in Horsham. A number of sites were assessed for this facility, with the McBryde street site identified as the preferred location. Centrally located sites, close to existing businesses would be beneficial for an indoor sports stadium for a number of reasons, including:

- Enabling the consolidation of regional sporting infrastructure within the central area, producing spin off benefits for existing businesses within the town centre when events are hosted in town;
- Provides an equitable location from an access point of view for residents;
- Provides access to existing infrastructure and services such as accommodation, cafes and restaurants for events visitors;
- Consolidates and improves the role and primacy of the CBD;
- Provides opportunity to showcase modern infrastructure to both visitors and residents (existing and potential).

OUTDOOR SPORTS FACILITIES IN HORSHAM

The following information has been sourced from the *Horsham Sports Facilities Demand Assessment* report, which was prepared concurrently to this study. The *Horsham Sports Facilities Demand Assessment* included a review of the demand for outdoor sports facilities to 2033, including AFL, Cricket, Athletics, Lawn Bowls, Netball, Rugby League, Soccer and Tennis.

Current sporting facilities in Horsham are disbursed and primarily designated/used for individual sports, separate to other facilities. There are limited examples of co-location of sports beyond traditional relationships (e.g. Football/Netball clubs and Cricket). Generally, sporting facilities are ageing, not up to current day standards and are lacking in infrastructure. Although many clubs and sports have been able to 'make do' with these facilities, they are not of a quality aligned to a regional City, nor are they of a quality which provides a platform for strong sporting participation or community development.

From the perspective of quantitative supply relative to population, there is generally a sufficient number of fields/courts/pitches to meet the current needs of the local community, however, this varies depending on the sport.

There are significant issues with the quality of a number of facilities in Horsham including the quality and size of playing surfaces, run-off areas, lighting, condition of clubrooms (lack of universal access, female inclusive facilities), storage, car parking and in some cases scheduling conflicts.

There are currently no outdoor sporting precincts in Horsham that align to sporting association requirements to host regional events.

The following table provides a snapshot summary of the demand assessment for outdoor sports. For further detail on each sport, please refer to the *Horsham Sports Facilities Demand Assessment* report.

[4] *Horsham Multi-Use Indoor Sports Stadium Plan-Phase One: Feasibility (2016)* and *Wimmera Sports Stadium Business Case and Concept Design Report (2017)*

TABLE 45 DEMAND SUMMARY

Sport	Quantitative Demand Summary	Qualitative Demand Summary	Position on Need
AFL	Sufficient current provision of AFL fields. Requirement for an additional 0.8 fields by 2033.	There is short term demand for an additional AFL field or use of an existing field for AFL to cater for pre-season training and future opportunities for club matches. There is a need for an appropriate venue to host regional events.	Need for appropriate regional venue. Additional field required for AFL use in the medium term to cater to future strategic opportunities as well as cater to growth to 2033. The facility should be multi-purpose.
Cricket	Sufficient current provision of cricket fields. Requirement for an additional 0.4 fields by 2033.	There is a need for an additional 'hard wicket' facility in Horsham.	Potential for additional 'hard wicket' cricket field for cricket use, to assist with training and promoting short forms of the game and cater to growth to 2033. The facility should be multi-purpose.
Soccer	Demand for approximately 2.4 pitches by 2033.	Current facilities are not of an adequate standard. Minimum one full size field is required to cater to the needs of Horsham Soccer Club.	Adequate facility and pitch required to cater for soccer, with potential to grow to 2 pitches in the long term. Facility should be multi-purpose.
Tennis	Significant projected oversupply of tennis courts to 2033.	Adequate courts but require one venue capable of hosting regional events (16+ courts)	Need for one venue capable of hosting regional events. Opportunities to consolidate courts should be explored.
Netball	Netball Vic identified need for 14.4 courts.	Current facilities are not adequate. Need for suitable venue with minimum 8 compliant courts.	Need for one venue capable of hosting regional events. Need for suitable venue with minimum 8 compliant courts. Facility should be multi-purpose.
Little Athletics	Does not meet the 'typical' population provision trigger for Athletics facilities.	Need for suitable venue, including 8 lane athletics track, which can also accommodate regional events.	Need to address Athletics facility issues, including need for 8 lane track. Consideration should be given to 'grass' athletics tracks in the short to medium term. Facility should be multi-purpose.
Rugby League	Does not meet the 'typical' population provision trigger for Rugby facilities.	Current facilities are not of an adequate standard.	Adequate facility and pitch required to cater for rugby. Facility should be multi-purpose.
Hockey	Does not meet the 'typical' population provision trigger for synthetic hockey facilities.	There is no facility in Horsham for Hockey games. Need for a facility located in Horsham.	Hockey facility required in Horsham. Facility should be multi-purpose.
Lawn Bowls	Adequate supply of Bowls Greens.	Lawn Bowls facilities in Horsham currently competing against each other for members.	Adequate number of bowling greens with opportunity for consolidation. Potential to upgrade one venue to be capable of hosting regional events.

Source: Horsham Facilities Demand Assessment, 2019

OUTDOOR SPORT FACILITIES WITHIN THE STUDY AREA

The following tables provide an overview of the key sporting facilities within the Study area assessed as part of the *Horsham Sports Facilities Demand Assessment,* including City Oval, Horsham Lawn Tennis and Croquet.

TABLE 46 CITY OVAL

Facility Name	City Oval
Sports Catered For	AFL, Cricket, Netball
Clubs	Horsham Demons Football and Netball Club Horsham Cricket Association Inc.
Number of Courts/Fields/Rinks	X1 football/cricket oval (grass field with turf wicket) X1 netball court (hard court)
Main Purpose	Club grounds, training and matches
Land Ownership	Crown Land
Playing Arenas Indoor / Outdoor	Outdoor
Lighting	Yes (150-300 Lux)
Clubrooms/Pavilion	X1 Grandstand X1 Clubrooms (two storey building upstairs licenced to Horsham Demons) X1 Netball Clubrooms
Car Parking	Yes (some onsite parking around the ground and offsite, on street parking)
Other Facilities	Digital Scoreboard Broadcasting Box Toilet Block Halls (Horsham Pipe Band Inc. & Horsham City Brass Band Inc) Playgrounds
Other Comments	Considered the premier venue in Horsham for football and cricket matches.
Key Facility Issues Identified through Consultation and Site Visits	• Size of the field is too small for hosting premier matches. • Limited area for runoff between boundary and fence. • Short boundary length for cricket. • Incorrect field orientation for cricket. • Pavilion is ageing and is over two levels. • No Universal access (no lift to second storey). • Horsham Demons Football/Netball Club have exclusive use over second storey of the Pavilion. • Insufficient number of public toilets and poorly accessible. • Universal access not provided to grandstand. • Facility is generally not open to the public. • Onsite parking is generally not allowed. However, access to onsite parking is provided for people with a disability. • Accessibility/scheduling of use of the facility for different sports i.e. Football / Cricket • Grandstand subject to cold southerly winds in winter (steel seating is cold). • Current location of pavilion is not ideal.

Source: Horsham Facilities Demand Assessment, 2019

TABLE 47 HORSHAM LAWN TENNIS (AND CROQUET)

Facility Name	Horsham Lawn Tennis (and Horsham Croquet)
Sports Catered For	Tennis, Croquet
Clubs	Horsham Lawn Tennis Club
Number of Courts/Fields/Rinks	X24 Courts - grass (approx. 16 courts maintained) X1 Croquet Court
Main Purpose	Club grounds, training, matches
Land Ownership	Crown Land managed by Council as the Committee of Management
Playing Arenas Indoor / Outdoor	Outdoor
Lighting	No (recent application for funding for lighting)
Clubrooms/Pavilion	Clubrooms
Car Parking	Yes on site parking
Other Facilities	Co-located with Horsham Croquet Club.
Key Facility Issues Identified through Consultation and Site Visits	• Not all courts are maintained. Courts are difficult to maintain and costly to maintain. • Currently no lighting. • No formal licence in place. • Pavilion has no accessible toilets.

• Roadway between community pavilion and courts which accesses car parking and playground.

Source: Horsham Facilities Demand Assessment, 2019

6.5. COMMUNITY FACILITIES

Table 48 and Figure 11 summarise the community assets and infrastructure in the study area.

Horsham's community facilities are predominantly concentrated to the CAD, with the exception of the Kalkee Integrated Children's Hub in Horsham North. Many of the community facilities in the CAD are disparate and are not well integrated.

There are limited examples of a co-location of community uses in the study area. Community uses are shifting towards a co-location model, whereby a multitude of uses are provided within the one facility (or Hub). This can encourage greater utilisation, as well as help realise efficiencies in management, operations and cater to varying economies of scale. Successful examples of co-located community hubs can be seen throughout Regional Victoria including the Echuca Library/Community Hub, Civic Hall Ballarat and Tallangatta Integrated Community Centre.

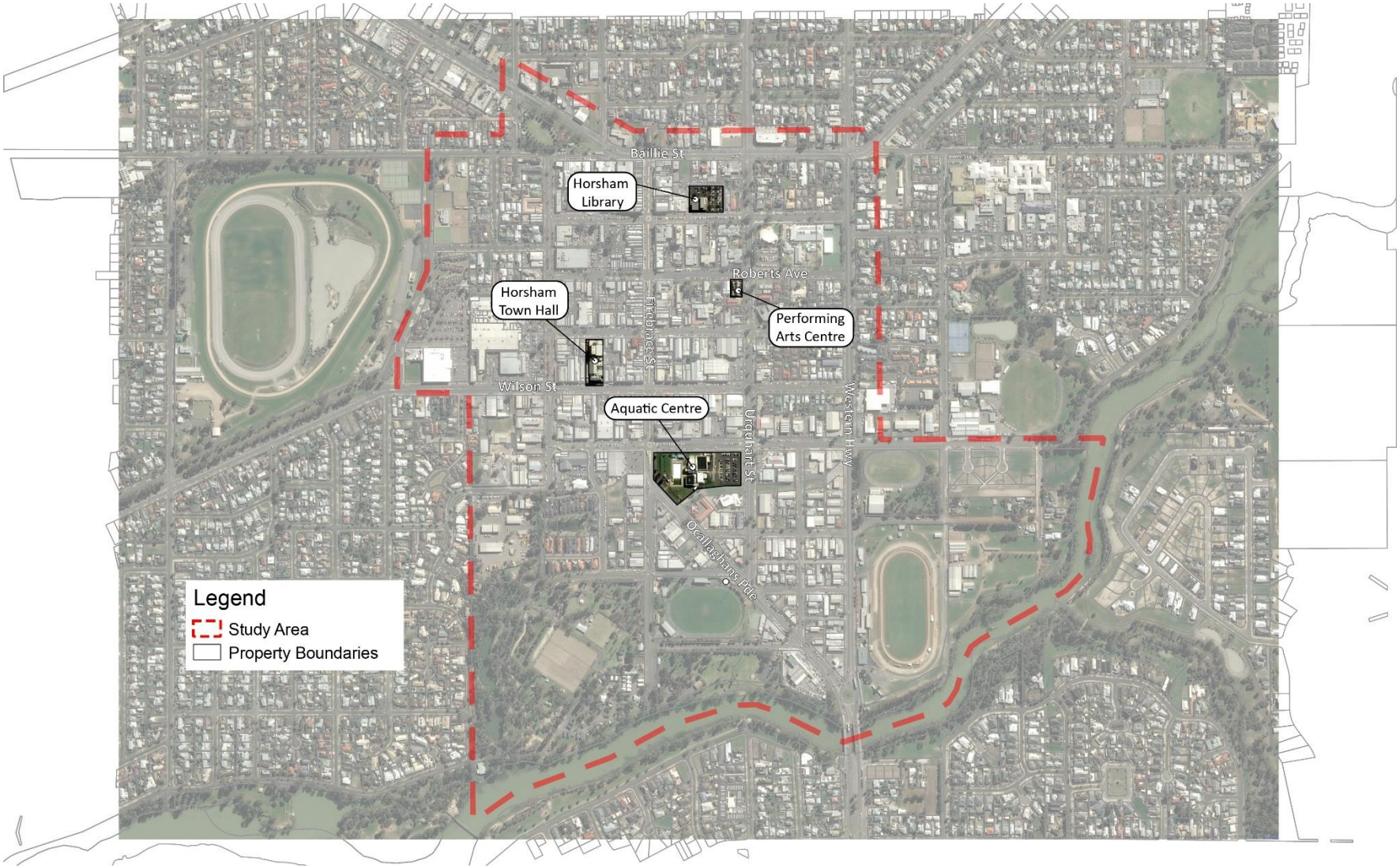
Whilst the Kalkee Integrated Children's Hub and the Horsham Town Hall are successful examples of integrated models for community uses, there is an opportunity to improve and strengthen this in Horsham, particularly in the CAD.

TABLE 48 LOCATION & TYPES OF COMMUNITY ASSETS & INFRASTRUCTURE – HORSHAM (STUDY AREA) - 2019

NAME	CATEGORY	LOCATION	DESCRIPTION
Wesley Performing Arts Centre	Arts and Culture (Performing Arts Centres)	17A Roberts Ave	A vibrant hub for cultural and community events in the Wimmera region.
Horsham Regional Art Gallery (Horsham Town Hall)	Arts and Culture (Art Gallery)	80 Wilson St, Horsham	Showcases local and international arts
Horsham School of Dance	Arts and Culture (Performing Arts Centres)	Level 1/77 Firebrace St	Offers classes in Pre-School Dance, Classical Ballet, Contemporary, Hip Hop, Street Beat (Tap), Irish Dancing and Musical Theatre.
Maydale Reserve (Events venue)	Events space	22 McBryde St, Horsham	Events venue for the Horsham Show, Horsham Irish Festival and the Horsham Agricultural Society and more.
Horsham Library	Community Facility (Library)	28 McLachlan St, Horsham	Local library that is part of the Wimmera Regional Library Corporation.
Kalkee Integrated Children's Hub*	Community Facility (Children's Hub)	28 Kalkee Road, Horsham	This Integrated Children's Hub is located in Horsham North and opened in 2018. The Hub delivers a range of education, health and support services to children and their families including a Maternal Child Health (MCH), childcare and kindergarten, playgroup, Uniting Wimmera's parenting training and other specialist services like Barwon CASA and the Horsham Toy Library.
Federation University*	Education (University / TAFE)	289 Baillie St, Horsham VIC 3400	Offers a selection of university and TAFE courses and features modern and specialised training facilities.

Source: Urban Enterprise, 2019
* outside of the study area

FIGURE 11 MAP OF COMMUNITY ASSETS & INFRASTRUCTURE – HORSHAM (STUDY AREA) - 2019



PART C:

RETAIL AND COMMERCIAL LAND SUPPLY AND DEMAND

Part C provides a high-level assessment of commercial and retail uses in the study area including the current land use mix and floorspace provision.

This assessment also projects the estimated level of floorspace that will be supportable in the study area in the future having regard to the existing provision of floorspace and retail mix, population growth, Horsham's current retail catchment and expenditure per capita, as well as current and future trading performance.

7. EXISTING LAND SUPPLY IN THE CAD

7.1. INTRODUCTION

This section provides an overview and assessment of the existing supply of land in the study area. The key focus for the assessment is retail and commercial land use in the study area.

The information presented in this section is based on Horsham Rural City Council's Property Rates Database (2018), utilising the Australian Valuation Property Classification Code (AVPCC) and an Urban Enterprise retail and commercial category to analyse the data.

7.2. EXISTING LAND SUPPLY IN THE CAD

There is approximately 170 hectares of zoned land in the study area, with the majority of land zoned for commercial and residential uses, as shown in Table 49.

The Commercial 1 Zone (C1Z) precinct includes approximately 50 hectares of land. The supporting Commercial 2 Zone (C2Z) precinct on O'Callaghan's Parade includes approximately 15 hectares of land.

Residential uses in the study area include approximately 41 hectares of land. The Public Parks and Recreation Zone (PPRZ) includes approximately 40 hectares of land, the majority of which is located in the south of the study area, along the riverfront.

TABLE 49 LAND SUPPLY BY ZONE, STUDY AREA

ZONE	AREA (HA)
General Residential Zone 1	31.68
General Residential Zone 2	9.32
Commercial 1 Zone	48.50
Commercial 2 Zone	14.98
Public Park and Recreation Zone	39.26
Public Use Zone 1	0.79
Public Use Zone 4	0.05
Public Use Zone 6	2.27
Public Use Zone 7	1.34
Rural Living Zone	0.83
Special Use Zone 4	19.88
TOTAL	168.90

Source: HRCC Property Rates Database, verified by Urban Enterprise, 2019

VACANT LAND SUPPLY

It is estimated that there is approximately 3.1 ha of vacant land across 26 properties in the study area, including one vacant Council owned site (0.11 ha) to the east of the study area, along the riverfront. 68% of vacant land (2.12ha) is zoned commercial.

There are three notably larger vacant sites in the study area with future development potential. The largest of the three is located at 99 Wilson street and is C1Z. The site has an approximate land area of 0.46 ha and is currently for sale.

The second vacant site is 0.34ha and zoned C1Z. This site is located at 3-7 Madden Street; to south of Harvey Norman.

The other smaller vacant site is approximately 0.2 ha and is zoned C2Z. The site is located to the west of Horsham Gateway Centre (124 Wilson Street).

TABLE 50 VACANT SUPPLY BY LAND USE TYPE, STUDY AREA

	AREA (HA)	NO. OF LOTS
Vacant Residential	0.87	8
Vacant Commercial	2.12	17
Vacant Council Land	0.11	1
Total Vacant Land	**3.10**	**25**

Source: HRCC Property Rates Database, verified by Urban Enterprise, 2019

7.3. EXISTING SUPPLY OF RETAIL AND COMMERCIAL FLOORSPACE

This section summarises the existing supply of retail and commercial floorspace in the study area. In order to accurately quantify retail and commercial floorspace using HRCC's Property Rates Database, a retail and commercial category has been adopted for each property and is based on the AVPCC. The rates database has been verified by Urban Enterprise through a desktop analysis.

It should be noted that the adopted method to estimate floorspace is different to the method adopted in the retail analysis prepared in 2011 and 2013 by Essential Economics.

As at 2018, it is estimated that there is a total of 79,000 sqm of occupied retail floorspace and 41,000 sqm of occupied commercial floorspace in the study area. Further, there is an estimated 6,800 sqm of vacant retail and commercial floorspace. In total, there is there is approximately 128,000 sqm of built floorspace within the study area.

The study area has a broad range of retail uses and is largely concentrated to Firebrace Street, Horsham Plaza and Horsham Gateway Centre. It should be noted that the scale of retail floorspace provision in the study area is significant, with 3.9 sqm of retail floorspace per HRCC resident. This is significantly higher when compared with the national average (2.2 sqm/person)[5].

Of the 79,000 sqm of occupied retail floorspace in the study area, 69% of total retail floorspace is categorised as non-food retail. The current ratio of non-food retail indicates a potential oversupply, particularly given that comparable regional centres such as Swan Hill's CBD has a current ratio of 53% (non-food retail).

Food, Liquor and Groceries (FLG) accounts for 13% of occupied retail floorspace. The majority of FLG floorspace is occupied by the two full-line supermarkets (Coles and Woolworths) and a smaller supporting discount supermarket (ALDI).

[5] Performance Benchmarking of Australian Business: Planning, Zoning and Development Assessment, Shopping Centre Council of Australia, 2010

Additionally, there is significant floorspace associated with office uses in the activity centre, largely accommodating major bank branches, real estate, finance, insurances, accountants and other consultants.

TABLE 51 FLOORSPACE SUMMARY BY RETAIL AND COMMERCIAL USE, STUDY AREA

RETAIL FLOORSPACE				
	Essential Economics (sqm) (2011)	Essential Economics (sqm) (2013)	Urban Enterprise (sqm) (2018)	% of total floorspace
Food, Liquor & Groceries	9,690	9,610	10,207	13%
Food Catering	3,600	3,400	7,148	9%
Apparel, Homewares & Leisure	42,270	42,900	27,925	35%
Bulky Goods			21,892	28%
Unclassified Shopping Centre Retail			4,944	6%
Retail Services	4,460	3,810	6,674	8%
Total Retail	**60,020**	**59,720**	**78,791**	**100%**
COMMERCIAL FLOORSPACE				
	Essential Economics (sqm) (2011)	Essential Economics (sqm) (2013)	Urban Enterprise (sqm) (2018)	% of total floorspace
Office			28,187	66%
Bank			2,410	6%
Medical			7,087	17%
Entertainment			1,500	4%
Other Commercial			1,698	4%
Mixed Use			1,622	4%
Total Commercial	**33,660**	**34,440**	**42,504**	**33%**
Vacant Retail and Commercial	5,680	4,630	6,845	5%
Total (Occupied and vacant)	**99,360**	**98,790**	**128,140**	

Source: HRCC Property Rates Database, verified by Urban Enterprise, 2018

RECENT RETAIL DEVELOPMENT ACTIVITY

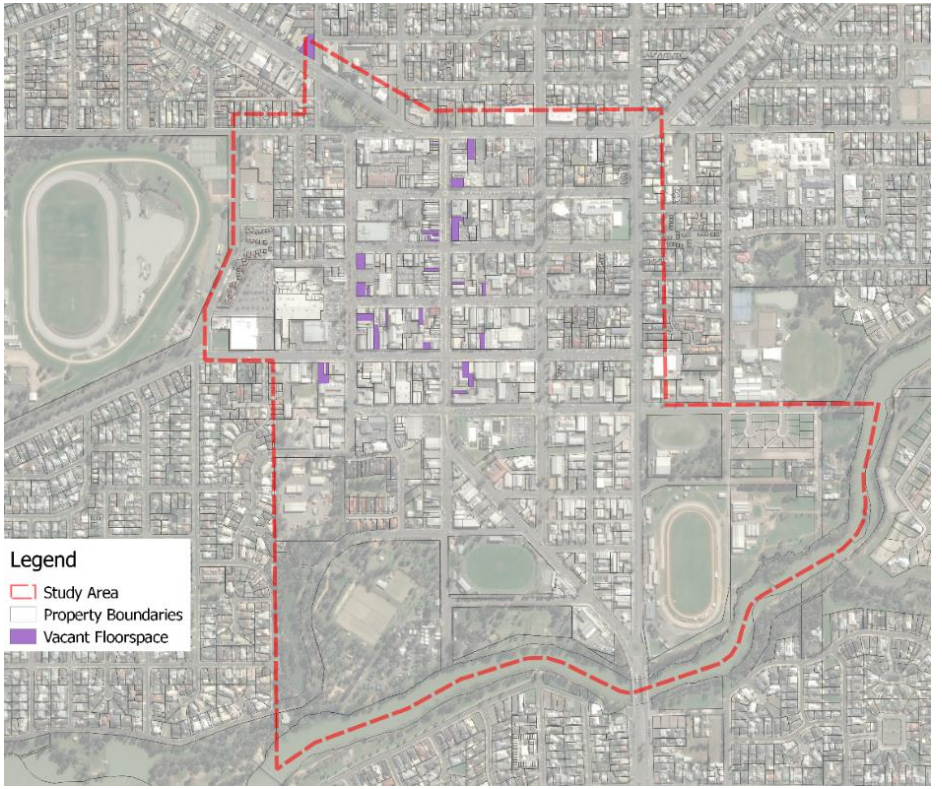
Since the Retail Assessment was undertaken by Essential Economics in 2013, there has been limited retail development activity. The estimated net additional floorspace in the study area is in the order of 6,500 sqm. This includes the development of the Horsham Gateway Centre (approx. 5,000sqm net additional floorspace) and Mitre 10 (approx. 1,400 sqm net additional floorspace).

VACANCY RATE

There is a total of 6,845 sqm of vacant retail and commercial floorspace, which represents 5.3% of all floorspace within the study area. The vacancy rate has increased slightly from since 2013, indicating a potential weakening of demand in the retail and office market.

Figure 12 shows the current vacant and unoccupied commercial floorspace within the study area. The figure shows that the retail vacancies are dispersed throughout the CAD, but are generally concentrated to the larger premises that have a higher provision of floorspace.

FIGURE 12 LOCATION OF VACANT FLOORSPACE, STUDY AREA



Source: Urban Enterprise, 2019

8. RETAIL DEMAND

8.1. INTRODUCTION

This section provides a high-level assessment of demand for retail floorspace in the study area. The forecast supportable is estimated based on projected population growth as well as an analysis of Horsham's current role and position in the regional retail hierarchy. This assessment also considers Horsham's current retail catchment and market share of retail expenditure.

8.2. KEY FINDINGS

Horsham is the highest order regional centre in the Wimmera Southern Mallee region.

Horsham is the highest order retail centre in the Wimmera Southern Mallee. Horsham attracts shoppers from smaller towns within the broader region of Yarriambiack, Hindmarsh, West Wimmera and Northern Grampians, as well as parts of Buloke Shire and South Australia.

Although major regional centre retailers are located within 2 hours drive in Bendigo and Ballarat, Horsham will need to continue to perform a regional retail role into the future.

There is a potential oversupply of retail floorspace in the study area.

Although Horsham's retail catchment extends across the Wimmera Southern Mallee region, there is a potential oversupply of retail floorspace in the study area. The current provision is in the order of 4 sqm per Horsham resident, significantly higher than the national average (2.2 sqm/person).

The current commercial vacancy rate across the study area is above 5%. Unoccupied commercial floorspace is generally concentrated to larger floorplate premises, which are often unsuitable for niche and boutique retailers and does not often meet contemporary retail business needs.

There is a potential over provision of non-food retail.

Of the 79,000 sqm of occupied retail floorspace in the study area, approximately 70% is categorised as non-food retail. This is a very high proportion of non-food retail, particularly given that comparable regional centres such as Swan Hill's CBD has a current ratio of 53% (non-food retail).

Discussions with local agents revealed that there are recent examples of a transition of use across larger vacant retail space, whereby larger retail premises typically suited to larger format goods; are transitioning into shop front office uses.

Given the potential overprovision of non-food retail in the study area, there is an opportunity to encourage a more diverse retail mix in the future. This includes a higher provision of food catering retail (i.e. hospitality uses), as well as supporting more of an entertainment and service offering.

There is a limited amount of vacant commercially zoned land in the study area, but there are clear opportunities for reinvestment and redevelopment.

There is an estimated 2.1 hectares of vacant commercial land dispersed across 17 properties in the study area. The vacant supply of commercially zoned land in the study area is limited. There are, however, clear examples and candidate sites for reinvest or redevelopment. Sites and precincts that present as potential candidates for re-investment and/or redevelopment include:

- Council depot;
- Concrete batching plant (Selkirk Drive);
- Commercial/light industrial precinct on O'Callaghans Parade; and
- Lower-value retailers dispersed throughout the CAD.

Forecast demand for retail floorspace in Horsham to 2036 is negligible.

Horsham's retail catchment is forecast to experience low population and expenditure growth over the next 20 years. The level of retail floorspace that is supportable in Horsham to 2036 is estimated in the order of 2,000 sqm.

This level of growth is negligible and could be absorbed within existing unoccupied premises. The estimate indicates that there is a sufficient and potential oversupply of built retail floorspace in the study area.

8.3. RETAIL TRADE AREA

RETAIL HIERARCHY

Table 52 shows the competing retail hierarchy within a 200km catchment of Horsham. The table shows that Horsham is the highest order retail centre in the Wimmera Southern Mallee region. Given its relative isolation, it is assumed that Horsham attracts shoppers from smaller satellite towns within the broader region.

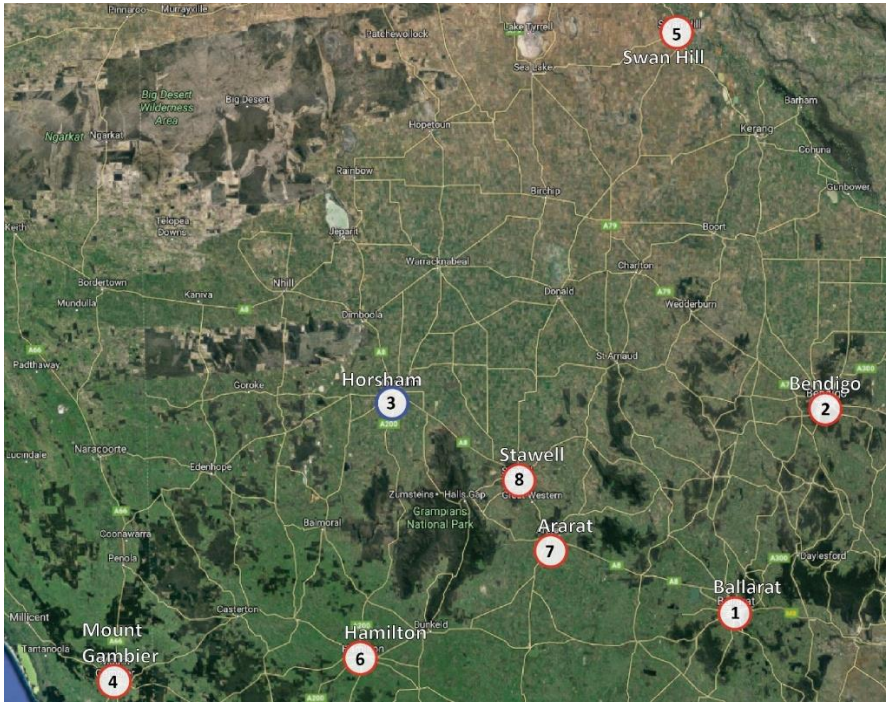
The two higher order retail centres are Ballarat and Bendigo. These large retail centres support in excess of 100,000 sqm of retail floorspace and include major retailers such as Myer and Big W. However, both of these centres are in excess of 170km and a 2-hour drive from Horsham.

TABLE 52 RETAIL HIERARCHY

ID	TOWNSHIP	ROLE	ANCHORS	FLOORSPACE (SQM)	DISTANCE FROM HORSHAM
1	Ballarat	Regional City	Woolworths, Coles, ALDI, Myer, Target, Big W, Bunnings Warehouse	140,000[1]	175km (2hr 7min drive)
2	Bendigo	Regional City	Woolworths, Coles, Myer, Target, Big W, Officeworks, Cinema		185km (2hr 30min drive)
3	Horsham	Regional City	Woolworths, Coles, ALDI, Target, Kmart, Bunnings Warehouse, Mitre 10, Harvey Norman	79,000[2]	
4	Mount Gambier	Regional City	Woolworths, Coles, Target, Kmart, Harvey Norman		175km (2hr 23min drive)
5	Swan Hill	Regional Centre	Woolworths, Coles, Target, Bunning Warehouse, Harvey Norman	46,610[3]	195km (2hr 30mins drive)
6	Hamilton	Regional Centre	Woolworths, Coles, ALDI, Target, Harvey Norman		115km (1hr 26min drive)
7	Ararat	Regional Centre	Woolworths, ALDI, Target, Mitre 10, Cinema	22,894[4]	91km (1hr 7min drive)
8	Stawell	Town	Woolworths, SUPA IGA, Mitre 10		64km (46min drive)

2. Council Rates Database, 2018; 3. Swan Hill Retail Strategy 2014; 4. Ararat Sustainable Growth Future, 2014;
* Data unavailable

FIGURE 13 RETAIL HIERARCHY LOCATIONS



Source: Urban Enterprise, 2019

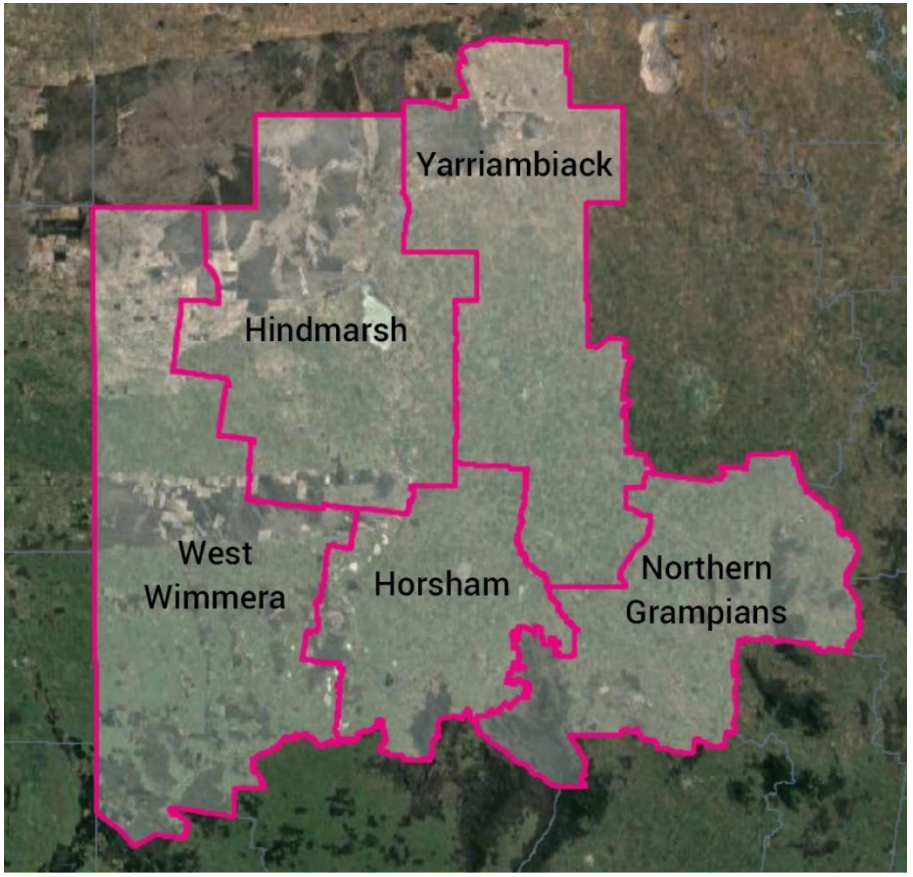
DEFINING THE RETAIL TRADE AREA

The main trade area (MTA) is defined as the Wimmera Southern Mallee Region, which includes the Local Government Areas (LGA) of Horsham, Northern Grampians, Yarriambiack, West Wimmera and Hindmarsh (LGA), as shown in Figure 2.

Within the MTA, Horsham has been identified as the Primary Catchment, while the remaining municipalities form the Secondary Catchment.

Given the economic role and existing supply of retail floorspace in centres such as Hamilton and Mount Gambier to the south, and Ballarat and Bendigo to the south-east of Horsham, the MTA does not include municipalities further south. However, given the lack of any regional centre to the immediate north-west of Horsham, it is appropriate for the MTA to extend further to the north-west.

FIGURE 14 MAIN TRADE AREA, HORSHAM



Source: Remplan MapBuilder, 2019

POPULATION

As at 2016, the population of the MTA was 47,704 people. The Primary Catchment (Horsham) accommodates 42% of the MTA population.

Overall, the MTA experienced a decline in population between 2011 and 2016. The MTA population has decreased by 1,200 persons, with all LGAs in the Secondary Catchment recording a decline in population. The Primary Catchment (Horsham) is the only area to experience population growth; increasing by 366 persons (1.9%) between 2011 and 2016.

Table 53 summarises the historical population change within the MTA between 2011 and 2016. Please note that this assessment is high-level only. As there are only parts of Buloke Shire considered to be a part of the secondary trade area, it has been excluded from the assessment.

TABLE 53 CATCHMENT AREA POPULATION, ABS ERP

	POP. 2011	POP. 2016	CHANGE (2011-16)	AAGR % (2011-2016)
Horsham LGA (Primary Catchment)	19,523	19,889	366	0.4%
Hindmarsh LGA (Secondary)	5,856	5,718	-138	-0.5%
Northern Grampians LGA (Secondary)	12,054	11,518	-536	-0.9%
West Wimmera LGA (Secondary)	4,287	3,895	-392	-1.9%
Yarriambiack LGA (Secondary)	7,183	6,684	-499	-1.4%
Total: Primary Catchment	*19,523*	*19,889*	*366*	*0.4%*
*Total: Secondary Catchment**	*29,380*	*27,815*	*-1,565*	*-1.1%*
Total: Main Trade Area	***48,903***	***47,704***	***-1,199***	***-0.5%***

Source: ABS Regional Population Growth, 2017
* Buloke Shire has been excluded from this assessment

FORECAST POPULATION

Table 54 shows the forecast population of the MTA to 2031. Historical population trends for the MTA are forecast to continue. The population of the MTA is projected to decline by approximately 1,300 persons by 2031. The Horsham is the only area within the MTA that is projected to increase (0.6% per annum).

As at 2031, it is projected that the MTA population will shrink to 45,860, declining at a rate of 0.2% per annum.

The population projections provided in Table 54 indicate that Horsham is attracting residents from surrounding Council areas, predominantly from more rural areas as proximity and access to amenity becomes more paramount as residents get older.

The forecast decline in the MTA population over the next 15 years suggests that demand for additional retail floorspace in Horsham may not be needed.

TABLE 54 VICTORIA IN FUTURE POPULATION, 2016-2031

VIF AREA (LGA)	2016	2021	2026	2031	CHANGE 2016-2031	AAGR 2016-2031
Primary Catchment						
Horsham	19,887	20,492	21,129	21,793	+1,906	0.6%
Secondary Catchment						
Hindmarsh	5,393	5,130	4,883	4,641	-752	-1.0%
Northern Grampians	11,420	11,119	10,931	10,820	-600	-0.4%
West Wimmera	3,811	3,471	3,210	2,988	-823	-1.6%
Yarriambiack	6,645	6,254	5,931	5,618	-1,026	-1.1%
Total: Primary Catchment	*19,887*	*20,492*	*21,129*	*21,793*	*+1,906*	*0.6%*
Total: Secondary Catchment	*27,268*	*25,975*	*24,956*	*24,067*	*-3,201*	*-0.8%*
Total: Main Trade Area	**47,156**	**46,466**	**46,085**	**45,860**	**-1,296**	**-0.2%**

Source: Victoria In Future, 2017

8.4. RETAIL EXPENDITURE

RETAIL EXPENDITURE

Retail expenditure in the Primary Catchment (Horsham) is $13,223 per capita. This is lower when compared with the Victorian average ($13,626).

Based on the MTA's estimated residential population (2018), total retail expenditure pool is estimated at $619.1 million, as shown in Table 56.

TABLE 55 RETAIL EXPENDITURE BY CATEGORY, 2018

RETAIL CATEGORY	PRIMARY	SECONDARY	VICTORIA AVE
Food, Liquor and Groceries	$6,510	$6,584	$6,360
Food Catering	$1,527	$1,421	$1,768
Apparel, Homewares and Leisure	$3,299	$3,122	$3,604
Bulky Goods	$1,431	$1,351	$1,413
Retail Services	$457	$426	$480
Total	**$13,223**	**$12,904**	**$13,626**

Source: Marketinfo, 2014 indexed by Urban Enterprise to 2018

TABLE 56 RETAIL EXPENDITURE POOL, MTA 2018

CATCHMENT AREA	POPULATION ESTIMATE (2018)	EXPENDITURE PER CAPITA	TOTAL EXPENDITURE
Primary Catchment	20,133	$13,223	$266.2 m
Secondary Catchment	27,347	$12,904	$352.9 m
Main Trade Area	**47,480**	**$13,039**	**$619.1 m**

Source: MarketInfo, 2014 adapted by Urban Enterprise 2019; VIF, 2017

ESTIMATED MARKET SHARE

To estimate Horsham's current market share, Urban Enterprise has adopted certain assumptions in respect of retail turnover density, the retail trade catchment and retail expenditure per capita. Assumptions are based on previous experience in retail demand analysis but have been adapted to reflect the current retail conditions in Horsham.

The total annual retail turnover in Horsham is estimated at $326.7 million. based on our analysis, Horsham captures 47% of the MTA expenditure pool and 10% of market share is generate by visitors (i.e. from persons outside of the MTA). The 10% of turnover that is generated from outside the MTA is typically a lower proportion when compared with other regional cities. However, this is largely due to the isolated location of Horsham and the broad catchment area.

The Primary Catchment is estimated to have a higher primary catchment of approximately 72%, as shown in Table 57.

TABLE 57 ESTIMATED MARKET SHARE SUMMARY

	TURNOVER	EXPENDITURE	MARKET SHARE
Horsham Annual Turnover	$326.7 m		
External Turnover	$32.7 m		10%
Total MTA	**$294 m**	**$619.1 m**	**47%**
Primary Catchment	$191.1 m	$266.2 m	72%
Secondary Catchment	$102.9 m	$352.9 m	29%

Source: Urban Enterprise, 2019

FORECAST RETAIL EXPENDITURE GROWTH

Retail expenditure of the residential catchment is expected to grow by $45 million, to $664 million, over the next 18 years. Given that the overall population of the MTA is expected to decline, this growth in expenditure is largely driven by the assumed real growth in retail expenditure of 0.5% per annum.

This real growth rate is lower than the long-term average to reflect the declining rate of real growth in recent years, and to allow for an expected increase in the impact of online retail on store-based retailers, which is also supported by the decline in retail employment in the Horsham suburb and Horsham RC between 2011 and 2016.

TABLE 58 PROJECTED RETAIL EXPENDITURE GROWTH, 2018-2036

	2018	2026	2036	CHANGE
Primary Catchment	$266.2 m	$293.8 m	$328.3 m	+$62.1 m
Secondary Catchment	$352.9 m	$346.9 m	$335.9 m	-$17 m
Total MTA	**$619.1 m**	**$640.7 m**	**$664.2 m**	**+$45.1 m**

Source: MarketInfo, 2014 adapted by Urban Enterprise 2019; VIF, 2017

8.5. SUPPORTABLE FLOORSPACE PROJECTIONS

Projections for supportable retail floorspace in the study area are prepared based on the preceding analysis and the following set of assumptions:

- Both the Primary and Secondary Catchments will continue to attract a constant market share based on current estimates. Given the transition of population (and expenditure) from the Secondary Catchment to the Primary Catchment, this will lead to a growing market share of catchment resident turnover.
- Turnover densities will increase at a rate of 0.5% per annum over the adopted period.
- Retail expenditure per capita will increase at a rate of 0.5% per annum over the adopted period.
- The MTA population is based on ERP at 2016 and is projected to 2036 using the Victoria in Future growth rates.

Table 59 shows that supportable floorspace projections for all retail types to 2036 estimate an increase in supportable floorspace of 2,110 sqm over the next 18 years in Horsham.

TABLE 59 RETAIL EXPENDITURE, TURNOVER AND SUPPORTABLE FLOORSPACE, HORSHAM, 2018-2036

	2018	2026	2036	Change	AAGR
Population	47,480	46,713	46,029	-1,451	-0.2%
Catchment Retail Spending	$619.1 m	$634.2 m	$657.4 m	+$38.3 m	0.3%
Turnover from Primary Catchment	$191.1 m	$208.8 m	$233.3 m	+$42.2 m	1.0%
Turnover from Secondary Catchment	$102.9 m	$100.1 m	$96.9 m	-$6 m	-0.3%
Turnover from outside catchment	$32.7 m	$34.3 m	$36.7 m	+$4 m	0.6%
Total Turnover	$326.7 m	$343.3 m	$367 m	+$40.3 m	0.6%
Average Turnover per sqm	$4,150	$4,320	$4,540	+$390	0.5%
Total Supportable Retail Floorspace	**78,790**	**79,560**	**80,900**	**+2,110**	**0.1%**

Source: Urban Enterprise, 2018

9. INDUSTRIAL LAND ANALYSIS

9.1. INTRODUCTION

This section provides an overview of the existing industrial uses within the study area and the competing supply, both within and surrounding Horsham.

9.2. KEY FINDINGS

Some parts of the Commercial 2 Zone Precinct on O'Callaghans Parade present an opportunity for urban renewal.

The commercial precinct on O'Callaghans Parade primarily consists of light industrial uses (manufacturing, wholesale trade), bulky goods retail and a number of residential dwellings.

Given the ad-hoc nature of development that has occurred in this precinct over a long period of time, there is an absence of business clustering and very limited examples of new businesses that have established in the precinct.

The precinct is strategically located between the CAD and the Wimmera riverfront and contains some areas which are candidates for urban renewal.

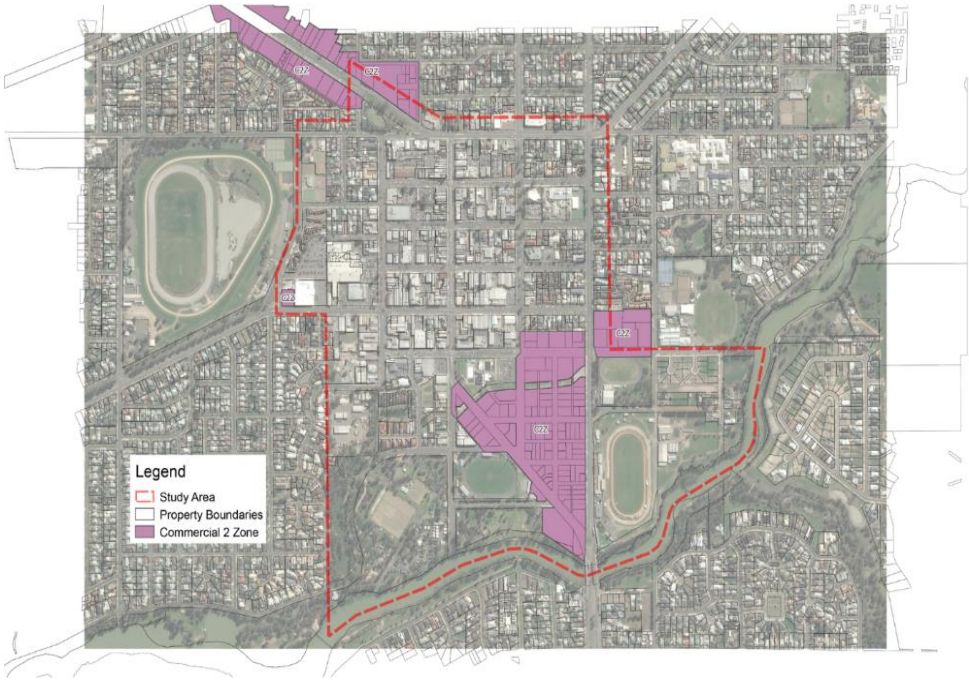
Some industrial uses in the study area are considered unsuitable and difficult to integrate with surrounding urban uses and opportunities to re-locate to dedicated industrial precincts outside of the urban area should be considered. There is a significant supply of vacant industrial land in both Horsham South and the proposed WIFT precinct and are considered more suitable areas for heavier industrial uses.

The western section of the O'Callaghans Parade precinct should be considered as candidates to accommodate housing, tourism and commercial uses, particularly those with proximity to retail and civic services and those in proximity to the riverfront precinct and near Firebrace Street.

9.3. EXISTING STUDY AREA SUPPLY

The industrial uses that exist in the Horsham study area currently operate within the Commercial 2 Zone (C2Z), generally to the south of the retail core. Based on the same method undertaken for the retail and commercial supply analysis, it is estimated that there is 14.98 ha of C2Z land within the study area as at 2018.

FIGURE 15 LOCATION OF COMMERCIAL 2 ZONED LAND, STUDY AREA



Source: Urban Enterprise, 2019

VACANT LAND

Within the C2Z, there is a total of 0.4 ha of vacant land across five different properties. Each of these properties are of similar land area, ranging from 0.06 ha to 0.1 ha in size.

INDUSTRIAL FLOORSPACE

Although the majority of industrial uses sit within the C2Z (21,000 sqm), other zones including C1Z (11,900 sqm), GRZ1(300 sqm) and GRZ2 (300 sqm) also accommodate some industrial uses. As such, the study area does not include a clearly defined industrial cluster. Rather, the industrial uses are primarily dispersed.

Based on Council's Property Rates Database, it is estimated that there is 33,515 sqm of industrial floorspace in the study area; consisting mostly of warehouse space (69%), as shown in Table 60.

TABLE 60 INDUSTRIAL FLOORSPACE BY LAND USE, STUDY AREA

	Floorspace	Proportion of total (%)
Factory	4,741	14%
Warehouse	23,084	69%
Other Industrial	4,571	14%
Vacant Industrial	1,119	3%
Total (Occupied and vacant)	**33,515**	

Source: Property Rates Database, 2018

There is a floorspace vacancy rate of 3% within the industrial uses. This rate is approximately half the vacancy rate of retail and commercial uses in the study area, suggesting that industrial activity is relatively productive and well utilised.

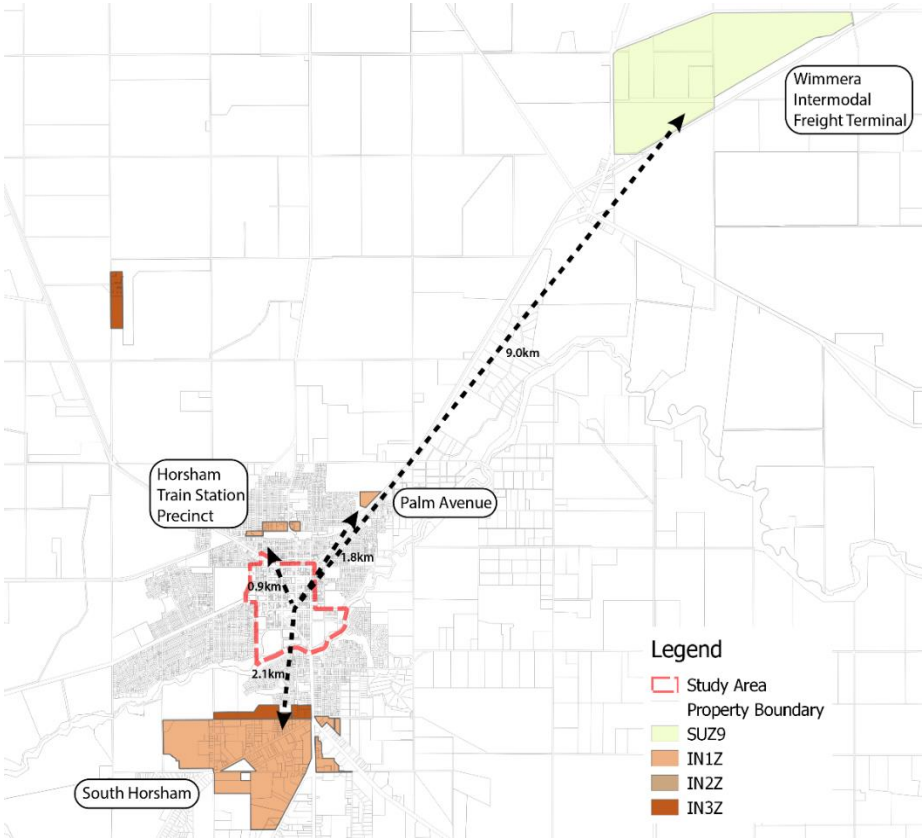
However, development of industrial uses within the study area appears to have occurred in an ad-hoc manner. This means that there are limited examples of new industrial businesses that have established in the precinct.

9.4. COMPETING SUPPLY

Surrounding the study area, there are three Industrial 1 Zone (IN1Z) clusters, being:

- South Horsham and Enterprise Estate (300 ha)
- Horsham North Industrial Precinct (10.7 ha); and
- Dooen Road/Palm Avenue (5.3 ha).

FIGURE 16 FIGURE 2 COMPETING INDUSTRIAL SUPPLY CONTEXT



Source: Urban Enterprise

SOUTH HORSHAM AND ENTERPRISE ESTATE

The largest industrial precinct in the Horsham locality is Horsham South, with an estimated 275 ha of IN1Z land (180 ha within Horsham) and 23.8 ha of Industrial 3 Zone (IN3Z) land. This precinct is bisected by Golf Course Road and is largely made up of medium-large sites (1+ ha). There is a range of businesses in the precinct, including various manufacturers (plastics, paving and building parts), vehicle and automotive repairs, car sales and engineering services.

It is also estimated that 74 ha of the IN1Z land is vacant (27%), while 17 ha of the IN3Z land is vacant (71%).

HORSHAM NORTH INDUSTRIAL PRECINCT

The train station precinct is located just north of Horsham Station. The major industrial uses of the site appear to be related to fuel services, grain silos and smash repairs.

It is estimated that there is approximately 9,000 sqm of industrial floorspace within the precinct. Additionally, approximately 1.5 ha of the precinct is occupied by residential uses, while 1.0 ha is vacant.

DOOEN ROAD/PALM AVENUE

From desktop research, it appears that the development at Palm Avenue includes a single property and building, with a total estimated floorspace of 5,300 sqm.

The primary use of the site appears to be for farming equipment. Previously, the site was home to the CMI Foundry, which closed in 2012. Current operations appear to have started between 2016 and 2017. It is unclear whether the main building is currently under use.

OTHER

- Burnt Creek Drive Industrial Estate
- Regional Livestock Exchange

9.5. PROPOSED FUTURE INDUSTRIAL INVESTMENT

WIMMERA INTERMODAL FREIGHT TERMINAL PRECINCT

The Wimmera Intermodal Freight Terminal (WIFT) is located to the north-east of Doeen and is bound by the Wimmera Highway and the train line. The site is estimated to be 100 ha in size, with investment in the development being $2.5 million.

In 2017, it was announced that the State Government would support the development with $1.25 million of funding, which is estimated to create 20 new industrial lots, generate 80 jobs and attract further commercial opportunities.

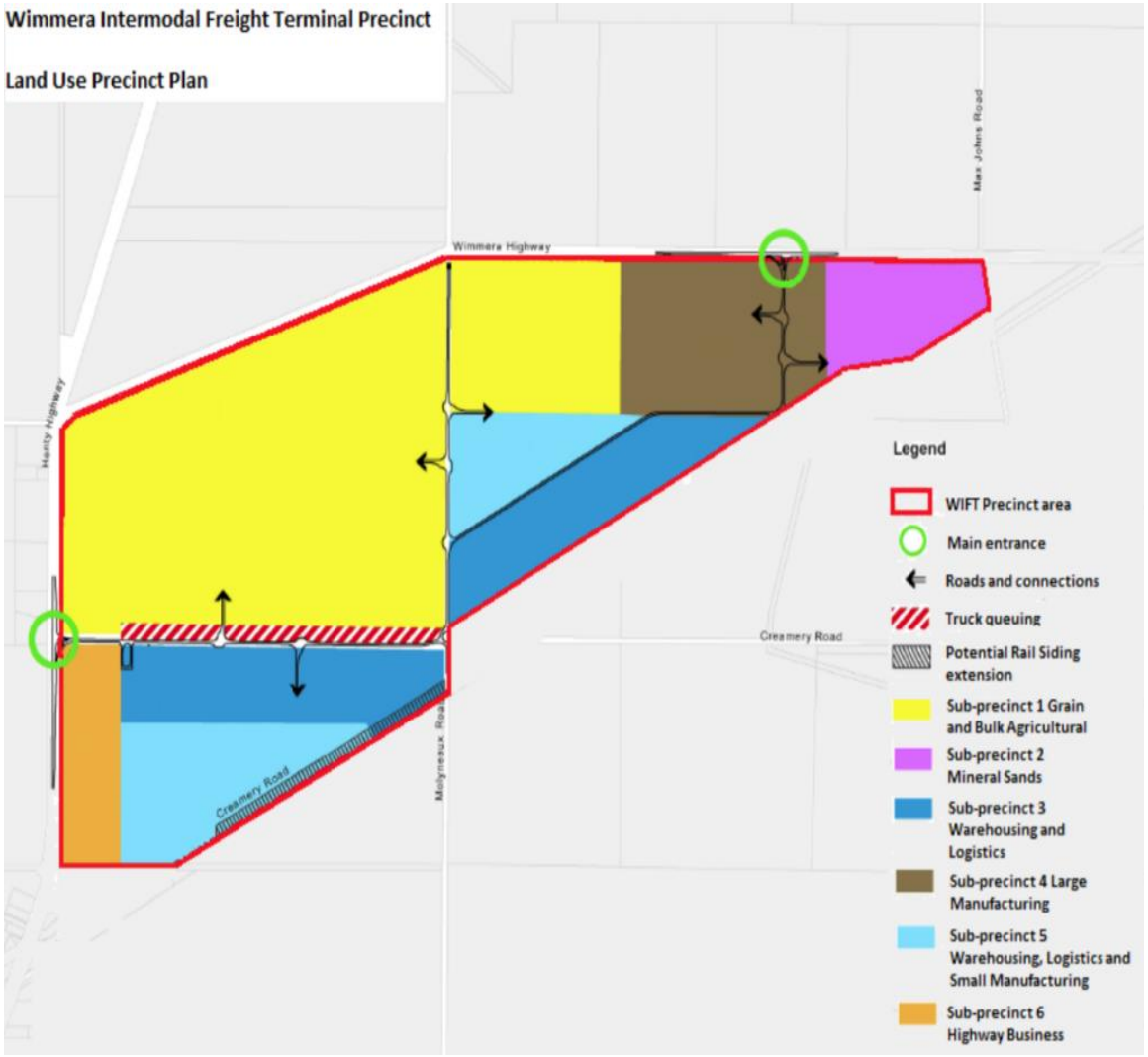
The development of site aims to improve "supply chain efficiency, reducing cost and improving the competitiveness of Victorian farmers". The Wimmera is one of Victoria's larger dryland farming regions and the site is identified as a key export hub for local grain growers.

Located in Schedule 9 to the Special Use Zone (SUZ9), the purpose of the zone is "to provide for industry involved in the storage and distribution of primary produce and raw materials and associated industry, warehouse, manufacturing, mineral sands processing and storage handling, office and retail uses in a manner which does not affect the safety and amenity of local communities".

The Planning Scheme identifies six sub-precincts of the WIFT, including:

- Grain and bulk agriculture produce;
- Mineral sands;
- Warehousing and logistics;
- Large manufacturing;
- Warehousing, logistics and small manufacturing; and
- Highway businesses.

FIGURE 17 WIFT LAND USE PRECINCT PLAN



Source: Horsham Planning Scheme, 2019

PART D:
CONSULTATION

Part D provides an overview of the consultation process including a summary of stakeholders that were engaged and a summary of findings.

The consultation process contributed to identifying issues relating to the study area, as well as formulating a vision and strategic objectives for the study area.

10. CONSULTATION

An extensive consultation process was undertaken with a broad range of stakeholders including Horsham Rural City Council, State Government, business and industry, the local community and various referral agencies.

Table 61 (overleaf) provides a summary of stakeholders who were engaged and consulted.

TABLE 61 OVERVIEW OF STAKEHOLDER CONSULTATION

SESSION	ATTENDEES	FORMAT	LOCATION
Council Officer Workshop	Council Officers	Workshop	Council Offices
Council Executive Management Team Workshop	EMT	Workshop	Council Offices
State Government Agencies	SRV / VPA / RDV / DELWP	Workshop	Ballarat
Horsham community	38 attendees	3 Workshop	Council Offices
Referral Agencies	RDV / WDA / DELWP / WCMA	Workshop	
Wimmera CMA / WDA	Dave Brennan (CMA) / Ralph Kenyon (WDA)	one-on-one	Council Offices
WSM Regional Partnership / Sustainable Project Services	Emma Vogel / Mark Williams / Carolynne Hahndorf	one-on-one	Council Offices
Local Business Person	Michael Vincent	one-on-one	Council Offices
Caravan Park	Tim Rohan	one-on-one	Council Offices
Local Business Person	David Parkin	one-on-one	Council Offices
Coller Rathgeber Real Estate	Tim Coller	one-on-one	Council Offices
Business Horsham	Sarah Kelm (EO) / Graham Keay (Chair)	one-on-one	Council Offices
Grampians Tourism	Marc Sleeman	one-on-one	Council Offices
Horsham Agricultural Society	Chair, President	one-on-one	Council Offices

Table 62 summarises the 38 community attendees and the groups / organisations / agencies they represented:

- 4 Sporting Associations
- 10 Sporting Clubs
- 11 Community groups - Environment, Business, Arts and Agriculture
- 4 individuals

TABLE 62 SUMMARY OF COMMUNITY GROUPS & REFERRAL AGENCIES

Agency	Regional Development Victoria
	Wimmera Development Association
	DELWP
	Wimmera CMA
	Barengi Gadjin Land Council
Sporting Associations	Tennis Vic
	AFL Wimmera Mallee
	Netball Vic
	Wimmera Regional Sports Assembly
Sporting Clubs	Horsham City Netball
	Horsham Football Netball Club
	Central Park tennis Club
	Rowing Club
	Horsham Angling club
	Natimuk Lake Water Ski Club
	Horsham Lawn Tennis Club
	Horsham and District Soccer Club
	Wimmera River Park Run
	Sunnyside Sporting Club (Bowls)
Community groups	Centre for Participation
	Business Horsham
	Wimmera River Improvement Committee
	Art is
	Horsham town Hall
	Rotary Club Horsham East
	Wimmera River Project Report group
	Horsham Agricultural Society
	Bicycle Advisory Committee
	Public art Advancement Committee
	Kannamaroo Plus Community
Individuals	4

10.1. SUMMARY OF FINDINGS

Table 63 summarises the recurring issues and opportunities that were raised throughout the consultation phase.

TABLE 63 SUMMARY OF ISSUES AND OPPORTUNITIES – CONSULTATION PHASE

AREA OF FOCUS	WHAT WE HEARD
CENTRAL ACTIVITIES DISTRICT (STREETSCAPE, PUBLIC REALM, TRANSPORT, CONNECTIVITY)	- Improve the streetscape environment by providing more shade, public and green spaces, and wider footpaths. - Make the CAD a safer environment for pedestrians and cyclists. - Reduce the number of trucks in the CAD. - Improve linkages between CAD anchors (Town Hall, May Park, Riverfront, Friebrace Street etc). - Construct a pedestrian bridge over the River at Hamilton Street. - Formalise a pedestrian/cycling trail along the existing drainage easement. - Provide more opportunities for public art. - Beautify the streetscape environment at strategic locations. - Reduce speed limits in the CAD. - Upgrade the library/community spaces. - Improve signage.
WIMMERA RIVERFRONT PRECINCT & RIVER CORRIDOR	- The riverfront precinct is significantly underutilised. - Need to activate the riverfront precinct (e.g. water play/splash park, meeting place, events, walking/cycling, public art). - Consider better integration or relocation of the Caravan Park. - Increase opportunities for recreational boating. - Establish hospitality uses in the riverfront precinct. - Create a pedestrian/cycling circuit around the river. - Improve the integration of the Botanic Gardens and Law Tennis precinct. - Consider developing the site at 22 O'Callaghans Parade into an iconic gateway/tourist attraction (e.g. destination restaurant, conferences, accommodation).

	- Improve pedestrian connections between the CAD and riverfront precinct. - Consider expansion of the wetlands.
SPORT AND RECREATION	- There are currently no examples of multi-use/multi-purpose sport facilities. - Sporting facilities are too user specific. - Develop a regional sporting precinct (multi-use, multi-purpose). - City Oval is not publicly accessible. - Consider closing Hocking Street (between City Oval and Sawyer Park) - Sawyer Park is underutilised. - Consider developing a regional tennis facility. - Improve facilities for Netball.
TOURISM	- Strengthen Horsham as a tourist destination and its role as a stopover destination and a destination to tour the broader region. - Leverage major tourism product in the region (e.g. Grampians Peaks Trail, Silo Art Trail). - Develop the riverfront precinct into a tourist destination. - Address the accommodation gaps in Horsham (e.g. high-quality serviced apartments). - Leverage off the success of the Town Hall.
PROPERTY & LAND USE (RESIDENTIAL, COMMERCIAL, RETAIL, INDUSTRIAL)	- Consider alternative uses for the Showgrounds/Greyhound Precinct (e.g. sport and recreation, tourism and hospitality) - The Showgrounds/Greyhound Precinct is underutilised and economically unproductive. - Consider more residential uses in the CAD (e.g. medium density). - Consider relocating the Council Depot and Concrete Batching Plant and investigate urban renewal opportunities at these sites. - Re-develop Government agencies precinct (e.g. GovHub). - Consider relocating the Greyhound Track to alternative location (e.g. inside the Horsham Racecourse). - Consider redeveloping the Wimmera Business Centre. - Consider rezoning the light industrial precinct on O'Callaghans Parade as it presents a long-term urban renewal opportunity.

APPENDICES

APPENDIX A DATA AREAS

The data areas adopted for Part B include:

- ABS data regions (Figure 18)
- Victoria in Future data regions (Figure 19)

FIGURE 18 AUSTRALIAN BUREAU OF STATISTICS DATA REGIONS

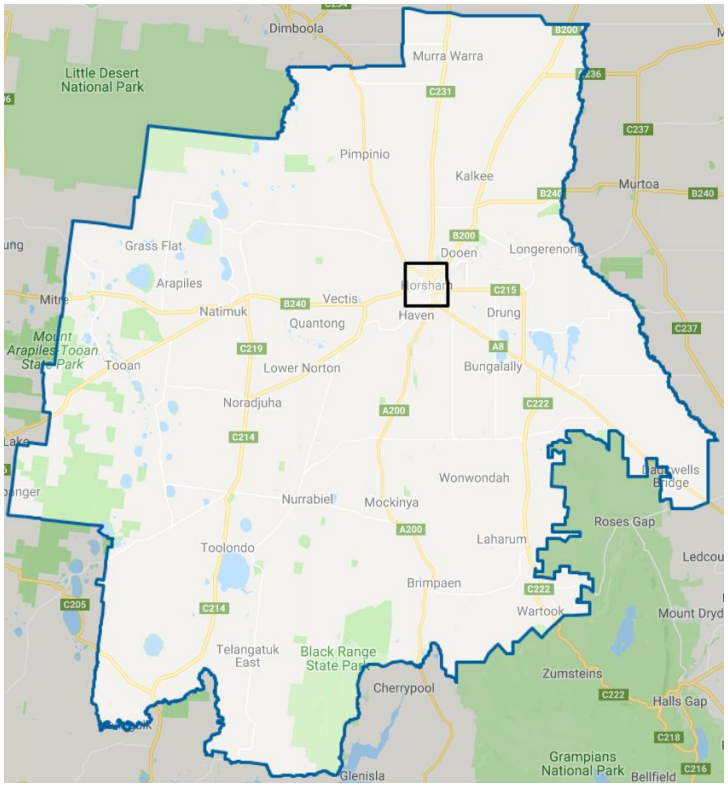
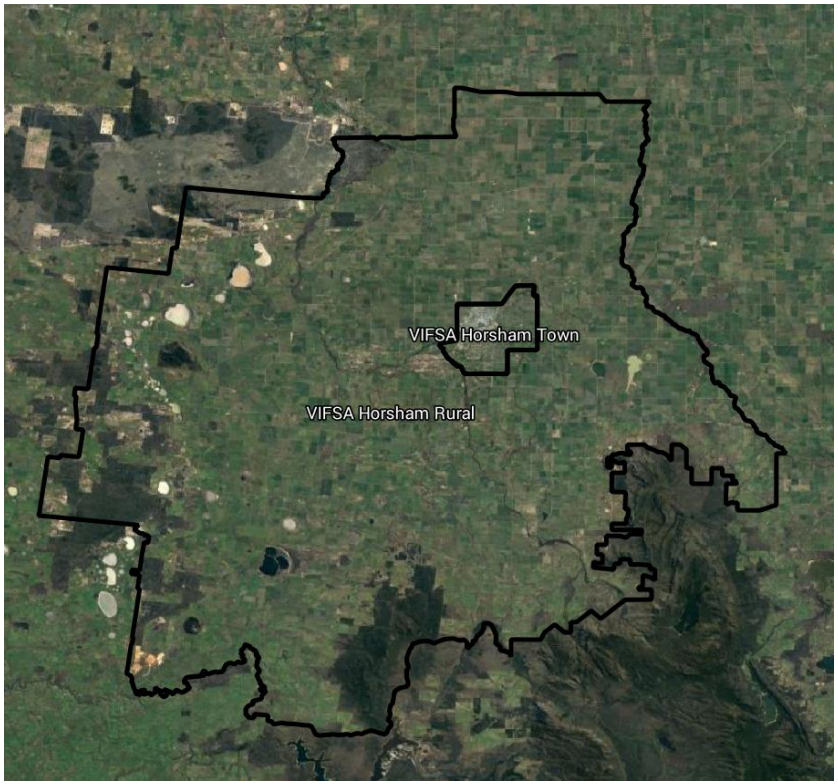
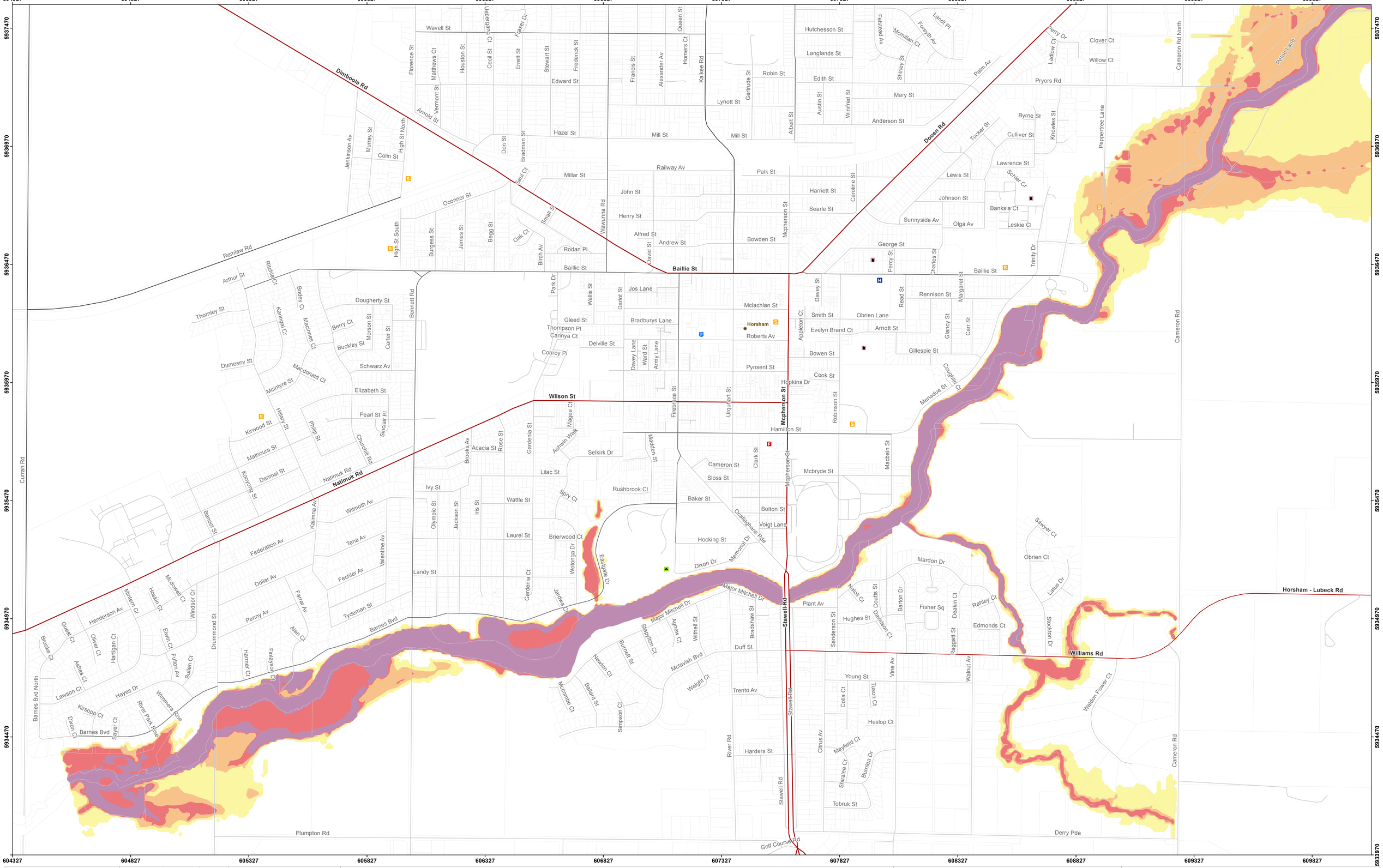


FIGURE 19 VICTORIA IN FUTURE DATA REGIONS



APPENDIX B HORSHAM FLOOD MAPPING

FIGURE 20 1 IN 5 YEAR FLOOD



Flood Investigation: Horsham 2002

20% AEP

Sheet: 1 of 3

Northern Grampians Shire Council

Wimmera CMA

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607611 608111 608611 609111 609611 610111 610611 611111 611611 612111 612611 613111 613611 614111 614611 615111 615611

5941841 5941341 5940841 5940341 5939841 5939341 5938841 5938341 5937841 5937341 5936841

Blue Ribbon Rd
Aerodrome Rd
Longerenong Rd
Molyneaux Rd
Docen South Rd
River Heights Rd
Brighton Dr
Grant Dr
Gatehouse Rd
Henty Hwy
Heards Rd
Rasmussen Rd
Riverside Rd
Peels Rd
Rokeskys Rd
Riverside East Rd
Rogersons Rd
Albert St
Puls Pl
Gerlach St
Hennessy St
Rodda Pl
Watts St
Creek Cr
Felstead Av
Monnillan Ct
Forsyth Av
Hutchesson St
Langlands St
Shirley St
Palm Av
Edith St
Pryors Rd
Mary St
Austin St
Winifred St
Anderson St
Dooen Rd
Tucker St
Byrne St
Knowles St
Culliver St
Lawrence St
Palk St
Ferry Dr
Peppertree Lane
Cameron Rd North
Petrie Lane

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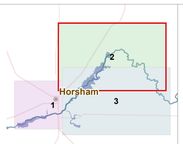

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False Northing: 10,000,000.0000
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Units: Meter

GDA

Legend

Flood Depth
- <0.25m
- 0.25 to <0.5m
- 0.5 to <1m
- 1m +

- Parcels
- MajorTowns
- Minor Towns

- Highways
- Other Major Roads
- Minor Road Class 3
- Minor Road Class 4
- Minor Road Class 5+

FOI (points)
- F Fire station
- P Police station
- H Emergency Hospital
- S School
- Aged care
- Caravan / Camp Site

Flood Investigation: Horsham 2002

20% AEP

Sheet: 2 of 3

Northern Grampians Shire Council

Wimmera CMA

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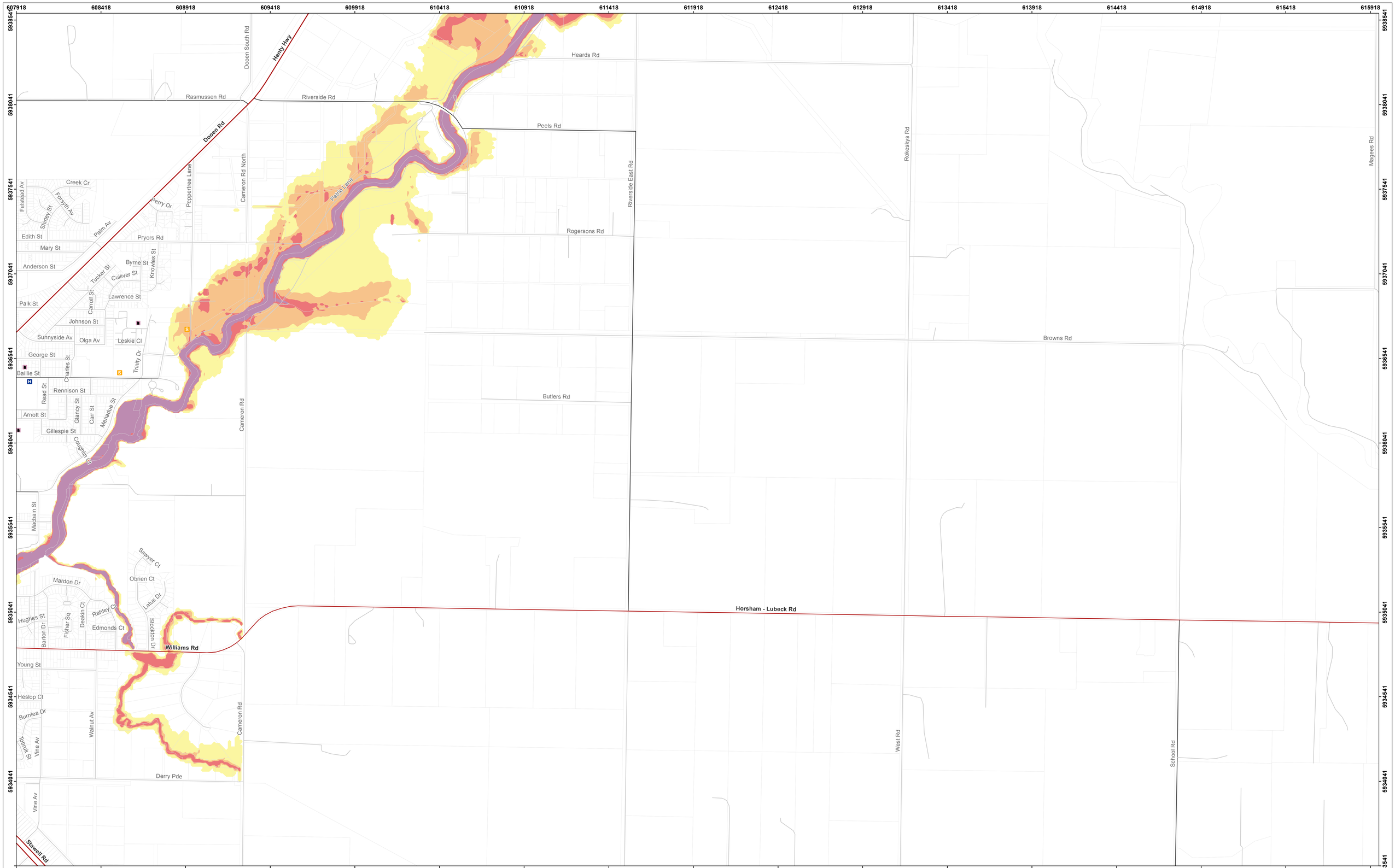

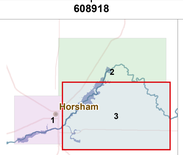

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Central Meridian: 141.0000
Scale Factor: 0.9996
Latitude Of Origin: 0.0000
Units: Meter

GDA

N

Legend

Flood Depth
- <0.25m
- 0.25 to <0.5m
- 0.5 to <1m
- 1m +

- Parcels
- MajorTowns
- Minor Towns

- Highways
- Other Major Roads
- Minor Road Class 3
- Minor Road Class 4
- Minor Road Class 5+

FOI (points)
- Fire station
- Police station
- Emergency Hospital

- School
- Aged care
- Caravan / Camp Site

Flood Investigation: Horsham 2002

20% AEP

Sheet: 3 of 3

Northern Grampians Shire Council

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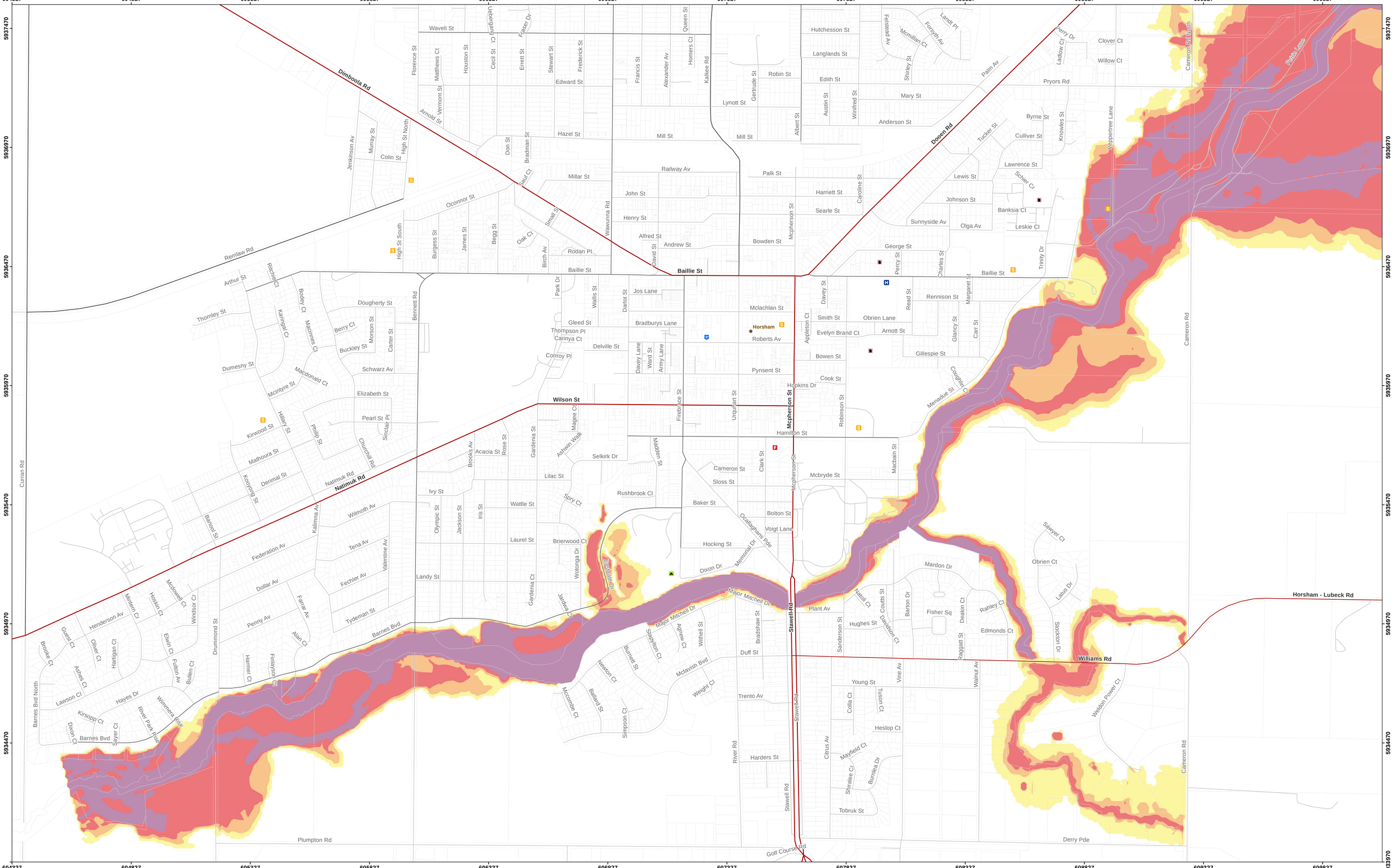
FIGURE 21 1 IN 20 YEAR FLOOD



Legend

Flood Depth
- <0.25m
- 0.25 to <0.5m
- 0.5 to <1m
- 1m +

- Parcels
- MajorTowns
- Minor Towns
- Highways
- Other Major Roads
- Minor Road Class 3
- Minor Road Class 4
- Minor Road Class 5+

FOI (points)
- Fire station
- Police station
- Emergency Hospital
- School
- Aged care
- Caravan / Camp Site

Flood Investigation: Horsham 2002

5% AEP

Sheet: 1 of 3

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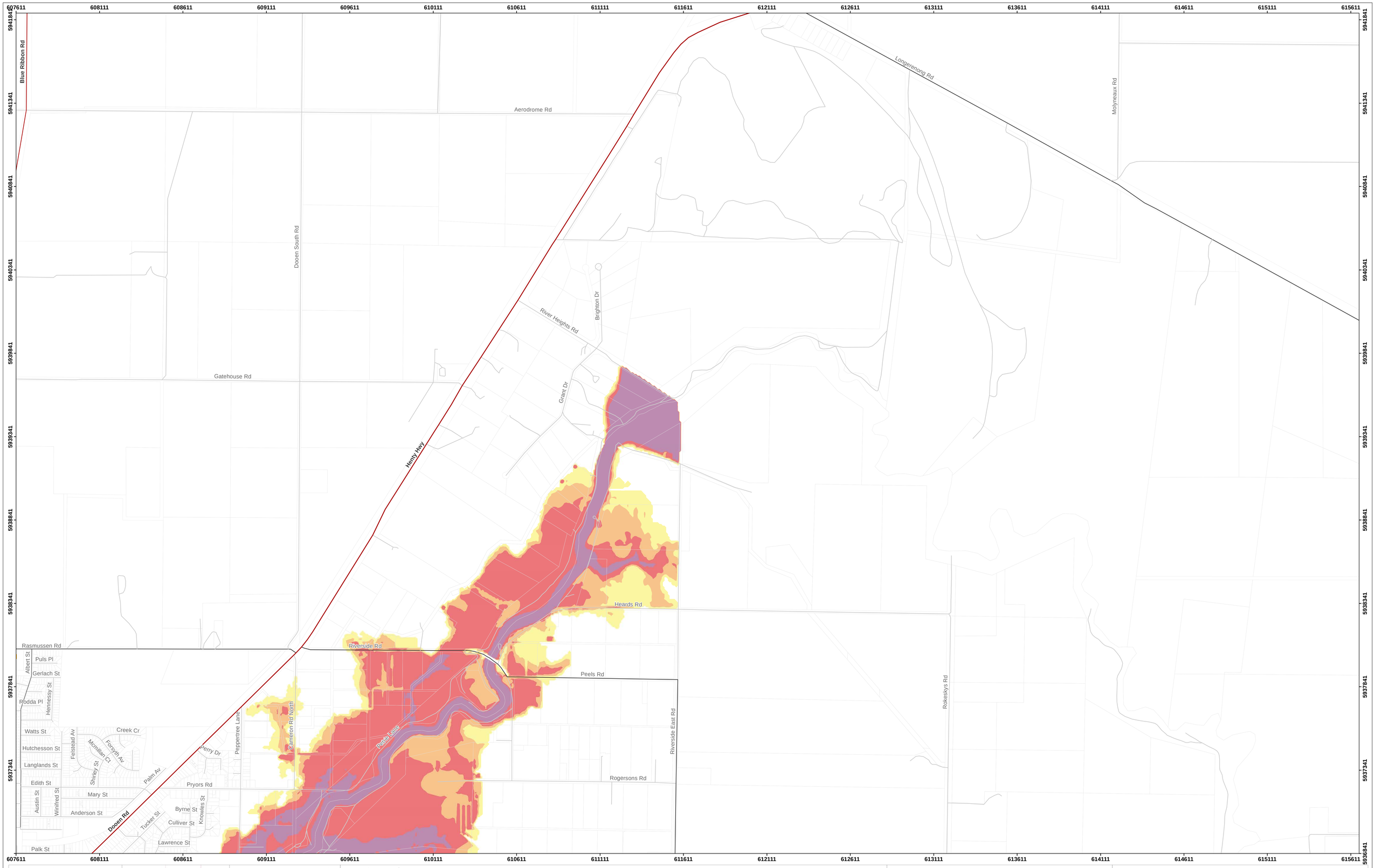

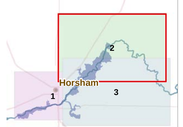

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Central Meridian: 141.0000
Scale Factor: 0.9996
Latitude Of Origin: 0.0000
Units: Meter

GDA

Legend

Flood Depth
- <0.25m
- 0.25 to <0.5m
- 0.5 to <1m
- 1m +

- Parcels
- MajorTowns
- Minor Towns

- Highways
- Other Major Roads
- Minor Road Class 3
- Minor Road Class 4
- Minor Road Class 5+

FOI (points)
- Fire station
- Police station
- Emergency Hospital

- School
- Aged care
- Caravan / Camp Site

Flood Investigation: Horsham 2002

5% AEP

Sheet: 2 of 3

NORTHERN Grampians SHIRE COUNCIL

Wimmera CMA

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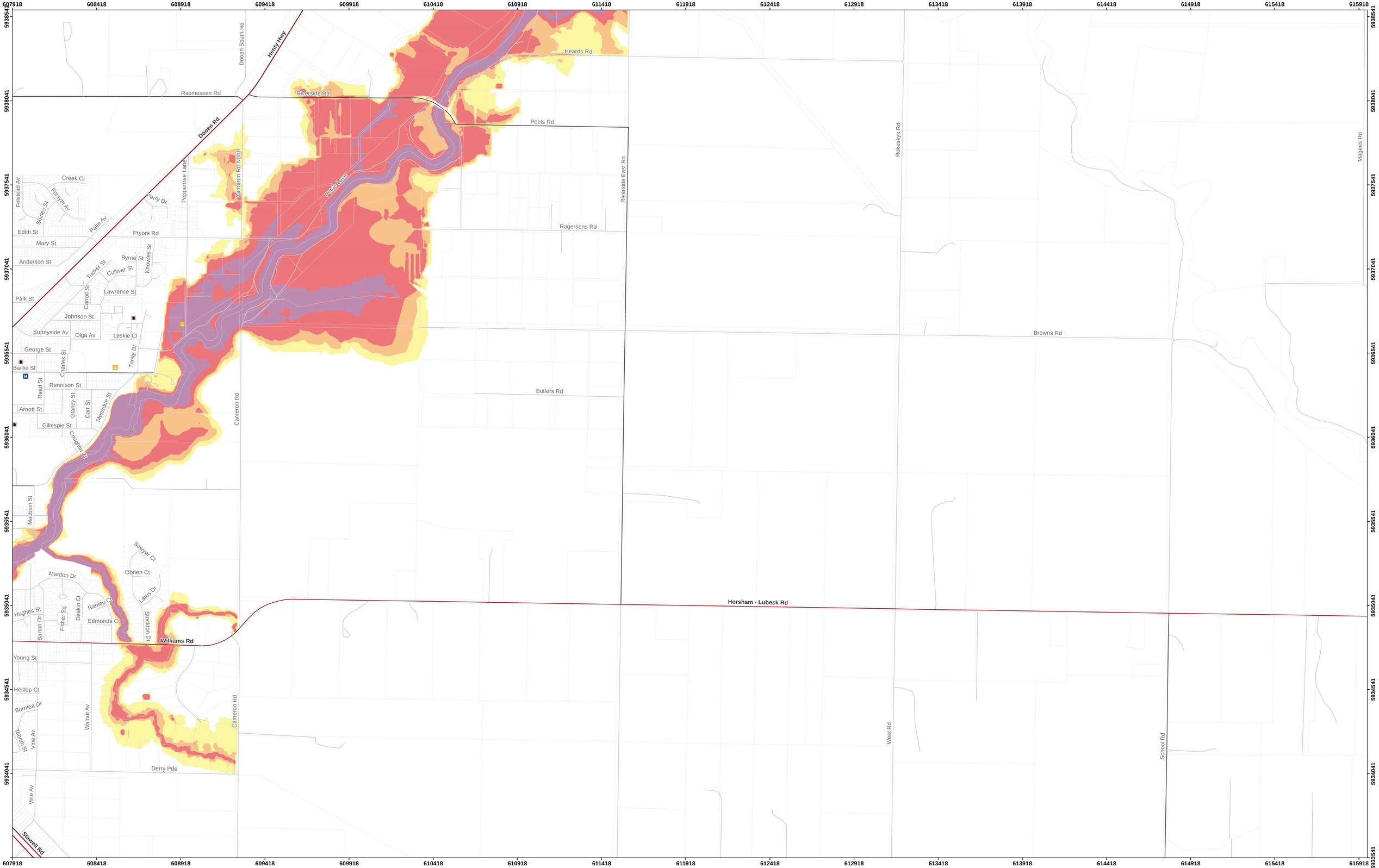

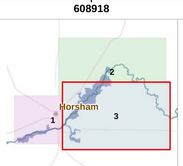

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Scale Factor: 0.9996
Latitude Of Origin: 0.0000
Units: Meter

GDA

Legend

Flood Depth
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- 0.5 to <1m
- 1m +

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- Minor Road Class 3
- Minor Road Class 4
- Minor Road Class 5+

FOI (points)
- Fire station
- Police station
- Emergency Hospital

- School
- Aged care
- Caravan / Camp Site

Flood Investigation: Horsham 2002

5% AEP

Sheet: 3 of 3

Northern Grampians Shire Council

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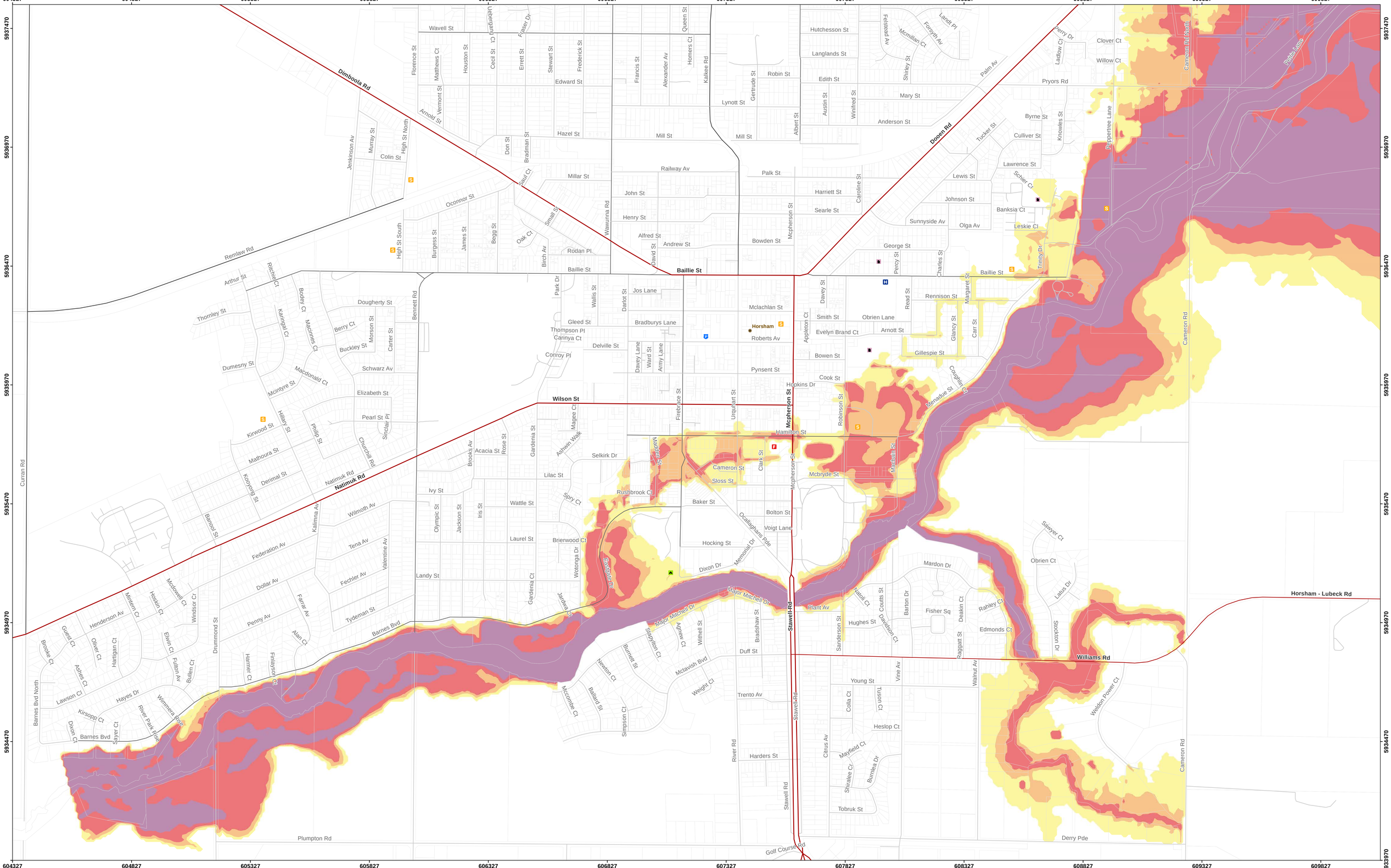
FIGURE 22 1 IN 50 YEAR FLOOD



Flood Investigation: Horsham 2002

2% AEP

Sheet: 1 of 3

Northern Grampians Shire Council

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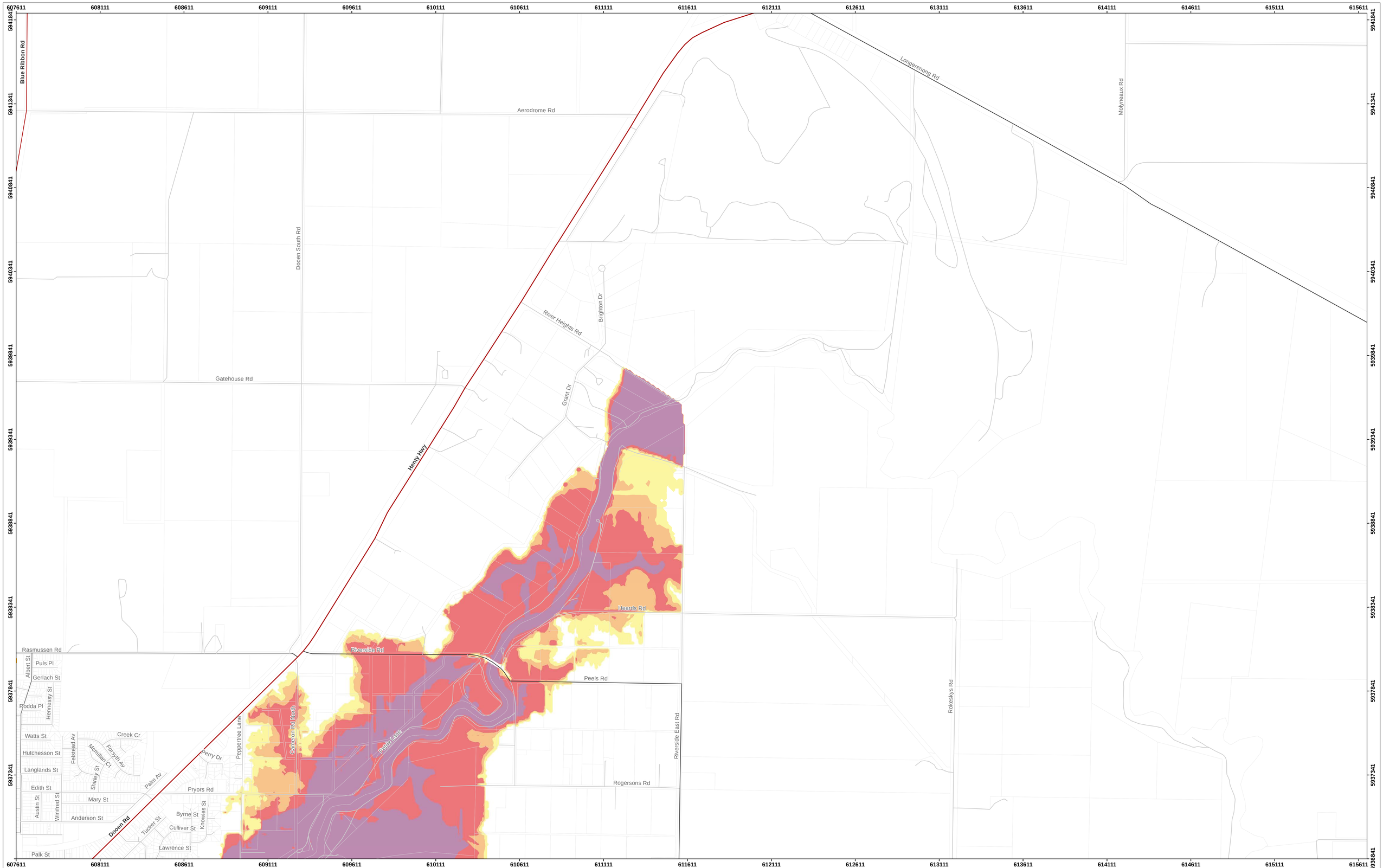

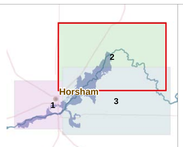

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Central Meridian: 141.0000
Scale Factor: 0.9996
Latitude Of Origin: 0.0000
Units: Meter

GDA

Legend

Flood Depth
- <0.25m
- 0.25 to <0.5m
- 0.5 to <1m
- 1m +

- Parcels
- MajorTowns
- Minor Towns

- Highways
- Other Major Roads
- Minor Road Class 3
- Minor Road Class 4
- Minor Road Class 5+

FOI (points)
- Fire station
- Police station
- Emergency Hospital
- School
- Aged care
- Caravan / Camp Site

Flood Investigation: Horsham 2002

2% AEP

Sheet: 2 of 3

Northern Grampians Shire Council

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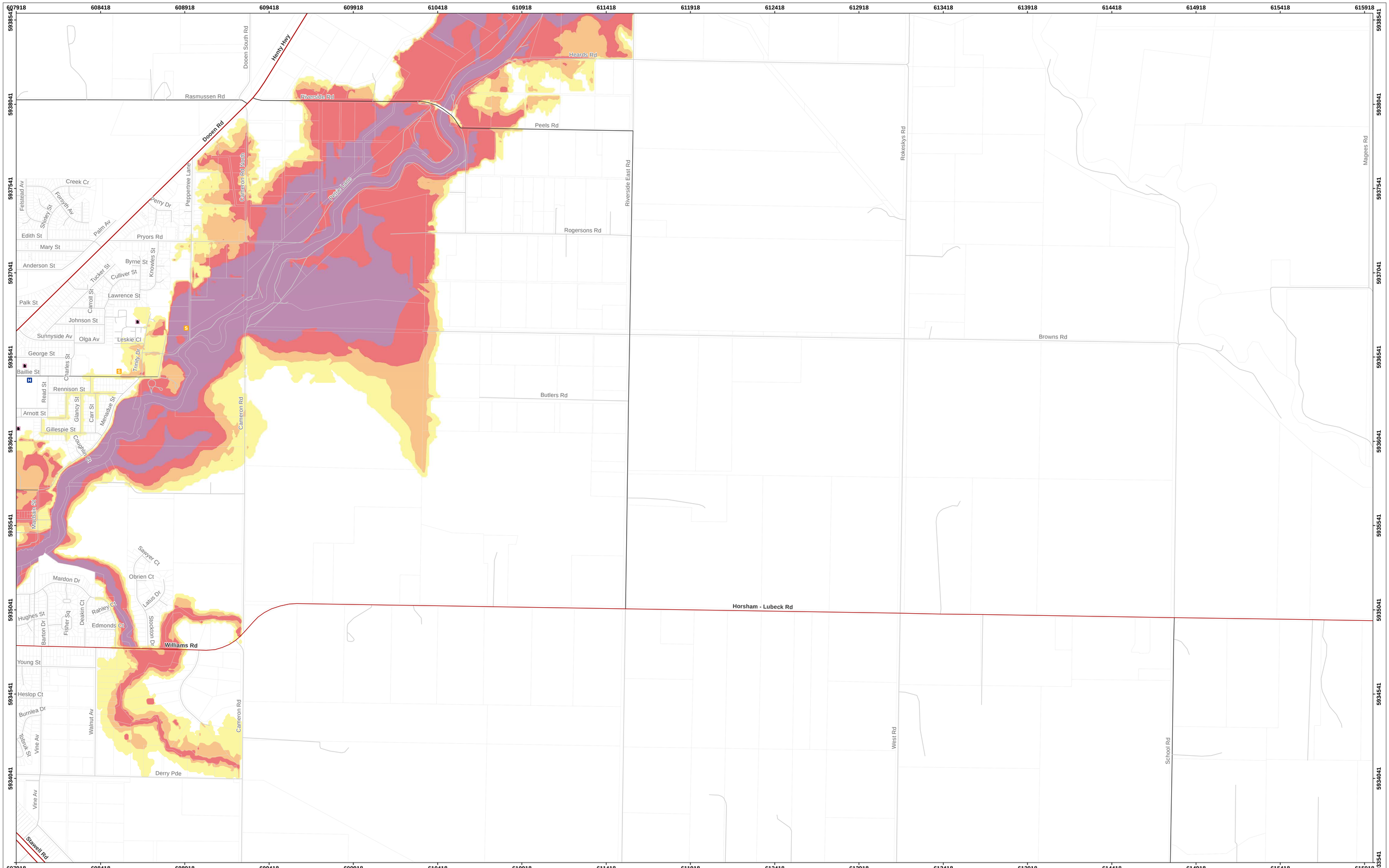

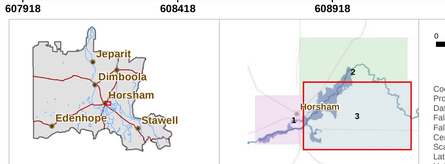

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False Northing: 10,000,000.0000
Central Meridian: 141.0000
Scale Factor: 0.9996
Latitude Of Origin: 0.0000
Units: Meter

GDA

Legend

Flood Depth
- <0.25m
- 0.25 to <0.5m
- 0.5 to <1m
- 1m +

- Parcels
- MajorTowns
- Minor Towns
- Highways
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- Minor Road Class 3
- Minor Road Class 4
- Minor Road Class 5+

FOI (points)
- F Fire station
- P Police station
- H Emergency Hospital
- S School
- Aged care
- Caravan / Camp Site

Flood Investigation: Horsham 2002

2% AEP

Sheet: 3 of 3

Northern Grampians Shire Council

Wimmera CMA

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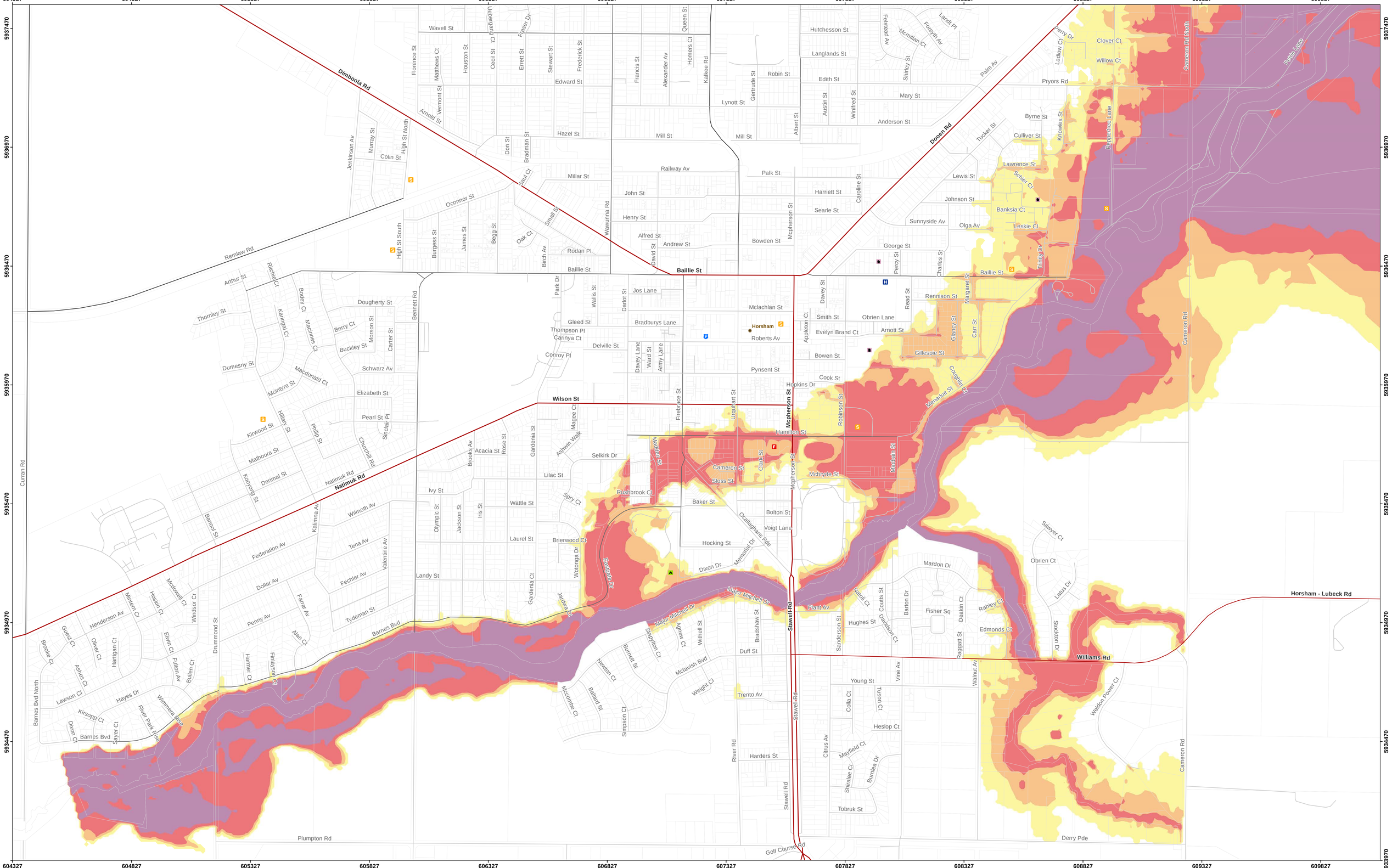
FIGURE 23 1 IN 100 YEAR FLOOD



Legend

Flood Depth
- <0.25m
- 0.25 to <0.5m
- 0.5 to <1m
- 1m +

- Parcels
- MajorTowns
- Minor Towns
- Highways
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- Minor Road Class 4
- Minor Road Class 5+

FOI (points)
- Fire station
- Police station
- Emergency Hospital
- School
- Aged care
- Caravan / Camp Site

Flood Investigation: Horsham 2002

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Sheet: 1 of 3

Northern Grampians Shire Council

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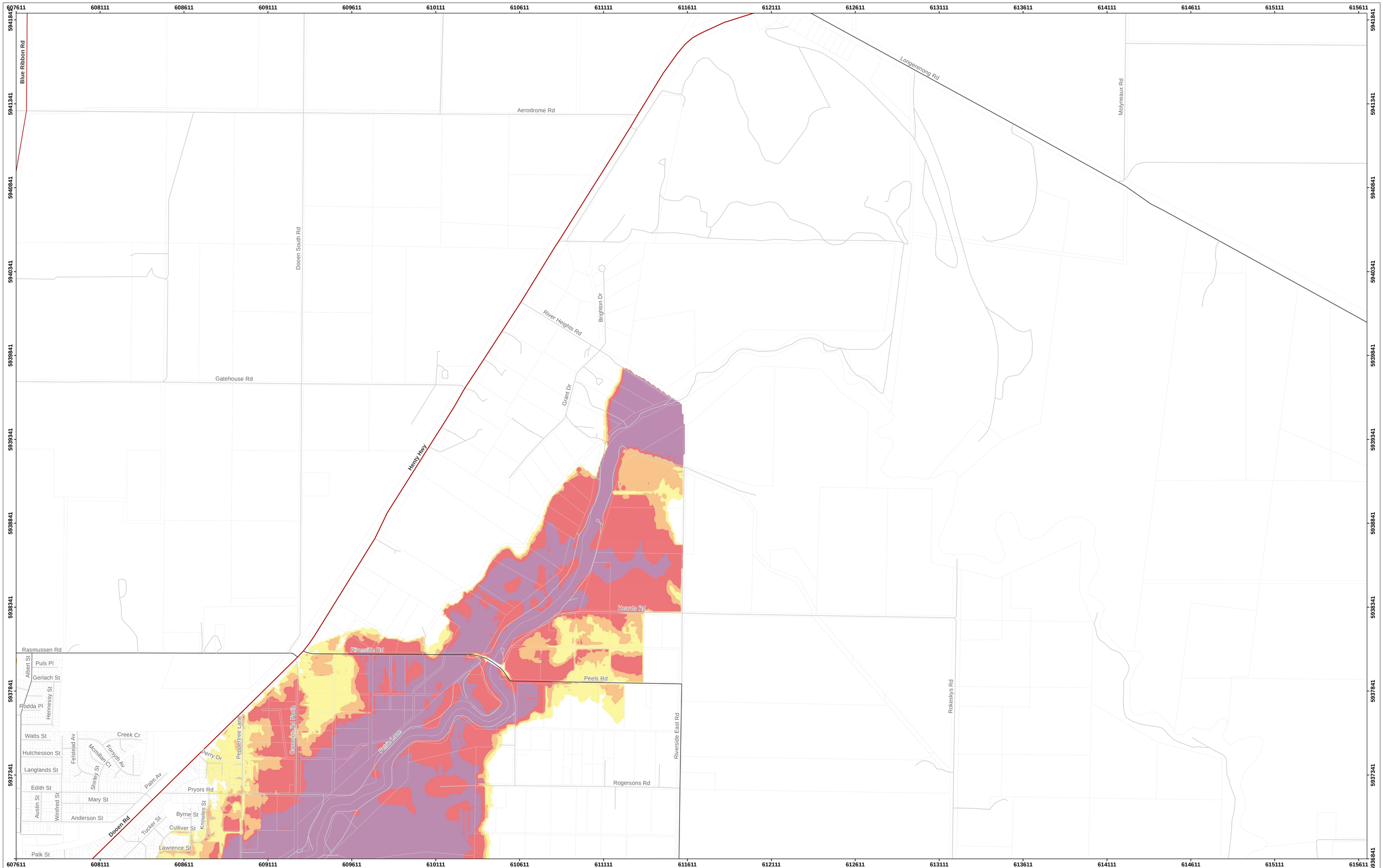

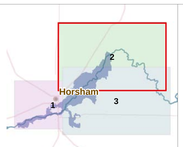

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Meters

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Scale: 1:7,000

Coordinate System: GDA 1994 MGA Zone 54
Projection: Transverse Mercator
Datum: GDA 1994
False Easting: 500,000.0000
False Northing: 10,000,000.0000
Central Meridian: 141.0000
Scale Factor: 0.9996
Latitude Of Origin: 0.0000
Units: Meter

GDA

Legend

Flood Depth

- <0.25m
- 0.25 to <0.5m
- 0.5 to <1m
- 1m +

- Parcels
- MajorTowns
- Minor Towns

- Highways
- Other Major Roads
- Minor Road Class 3
- Minor Road Class 4
- Minor Road Class 5+

FOI (points)

- Fire station
- Police station
- Emergency Hospital
- School
- Aged care
- Caravan / Camp Site

Flood Investigation: Horsham 2002

1% AEP

Sheet: 2 of 3

Northern Grampians Shire Council

Wimmera CMA

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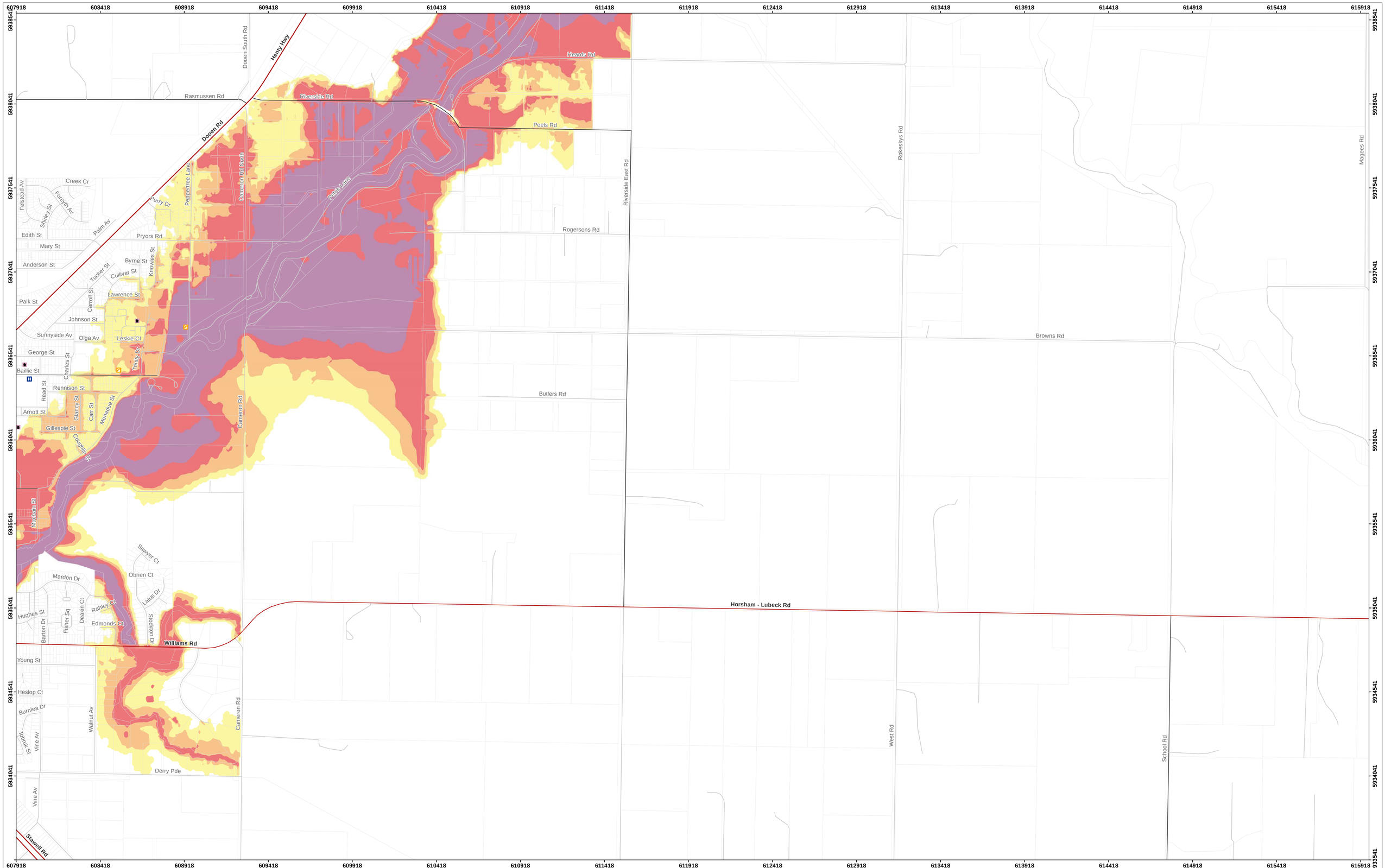

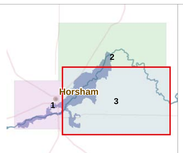

0 100 200 400
Meters

N

Scale: 1:7,000

Coordinate System: GDA 1994 MGA Zone 54
Projection: Transverse Mercator
Datum: GDA 1994
False Easting: 500,000.0000
False Northing: 10,000,000.0000
Central Meridian: 141.0000
Scale Factor: 0.9996
Latitude Of Origin: 0.0000
Units: Meter

GDA

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1% AEP

Sheet: 3 of 3

Northern Grampians Shire Council

Wimmera CMA

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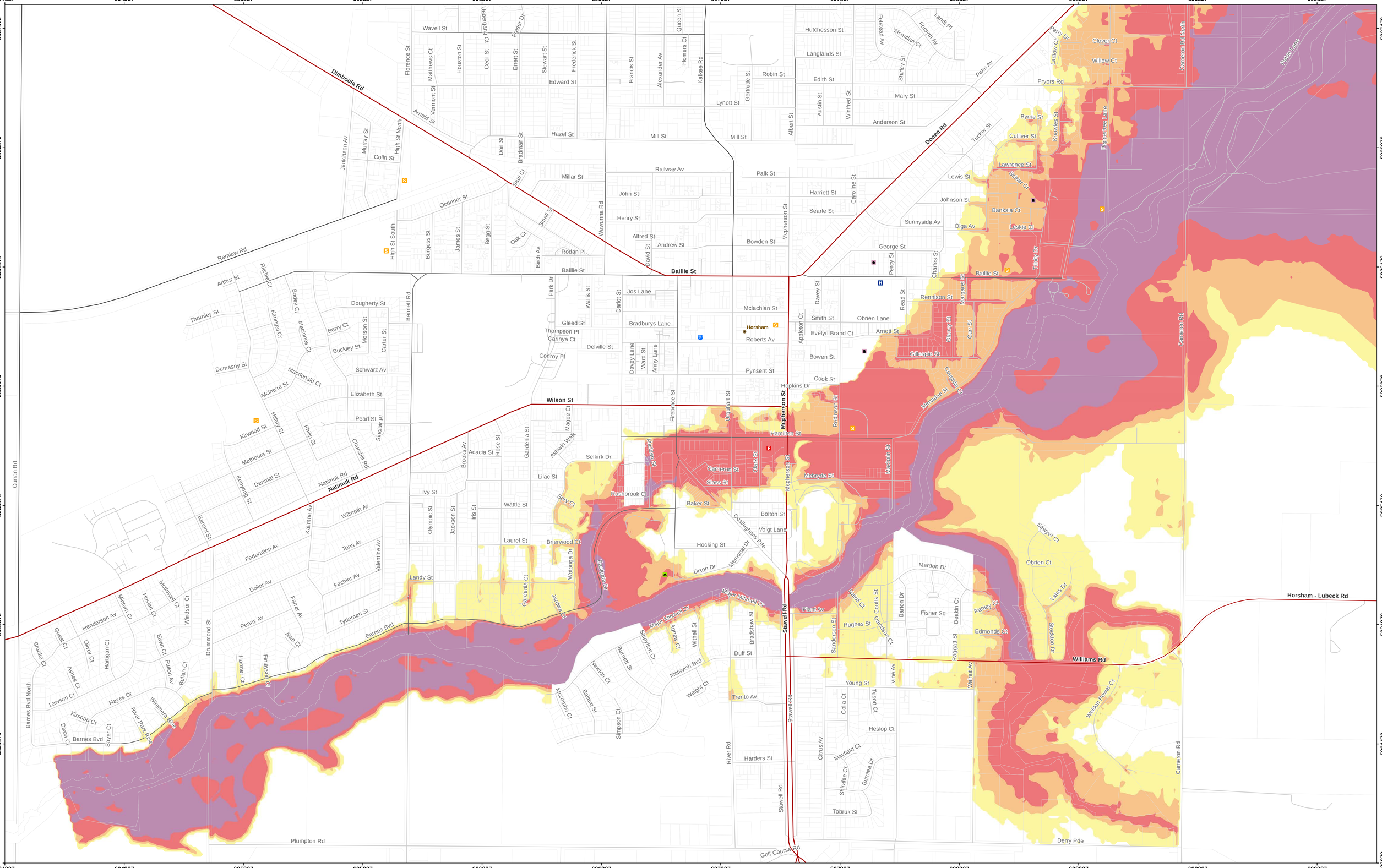
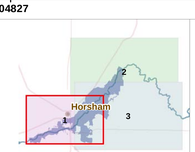
FIGURE 24 1 IN 200 YEAR FLOOD





0 100 200
Meters

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Scale: 1:5,000

Coordinate System: GDA 1994 MGA Zone 54
Projection: Transverse Mercator
Datum: GDA 1994
False Easting: 500,000.0000
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GDA

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FOI (points)
- F Fire station
- P Police station
- H Emergency Hospital

- S School
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- Caravan / Camp Site

Flood Investigation: Horsham 2002

0.5% AEP

Sheet: 1 of 3

Northern Grampians Shire Council

Wimmera CMA

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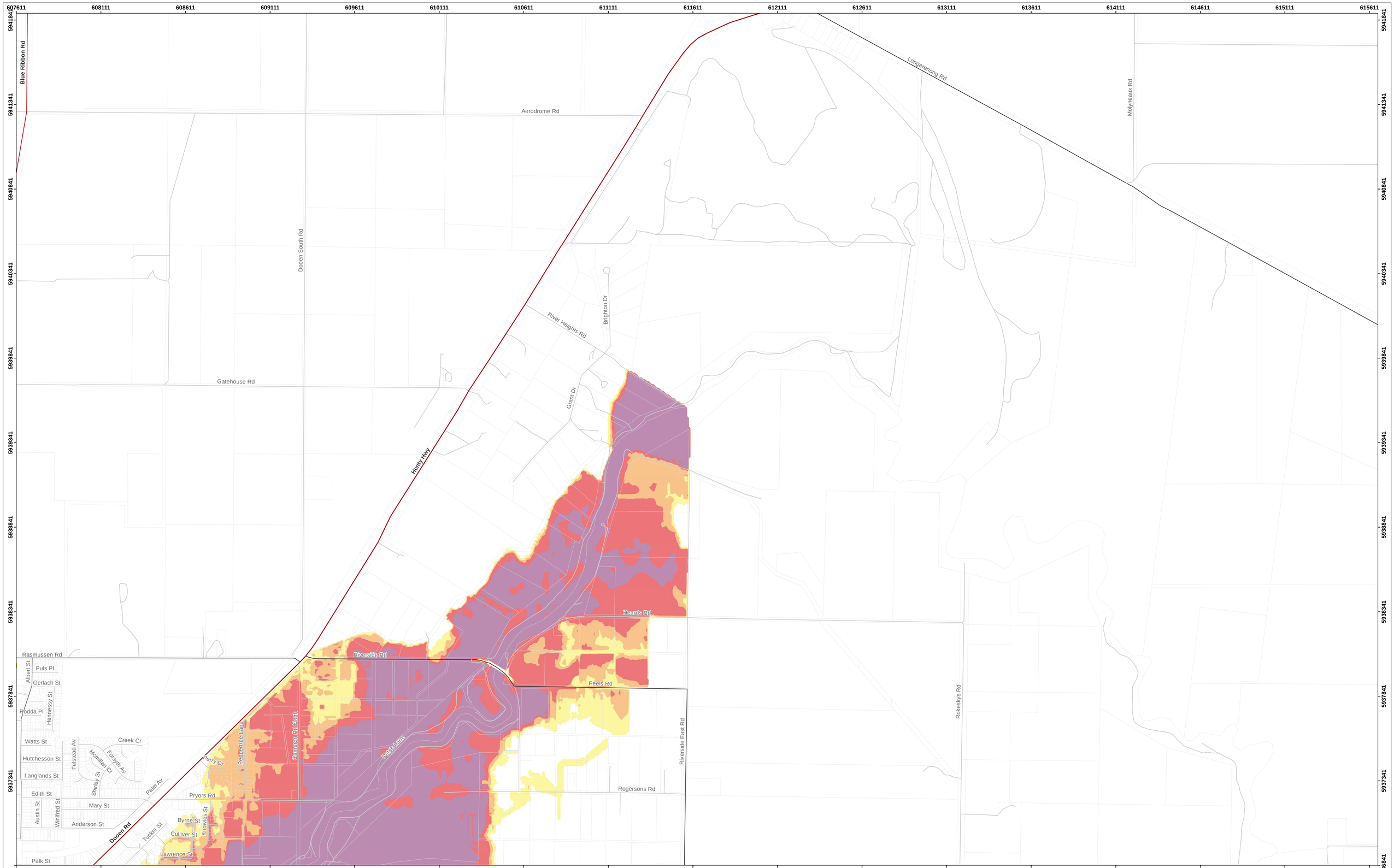

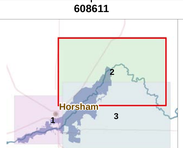

0 100 200 400
Meters

Scale: 1:7,000

Coordinate System: GDA 1994 MGA Zone 54
Projection: Transverse Mercator
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False Easting: 500,000.0000
False Northing: 10,000,000.0000
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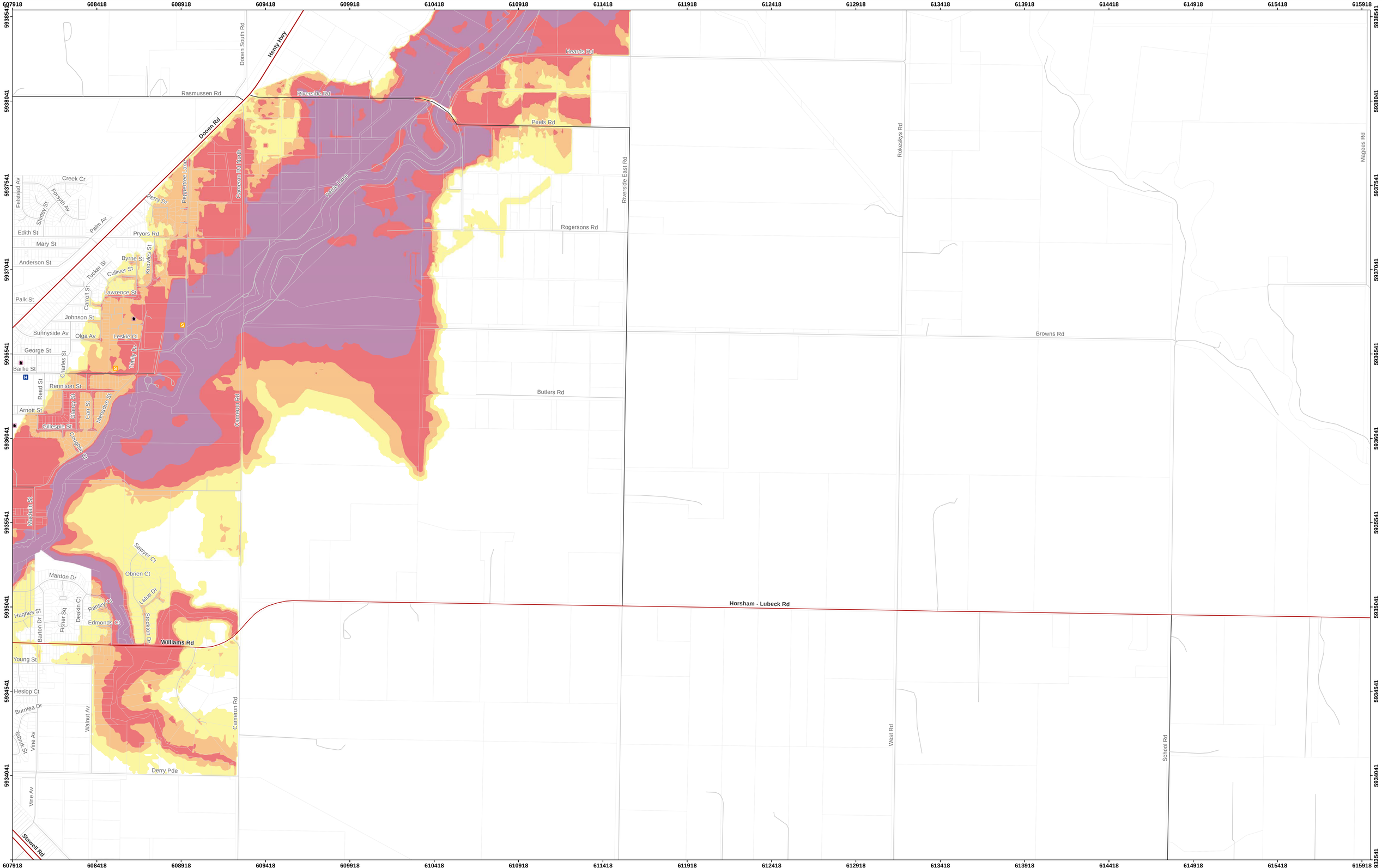

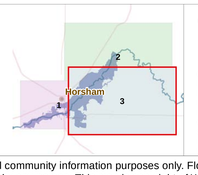

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