



GOULBURN VALLEY HARNESS & GREYHOUND RACING PRECINCT

FEASIBILITY STUDY & MASTERPLAN

DRAFT REPORT | GREATER SHEPPARTON CITY COUNCIL | MAY 2015

URBAN ENTERPRISE

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GLOSSARY

GV - Goulburn Valley

GRV - Goulburn River Valley

HRV - Harness Racing Victoria

GRV - Greyhound Racing Victoria

SHRC - Shepparton Harness Racing Club

SGRC - Shepparton Greyhound Racing Club

SPC - Shepparton Pony Club

EA - Equestrian Australia

PCA - Pony Clubs Australia

PCAV - Pony Club Association of Victoria

HRCAV - Horse Riding Club Association of Victoria

NVSJC - The Northern Victorian Show Jumping Club

GRVT - Goulburn River Valley Tourism

DMP - Destination Management Plan

MSS - Municipal Strategic Statement

MOU - Memorandum of Understanding

GOTAFE - Goulburn Ovens Institute of TAFE

RLZ - Rural Living Zone

GRZ - General Residential Zone

FZ2 - Farming Zone 2

SU4 - Special Use Zone 4

UFZ - Urban Floodway Zone

FO - Floodway Overlay

LSIO - Land Subject to Inundation Overlay

EXECUTIVE SUMMARY

BACKGROUND

Urban Enterprise has been appointed to undertake a feasibility study and masterplan for the Goulburn Valley Harness and Greyhound Racing Precinct and Investigation Area.

The masterplan provided in this document is the outcome of extensive consultation and market research into the various uses identified for the Investigation Area.

VISION

The Goulburn Valley Harness and Greyhound Precinct will continue to grow as an equine and greyhound events hub through the development of additional equine recreation areas, equine focused residential areas, expanded training facilities and quality tourist accommodation.

The masterplan will deliver strong community and economic benefit for Greater Shepparton through the attraction of additional visitors to events, provision of quality training and recreational facilities and the provision of tourism accommodation uses.

The Goulburn Valley Harness and Greyhound Racing Precinct Masterplan will continue to strengthen Greater Shepparton as a premier equine region.

STRATEGIC CONTEXT

The majority of the investigation area is Farming Zone 2 (FZ2), apart from the Harness and Greyhound Racing Precinct which is Special Use Zone 4 (SUZ4). The purpose of Farming Zone 2 is to provide the use of land for agriculture. The purpose for the Special Use Zone 4 is for harness and greyhound racing and a range of entertainment, recreational, commercial and community activities.

A Flood Overlay (FO) and Land Subject to Inundation Overlay (LSIO) exists over the south and North West corners of the precinct, as well as the north east corner. These zones and overlays restrict the level of development that can occur.

The Greater Shepparton Housing Strategy (2011) has estimated a need for 365 new dwellings per year to meet demand. Low density and rural living are currently underrepresented and reflect a gap in the market. The Greater Shepparton Housing Strategy also identifies the potential for rural living in the investigation area and highlights the importance of careful planning in the 'Kialla Paceway' precinct to minimise land conflicts between the facility and future residents.

Greater Shepparton's Rural Land Use Strategy (2010) highlights the importance of the equine industry to the Goulburn Valley and emphasises its economic value and community contribution to the region.

The Goulburn River Valley Destination Management Plan (2013) identifies the opportunity for the equine and greyhound industry to become a major draw card for the region. The plan also identifies the need for new tourism product to grow yield from the tourism sector such as accommodation targeted to market needs in Shepparton.

OVERVIEW OF THE HARNESS AND GREYHOUND SECTORS

There are 13 greyhound racing clubs in Victoria, with Shepparton being the only club in the north east of the State. This ensures that Shepparton has a large catchment for greyhound races which includes north east Victoria, the Murray Region and southern NSW.

In 2013, Greyhound Racing Victoria held a total of 937 race meetings with an 11.3% increase in attendance from the previous year.

There are 38 harness racing clubs across Victoria. In 2013, Harness Racing Victoria held 452 race meetings. Shepparton Racing Club is one of many clubs situated in Victoria's north east, however it is one of the strongest performing clubs in the region.

Both the greyhound and harness racing industries have reported strong income growth over the past five years. In the case of the Harness Racing, much of this growth can be attributed to the introduction of Tabcorp Park and its non-racing entertainment, tourism and hospitality functions.

Greyhound Racing Victoria has had strong growth in revenue on the back of a greater share of income from Tabcorp and increased wagering as a result of more race meets.

Industry trends highlight that the opportunity for the Goulburn Valley Harness and Greyhound Racing Precinct is to grow visitation through events, and greater entertainment during race nights. Tabcorp Park provides a good example of how multiple strong revenue streams can be leveraged from Harness Racing facilities and wagering.

There is an opportunity for the Goulburn Valley Harness and Greyhound Precinct to become a premier racing precinct in Regional Victoria.

GOULBURN VALLEY HARNESS AND GREYHOUND RACING CLUBS FACILITIES AND OPERATIONS

The Harness and Greyhound Racing Precinct is largely built out across the site, with little room for broad scale expansion. The Greyhound Racing Club occupies the front of the site, with the Harness and Pony Club situated at the rear.

The precinct is home to excellent function room facilities including the Greyhound Racing Club's function room which accommodates 200 seated patrons. The Harness Racing Club's AH Rathjen Dining room and the Winning Post Complex has a capacity of 400 standing and 250 seated guests respectively.

Discussion with the clubs highlights that there is no requirement for short to medium term expansion of their operations, however both clubs concede that a straight track in the precinct will grow the training potential of the precinct. In the long term, consideration of other ancillary facilities may be made such as gaming facilities, full time bistro function and accommodation. These type of facilities will provide the potential to increase visitation to the precinct and complement the racing functions.

The Harness and Greyhound Racing Clubs would like to see buffers around the precinct to protect any long term potential conflict from residential encroachment that might impact on their long term use.

BUSINESS GROWTH OPPORTUNITIES FOR THE CLUBS

Greater Shepparton is projected to grow substantially over the next 15-20 years. Victoria in Future projects that Greater Shepparton population will experience a total of 23% growth between 2014 and 2031. This will provide growth in local market demand for function spaces, events and memberships for the clubs.

Greater Shepparton is a key visitor node within the Goulburn River Valley Tourism Region, attracting 1.1 million visitors per annum. A large proportion of visitors to the Goulburn River Valley are visiting for special events or for business reasons. This highlights the strength of business and non-business event markets in Shepparton.

It is estimated that the Harness and Greyhound Racing Precinct attracts around 65,000 visitors per annum, of which around 9,500 are estimated to be overnight visitors to Shepparton. Visitation to the precinct creates demand for food, beverage, accommodation and equine/greyhound services in Shepparton.

There is opportunity for the equine precinct to grow visitation through attracting more social and non-social events and through development of the entertainment offer during race nights and non-racing times.

PHYSICAL ISSUES AND OPPORTUNITIES

The key physical issues and opportunities to be considered when developing the precinct and investigation area are:

- Minimise entry points to the precinct and investigation area from the Goulburn Valley Highway. A service road may be implemented to provide access to properties.
- Land on the corner of the Goulburn Valley Highway and River Road will be required to allow for a sweeping bend and traffic changes in the long term to support large vehicle transport.
- Entry points should be minimised on River Road as it is a heavy vehicle thoroughfare;
- Improved traffic management at all interactions surrounding the precinct will be required with further development of the investigation area;
- Large areas of the site are subject to flooding and development in these areas should be minimised;
- Due to the precinct's distance from water and sewerage treatment plants it is Goulburn Valley Water's preference that conventional residential development in the area be minimised, otherwise large and costly infrastructure improvements will be required.
- Channel water is provided to the precinct by Goulburn Murray Water, which could be put underground as the demand for water in the area is not of a large agricultural scale. Properties and residents would still require access to raw water, this means that a straight track could be built within the precinct in replacement of the existing channel.
- General landscape amenity of the precinct could be improved with tree plantings, trails and way finding signage.

CONSULTATION

Urban Enterprise has undertaken a number of consultation sessions to support the preparation of the masterplan for the Goulburn Valley Harness and Greyhound Racing Precinct. The initial consultation was conducted with landowners, referral authorities and recreation equine clubs early in the strategy process.

A Background Discussion Paper was released and the general public were invited to submit in support or opposition of options considered for the Investigation Area.

The Background Discussion Paper and alternative concepts considered received a total of 24 submissions.

Key concepts supported included:

- Expansions of recreational equine uses;
- Commercial, tourism and accommodation uses; and
- Equine related rural living allotments.

Key issues that were raised through submissions included:

- Bias toward Harness & Greyhound Clubs;
- Potential impacts on Harness and Greyhound Racing operations through future development of Investigation Area 1;
- Lack of landowner consultations;
- Lack of reference to the Greater Shepparton Housing Strategy; and
- Potential conflicts between on-site animals (greyhounds) and surrounding residents.

The final masterplan has been prepared with reference to feedback received during this process.

FUTURE LAND USE ASSESSMENT AND RECOMMENDATIONS

The future land use opportunities of the investigation area include low density residential allotments, rural living allotments (equine), equine recreation, commercial, tourism accommodation and equine services.

There is strategic support for low density residential and rural living residential uses in the precinct, however it will be important that these do not adversely impact the existing Harness and Greyhound Racing Precinct. If this were themed for equine, it would build on the synergies with the current Greyhound and Harness Racing functions in the precinct. Initial discussions with representatives of the equine recreation sector suggest 1 - 2.5 hectares for equine/greyhound lifestyle allotments. Further strategic support shows that the optimum lot sizes for low density residential is between 2,000 and 8,000 m².

Strengthening the equine role of the precinct through land provided for equine recreational uses and commercial equine uses will provide greater market demand for equine themed rural living uses. This will also assist in growing the precinct as the home of the equine industry. Discussions with the equine recreational sector highlight a lack of facilities to accommodate the growing needs of clubs in the region. In particular the pony club has use conflicts with the training undertaken at the rear of the site. The precinct provides the opportunity to collocate a number of the Goulburn Valley's equine recreational clubs into one precinct.

There is market support for visitor accommodation within the Investigation Area 1, notably to leverage off visitation to the racing precinct and equine recreation uses, but also to provide accommodation more broadly to Shepparton and the surrounding region.

In addition to equine related uses within the precinct, a highway service centre leveraging from exposure to Shepparton's heavy vehicle route may also be considered.

The precinct is best developed with a mix of the above uses in mind as they can complement each other. The key for the investigation area is to bring all of these uses together in a spatial way that complements the existing function of the area.

RECOMMENDED MASTERPLAN

The masterplan has been designed to develop a strong integrated precinct which leverages off the existing equine and greyhound events and training role of the Kialla Paceway. Expansion of equine uses including a new purpose designed recreation equine area and rural equine residential will create a strong home for the equine sector uses in Greater Shepparton.

Commercial accommodation uses are proposed to leverage from visitation to the precinct, but will also meet accommodation gaps in the Greater Shepparton Region.

Low density residential uses will provide diversity in the dwelling stock for Shepparton, creating a high quality residential precinct.

Section 9 provides an overview of the proposed masterplan.

ECONOMIC IMPACT OF THE MASTERPLAN

The proposed masterplan for the Equine and Greyhound Precinct will enable the following economic benefits to the Victorian economy:

- \$287 million in output and 744 jobs during the construction phases of development;
- A minimum ongoing impact of \$12 million in output and 73 jobs per annum;

The vast majority of these jobs will be within Greater Shepparton due to the large scale of Shepparton's construction industry and population base to support ongoing service sector jobs.

The ongoing economic impact identified is conservative as it does not include ongoing jobs generated from the proposed service centre nor does it account for additional expenditure to Greater Shepparton by attracting new visitors to the region outside of accommodation expenditure and expenditure within the Equine and Greyhound Precinct.

1. INTRODUCTION

1.1. PROJECT OVERVIEW

Urban Enterprise was commissioned by Greater Shepparton City Council to prepare a Feasibility Study and Masterplan for the development of The Goulburn Valley Harness and Greyhound Racing Precinct and surrounding Investigation Area 1. The study will draw on Urban Enterprise's extensive knowledge and experience working within the equine and tourism industry and land use planning. Urban Enterprise is supported by Planisphere, landscape and urban design consultants.

The study assesses the performance of the equine and greyhound industry in Victoria and also within Greater Shepparton. In addition, the study identifies potential opportunities for the precinct as well as any physical issues and constraints. This study provides a clear direction for the future use of the precinct and the surrounding area.

The Feasibility Study and Masterplan has a project steering committee consisting of:

- The City of Greater Shepparton;
- The Shepparton Harness Racing Club; and
- The Shepparton Greyhound Racing Club.

The role of the project steering committee is to ensure the project brief is delivered by providing background information and contributing to the consultation process. The steering committee is not a part of the decision making process, this role and responsibility rests solely with Greater Shepparton City Council.

This study is informed by council strategies which identify this precinct as a future growth area of Shepparton, as well as numerous community stakeholders including the Shepparton Harness and Greyhound Racing Clubs, Shepparton equine clubs, referral authorities and landowners within and adjoining Investigation Area 1.

1.2. PROJECT OBJECTIVES

The Feasibility Study and Masterplan will guide the future development of the Goulburn Valley Harness and Greyhound Precinct and surrounding land. The objectives of this study are as follows:

1. **Understand the strategic context of the precinct** - Review local planning policy and council documents, which identifies this precinct as a future growth area of Shepparton. This will require an analysis of the adequacy and functionality of current facilities within the precinct.
2. **Identify the current state of the equine and greyhound industry in Victoria** - Investigate the strengths and weaknesses of the equine and greyhound industry, as well as investigating the regional demand for an upgrade or extension of facilities within the precinct.
3. **Assess potential demand and relative competitiveness for this precinct** within the region and Victoria - Identify the regional catchment for this precinct and assess competing precincts in the region.
4. **Determine the economic impact of any proposed development to Greater Shepparton** and the region - Assess the economic outcome in terms of employment, tourism and the equine industry.
5. **Evaluate the development costs** associated with potential improvements to the racing complex and surrounding areas, and undertake a cost benefit analysis.
6. **Investigate the viability of ancillary activities** to harness racing and greyhound racing that could be established within the precinct as a means of leveraging off existing operations.
7. **Investigate how the development of the precinct could be delivered**, including funding sources and acquiring land within the precinct.

1.3. METHODOLOGY

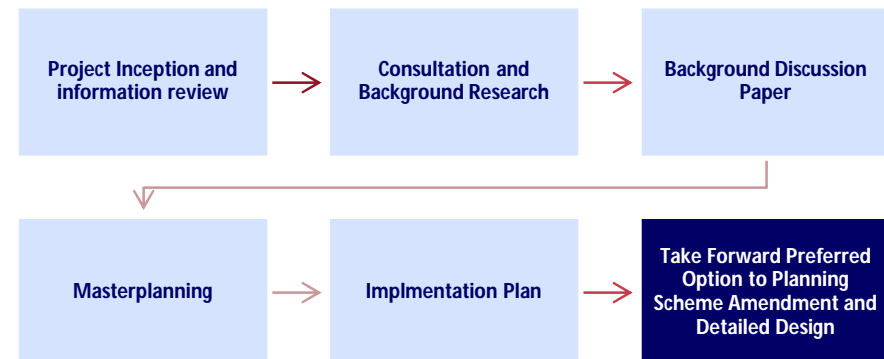
Figure 1 represents the step by step methodology for the Goulburn Valley Harness and Greyhound Racing Precinct Feasibility Study.

The project will be delivered in five key stages and are as follows:

- **Inception, Background Review and Consultation**
 - *Inception* - including agreement of the scope of works, initial inception and site visits.
 - *Literature Review* - providing a review of background information, literature and key policy/strategy.
 - *Consultation* - extensive stakeholder consultation with the project steering committee, key Council departments, referral authorities, as well as affected landowners within and adjoining the investigation area.
- **Feasibility Study [Background Discussion Paper]**
 - *Regional Positioning* - providing an assessment of the importance of the facility to the region and the potential to be positioned as a regional leader in the equine industry.
 - *Analysis of Existing Conditions* - an audit and condition report of existing facilities.
 - *Market Analysis* - including investigation of current uses, identification of demand and a review of market trends and potential markets.
 - *Assessment of Development Alternatives* - examining the range of facilities and activities for inclusion in the masterplan and an assessment of potential development scenarios; with the ultimate selection of a preferred development alternative.
 - *Economic considerations* - analysing the viability of proposals, the economic impact of the preferred development alternative and potential funding opportunities.
- **Recommendations Report.**
 - *Following consultation of the Background Discussion Paper a recommended concept will be proposed.*

- **Masterplan**
 - *Preparation of a masterplan for the investigation area* - to address the key objectives and recommended concept.
- **Final Reporting**
 - *Final Report* - the delivery of a final report that succinctly summaries all elements of the project in a consolidated report.

FIGURE 1 METHODOLOGY APPROACH



1.3.1. CONSULTATION PROCESS

Urban Enterprise conducted a number of stakeholder workshops with the steering committee and recreational equine and greyhound clubs, as well as one-on-one meetings with council staff, referral authorities and affected land owners located within and around the investigation area. The consultation process helped identify physical constraints and issues associated with the investigation area and presented potential opportunities for the future direction and development of the precinct.

The consultation process included the following steps:

- **Preparation of project information** for stakeholders;
- 8. **Project information and invitations** to attend a one-on-one interview sent to all landowners within and adjoining Investigation Area 1 and referral authorities;
- 9. **Arrangement of in region consultation** including invites to a recreational equine industry workshop, council staff workshop and harness and greyhound industry workshop;
- 10. **In region consultation**
 - Meetings with landowners who responded to the invitation to meet
 - Meetings with referral authorities
 - Workshop with Harness and Greyhound Clubs and State representatives
 - Meetings with various council departments
 - Workshop with recreation horse industry
- 11. **Presentation of Issues, opportunities and options** to steering committee and Greater Shepparton City Council;
- 12. **Exhibition of Background Discussion Paper**; and
- 13. **Comment on Background Discussion Paper received and reviewed**

1.4. KEY STAKEHOLDERS

PROJECT STEERING COMMITTEE

The Feasibility Study and Masterplan has a project steering committee consisting of:

- Greater Shepparton City Council;
- The Shepparton Harness Racing Club; and
- The Shepparton Greyhound Racing Club.

The role of the project steering committee is to ensure the project brief is delivered by providing background information and contributing to the consultation process. The steering committee is not a part of the decision making process, this role and responsibility rests solely with the Greater Shepparton City Council.

Urban Enterprise conducted a workshop with the project steering committee to understand existing conditions for the racing precinct, and understand current operations. The workshop also helped understand physical constraints for the precinct and potential opportunities.

REFERRAL AUTHORITIES

Urban Enterprise invited a number of referral authorities to participate in the consultation process. Thirty minute sessions were allocated for each authority in order to understand existing conditions. Urban Enterprise met with the following authorities: Vic Roads, Goulburn Valley Water, Goulburn Murray Water, Department of Primary Industries, GRVT and Tourism Greater Shepparton.

Referral authorities that were invited to participate, but could not attend include: Goulburn Broken Catchment Authority, CFA, APA Group, Powercor Australia, EPA and PTV.

COUNCIL STAFF

Urban Enterprise met with a number of council staff from several departments including representatives from Strategic Planning, Sustainability and Environment, Events and Tourism, Waste Management and Property.

LANDOWNERS

Landowners were formally contacted by Greater Shepparton City Council to participate and contribute in the consultation process. Landowners were informed of the project brief and potential outcomes, as well as notified of specific times and dates in which consultation sessions would be occurring. Several weeks prior to the allocated dates, landowners were sent a letter in the post outlining the purpose of the study and the importance for them to contribute in the process to aid in understanding certain aspirations and opportunities for the investigation area, as well as physical issues and constraints.

Landowners were instructed to contact Urban Enterprise to book a specific thirty minute one-on-one session at the Greater Shepparton City Council offices.

Landowners have subsequently been provided with opportunity to provide comment on the background discussion paper options and also the draft report.

EQUINE CLUBS

Urban Enterprise conducted a workshop for the region's equine clubs to gain an understanding of physical issues facing the clubs, as well as potential opportunities for these clubs in the future. The following equestrian clubs attended the workshop: Shepparton Pony Club, Goulburn Valley Equestrian Club, Southern Seven Cutting Horse Association, Goulburn Valley Show jumping Club and Goulburn Valley Pony Club.

Follow up consultation has been conducted with the Shepparton Pony Club and Goulburn Valley Equestrian Club to determine their space and facilities requirements.

1.5. SITE DETAILS

1.5.1. LOCATION AND SPECIFICATIONS

The report refers to two separate areas and include:

- The Investigation Area; and
- The Goulburn Valley Harness and Greyhound Racing Precinct.

Figure 2 shows the two separate areas as discussed.

INVESTIGATION AREA

The Investigation Area for this project is the area which is enclosed by the Goulburn Valley Highway, Mitchell Road, Archer Road and River Road, located in Kialla, Greater Shepparton. The area of the precinct is approximately 3.1 km² (310 hectares).

The investigation area is approximately 7.5 km south of the Shepparton CBD along the Goulburn Valley Highway. The Seven Creeks runs through the south west corner of the precinct.

Apart from the Harness and Greyhound Racing Precinct, the investigation area consists of privately owned allotments.

GOULBURN VALLEY HARNESS AND GREYHOUND RACING PRECINCT

The Harness and Greyhound Racing Precinct is defined by the Special Use Zone 4. This area includes the Shepparton Harness and Greyhound Racing Clubs and their ancillary facilities, as well as the training facilities, which includes a training track and stables. This area is located directly behind the harness racing track. This area is shared between the Shepparton Harness Racing Club and the Shepparton Pony Club.

There is one access point to the Shepparton Harness and Greyhound Racing Precinct from the Goulburn Valley Highway.



FIGURE 2 INVESTIGATION AREA AND LAND ALLOTMENTS

PART A: BACKGROUND INFORMATION

2. STRATEGIC CONTEXT

2.1. INTRODUCTION

The following section analyses key background and reference documents. This will highlight any significant documentation or strategic work related to the equine and tourism industry, Shepparton's residential market, as well as the precinct and investigation area shown in Figure 2.

Documents reviewed in this section include:

- Greater Shepparton Planning Scheme;
- Greater Shepparton Housing Strategy (2011);
- Greater Shepparton Council Plan and Strategic Resources Plan (2009-2013);
- Greater Shepparton 2030 Plan;
- Regional Rural Land Use Strategy (2010);
- Municipal Strategic Statement;
- Greater Shepparton Economic Development Strategy (2009-2012);
- Goulburn River Valley Tourism Development Plan (2011-2016); and
- Goulburn River Valley Destination Management Plan (2013).

KEY FINDINGS

- The majority of the investigation area is Farming Zone 2 (FZ2), apart from the Harness and Greyhound Racing Precinct which is Special Use Zone 4 (SUZ4). The purpose of Farming Zone 2 is to provide the use of land for agriculture. The purpose for the Special Use Zone for the Harness and Greyhound Racing Precinct is for horse racing and a range of entertainment, recreational, commercial and community activities.
- A Flood Overlay (FO) and Land Subject to Inundation Overlay (LSIO) exists over the south and north west corners of the precinct, as well as the north east corner. These zones and overlays restrict the level of development that can occur.
- The Greater Shepparton Housing Strategy (2011) has estimated a need for 365 new dwellings per year to meet demand; low density, rural living is limited and currently reflects a gap in the market. The Greater Shepparton Housing Strategy also identifies the potential for rural living in the investigation area and highlights the importance of careful planning in the Kialla Paceway precinct to minimise land conflicts between the facility and future residents.
- The Greater Shepparton Rural Land Use Strategy (2010) highlights the importance of the equine industry to the Goulburn Valley and emphasises its economic value to the region.
- The Goulburn River Valley Destination Management Plan (2013) identifies the opportunity for the equine and greyhound industry to become a major draw card for the region. The plan also identifies the need for new tourism product to grow yield from the tourism sector such as accommodation targeted to market need.

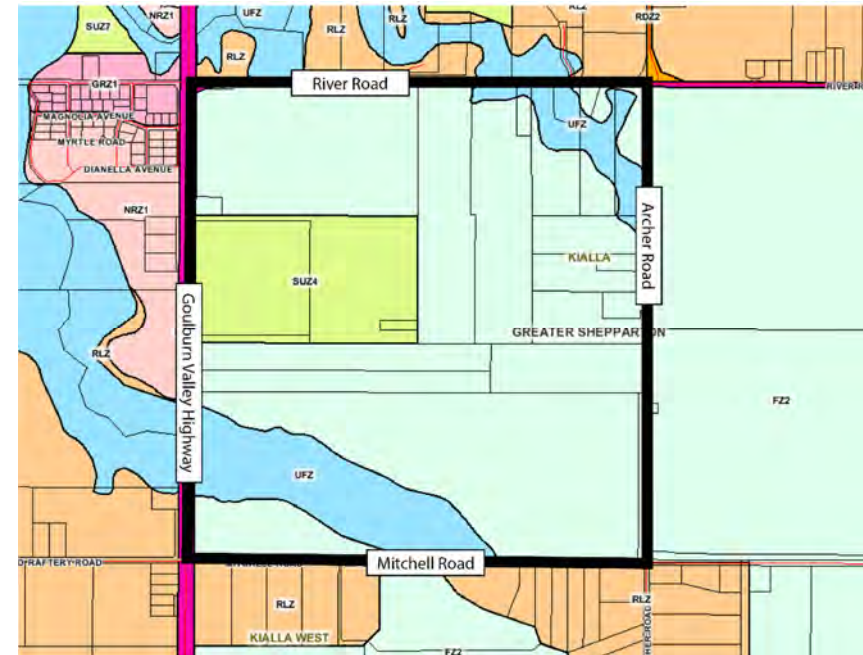
2.2. PLANNING POLICY

2.2.1. PLANNING ZONES

Figure 3 shows the planning zones for the land within and adjoining the investigation area. The overwhelming majority of land within the investigation area is Farming Zone 2 (FZ2). The Harness and Greyhound Racing Precinct adjoining The Goulburn Valley Highway is a Special Use Zone (SUZ4) and Seven Creeks which runs through the south west corner and the tributary of the Seven Creeks which runs through the north east corner of Investigation Area 1 is an Urban Floodway Zone (UFZ).

Across the Goulburn Valley Highway, directly west of the investigation area, is General Residential Zone (GRZ) and Neighbourhood Residential Zone (NRZ1). The land directly north and directly south of the investigation area is Rural Living Zone (RLZ) and the land directly east of the investigation area is Farming Zone 2 (FZ2).

FIGURE 3 PLANNING ZONES – INVESTIGATION AREA



Source: planning Maps Online

2.2.2. GREATER SHEPPARTON PLANNING SCHEME

The following outlines the purpose of use for each zone and overlay and summarises the key clauses and schedules that directly relate to the land within and directly adjoining the investigation area. There are a number of uses that each zone allow, require a permit or are prohibited. Table 1 summarises the permit requirements across each of the zones, as taken from the Greater Shepparton Planning Scheme's table of uses. This table is a general summary of permit requirements, and does not take into account unique requirements.

GENERAL RESIDENTIAL ZONE

Clause 32.08 of the Greater Shepparton Planning Scheme states that the purpose of the General Residential Zone is to:

- *“Provide a diversity of housing types and moderate housing growth in locations offering good access to services and transport.*
- *Encourage residential development that respects the neighbourhood character.*
- *In appropriate locations, to allow educational, recreational, religious, community and a limited range of other non-residential uses to serve local community needs.”*

The General Residential Zone, which is located directly west of the investigation area, does not require a permit for a dwelling, a bed and breakfast (no more than ten persons) and animal keeping (under two animals). However, a permit is required for subdivision, building and works, accommodation (other than B&B) and formal leisure and recreation. Animal boarding and horse stables are prohibited in the General Residential Zone.

RURAL LIVING ZONE

Clause 35.03 of the Greater Shepparton Planning Scheme state that the purpose of the Rural Living Zone is to:

- *“Provide for residential use in a rural environment.*
- *Provide for agricultural land uses which do not adversely affect the amenity of surrounding land uses.*

- *Protect and enhance the natural resources, biodiversity and landscape and heritage values of the area.*
- *Encourage use and development of land based on comprehensive and sustainable land management practices and infrastructure provision.”*

Rural living zone is located directly north of the investigation area and there are no permits required for a dwelling, B&B (no more than ten persons), animal keeping and informal outdoor recreation. A permit is required for subdivision, building and works, accommodation (other than B&B), agriculture and leisure and recreation. Retail premises are prohibited under section 2 of clause 35.03-1.

FARMING ZONE 2

Clause 35.07 of the Greater Shepparton Planning Scheme states that the purpose of the Farming Zone is to:

- *“Provide for the use of land for agriculture.*
- *Encourage the retention of productive agricultural land.*
- *Ensure that non-agricultural uses, including dwellings, do not adversely affect the use of land for agriculture.*
- *Encourage the retention of employment and population to support rural communities.*
- *Encourage use and development of land based on comprehensive and sustainable land management practices and infrastructure provision.”*

The majority of the investigation area is farming zone 2 (apart from the harness and greyhound racing precinct). Farming zone 2 does not require a permit for a dwelling as well as agriculture and animal keeping. A permit is required for subdivision, accommodation, camping and caravan, B&B and leisure and recreation. Retail premises are prohibited.

SPECIAL USE ZONE 4

Schedule four to Clause 37.01 of the Greater Shepparton Planning Scheme states that the purpose of the Special Use Zone 4 is to:

- *“Provide for the use of the Kialla Paceway for horse racing and a range of entertainment, recreational, commercial and community activities.*
- *Encourage the multiple use of land and buildings within the Kialla Paceway in order to facilitate its usage throughout the year.*
- *Ensure that the combination of uses, their density, and the scale and character of any development do not prejudice the amenity of surrounding land.*
- *Ensure that the future use and development of the Kialla Paceway occurs in a planned and orderly manner.”*

The Shepparton Harness and Greyhound Racing Precinct is a Special Use Zone 4. This relates specifically to Kialla Paceway and is designated for horse and greyhound racing and a range of entertainment, recreational, commercial and community activities.

Building and works and leisure and recreation infrastructure require permits.

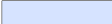



URBAN FLOODWAY ZONE

Clause 37.03 of the Greater Shepparton Planning Scheme states that the purpose of the Urban Floodway Zone is to:

- *“Identify waterways, major floodpaths, drainage depressions and high hazard areas within urban areas which have the greatest risk and frequency of being affected by flooding.*
- *Ensure that any development maintains the free passage and temporary storage of floodwater, minimises flood damage and is compatible with flood hazard, local drainage conditions and the minimisation of soil erosion, sedimentation and silting.*
- *Protect water quality and waterways as natural resources.*

TABLE 1 SUMMARY OF PERMIT REQUIREMENTS FOR PLANNING ZONES

USE	GRZ	RLZ	FZ2	SUZ4	UFZ
Dwelling	No permit required	No permit required	Subject to requirements	Subject to requirements	Subject to requirements
Subdivision	Permit required	Permit required	Permit required	Permit required	Permit required
Building/works	Permit required	Permit required	Subject to requirements	Permit required	Permit required
Accommodation	Permit required	Permit required	Permit required	Subject to requirements	Subject to requirements
Camping/caravan	Permit required	Subject to requirements	Permit required	Permit required	Prohibited
B&B	No permit required	No permit required	Subject to requirements	Subject to requirements	Prohibited
Agriculture	Subject to requirements	Permit required	No permit required	Subject to requirements	Subject to requirements
Leisure & recreation	Permit required	Permit required	Permit required	Permit required	Permit required
Retail Premises	Subject to requirements	Prohibited	Prohibited	Permit required	Prohibited
Animal keeping	Subject to requirements	Subject to requirements	No permit required	Permit required	Permit required
Animal boarding	Prohibited	Permit required	Permit required	Permit required	Subject to requirements
Horse stables	Prohibited	Permit required	Subject to requirements	Permit required	Permit required

	No permit required
	Permit required
	Prohibited
	Subject to requirements

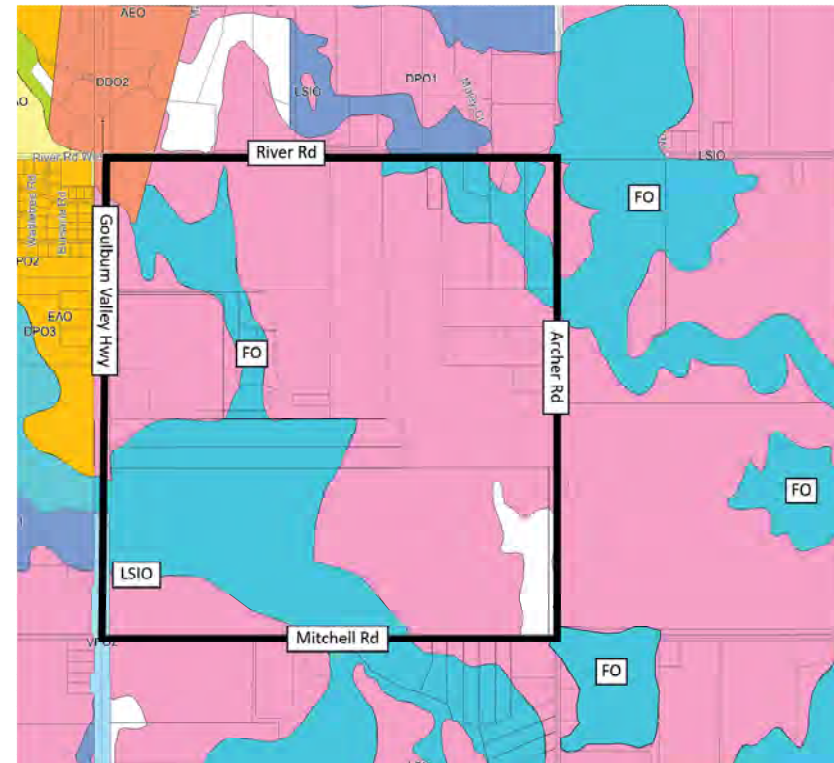
2.2.3. PLANNING OVERLAYS

Figure 4 shows the planning overlays that currently exist on the land within and adjoining the investigation area. Due to the Seven Creeks running through the south west corner and the tributary of Seven Creeks running through the north east of Investigation Area 1, there are certain parts of the precinct that are subject to flooding and inundation.

A Flood Overlay (FO) exists over a portion of the Harness and Greyhound Racing Precinct as well as the southern border of the investigation area, along Mitchell Road. A Land Subject to Inundation Overlay (LSIO) exists in the north west corner, as well as a large proportion of the southern half of the investigation area.

Planning overlays are detailed with specific allowances and restrictions. Permits are required for subdivision and building and works. Refer to Table 2 for a summary of overlay planning permit requirements.

FIGURE 4 PLANNING OVERLAYS INVESTIGATION AREA



Source: planning Maps Online

FLOODWAY OVERLAY

Clause 44.03 of the Greater Shepparton Planning Scheme states that the purpose of a floodway overlay is to:

- *“Identify waterways, major floodpaths, drainage depressions and high hazard areas which have the greatest risk and frequency of being affected by flooding.*
- *Ensure that any development maintains the free passage and temporary storage of floodwater, minimises flood damage and is compatible with flood hazard, local drainage conditions and the minimisation of soil erosion, sedimentation and silting.*
- *Protect water quality and waterways as natural resources in accordance with the provisions of relevant State Environment Protection Policies, and particularly in accordance with Clauses 33 and 35 of the State Environment Protection Policy (Waters of Victoria).*
- *Ensure that development maintains or improves river and wetland health, waterway protection and flood plain health.”*

LAND SUBJECT TO INUNDATION OVERLAY

Clause 44.04 of the Greater Shepparton Planning Scheme states that the purpose of the Land Subject to Inundation Overlay is to:

- *“Identify land in a flood storage or flood fringe area affected by the 1 in 100 year flood or any other area determined by the floodplain management authority.*
- *Ensure that development maintains the free passage and temporary storage of floodwaters, minimises flood damage, is compatible with the flood hazard and local drainage conditions and will not cause any significant rise in flood level or flow velocity.*
- *Protect water quality in accordance with the provisions of relevant State Environment*
- *Ensure that development maintains or improves river and wetland health, waterway protection and flood plain health.”*

TABLE 2 SUMMARY OF PERMIT REQUIREMENTS FOR PLANNING OVERLAYS

	FO	LSIO
Permit Required		
Building and Works	<ul style="list-style-type: none"> • Fence, roadworks, bicycle paths and trails 	<ul style="list-style-type: none"> • A fence, roadworks, rainwater tank with a capacity of less than 4500 litres, flood mitigation works
Subdivision	<ul style="list-style-type: none"> • The subdivision must not create any new lots, which are entirely within this overlay. • This does not apply if the subdivision creates a lot, which is to be transferred to an authority for a public purpose. 	<ul style="list-style-type: none"> • Permit required to subdivide land
No Permit Required		
Building and Works	<ul style="list-style-type: none"> • A single or multiple industrial, retail or office building extension, a single or multiple dwelling extension, a sportsground, racecourse or recreation area (with no permanent grandstand or raised viewing area), pathways and trails constructed at general natural surface elevation, playground and roadworks carried out by a public authority. 	<ul style="list-style-type: none"> • A new dwelling within Residential 1 Zones of Mooroopna, Shepparton and Tatura, an upper storey extension to an existing building within the existing building footprint, an agricultural shed (other than one used for industrial, retail or office purposes and a sportsground, racecourse or recreation area (with no permanent grandstand or raised viewing area), pathways and trails constructed at general natural surface elevation, playground.

2.3. LITERATURE REVIEW

The literature review provides a summary of Greater Shepparton and equine/greyhound related documents that align with the local/regional equine and greyhound industry as well as any future residential/housing/population projections and locations in Greater Shepparton.

2.3.1. COUNCIL DOCUMENTS

GREATER SHEPPARTON MUNICIPAL STRATEGIC STATEMENT

The Municipal Strategic Statement (MSS) is a concise statement of the key strategic planning, land use and development objectives for the municipality and the strategies and actions for achieving the objectives.

The MSS identifies several investigation areas that have been earmarked for potential future housing settlement in the framework plans. These areas have been identified as potential future areas to be rezoned or for high density residential development due to their proximity to amenity and growth areas. The two investigation areas in Kialla include:

- **Investigation Area 1** - Kialla Paceway and Shepparton Greyhound Racing environs. This area surrounds and includes the greyhound and trotting facilities and is directly adjacent to the Shepparton South Growth Corridor. There is potential to extend services to this land. However, future residential development within this area will be dependent on amenity issues such as lighting, noise, odour and dust being addressed to ensure that the long term interests of the racing facilities are protected.
- **Investigation Area 2** - Raftery Road, Kialla. The land is adjacent to the Shepparton South Growth Corridor and is situated between the Seven Creeks and Goulburn River corridors. Development is currently restricted by the 8ha minimum lot size under the Rural Living Zone. Higher density development is dependent on issues relating to servicing, flooding and the environmental assets of the two river corridors being resolved.

The Kialla Paceway investigation area has the potential to be rezoned as residential, however there are concerns of noise, light and odour pollution from the Harness and Greyhound racing precinct. Any future development mustn't interfere with the long term interests and operations of the racing clubs.

GREATER SHEPPARTON HOUSING STRATEGY (2011)

The Greater Shepparton Housing Strategy was prepared in order to provide a guide for the future provision and long term identification of residential land within the municipality.

The Greater Shepparton Housing Strategy (2011) has predicted that accommodating the growing population will require an additional 9,100 dwellings by 2031. This means that an average of 365 new dwellings will be needed every year to meet demand. Additional land for residential development will be required. While there is more than sufficient residential zoned land to accommodate conventional residential development over the next 10-20 years, opportunities for low density and rural living are quite limited.

Some of the relevant strategic directions of the Greater Shepparton Housing Strategy (2011) are:

- Locate residential development in locations appropriate to its intended use;
- Create sustainable living environments which conserve land and energy and are integrated with existing networks and systems; and
- Provide a diversity of housing options which become long-term assets to their neighbourhood.

The housing strategy plans for a mix of housing into locations proximate to shops, jobs, public transport, entertainment and open space. This will allow the most amount of people to take advantage of these local uses and spread the benefits of these areas as widely as possible.

Greater Shepparton currently has approximately 5,000 ha of zoned residential land which consist of 2,400 ha of Residential Zone 1 (R1Z), 775 ha of Low Density Residential Zone (LDRZ), and 1,000 ha of Rural Living Zone (RLZ).

The Greater Shepparton Housing Strategy also acknowledges that the investigation area is a potential location for future low density residential and rural living:

“Low Density Residential and Rural Living development has been limited in Greater Shepparton in recent times. There is anecdotal evidence that the current minimum lot size of 8ha within the Rural Living Zone (RLZ) is inhibiting further development. Other explanations include the reluctance of landholders to subdivide land where there is a

perception that there could be further development and rezoning opportunities for higher densities”.

And;

“There is some potential for rural living and low density within the current growth boundaries of Shepparton, Mooroopna and Kialla, however the location of these developments should not inhibit the future growth of the urban area and encourage land banking or leapfrogging. One example is the Kialla Paceway precinct that will require careful planning to minimise land use conflicts between this facility and future residents”.

GREATER SHEPPARTON COUNCIL PLAN & STRATEGIC RESOURCES PLAN (2009-2013)

The Greater Shepparton Council Plan is updated every four years and drives strategic direction in collaboration with community, councillors and council staff and reflects community aspirations, needs and expectations.

Key points from the council plan and strategic resources plan (2009-2013) are to:

- Encourage innovative, appropriate, sustainable and affordable housing solutions;
- Encourage sustainable municipal growth and development; and
- Develop a mix of sustainable tourist attractions, festivals and events.

GREATER SHEPPARTON 2030 PLAN

The Greater Shepparton 2030 Plan was prepared in order to build sustainable economic activity and maximise the quality of life in the municipality over the next 20 years.

Some key predictions in the plan for housing and settlement for the next 20 years include:

- “The municipality’s population will continue to grow from its current level of 59,660 persons towards 71,000 persons in 2021 and on to 75,700 persons by 2030. The multicultural and ethnic base will broaden and expand and the aboriginal community will remain a significant group in the local area.

- The size of households will decrease towards 2.7 persons per household; household structures will become more diverse and complex leading to a need for greater diversity in house types for a broad range of socio-economic characteristics.
- The overall population will “age” with the “baby boomers” moving into the latter part of their life cycle with a consequential greater demand upon health and support services and housing specifically suited to the needs of this sector.
- The environment and climatic benefits of the region, linked to an exodus to regional centres and coastal areas (within convenient access to the metropolitan areas) will see higher rates of persons attracted to the region for retirement and lifestyle reasons.
- The demand for rural residential environments will be tempered by greater concern to protect the productive capacity of soils and areas of native vegetation, provide services efficiently and cut dependence on fossil fuels to access facilities.”

The plan outlines a number of factors that will influence the siting and layout of new residential areas. Some of these factors include:

- Access to services;
- Water management;
- Energy efficiency; and
- Provision of diverse housing opportunities.

REGIONAL RURAL LAND USE STRATEGY (2010)

The purpose of this strategy is to develop consistent strategies and regulatory controls for the management of land use and development across the regions rural land.

The Regional Rural Land Use Strategy (2010) highlights the economic value and contribution of the horse racing industry within the Goulburn Valley.

The Strategy provides the following economic indicators for the Goulburn Valley Equine Industry:

- The GV region produces approximately 60% of all Victorian foals from many of the nation’s key breeders and trainers.

- In 2007, the Victorian harness racing industry had an estimated value of \$700 million per annum that included a significant employment component with over 11,000 people employed across the State. It is estimated that approximately \$72 million of industry value is derived out of the Goulburn Valley.
- \$36 million pa in industry turnover associated with racing, breeding and training activities.
- \$24 million pa in on-course and off-course wagering associated with the GV Region's harness racing meetings.
- \$12 million pa generated in State and Federal taxes levied on the GV Region's harness racing activities (Essential Economics 2007).

The thoroughbred racing industry within the Goulburn Valley:

- Generates some \$97 million annually in real gross value added, and equivalent to 6% of real gross value added in the industry in Victoria.
- Comprises 251 breeders, 210 trainers and 1,931 owners.
- Generates \$23.9 million annually in expenditures by breeders and trainers.
- Supports 1,130 full-time jobs.
- Generates \$8.5 million in tax revenue to State Government and \$10.5 million in tax revenue to Commonwealth Government.
- Generates total wagering of \$239 million annually of which 95% is TAB off course.

Other significant factors within this strategy include:

- Horse racing has a positive social outcome for regional communities as it is important in providing community identity, social cohesion and facilities for community use and enjoyment.
- Kialla is recognised as a development area for rural living for residents to create hobby or lifestyle farms.

MUNICIPAL STRATEGIC STATEMENT (MSS)

The Municipal Strategic Statement (MSS) makes reference to future residential development. It states that the municipality must ensure that there is an adequate land supply for residential and rural residential purposes, as well as promoting a choice and variety of housing.

The need for housing diversity and choice is advocated in State Planning Policy and is reflected in Clause 21.05-1 of council's MSS. In addition, the predominant form of housing in Shepparton is a detached three to four bedroom house on a larger lot.

GREATER SHEPPARTON ECONOMIC DEVELOPMENT STRATEGY (2009-2012)

The Greater Shepparton Economic Development Strategy is intended to increase the Council's capacity to identify and pursue economic development initiatives. The focus is identifying opportunities to promote investment and employment growth within a continually changing domestic and international economic and environmental landscape.

The Greater Shepparton Economic Development Strategy (2009-2012) makes a number of references to the Shepparton residential market, as well as population growth and housing projections.

Greater Shepparton's residential property sales reflect the same patterns as regional Victoria. The projected growth in Greater Shepparton's resident population between 2009 and 2026 (+10,000 persons, representing an average annual increase of 0.9%). This growth will have important economic development implications for the municipality, including the need to provide a significant number of new residential dwellings and a requirement for greater job creation, as well as expanding and improving the provision of infrastructure and services.

2.3.2. TOURISM DEVELOPMENT PLANS

GOULBURN RIVER VALLEY TOURISM DEVELOPMENT PLAN (2011-2016)

A tourism development strategy for Mitchell, Strathbogie, Greater Shepparton and Murrindindi Shires.

The Goulburn River Valley Tourism Development Plan (2011-2016) identifies existing equine facilities and services as well as equine tourism opportunities in the region.

The region is home to providers of specialist services, such as the Equine Hospital in Shepparton, and two post-secondary education institutions offer specialist equine-related courses in the region - The National Centre for Equine Education at Goulburn Ovens Institute of TAFE (GOTAFE) and Northern Metropolitan Institute of TAFE.

This development plan identifies a number of equine tourism opportunities, and they include:

- Continue to develop the Equine industry: Equine festival, special race meetings, special tickets and passes, Horse parade, a festival dinner.
- Equine tourism packages: Food, wine and horse stud visits - combined with accommodation, bus trips to view equine activities.
- Support the development of 'horse-friendly' accommodation: Equine symposium.
- Establish communication linkages with appropriate equine organisation.
- Develop an equine regional calendar of events.
- Develop on-farm viewing platforms.
- Attract new investment in accommodation to the region.
- Undertake a rural tourism planning review, to identify rural precincts which could be rezoned to support rural tourism development.

GOULBURN RIVER VALLEY DESTINATION MANAGEMENT PLAN (2013)

The Goulburn River Valley Destination Management Plan (DMP) was prepared on behalf of Goulburn River Valley Tourism (GRVT), to provide a strategic approach to growing tourism in the Goulburn River Valley (GRV) region; aligning with key visitor needs and building on the GRV region's existing strengths.

All four Local Government municipalities within the Goulburn River Valley Tourism Region (Greater Shepparton, Strathbogie, Mitchell and Murrindindi) are supportive of the equine industry and support the development of linkages with the tourism industry.

The DMP identifies a number of priority tourism projects that will look to strengthen destinations within the Goulburn River Valley Region.

In particular the Goulburn Valley Equine Precinct is identified with the need to investigate the option to redevelop the Goulburn River Equine and Greyhound Precinct to position Shepparton and the Goulburn River Valley as a premier destination for racing, breeding, and equine education.

Other key opportunities for Shepparton which should be considered are:

- **Shepparton Events Program:** Identify event locations and engage with potential event organisers and operators. Secure access and use of events sites and promote co-operation between events operators and relevant Council Departments. Promote and market events regionally to target segments as part of the formal events calendar.
- **Goulburn Valley Harness and Greyhound Racing Precinct:** Support the undertaking of a masterplan and feasibility study in order to guide the future development of the Goulburn Valley Equine and Greyhound Precinct. This work will provide the framework for decision making and a platform for further detailed planning, design, funding and implementation.
- **Investigate Farm Gate Opportunities (Accommodation, Produce, and Retail):** Identify farm gate businesses with the potential for tourism product. Provide business support and notify businesses of changes to the Farming Zone, and the potential impact on tourism opportunities.

3. PROFILE OF THE HARNESS AND GREYHOUND SECTOR

3.1. INTRODUCTION

This section provides a profile of Victoria's greyhound and harness racing industries. Key statistics include number of existing greyhound racing clubs and tracks, number of race meetings and attendees.

This section draws on information provided to Urban Enterprise from both sectors including annual reports and financial data.

KEY FINDINGS

- There are 13 greyhound racing clubs in Victoria, with Shepparton the only club in the north east of the State. This ensures that Shepparton has a large catchment for races which includes north east Victoria, the Murray Region and southern NSW.
- In 2013, Greyhound Racing Victoria held a total of 937 race meetings with an 11.3% increase in attendance from the previous year.
- There are 39 harness racing clubs across Victoria and in 2013, Harness Racing Victoria held 452 race meetings.
- Both the greyhound and harness racing industries have reported strong income growth over the past five years. In the case of the Harness Racing, much of this growth can be attributed to the introduction of Tabcorp Park and its non-racing entertainment, tourism and hospitality functions.
- Greyhound Racing Victoria has had strong growth in revenue on the back of a greater share of income from TABCORP and increased wagering as a result of more race meets.
- Industry trends highlight that the opportunity for the Goulburn Valley Harness and Greyhound Racing Precinct is to grow visitation through events, and greater entertainment during race nights. Tabcorp Park provides a good example of how multiple strong revenue streams can be leveraged from Harness Racing facilities in addition to wagering.

3.2. VICTORIAN GREYHOUND RACING INDUSTRY

3.2.1. PROFILE OF VICTORIA'S GREYHOUND INDUSTRY

There are 71 Greyhound Racing Clubs in Australia, of those, 13 are operating in Victoria. According to Greyhounds Australia there were approximately 933 race meetings in Victoria during 2011, with 10,607 races.

2013 witnessed a strong year for the greyhound racing industry in Victoria. There were five year high's for income, race meetings and attendance. Refer to Table 3 for a comprehensive list of Greyhound Racing Victoria's key industry statistics for 2013.

VICTORIAN RACING CLUBS

There are 13 Greyhound Racing Clubs currently operating in Victoria, Sandown being the premier racing club in the state hosting two race meetings per week. Shepparton has the potential to become a premier greyhound racing track as it too hosts 104 race meeting per annum. Clubs include:

- Bendigo;
- Geelong;
- Meadows;
- Shepparton;
- Warrnambool;
- Ballarat;
- Healesville;
- Sale;
- Traralgon;
- Cranbourne;
- Horsham;
- Sandown; and
- Warragul.

Figure 5 shows the distribution of Greyhound Racing Clubs in Victoria, highlighting that Shepparton is the only club in the north east of the state.

FIGURE 5 EXISTING GREYHOUND RACING CLUBS - VIC



TABLE 3 KEY INDUSTRY STATISTICS – GREYHOUND RACING VICTORIA 2013

CLUB	MEETINGS	ATTENDANCE
Meadows	104	32,018
Sandown	105	35,943
Total Metro	209	67,961
Ballarat	67	9,010
Bendigo	97	10,337
Cranbourne	53	10,620
Geelong	103	10,459
Healesville	56	6,859
Horsham	49	5,319
Sale	58	28,330
Shepparton	100	8,877
Traralgon	54	5,573
Warragul	98	12,749
Warrnambool	59	11,696
Total Country	728	119,829
Total	937	187,790

3.2.2. INDUSTRY TRENDS

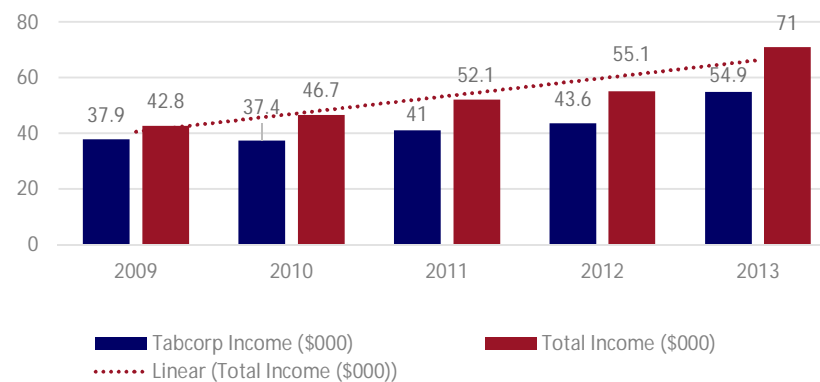
Figure 6 provides an overview of the Greyhound industry performance in Victoria. Income has grown significantly for Greyhound Racing Victoria due to:

- An overall increase in funding from the new wagering licence with Tabcorp that was also assisted by overall wagering revenues performing above budget ;
- The Victorian Racing Industry obtained the benefit of a new joint venture with Tabcorp called 'Premium Gateway International' that provided GRV with an additional \$0.5 million in income and given the relevance of international wagering is likely to be an important source of income to GRV;
- Racefields income increased by \$4.1 million (43.1 per cent increase).

The greyhound industry is in a strong position, and Shepparton has been a strong regional performer. The growth of Shepparton is observed through increases in race days and wagering as a result.

Shepparton, being the only GRV track in Victoria's north east highlights the strong growth potential of Shepparton Greyhound Racing Club to grow.

FIGURE 6 TRENDS IN INDUSTRY REVENUE/INCOME (GRV)



Source: Greyhound Racing Victoria Annual Report

3.2.3. FUTURE OBJECTIVES

The Greyhound Racing Victoria Strategic Plan identifies the following areas of focus for developing the industry:

- Greyhound welfare excellence;
- Racing operations excellence;
- Membership experience excellence;
- Club enablement excellence;
- Wagering operations excellence;
- People and culture excellence;
- Technology, systems and processes excellence; and
- Brand, reputation and stakeholder engagement excellence.

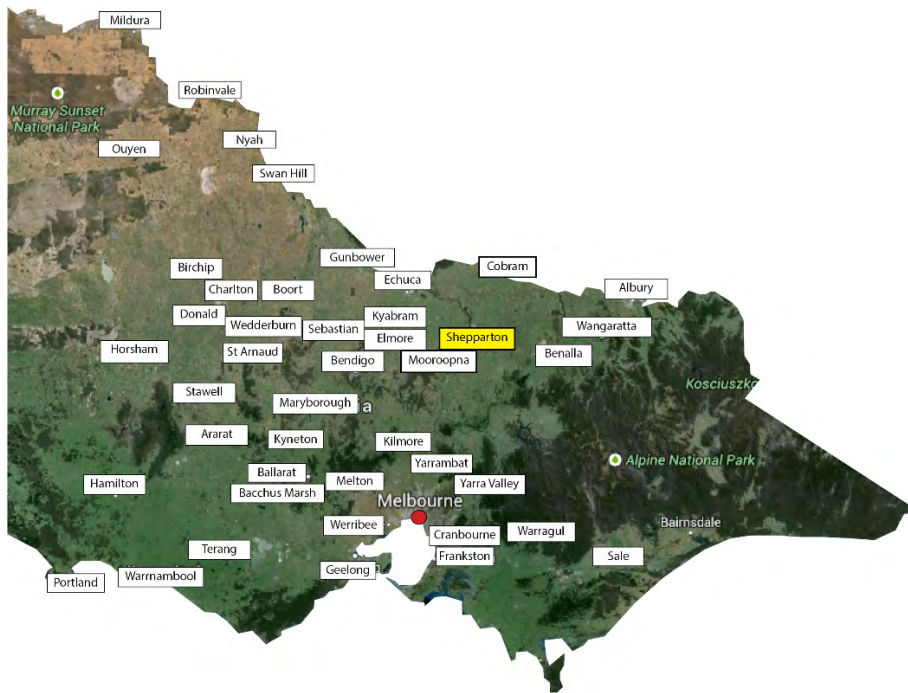
3.3. VICTORIAN HARNESS RACING INDUSTRY

3.3.1. PROFILE OF VICTORIA'S HARNESS RACING INDUSTRY

There are 117 Harness Racing Clubs in Australia, operating at 97 race tracks. Of those, 39 are located in Victoria. There are approximately 500 harness race meetings in Victoria alone, with 4,006 races and 3,303 club members.

In 2013, Harness Racing Victoria held 452 race meetings (TAB), with 3,814 races involving 4,099 horses.

FIGURE 7 EXISTING HARNESS RACING CLUBS



HARNESS RACING CLUBS - VIC

There are 39 harness racing clubs currently operating in Victoria. The majority of harness racing clubs in Victoria are found in a cluster throughout the Murray region, High Country and the Goulburn River Valley region. The Goulburn Valley Harness and Greyhound Racing Precinct's proximity to surrounding harness racing clubs suggests that it has the potential to attract visitors to the precinct for equine related events, and as a result has the opportunity to become a premier equine destination in the region. Harness racing Clubs in Victoria include:

- Ararat;
- Cobram;
- Kilmore;
- Nyah;
- Terang;
- Bacchus Marsh;
- Echuca;
- Kyabram;
- Ouyen;
- Wangaratta;
- Ballarat;
- Elmore;
- Kyneton;
- Robinvale;
- Warragul;
- Bendigo;
- Geelong;
- Cranbourne;
- Donald
- Wedderburn
- Boort;
- Hamilton;
- Mildura;
- St Arnaud;
- Yarrambat;
- Charlton;
- Horsham;
- Mooroopna;
- Stawell;
- Melton;
- Sebastian;
- Warrnambool;
- Birchip;
- Gunbower;
- Maryborough;
- Shepparton;
- Yarra Valley.
- Benalla;
- Swan Hill

TABLE 4 KEY INDUSTRY STATISTICS - 2013

	2013
Race Meetings	452
Races	3,814
Horses Raced	4,099
Trainers	1,300
Stablehands	1,271
Foals	2,359

Harness Racing Victoria - Annual Report (2013)

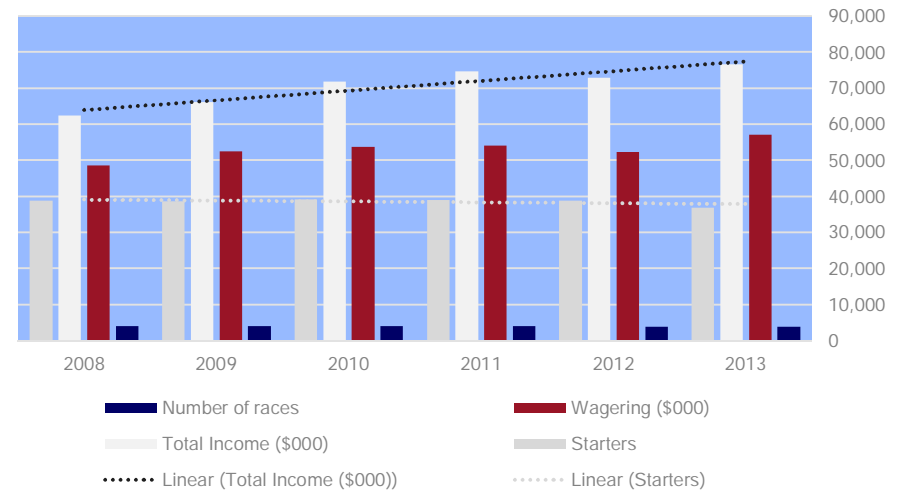
3.3.2. INDUSTRY TRENDS

Figure 8 shows trends in key statistics including number of harness races, revenue from wagering, race stater and total income for Harness Racing Victoria. The data shows that the number of races and number of starters has decreased over the past 5 years, whilst the total income has increased. Interestingly wagering has increased slightly, however much of the income growth for Harness Racing Victoria has been from non-wagering sources.

Revenue from Tabcorp Park has significantly improved the income for Harness Racing Victoria through the multiple revenue streams on offer which relate to entertainment and hospitality uses.

The trends in the harness industry highlight that there is likely to be limited growth in the number of starters and races held at Shepparton, however there is opportunity to strengthen other revenue streams for the precinct such as through growing events and strengthening visitation to existing races.

FIGURE 8 TRENDS IN KEY STATISTICS (HRV)



Source: Harness Racing Victoria Annual Report 2013

3.3.3. FUTURE OBJECTIVES

The following is a summary of the objectives which have set the future direction of the Victorian harness racing industry. These objectives and strategic initiatives can be adopted by the Shepparton Harness Racing Club and will strengthen its position as a premier harness racing destination in Victoria.

The desired outcomes are identified as follows:

- Create more industry events;
- Reduce barriers into entering the Harness Racing Industry;
- Improve community perception of the Harness Racing Industry; and
- Re-brand and Re-position Harness Racing as a sport of the future.
- Increased attendance;
- Increased economic benefits;
- Increased numbers of people involved in the industry as participants and spectators;
- Targeted education to attract and retain young people;
- Increased awareness of the industry, particularly at a local level;
- Improved racing stock;
- Improved breeding stock;
- Increased distributions of prize money;
- Significantly improved facilities;
- More young people to become a part of the industry; and
- Recognition of harness industry as a primary industry.

Some key strategic directions have been outlined and are summarised as follows:

- Develop a united and cohesive Goulburn Valley Harness industry through building enduring relationships with breeders, trainers, owners, administrators, clubs and allied professionals.
- Increase the profitability, profile and sustainability of the industry by developing mutually beneficial strategic partnerships and alliances.
- Develop quality facilities to feed future needs and encourage increased participation.
- Drive positive policy change by effectively representing the Goulburn Valley Harness Racing Industry.

4. EXISTING CONDITIONS: CLUB FACILITIES AND OPERATIONS

4.1. INTRODUCTION

This section provides an overview of the existing conditions in relation to club facilities and operations.

The existing conditions analysis is based on discussions with club members and a site visit of the precinct. Figure 9 shows the existing conditions for the Shepparton Greyhound and Harness Racing Precinct.

KEY FINDINGS

- The Harness and Greyhound Racing Precinct is largely built out across the site, with little room for broad scale expansion. The Greyhound Racing Club occupies the front of the site, with the Harness and Pony Clubs situated at the rear.
- There is opportunity for infill expansion of facilities and the layout of the training area does not use space efficiently.
- The precinct is home to excellent function room facilities including the Greyhound Racing Club's function room which accommodates 200 seated patrons, and the Harness Racing Club's AH Rathjen Dining room and the Winning Post Complex with capacity for 400 and 250 seated guests respectively.
- The Harness and Greyhound facilities are largely in good order as a result of recent grant funding for both facilities.
- The racing tracks and ancillary facilities are located on crown land and is leased to the Shepparton Harness and Greyhound Racing Clubs management committee.
- The parcel of land utilised for training and stabling is owned by the harness racing club.
- Shepparton Pony Club lease the land utilised for their clubroom facilities from Greater Shepparton City Council.

FIGURE 9 SHEPPARTON HARNESS AND GREYHOUND PRECINCT EXISTING CONDITIONS



EXISTING CONDITIONS
KIALLA EQUINE MASTERPLAN

4.2. SHEPPARTON GREYHOUND RACING CLUB

The Shepparton Greyhound Racing Club relocated to this precinct (Goulburn Valley Highway, Kialla) in 2005 after previously occupying the Shepparton Showgrounds.

Shepparton Greyhound Club is located on the left of the entrance to the precinct and is comprised of a greyhound racing track, club room/dining area and viewing deck. Directly behind the greyhound racing track are the holding yards, kennels and the office and administration building.

4.2.1. OVERVIEW OF USE AND ACTIVITIES

The Shepparton Greyhound Racing Club host a race meeting every Monday and Thursday throughout the year. During a race meeting, the dining room and viewing area are occupied by attendee's and club members.

4.2.2. JOBS

The Shepparton Greyhound Racing Club is made up of a committee and management team. The manager is aided by two full-time office and administration employees. During race meetings, additional staff are required for catering, bar and TAB duties.

4.2.3. OVERVIEW OF FACILITIES

GREYHOUND RACE TRACK

The sand based track upholds a high industry standard for racing and offers trainers three separate distances for racing. The club has consistently increased the amount of race meetings it hosts, reaching its highest number of meetings in 2013 with 100. The Club is scheduled to hold race meetings every Monday and Thursday night throughout the year.

The track has some landscaping around the winning post as it is the focal point for the viewer. Apart from the water storage dam in the centre of the track, which is utilised for watering the track, the areas surrounding the track are barren and un-vegetated.

DINING ROOM/VIEWING AREA

The function area incorporates an enclosed dining room, bar and TAB facilities that overlook the home straight. This function area often hosts corporate and social events as the dining room can seat up to 200 guests. Events range from corporate functions to weddings and parties. The Club hosts approximately 20-25 corporate/social events per year.

OFFICE ADMINISTRATION

The office administration buildings are located at the rear end of the greyhound racing track and adjoins the harness racing club dining room and viewing areas. The full time office staff are based in this building.

KENNELS/HOLDING AREAS

The kennels, swabbing station, veterinary and stewards room are in the same building as the office administration and are adjoining the harness racing dining room/function and viewing area. The greyhounds are kept in the kennels until the lead up to their race. From there, they are taken out to the holding areas until moments prior to the race. The holding areas are directly behind the track in front of the office administration building.

4.3. SHEPPARTON HARNESS RACING CLUB

The Shepparton Harness Racing Club is located in the centre of the Goulburn Valley Harness and Greyhound Racing Precinct. The Club incorporates a harness racing track, dual dining rooms, viewing grandstand, café, and big shed for stabling, administration office, commentary and corporate box. At the rear of the racing track there are training facilities which include a training track and stables.

Geographically the club is centrally located to the racing and breeding industries and since 2004 the industry, State Government and Greater Shepparton City Council have invested \$5 million to significantly upgrade the racing track, construct a new dining complex and develop an undercover stable complex. The Shepparton Club now boasts facilities more than comparable to any other provincial club and enjoys above state average performance in terms of racing entries and patron attendance.

4.3.1. OVERVIEW OF USE AND ACTIVITIES

The Shepparton Harness Racing Club hosts approximately 40 race meetings, predominantly at night. Of those race meetings, 30 are conducted for the Shepparton Racing Club and the remaining ten are held on behalf of a combination of Wangaratta, Kyabram and Mooroopna Harness Racing Clubs. The Club also conducts approximately 52 trial sessions and a further 20-25 social events, seminars and trade functions. Social events and functions are generally hosted in the dining rooms and the trade functions in the stabling complex (big shed).

The Shepparton Harness Racing Club can cater for corporate and social events and can host a number of different exhibitions.

The Shepparton Harness Racing Club has a total of 140 members and the attendances to a race meeting varies between 200-600 people.

4.3.2. JOBS

The Shepparton Harness Racing Club employs a racing and operations manager as well as an events and catering manager. There are a total of 4 full time equivalent staff employed by the club including maintenance and administration staff.

During a race meeting, the club employs an additional 13-25 staff depending on the scale and nature of the event. These staff members are employed for catering, bar and TAB duties.

4.3.3. OVERVIEW OF FACILITIES

SHEPPARTON RACE TRACK

The 1000 metre track is surfaced with granitic sand with a 200 metre straight and 100 metre turns. Races are run over 1609, 1690, 2190, 2690 & 3190 metre with 7 horses off the front for both mobile and standing starts and maximum field sizes of 12 for mobile and 11 in standing start events.

DINING ROOMS/VIEWING STAND

The Shepparton Harness Racing club have two dining rooms: The AH Rathjen Dining room and the Winning Post Complex. The Winning Post Complex overlooks the home straight and includes a boutique bar, bistro and TAB facilities. The Complex can cater for social and corporate events with up to 250 guests.

The AH Rathjen Dining Room is located below the Winning Post Complex and can host large events and exhibitions with up to 400 guests. It has a boutique bar, dance floor and fully equipped kitchen, however it does not have views of the track.

STABLING COMPLEX (BIG SHED)

The Stabling Shed is a purpose built complex. The shed was constructed to stable the horses prior to and post racing. This shed is an adequate facility which also has a washing and swabbing station. The stable shed also has the ability to host non race day trade events. Due to its magnitude, the stable shed can host an array of exhibitions and events, such as dairy week.

HARNES COMPLEX

A feature of the Shepparton Harness Complex is the wide open spaces that also attracts a number of uses. The significant grassed areas of the complex host a variety of users including dog shows, camp overs, rallies and trade displays.

TRAINING FACILITIES

Training facilities are located behind the Shepparton harness racing track. These facilities include: a training track, stables, clubhouses and storage huts. These facilities are used predominately by the Shepparton Harness Racing Club and their associated trainers.

CORPORATE/COMMENTARY BOX

The Cormican Corporate Box is perched above the track and slightly south of the winning post. The elevated Corporate Box is fitted with televisions and bar facilities. With a capacity of 15-20 people the corporate box is an ideal facility to entertain. The level below the corporate facility is the commentary box in which the broadcasters call each race.

4.4. SHEPPARTON PONY CLUB

The Shepparton Pony Club is situated at the south east of the corner of the Shepparton Harness and Greyhound Racing Precinct. The club occupies a small space, which consists of stables, a clubhouse and shared use of the harness training track.

The Shepparton Pony Club has approximately 60 members and holds its club rallies at the first Sunday of every month.

The Pony Club utilises the space within the Harness training track for its rallies, training and events.

4.5. SHARED FACILITIES

There are a number of facilities that are shared between the three clubs occupying the precinct.

CAR PARK

The car park is shared between the Greyhound Racing Club and the Shepparton Harness Racing Club. This is a non-issue for the majority of the racing calendar, however, there are irregular occurrences whereby a greyhound race meeting and a harness race meeting overlap. During these times, the car park does not have the capacity to accommodate the excess number of vehicles and is forced to spill over into the communal grass area surrounding the car park. In addition, it results in vehicle congestion issues within the car park and also on to the Goulburn Valley Highway.

TRAINING TRACK

A use conflict exists between the Shepparton Pony Club and the Harness Racing Club. There is a lack of adequate space to accommodate the Pony Club. The Pony Club does not have a cross country track and often experiences scheduling issues with the harness racing club.

WATER

The water dam at the south of the precinct is the major water catchment. The dam pumps water into smaller dams located inside the harness racing track and the greyhound racing track. The water from the dams are used to water the tracks and landscape gardens. There is currently an adequate supply of water to satisfy both clubs.

4.6. PROPERTY OWNERSHIP

Figure 10 shows the property ownership and land parcels for the Goulburn Valley Harness and Greyhound Racing Precinct and includes the entirety of the Special Use Zone 4.

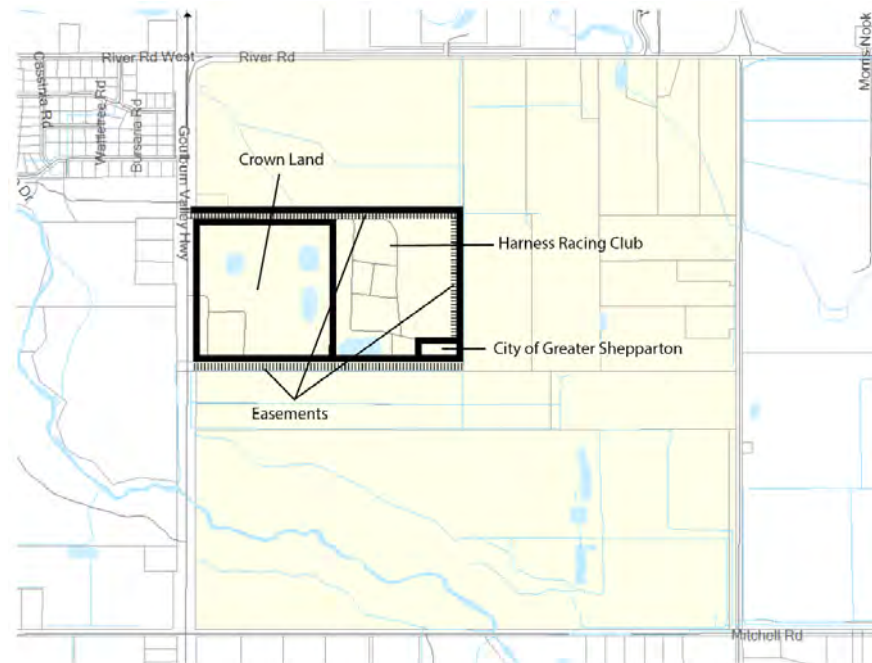
The crown land consists of all major racing operations including the harness and greyhound racing track, stabling complex, dining and function facilities, car park, kennels and administration buildings. This land is leased to a committee of management for the Shepparton Harness and Greyhound Racing Clubs.

The parcel of land owned by the Shepparton Harness Racing Club includes the training facilities (stables and track) as well as a clubhouse and storage huts.

The small parcel of land owned by the City of Greater Shepparton is leased to the Shepparton Pony Club. The parcel is only large enough for a clubhouse for the Pony Club.

A number of easements exist on the boundary of the precinct. A gas and electricity easement exists on the northern, eastern and south western boundary. There is also an easement on the water channel, on the southern boundary of the precinct. This is an easement to State Rivers Victoria and Water Supply Commission.

• PROPERTY OWNERSHIP – LAND PARCELS



5. HARNESS AND GREYHOUND PRECINCT BUSINESS GROWTH OPPORTUNITIES

5.1. INTRODUCTION

The market assessment for the precinct provides an indication of the ability to grow visitation and attendance to the precinct.

KEY FINDINGS

- Greater Shepparton is projected to grow substantially over the next 15-20 years with 23% projected growth between 2014 and 2031. This will provide growth in local market demand for function spaces, events and memberships for the clubs.
- Greater Shepparton is a key visitor node within the Goulburn River Valley Tourism Region, attracting 1.1 million visitors per annum. A large proportion of visitors to the Goulburn River Valley are visiting for special events or for business. This highlights the strength of business and non-business events markets for Shepparton.
- It is estimated that the Harness and Greyhound Racing Precinct attracts around 65,000 visitors per annum, of which around 9,500 are estimated to be overnight visitors to Shepparton. Visitation to the precinct creates demand for food, beverage, accommodation and equine/greyhound services in Shepparton.
- There is opportunity for the equine precinct to grow visitation through attracting both more social and non-social events and through developing the entertainment offer on race nights.

5.2. POPULATION

The Greater Shepparton population is expected to increase significantly over the next 20 years, with the population projected to grow from 63,447 in 2014 to 77,675 in 2031. This represents around 22% growth over that period.

This has consequences for the opportunities within Investigation Area 1 such as increased demand for residential housing, increased demand for function spaces and accommodation and increased demand for equine related facilities.

TABLE 5 PROJECTED POPULATION – GREATER SHEPPARTON

Year	2011	2016	2021	2026	2031
Population	61,744	64,775	68,973	74,189	77,675

5.3. VISITATION TO GREATER SHEPPARTON

Greater Shepparton is part of the Goulburn River Valley Tourism Region. The region includes the municipalities of Greater Shepparton, Strathbogie, Murrindindi and Mitchell, as shown in the Figure below.

Table 6 shows that Greater Shepparton attracts around 1.1 million visitors per annum which equates to 36% of all visitors to the Goulburn River Valley Region.

FIGURE 9 GOULBURN RIVER VALLEY REGION

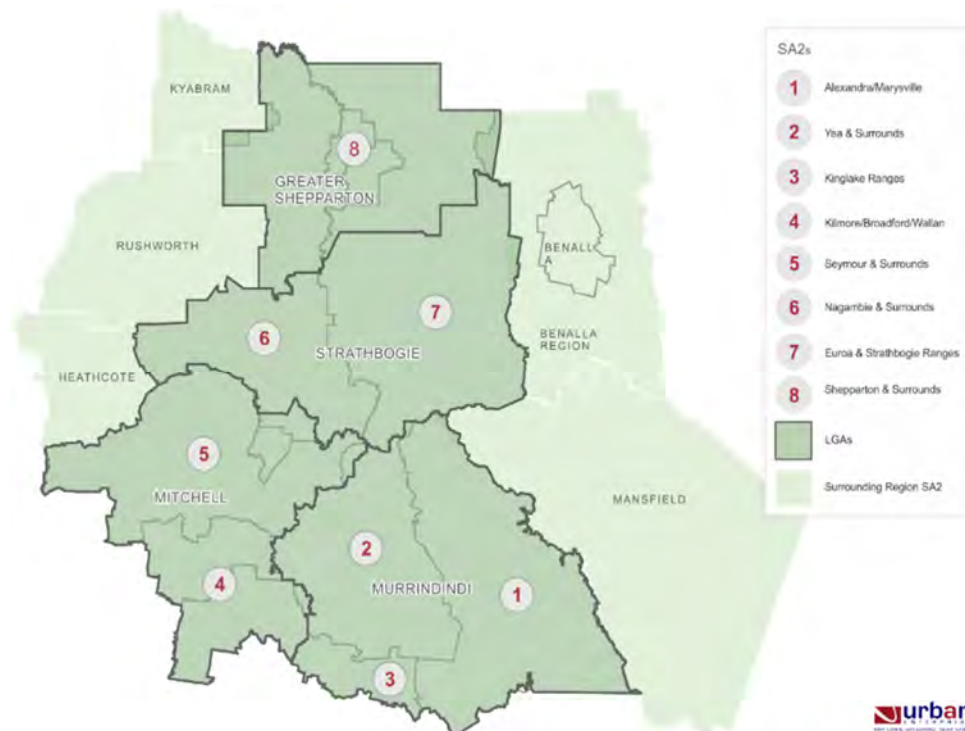


TABLE 6 VISITATION TO GREATER SHEPPARTON 2013

	Overnight Visitors	Daytrip Visitors	Total Visitors
Shepparton & Surrounds	545,795	634,000	1,179,795
Goulburn River Valley Region	1,311,218	1,971,000	3,282,218
	41%	32%	36%

Source: Goulburn River Valley Destination Management Plan

46% of visitors to Greater Shepparton visit for holiday leisure purposes, 17% for visiting friends and relatives and 29% for business. Greater Shepparton has a higher proportion of visitors coming for other reasons than other Goulburn River Valley municipalities. This is largely due to the strong special event market in Greater Shepparton of which the Harness and Greyhound Racing Clubs contribute to.

TABLE 7 REASON FOR VISIT - OVERNIGHT VISITORS

SA2	Holiday or leisure	Visiting friends and relatives	Business	Other
Shepparton & Surrounds	46%	17%	29%	7%

Source: Goulburn River Valley Destination Management Plan, National Visitor Survey

5.4. VISITATION TO PRECINCT

5.4.1. SHEPPARTON HARNESS RACING CLUB

Visitors to the precinct come from far and wide, Figure 12 shows the location origin of Harness Race starters for 2013. This highlights the large catchment for the Harness Racing Track with starters coming from as far as Newcastle, NSW.

Based on the estimates above the Shepparton Harness Track attracts around 27,240 visitors per annum. Based on data provided by the Shepparton Harness Racing Club and Harness Racing Victoria, around 15% of visitors to the precinct are likely to require overnight accommodation in Shepparton. This means that the precinct is driving demand for around 4,000 overnight visitors to Shepparton.

The number of overnight visitors to Greater Shepparton may be increased through provision of equine specific accommodation, so trainers and owners can stay in proximity to their animals.

TABLE 8 VISITATION ESTIMATES

Category	Assumptions	Visitors
Race meets	40 race meets 10 races per meet 10 horses per meet 2 people per horse 200 additional spectators per meet 400 visitors X 40 meets	16,000
Trial sessions	52 trial sessions 10 trials per session 6 horses per trial 2 people per horse	6,240
Other Events	25 events Venue capacity: AH Rathjen Dining Room 400 Winning Post Complex 250 Average no per event 200	5,000
Total		27,240

FIGURE 10 ORIGIN OF SHEPPARTON HARNESS STARTERS 2013



Source: Harness Victoria

5.4.2. SHEPPARTON GREYHOUND RACING CLUB

The Shepparton Greyhound Racing Club hosts 110 race meetings with a total attendance of 27,720 visitors. This equates to around 252 people per meet.

In addition the Greyhound Racing Club has an excellent dining and function room which can accommodate up to 200 seated guests. The function room attracts around 20 events per year, with an average of 130 people per event.

The Shepparton Greyhound Racing Club attracts around 36,560 visitors per year. Based on the previous assumption for the Harness Racing of 15% overnight visitors, the Greyhound Racing Club is estimated to attract 5,484 overnight visitors to Shepparton.

TABLE 9 RACES/EVENTS AND NUMBER OF VISITORS

Category	Assumptions	Visitors
Race meets	110 meetings per year 12 races per meeting 8 greyhounds per race 2 people per greyhound 16 x 12= 192 Plus 60 guests 252 x 110	27,720
Trial Sessions	Approx. 60 greyhound handlers per session 2 sessions per week	6,240
Other Events	20 events 130 average attendance at events	2,600
Total		36,560

5.4.3. PONY CLUB

The Shepparton Pony Club has 60 members and has 12 club rallies per year at the Harness and Greyhound Racing Precinct.

It is estimated that around 80 people are in attendance on rally days. In total it is estimated that the Shepparton Pony Club attracts around 960 visitors annually.

5.4.4. SUMMARY OF VISITORS ATTRACTED TO THE PRECINCT

The Shepparton Harness and Greyhound Racing Precinct currently attracts around 65,000 visitors per annum, of which around 9,500 are estimated to be overnight visitors to Shepparton.

TABLE 10 NUMBER OF VISITORS TO PRECINCT

Facility	Number of Visitors to Precinct	Overnight Visitors to Shepparton
Harness Track	27,240	4,000
Greyhound Track	36,560	5,484
Pony Club	960	0
Total	64,760	9,484

5.5. OPPORTUNITIES TO INCREASE VISITATION TO THE PRECINCT

Without any further expansion on the precinct, there is opportunity to grow the number of visitors to the precinct through growing the events calendar. Key opportunities include:

- **Local social events:** There is additional capacity within the function rooms to cater for more social events. The venues are of good quality and can attract larger social events of up to 400 people.
- **Business and special events:** The large 400 seat capacity AH Rathjen Dining room has great potential to attract large event special events. There are very few facilities in Shepparton and the broader region which can accommodate this number of visitors.
- **Shows and festivals:** The precinct is designed to accommodate a large number of visitors and there is opportunity to grow the number of outdoor events;
- **Special harness and greyhound nights:** Tabcorp Park has grown its attendance through the development of themed race nights. There is opportunity for both the Greyhound and Harness Tracks to explore themed nights.

In addition there is expected to be natural growth to the precinct based on population growth within the catchment area.

6. CASE STUDIES

6.1. INTRODUCTION

The following section highlights selected case studies of harness racing precincts and equine related rural residential/lifestyle farms. These case studies will inform the concepts and future land use options for the Shepparton investigation area.

KEY FINDINGS

- Tabcorp Park is a purpose built sporting and community hub. The development leverages off premier harness racing operations, whilst hosting a number of business and entertainment events and functions.
- Tabcorp Park's success can be attributed to a number of factors including a diverse mix of Harness racing operations, entertainment, functions and accommodation. This hub allows its users to experience a number of entertainment avenues.
- Brighton and Globe Derby Park contain generous residential allotments varying in size, generally 1-5 hectares. These land allotments are desired due to the proximity to equine related industries and recreation allowing residents to leverage off the regions equine related facilities and operations.
- Horse communities in the US are designed for equine recreation and provide a series of horse and nature trails with an abundance of public open space. Allotments are generally 1-3 hectares.
- The success of horse communities can be attributed to a number of factors which include social cohesion through the provision of community infrastructure and recreational space such as horse trails, parks and public open space.

6.2. HARNESS, THOROUGHBRED AND GREYHOUND PRECINCTS

6.2.1. DOWLING FOREST PRECINCT, BALLARAT

The Dowling Forest Precinct incorporates the Ballarat Thoroughbred Racecourse and the surrounding areas. Although the racecourse itself is Crown land, the land surrounding the racecourse was freehold Farming Zone land, which is ideal for horse trainers.

The development of this precinct was supported by local and state government, as well as the horse racing industry. A Dowling Forest Precinct Masterplan was prepared in 2011, which set aside the land surrounding the racecourse for horse trainers and equine enthusiast (hobby farms).

Planning controls were introduced via the Ballarat Planning Scheme which appropriately rezoned surrounding land to encourage activities and practices associated with the equine industry which is not fragmented by other uses such as non-equine activities (hobby farms). The purposes of any new controls are very important and should aim:

- To provide certainty and allow for future growth in terms of appropriate uses in close proximity to a major sporting venue;
- To encourage the continued growth of the racing industry at Dowling Forest;
- To improve access to the Dowling Forest Racecourse facilities which is safe and efficient by means of a suitably located "tunnel" under Midas Road and Kennedy's Road;
- To protect the interface of the racing industry with Miners Rest Township;
- To protect the environmental environs of Burrumbeet Creek;
- To set a minimum subdivision allotment size that satisfactorily addresses the needs of the equine industry whilst ensuring each lot is capable of retention of effluent discharge within the boundaries of the property; and
- To improve the overall traffic management of the precinct having regard to the purpose and use of the precinct.

The report recommended that the land identified within the precinct boundary be rezoned from Farming Zone to Rural Activity Zone or the Special Use Zone.

The Dowling Forest Precinct Masterplan was implemented through a planning scheme amendment and has implemented certain planning controls to ensure the future of the racing precinct and encourage equine related industries in the area.

6.2.2. TABCORP PARK MELTON

Tabcorp Park is located in Melton, 41 km west of Melbourne. Tabcorp Park is a unique sporting and community hub with a range of entertainment facilities operating seven days a week alongside a metropolitan harness racing track. The decision of Harness Racing Victoria to explore options for developing a major harness racing precinct came from the industry's five year strategic plan, developed in 2001. Melton was the ideal region for this development as it boasted the highest proportion of standardbreds in Victoria, identifying strong demand for this type of development in the region. In addition, Melton Shire recorded strong population growth, as well as providing attractive land that was required for a development of this size and scale.

Tabcorp Park is the premier harness racing facility in Victoria. Facilities include a 41 room four star hotel, function and conference rooms, bistro, sports bar, TAB and gaming room.

Tabcorp Park hosts harness race meets every Friday night and Thursday afternoon, as well as select Saturday nights and Sunday afternoons. Harness Racing Victoria have built a state-of-the-art 1040 metre track, which is the largest in Victoria. The track promotes fast, fair and competitive racing.

Tabcorp Park is designed to leverage off the Harness racing operations, however it is not the sole entertainment avenue in the precinct. The complex hosts an abundance of events and functions including weddings, parties, business conferencing as well as exhibitions and live music acts.

6.3. RURAL RESIDENTIAL/LIFESTYLE FARMS

The following case studies provide an insight into some rural residential/lifestyle farms throughout Australia. These areas are purpose built for its residents to utilise surrounding equine and equestrian related infrastructure and amenity, as well as having an abundance of open space for horse trails and recreation.

6.3.1. BRIGHTON TASMANIA

Brighton is located 27 km north of Hobart. Brighton racecourse, now known as Brighton Training Centre, is located north of the town centre, on Racecourse Rd and is utilised for training thoroughbred, trotting and pacing industry. The track has undergone some significant changes in the past 30 years, notably the addition of a chip wood track on the outer part of the course.

The land surrounding the training facility, is typically characterised by small lifestyle farms, often containing a house, shed/stables and recreational open space. Some properties have set up show jumping obstacles and other horse friendly apparatus on their land.

The properties in Brighton have the luxury of being in close proximity to the horse training facility and the Pontville Park Equestrian and Recreation Facility, as well as an abundance of open space.

6.3.2. MAHAINS ESTATE - GLOBE DERBY PARK, SOUTH AUSTRALIA

Globe Derby Park Harness Racing Club is located 15 km north of Adelaide CBD and is considered the premier standard harness racing venue in South Australia. Race meetings are held every week on Saturdays and Mondays, as well as Friday nights throughout the winter months.

Similarly to Brighton/Pontville in Tasmania, Globe Derby Park is characterised by an even mix of medium density residential and rural residential/lifestyle farm developments. Globe Park Derby leverages off the harness racing clubs and surrounding equine related centres in the area. Globe Derby Park contains a number of areas that are medium density living, however there is vacant land to the west of Globe Derby Park harness racing track that has been subdivided into eight rural residential allotments and is known as Mahains Estate.

Mahains Estate consist of eight 4,000 square metre allotments that are surrounded by equine related infrastructure, as well as park and wetlands. This estate is advertised as rural living in a metro area. Located 18 km from Adelaide CBD, it boasts an abundant amount of open space for horse riding, mountain biking and other outdoor adventure activities.

Mahains Estate has a particular focus on taking advantage of the equine amenity in the area. Nearby locations such as Betezy Park (Globe Derby Park Harness Racing Club), Globe Derby Equestrian Centre and Equus Horse and Pony Club and Public Riding Arena make it a prime destination for those seeking an equine lifestyle.

Allotments vary in size but are approximately 4,000 square metres and land prices are between \$180,000 and \$190,000.

6.3.3. HORSE/EQUESTRIAN COMMUNITIES CASE STUDIES

Horse or Equestrian Communities are planned and often gated developments in which residents can live with their horses on site and enjoy the pleasures of casual riding on a series of public horse trail networks. These communities have a number of equestrian related infrastructure and are becoming increasingly popular in rural areas of the United States as a result of a gradual decrease in horse trails and public equine facilities in semi-rural areas.

Horse/equestrian communities are often subdivided into 1-3 hectare allotments, and in addition to providing residents with equestrian related infrastructure, include a number of recreational facilities such as nature trails, picnic/recreation pavilions and parks.

6.3.4. KING OAKS, TEXAS

King Oaks is a horse/equestrian community that comprises a total land area of 380 hectares. This land is subdivided into 500 to 1,200 m² lots. This development was planned for the adventure/equine lover. The development incorporates a number of horse trail networks, as well as picnic/recreation and fishing areas.

6.3.5. SEMINOLE WOODS, FLORIDA

Seminole Woods is a rural/lifestyle farm estate in Florida. Its land area is approximately 650 hectares and is subdivided into 2-3 hectare lots. The estate includes a lake which can be

utilised for water activities such as fishing, kayaking and canoeing, as well as a series of nature and horse trails.

6.3.6. CONCLUSION

Table 11 shows a matrix of the five rural residential/equine lifestyle farm case studies. These properties and estates highlight the successful attributes that are implemented for these types of estates to be sought after. These attributes include:

- Allotments need to be subdivided into a minimum of 3-4 hectares to provide sufficient land to incorporate stables/kennels, water storage, septic units and a small horse yard;
- A close proximity to equine related infrastructure such as training facilities, trails, veterinary clinics and stockfeed;
- A provision of nature and horse trail networks, as well as a sufficient amount of public open space; and
- Create a network of rural residential/lifestyle farms that are of similar function in order to increase the number of residents leveraging off equine facilities in the area and maximise their use. Locate residential development in locations appropriate to its intended use.

TABLE 11 MATRIX OF RURAL RESIDENTIAL/EQUINE LIFESTYLE FARM CASE STUDIES

LOCATION	DESCRIPTION	LOT SIZE	EQUINE / COMMUNITY FACILITIES
Dowling Forest, Ballarat	Horse trainer, equine enthusiast, hobby farm precinct surrounding the Ballarat Racecourse. Leverages off the racing precinct operations to give rise to a state of the art horse training precinct.	Allotment size varies. Some areas have a minimum 4 ha lot size, other areas have a 10 ha minimum lot size. Zones vary between Farming Zone (schedule 1 & 2), Rural Residential and Special Use Zone.	<ul style="list-style-type: none"> • Rural residential allotments incorporate day yards and stables • Horse training facilities • Ballarat Thoroughbred Racecourse • Veterinary • Recreation areas • Horse related areas
Brighton, Tasmania	Rural residential/lifestyle farms situated around Brighton Training Centre	Vary significantly per lot. Range from approximately 1-10 hectares	<ul style="list-style-type: none"> • Brighton Training Track • Pontville Park Equestrian and Recreation Centre
Globe Derby Park, South Australia	Rural residential lots surrounding Betezy Park (Globe Derby Harness Racing Club) in South Australia. Mahains Estate is an estate purpose built to leverage off equine facilities in the area	A mix between medium density and rural residential. Existing lots range from 1-5 hectares. Mahains Estate has been subdivided into 4 hectare lots	<ul style="list-style-type: none"> • Betezy Park (Globe Derby Harness Racing Club) • Globe Derby Equestrian Centre • Equus Horse and Pony Club and Public Riding Arena
King Oaks, Texas	Horse community located in Texas, USA. King Oaks is a gated community that is a total of 380 hectares	Residential lots range from 500-1,200 m ²	<ul style="list-style-type: none"> • Horse and Nature Trail Network throughout the estate • Recreational Lake for water Activities such as fishing, swimming, kayaking and canoeing. • Picnic and recreation areas
Seminole Woods, Florida	Horse community situated in Florida, USA. The estate is approximately 650 hectares	Lot Sizes vary between 2 and 3 hectares.	<ul style="list-style-type: none"> • Series of public horse and nature trails • Recreational lake utilised for water activities such as fishing, swimming, kayaking and canoeing

PART B: ISSUES & OPPORTUNITIES

7. PHYSICAL ISSUES AND OPPORTUNITIES

7.1.1. INTRODUCTION

The following provides a comprehensive analysis of the physical issues and opportunities that arose from the consultation workshops with stakeholders such as Shepparton Harness and Greyhound Racing Clubs, Shepparton equine clubs, referral authorities such as Vic Roads, Goulburn Valley Water, Goulburn Murray Water, Goulburn River Valley Tourism, as well as various landowners who are situated within or adjoining the investigation area.

- Figure 13 shows the key physical issues associated with the investigation area and harness and greyhound racing precinct;
- Figure 14 shows the potential physical opportunities that may be presented for the investigation area and harness and greyhound racing precinct; and
- Figure 15 shows the existing situation and conditions for the harness and greyhound racing precinct.

KEY FINDINGS

The key physical issues and opportunities to be considered when developing the precinct and investigation area are:

- Only one entry point should be made to the precinct and investigation area from the Goulburn Valley Highway. A service road may be implemented to provide access to properties.
- Some land on the corner of the Goulburn Valley Highway and River Road will be required to allow for a sweeping bend and traffic changes in the long term to support large vehicle transport.
- Improved traffic management at all interactions surrounding the precinct will be required with further development of the investigation area;
- Large areas of the site are subject to flooding and development in these areas should be minimised;
- Due to the precinct's distance from water and sewerage treatment plants it is Goulburn Valley Water's preference that conventional residential development in the area be minimised, otherwise large and costly infrastructure improvements will be required.
- Channel water is provided to the precinct, which could be relocated underground as the demand for water in the area is not of a large agricultural scale. This means that a straight track could be built within the precinct in replacement of the existing channel, allowing the channel to be piped where required.
- There is potential for racing precinct to develop improved promotional and way finding signage.

7.2. INVESTIGATION AREA

7.2.1. ROADS

ENTRY POINT

The Goulburn Valley Highway is to have one entry point which will service the racing precinct as well as the potential commercial tenancies as discussed with Vic Roads. Currently the sole entrance to the Goulburn Valley Racing Precinct is located on Goulburn Valley Highway. During a race meeting for either the Harness or Greyhound Clubs, congestion becomes an issue on the Goulburn Valley Highway when vehicles are performing a right hand turn into the precinct. The traffic banks up and vehicles are forced to enter the emergency lane. This issue could be addressed by extending the turning lane into the precinct.

SWEEPING BEND

A potential long term requirement is to input a sweeping bend on the corner of Goulburn Valley Highway and River Road to improve the intersection and cater for increased traffic conditions. The sweeping bend would encroach on the North West corner of the precinct, therefore land would need to be acquired for this.

ACCESS POINTS

There is a need to minimise access points to the precinct on River Rd, as it is a highly used thoroughfare that absorbs high vehicle numbers travelling east west. Main access points to the precinct should be focused toward Archer Rd.

TRAFFIC

There will be a need to assess traffic conditions at the four intersect points around the perimeter of the precinct with further growth in use. Pending the outcome of analysis, there will be a requirement to treat each of the intersection points of the precinct.

FLOODING

The road bridge crossing over Seven Creeks on Mitchell Rd is subject to flooding, and as a result has flow on traffic affects for the surrounding roads.

7.2.2. SERVICING

RETICULATED WATER AND SEWERAGE

Reticulated water stops at River Rd and is pumped into the Harness Racing Club. The same conditions apply for the sewerage line.

The water mains are most likely to continue further down the Goulburn Valley Highway with the subsequent residential development potentially occurring opposite the Shepparton racing precinct.

Capacity constraints exist in relation to the water mains and sewerage drains into this part of Shepparton. Significant medium density, standard lot development will require significant infrastructure upgrades. These infrastructure upgrade costs would fall on the developer.

If the precinct was to take the direction of rural residential/lifestyle farms, lots would need to be large enough to be able to self-contain water. If this can be achieved there may not be a requirement to extend reticulated water. However, allotments can be provided with raw irrigation water, notably from the channel.

Approximately 1000 m² is required for septic disposal. This requirement needs to be considered when determining lot sizes, as they would need to be large enough to allow sufficient area for sewerage treatment on site.

A gas pipeline runs through the precinct and should be noted for future potential development, particularly with regard to communal uses.

CAPACITY

The investigation area is at the extremity of servicing due to its distance from the Shepparton sewerage treatment plant. The treatment plant is in North Shepparton, putting a strain on its capacity to service the investigation area.

7.2.3. WATER CHANNEL

A water channel runs from east to west through the precinct directly south of the racing precinct, and also runs from north to south on the western edge of the precinct. The channel

has the potential to be relocated underground and thus water can be piped into the precinct where required. This cost would fall on the developer as an infrastructure levy.

The channels water supply gets cut off from May 15th to August 15th every year for servicing and maintenance. Water storage would need to be present within each residential allotment in order to access water supply during these months.

If constructing near the water channel, a 30m setback (10m if piped) is required. The setback has the potential to be changed if necessary and would be at the developer's discretion.

7.2.4. ENVIRONMENT

NATURAL VEGETATION

There would be an opportunity to maintain stands of trees throughout the precinct where present, notably on the banks for Seven Creeks.

There is also the potential to use vegetation buffers where required. These could act as barriers which would break up areas within the precinct as well as combatting unfavourable exposures such as noise, light and smells from the racing precinct.

SEVEN CREEKS

A 60m setback is required for developing near/around Seven Creeks. Therefore there is potential to utilise the Seven Creeks area for recreation purposes such as an equine cross country course or other equine friendly uses.

OVERLAYS

A large proportion of the precinct is affected by a Flood Overlay (FO) and Land Subject to Inundation Overlay (LSIO). This will place development constraints in some areas of the site. Refer to figure 3 for a map of the current planning overlays.

Flood prone land areas could potentially be utilised for open space/recreation trails/horse tracks.

7.3. GREYHOUND AND EQUINE PRECINCT FACILITIES

7.3.1. EVENT FACILITIES

The Shepparton Harness Racing Club and the Shepparton Greyhound Racing Club both have good quality, large capacity function facilities. Function facilities are used for social and corporate events such as weddings and parties, as well as greyhound and harness purposes. There is a potential and capacity to expand the use of their facilities for an array of events. The Harness Racing Club and Greyhound Racing Club could stage multiple events at the one time and potentially brand/promote the two clubs together. I.e. the Shepparton Racing Precinct.

The Shepparton Harness Racing Club could use their stabling complex (big shed) to hold events/exhibitions/trade shows due to its size and capacity.

7.3.2. PRECINCT AMENITY

There is a potential for commercial amenity on the western face of the precinct, along the Goulburn Valley Highway. There is untapped space either side of the Greyhound Racing Club and car park that could be leased for commercial tenancy.

There is also a need to increase the signage and car parking capacity. The signage on the Goulburn Valley Highway is non-existent and the sign at the entrance to the precinct is small and confusing. Once you enter into the precinct, the layout is confusing and signage needs to be introduced to direct patrons.

Car parking is adequate for the majority of the race meetings for both racing clubs, however on the occasion that two club race meetings overlap, the car parking facilities cannot withstand the excess number of vehicles, and therefore spills over into the grassed areas. The car parking is a shared facility between the two clubs, and creates conflict at times. Therefore an opportunity exists to extend the car parking further.

7.3.3. RACING CLUB FACILITIES

The Shepparton Harness Racing Club expressed interest in developing a straight line track for training purposes. There would be a potential need to pipe a portion of the channel and take it underground to provide ample space for the track.

The unused land on the western face of the precinct, along the Goulburn Valley Highway has the potential to provide equine and greyhound friendly accommodation. This accommodation would require stables and kennels for owners and trainers to safely lock up their animals, as well as ample power outlets.

7.3.4. TRAINING TRACK AND FACILITIES

A use conflict exists between the Shepparton Pony Club and Shepparton Harness Racing Club. There is a lack of adequate space to accommodate the Pony Club on site. I.e. There is no cross country course and there are also scheduling conflicts.

FIGURE 13 INVESTIGATION AREA PHYSICAL ISSUES

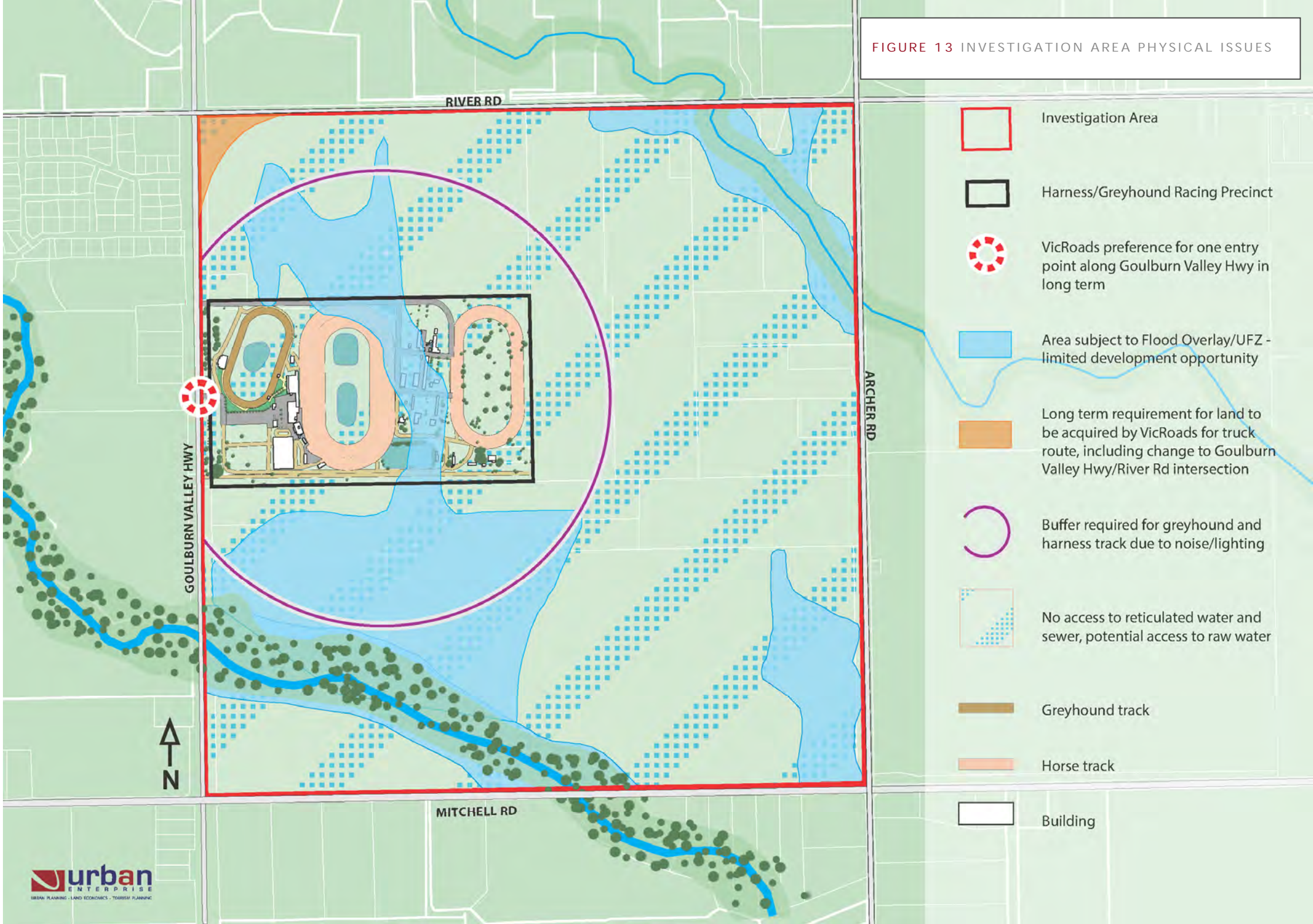


FIGURE 14 INVESTIGATION AREA PHYSICAL OPPORTUNITIES



-  Investigation Area
-  Utilise drainage lines and Seven Creeks precinct for open space
-  Commercial opportunities on Goulburn Valley Highway and River Rd
-  Opportunity to provide service rd for highway users
-  Opportunity for public trail network
-  Scenic lookout over river red gums
-  Reticulated water and sewer line and terminal point
-  Opportunity for underground water chanel to pipe water into the precinct
-  Straight training track above channe
-  Greyhound track
-  Horse track
-  Building

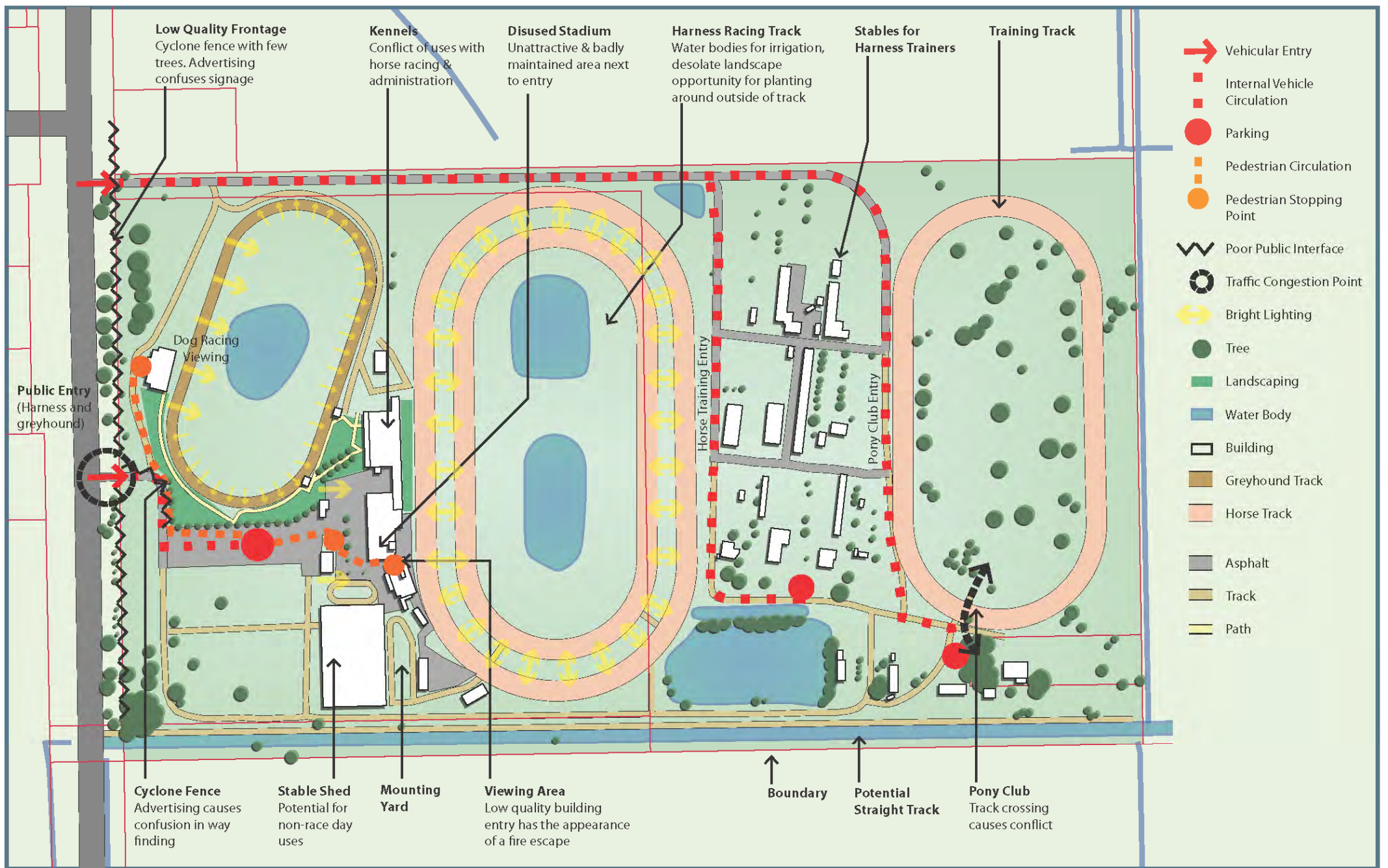


FIGURE 15 GREYHOUND AND HARNESS PRECINCT EXISTING CONDITIONS

8. FUTURE LAND USE ASSESSMENT AND RECOMMENDATIONS

8.1. INTRODUCTION

This section considers future land use opportunities that may be considered within the investigation area based on market information, consultation, workshops, planning policy and strategy, as well as physical constraints and opportunities. Land use options considered include:

- Standard lot residential;
- Low density residential;
- Rural living (equine);
- Equine recreation;
- Commercial and tourism uses (visitor accommodation & small tourism uses);
- Service centre;
- Village centre.
- Equine/greyhound services.

Recommendations on land use are based on an assessment of demand and supply for the potential uses identified.

KEY FINDINGS

- The future land use opportunities of the investigation area include residential (low density and rural living), equine recreation, commercial, tourism and equine/greyhound services.
- There is strategic support for low density residential uses in the precinct, however it will be important that these do not adversely impact the existing Harness and Greyhound Racing Precinct. If this were themed for equine purposes, it would build on the synergies with the current Greyhound and Harness Racing functions in the precinct.
- Strengthening the equine role of the precinct through land provided for equine recreational uses and commercial equine uses will provide greater market demand for equine themed low density residential uses. This will also assist in growing the precinct as the home of the equine industry.
- There is market support for visitor accommodation within Investigation Area 1, notably to leverage off visitation to the racing precinct and equine recreation uses.
- The precinct is best developed with a mix of the above uses in mind as they can complement each other. The key for the investigation area is to bring all of these uses together in a spatial way that complements the existing function of the area.
- In addition to equine related uses within the precinct a highway service centre leveraging from exposure to Shepparton's heavy vehicle route may also be considered.

8.2. RESIDENTIAL LAND

This section provides an overview of the residential housing market in Greater Shepparton. In particular, the current and future provision of residential land according to key council documents and demand through population projections.

The Greater Shepparton Housing Strategy 2011 identifies a number of growth opportunities for residential land to the north, south and east of Shepparton. The Housing Strategy allows for adequate land stocks for conventional and medium lot density (Residential 1 Zone) and Low Density Residential within the growth area of Shepparton to be delivered to 2031.

8.2.1. GROWTH CONTEXT

The Greater Shepparton population is expected to increase significantly over the next 20 years, with the population projected to grow from 63,447 in 2014 to 77,675 in 2031. This represents approximately 22% of growth over that period.

This has consequences for the opportunities within the investigation area such as increased demand for residential housing, increased demand for function spaces and accommodation and increased demand for equine related facilities.

The number of occupied private dwellings in Greater Shepparton are projected to steadily increase from 2011 to 2031. An estimated 7,700 additional occupied private dwellings are projected in Greater Shepparton.

TABLE 12 PROJECTED POPULATION – GREATER SHEPPARTON

Year	2011	2016	2021	2026	2031
Population	61,744	64,775	68,973	74,189	77,675

Victoria in Future, Population Projections

TABLE 13 PROJECTED DWELLINGS GREATER SHEPPARTON

Year	2011	2016	2021	2026	2031
Number of Occupied Private Dwellings	24,256	25,711	27,788	29,898	31,985

Victoria in Future, Dwelling Projections

8.2.2. STANDARD LOT RESIDENTIAL

Greater Shepparton Housing Strategy (GSHS) shows that there is currently a total of approximately 5,000 ha of zoned residential land in Shepparton which consists of:

- 2,400 ha of GRZ and NRZ;
- 775 ha of LDRZ;
- 775 ha of TZ; and
- 1,000 ha of RLZ.

Of the total zoned residential land, it is estimated that a total of 605 ha is available for future residential development in greenfield locations. This land consists of large, contiguous tracts of undeveloped land which is currently zoned for residential development and includes 476 ha of GRZ land and 41 ha of combined LDRZ and TZ land.

The residential development targets in the Housing Strategy seek to provide for a variety of choice in terms of location and type of living setting while also contributing to appropriate growth management and enhancing the viability of Greater Shepparton's small towns.

The residential development targets have been informed by:

- The type, amount and proportion of existing residential zones;
- The existing average lot sizes in each residential zone type;
- A qualitative assessment of dwelling demand and housing market conditions;

- Our understanding of sustainable development and the need to conserve land and energy; and
- The need to achieve the strategic directions and objectives of the GSHS.

The residential targets in the Greater Shepparton Housing Strategy identify the proportion of dwellings that should be achieved in each zone type and the likely average lot size for residential development within each zone. Targets have been set for both infill development in established areas and Greenfield development in new areas.

The residential development targets for the GSHS are as follows:

- Infill Development - accommodate at least 10 percent of the 9,100 dwellings (910 dwellings) in existing areas through infill and redevelopment at higher densities. New dwelling construction in these areas is highly encouraged by the GSHS and this target should be exceeded where possible.
- Greenfield Development -accommodate the remaining 8,190 dwellings in greenfield locations with:
 - 60% as conventional living (GRZ);
 - 20% as medium density housing (GRZ);
 - 15% as low density living (LDRZ and TZ); and
 - 5% as rural living (RLZ).

From a demand and supply perspective, there are adequate land reserves to accommodate conventional residential growth in the south of Shepparton with a number of areas already prioritised for conventional residential development to accommodate in advance of 15 years supply. Therefore there is no requirement for the investigation area to deliver additional medium/conventional density residential land to meet demand.

8.2.3. LOW DENSITY RESIDENTIAL AND RURAL LIVING RESIDENTIAL ALLOTMENTS

The Greater Shepparton Housing Strategy also considers low density residential uses:

“Low Density Residential and Rural Living development has been limited in Greater Shepparton in recent times. There is anecdotal evidence that the current minimum lot size of 8ha within the Rural Living Zone (RLZ) is inhibiting further development. Other explanations include the reluctance of landholders to subdivide land where there is a perception that there could be further development and rezoning opportunities for higher densities”.

And;

“There is some potential for rural living and low density within the current growth boundaries of Shepparton, Mooroopna and Kialla, however the location of these developments should not inhibit the future growth of the urban area and encourage land banking or leapfrogging. One example is the Kialla Paceway precinct that will require careful planning to minimise land use conflicts between this facility and future residents”.

The housing strategy above acknowledges the potential conflict of use between the Goulburn Valley Harness and Greyhound Racing Precinct (Kialla Paceway). Based on this and also the current restrictions on servicing the precinct, some form of rural living uses would be well suited to the precinct as:

- It will allow for a buffer from the Goulburn Valley Harness and Greyhound activities;
- It may provide opportunities for equine and greyhound enthusiasts such as trainers to locate next to the facility; and
- It will provide for a diversity of uses to the south of Shepparton in line with the recommendations of the Shepparton Housing Strategy.

Discussions with horse owners from recreation equine clubs and trainers highlighted the need for allotments to be a minimum of 5000m² and up to 2.5 hectares to accommodate stabling and a small yard for horses. Case studies such as the Dowling Forrest Precinct Masterplan in Ballarat show that equine allotments between 4 and 10 hectares are ideal,

with a minimum of 2 hectares to allow animal keeping infrastructure on the premises. There must also be sufficient land for essential infrastructure such as septic and water storage. Sites of this size would also be required for effective wastewater treatment.

Review of the panel report provided for the implementation of the Greater Shepparton Housing Strategy (Amendment C93) determines average and minimum lot sizes for the Low Density Residential Zone (LDRZ) and the Rural Living Zone (RLZ). Average lot sizes provided for Low Density Residential Zone is 2,000 - 8,000 m² and Rural Living Zone incorporates a lot size of 2 - 8 hectares.

For highest and best use, as well as allowing for potential horses on site with stables and day yards, the Rural Living Zone within Investigation Area 1 would be best suited to lot sizes of 1 - 2.5 hectares. For Low Density Residential Zone, optimal lot sizes will be approximately 2,000 - 4,000 m². Consultation with local agents highlights that there is major demand for rural lifestyle and low density residential allotments in close proximity to Shepparton CBD and suggest that Kialla, and in particular Investigation Area 1 would be an ideal location. Agents suggest that the lot sizes mentioned above are fitting, as anything less would be competing with residential estates such as Kialla Lakes and Seven creeks Estate.

The Greater Shepparton Housing Strategy highlights the lack of diversity in the housing stock in Greater Shepparton. The investigation area may provide opportunity to strengthen diversity in housing stock and provide choice for larger low density allotments and equine focused rural living allotments. These allotments will be suitable for trainers to locate in close proximity to the paceway and equine recreational uses to locate in a horse friendly estate.

8.3. RECREATIONAL EQUINE GROUPS

Two clubs have shown interest in relocating to the area south of the Kialla Paceway within Investigation Area 1. The two clubs who are in support of co-locating are the Shepparton Pony Club and Goulburn Valley Equestrian Club.

Both clubs have a steady membership base, with Goulburn Valley Equestrian Club experiencing growth in recent years and expecting growth in the future.

The Shepparton Pony Club have a number of land and infrastructure requirements including:

- 50 acres for a cross country course;
- 8 arenas approximately 60m x 80m;
- 200 car parking spaces with floats;
- Clubrooms; and
- 55 day yards approximately 10m²

In addition, Goulburn Valley Equestrian Club have the following land and infrastructure requirements:

- 3 all-weather surface arenas (one covered) approximately 80m x 40m each;
- Clubrooms with toilets/showers;
- Day yards;
- External power outlets, PA system and lights for arenas;
- Sufficient provision of car and float parking.

The total land requirements for both clubs is approximately 30 hectares, which includes circulation space.

With both clubs expecting significant growth in membership in the near future, an opportunity exists to create a regionally significant recreational equine precinct. This would not only benefit the Greater Shepparton community, but also grow tourism events through the provision of equine and other tourism events. Currently there is no cross country course in Shepparton and very few in Victoria and delivery of a high quality recreation equine precinct would provide significant opportunity to grow outdoor equine events.

8.4. COMMERCIAL AND TOURISM USES

There is opportunity for the precinct to consider commercial and tourism uses that may leverage from the Harness and Greyhound Racing activities. In particular, commercial uses may leverage from exposure along the Goulburn Valley Highway to passing trade. Specific commercial uses that may be suited to the precinct are highlighted below.

8.4.1. VISITOR ACCOMMODATION

The Harness and Greyhound events have a combined total of around 150 race meets per year with visitation to the precinct at around 65,000 per annum, which deliver around 10,000 overnight visitors to the precinct. Discussions with the clubs highlight there is potential for this to increase and that the Goulburn Valley Precinct could become one of the premier Harness and Greyhound precincts in Victoria. In addition to race meets that bring visitors from across Victoria and interstate, the precinct also accommodates an expanding number of events including special interest events such as automobile and trade shows, large family events and sporting events. A range of accommodation segments may be considered in the investigation area which appeal to different market need, including:

- Self-contained accommodation (farm stay/nature based tourism);
- Caravan park with potential equine holding infrastructure;
- 4 star motel/hotel accommodation; and
- B&B's.

In addition, allowing for equine recreational uses in the investigation area will create additional demand for overnight accommodation, particularly if cross country and pony club events are held in the area. This will provide additional demand for group accommodation and camping sites.

If the Shepparton Pony Club and Goulburn Valley Equestrian Club co-locate to the area south of the Kialla Paceway, it will generate an abundance of events within the investigation area. Assuming the two recreation clubs host a combined 30 events annually, and attract more an additional 200 visitors from outside the region including competitors and their

friends and family per vent the precinct has the potential to attract 6000 visitors to the precinct, of which many will require overnight accommodation due to the duration of events.

Outlined in section 5.5.4, the Kialla Paceway experiences an estimated 64,760 visitors, with approximately 9,484 overnight visitors. The equine recreation clubs in the precinct are likely to increase this to say at least 15,000 overnight visitors due to their events schedule.

This level of overnight visitation to events in the precinct can support an estimated 35 rooms. However this could increase if the accommodation provided for a market broader than precinct uses (e.g. international markets, touring markets and business markets). There is scope for the accommodation type and capacity to increase over time as the Investigation Area develops through increase operations of the Kialla Paceway and Recreational Equine Groups.

The area south west of Seven Creeks is an ideal location for a major visitor accommodation offer, which can leverage off the harness and greyhound racing operations and potential recreational equine activities. The accommodation establishment should be of high quality design and be able to support key market gaps in tourist accommodation, as well as maximising the exposure to the natural setting of the area. Consideration may be made to an integrated resort development which caters for a number of user groups, similar to the RACV Inverloch resort. This could service the touring market, group accommodation market and weekend escape market.

There is also an opportunity to provide a mid and budget market accommodation establishment in close proximity to Kialla Paceway that directly services the users of the Paceway, as well as recreational equine group users. For example, a caravan park which incorporates infrastructure to accommodate horses.

Refer to Appendix A for a comprehensive accommodation assessment.

8.4.2. SERVICE CENTRE – PETROL STATION

A service centre/petrol station within the investigation area is being considered due to exposure to Shepparton's heavy vehicle route along the Goulburn Valley Highway and River Road.

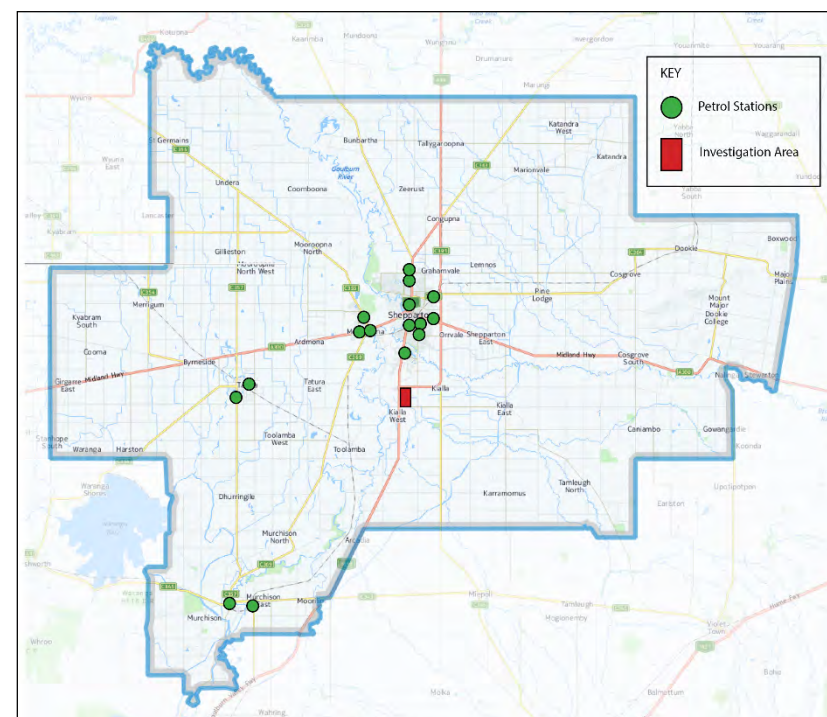
There are 16 petrol stations in Greater Shepparton; one located in Kialla, eight in Shepparton, three in Mooroopna, two in Tatura and two in Murchison.

The majority of petrol stations in Shepparton are located within the CBD, show in Figure 16. There is one petrol station in Kialla, and is located on the Goulburn Valley Highway.

TABLE 14 SERVICE STATIONS: GREATER SHEPPARTON

Service Station	Address	Distance from	Truck stop
United Petroleum	8010 Goulburn Valley Hwy, Kialla	4.5 km	No
Coles Express	530-532 Wyndham St, Shepparton	6.3 km	No
Mobil Oil	105 Archer St, Shepparton	8.6 km	No
Archer St Service Station	115 Archer St, Shepparton	8.5 km	No
Sofra's Service Senta	75 Benalla Rd, Shepparton	9.4 km	No
Caltex Shepparton	187 Wyndham St, Shepparton	7.9 km	No
Caltex New Dookie Rd	117-123 New Dookie Rd, Shepparton	11.6 km	No
Groves DR&HM	145 Numurkah Rd, Shepparton	10.3 km	No
Pat & Tina's Service Station	176 Numurkah Rd, Shepparton	10.5 km	No
BP Echuca Rd	Echuca Rd, Mooroopna	9.2 km	No
Caltex, Mooroopna	40 McLennan St, Mooroopna	8.2 km	No
BP, Mooroopna	105 McLennan St, Mooroopna	8.6 km	No
Fishers Fuel Tatura	180 Hogan St, Tatura	23.4 km	No
Independent Fuel Services	101 Ross St, Tatura	24.2 km	No
Shell Murchison East	4895 Goulburn Valley Hwy, Murchison	27.1 km	No
Murchison Service Station	23 Stevenson St, Murchison	29.1 km	No

FIGURE 16 SERVICE STATIONS: GREATER SHEPPARTON



According to the Australian Valuation Property Classification Codes (AVPCC), the petrol station industry operates on a three-tiered market:

1. Primary Tier (AVPCC 216) - the primary category is divided into two sub categories:
 - a. Super sites - very large petrol stations or service centre truck stops usually located on freeways, major highways/arterials. These sites cater for large transports i.e. B-doubles and semi-trailers and frequently have fast food outlets available i.e. McDonalds, KFC, plated food and amenities.
 - b. Primary sites - large main road sites, generally with starter gate canopies, larger convenience stores and other uses, with Oil Company or larger independent branding.
2. Secondary Tier (AVPCC 215) - the secondary category is divided into two sub categories:
 - a. Neighbourhood Sites - smaller sites often with older improvements and limited facilities. Can include 7-Eleven sites.
 - b. Shopping Centre Pads are driven by supermarket discount vouchers and are frequently located within shopping centre complexes or without prime exposure. While the Supermarket Pad sites have been separately categorised it should be noted that these sites may need to be further grouped into Primary Pad sites and Secondary Pad sites.
3. Marginal - older sites with limited facilities and old tanks. Primarily utilised as auto service/workshops or similar. Value generally driven by underlying land value after deduction for demolition and remedial costs.

None of the petrol stations in Greater Shepparton have a purpose built truck stop and thus reflects a gap in service station amenity. There is an opportunity to locate a service station with truck facilities (primary tier, supersite) within the investigation area, taking advantage of the frontage on Goulburn Valley Highway and River Road. This station would potentially pick-up truck traffic travelling east west, as well as north south. A large truck stop service centre would require approximately 3 hectares of land based on case studies of newly developed comparable centres.

8.4.3. EQUINE/GREYHOUND SERVICES

There may be opportunity to explore equine and greyhound related services in the precinct such as stockfeed, farriers, saddlery and equipment. This will be largely left to market demand, however there are clearly synergies between these uses and the market for the precinct.

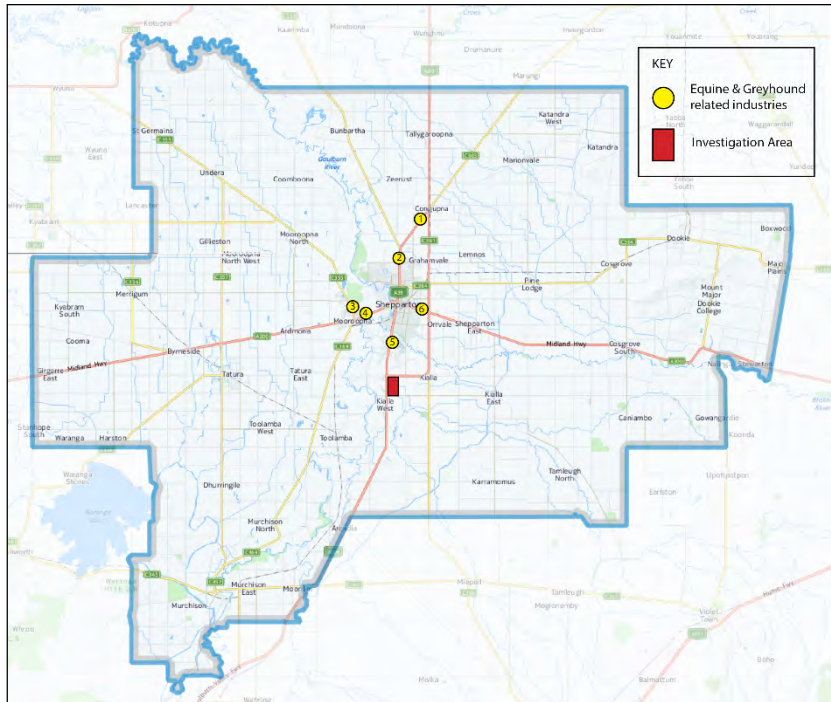
The following Table and Figure show the numerous veterinaries and stock feed establishments in Greater Shepparton.

The proposed commercial space in the alternative concepts considered presents an opportunity to add to the Harness and Greyhound racing precincts operations. A veterinary and/or wholesale stock feed and supplies establishment would add to the equine/greyhound hub already present in the area.

TABLE 15 EQUINE AND GREYHOUND RELATED INDUSTRIES: GREATER SHEPPARTON

	Name	Address	Services
1	Goulburn Valley Equine Hospital	905 Goulburn Valley Hwy, Congupna	Lameness, radiography, arthroscopy, scintigraphy, fracture repair, respiratory repair, reproduction and surgical services
2	Shepparton Veterinary Clinic	2 Wanganui Rd, Shepparton	Pet care, healthcare, surgical and wellbeing services
3	Mooroopna Veterinary Clinic	71 Echuca Rd, Mooroopna	Dogs, Cats, Birds, Poultry and exotic pets. Breeders/Greyhound services, grooming, consultation, surgeries, vaccination & micro chipping
4	The Causeway Veterinary Clinic	10 McLennan St, Mooroopna	Healthcare, surgical and well-being services.
5	Kialla Veterinary Clinic	7966 Goulburn Valley Hwy, Kialla	Pet care, healthcare, surgical and wellbeing services
6	PETStock Shepparton	210 Benalla Rd, Shepparton	Domestic pet food, supplies and equipment. Caters for dogs, cats, fish, reptiles, horses and chickens.
7	Tatura Veterinary Clinic	29 Ross St, Tatura	Equine & Livestock services

FIGURE 17 EQUINE AND GREYHOUND RELATED INDUSTRIES: GREATER SHEPPARTON



8.4.4. RETAIL

SHOPPING PRECINCTS

Riverside Plaza is located approximately 4.5 km from the investigation area and is the closest shopping precinct to the investigation area and thus services the residents of Kialla, including new medium density residential developments (Kialla Lakes, Kialla Green and Seven Creeks Estate).

Riverside Plaza includes:

- Coles Supermarket;
- Target;
- Medical centre;
- Dental surgery;
- Pharmacy;
- Eateries;
- Butcher;
- Bakery; and
- Various clothing stores.

Riverside Plaza more than satisfies the current residents of Kialla and provides a good mix of amenity. If residential development continues to the south of Kialla, there will be a need for retail space.

Figure 18 shows the numerous medium density residential developments in Kialla. Kialla Green, Riverview Park Estate, Seven Creeks Estate and Kialla Lakes Estate are being delivered in stages and are experiencing strong take up rates.

Riverside Plaza is shown in Figure 18 and highlights its close proximity to these developments. Riverside Plaza is a large retail centre that services the Kialla area, in particular the growing number of residential estates. Due to the lack of water and sewerage infrastructure to the south of the investigation area, residential development is likely to continue north of the investigation area, as well as through the northern growth corridor. As a result, Riverside Plaza is more than serviceable for the current provision of residents in the area. Thus the proposed commercial space reserved in the investigation area will best

suit a service provider that leverages from the operations of the Harness and Greyhound racing clubs.

FIGURE 18 RESIDENTIAL DEVELOPMENT IN KIALLA



Base Map Source: Google Earth

DEMAND FOR RETAIL

Given the proximity of the precinct to Riverside Plaza, there will be no requirement for higher order retail within the precinct. Preliminary outcomes from the Greater Shepparton Commercial Land Use Study 2014/15 highlight that retail in the investigation area would not be suitable given the distance and isolation of the area from the existing retail core.

Some allowance may be made within the investigation area for retail that services the local catchment only such as a general store or food and beverage outlet. This could be included within a village centre concept within the precinct and have dual role of servicing visitors to the precinct and residents within the investigation area.

8.4.5. FARM GATE TOURISM

There is a potential opportunity to leverage off small scale agriculture in the precinct.

The Goulburn River Valley Destination Management Plan identifies an opportunity to investigate the potential for farm gate accommodation, produce and/or retail. This is recognised as a tourism opportunity for Shepparton as it could promote local business and tourism within the region. This use may be supported on rural residential allotments within the precinct.

8.5. SUMMARY OF LAND USES

The following table is a summary of the land requirements needed to satisfy the different land uses which have been identified for Investigation Area 1.

Low Density Residential will comprise approximately 50-60 hectares of land, primarily along Archer Road and is expected to yield between 250 and 300 allotments.

Rural Residential Living is concentrated to the area directly east of the Kialla paceway and extends to the north and south of the Investigation area. Rural Living will comprise an estimated 45-55 hectares of land yielding approximately 40-50 allotments, with 30-40 allotments being for rural equine residential and the remaining 10 allotments being a rural residential buffer between rural equine uses and low density residential uses.

Recreational Equine is identified for the land directly south of the Kialla Paceway and includes approximately 30 hectares of land. The two clubs who have shown interest in co-locating here have specific land requirements, which are shown in Table 16.

Land for accommodation has been concentrated to the area south of Seven Creeks for a high quality accommodation offer and a tourist park facility to the north east of the Kialla Paceway to leverage off equine and greyhound operations. It is recommended that there be animal holding facilities on site. The caravan park would require around 12 hectares, whilst the integrated resort would require around 10-15 hectares as well as linkages with the natural setting along the Seven Creeks.

The North West corner of the precinct, in which the Goulburn valley Highway and River Road meet has been designated for a highway service centre (with truck stop) and a retarding basin to facilitate the development of the commercial land. It is assumed that 3 hectares will be utilised for the service station, and a further 2 hectares for the retarding basin.

TABLE 16 ESTIMATE OF LAND REQUIREMENTS PER LAND USE

Land Use	Lot Sizes	Estimated Number of Lots	Estimated Land Budget
Low Density Residential	2,000 - 4,000 sqm	250-300	50-60 hectares
Rural Residential Living	10,000 Sqm	10	10 hectares
Rural Equine Living	10,000 - 25,000 sqm	30-40	35-45 hectares
Commercial Uses			
Highway Service Centre and Truck Stop	35,000 sqm	1	3.5 hectares
Accommodation			
Caravan Park	N/A	1	12 hectares
Integrated Resort	N/A	1	10-15 hectares
Recreational Equine Clubs		1	30 hectares
Shepparton Pony Club			
Cross Country course	20 hectares	1	20 hectares
Arenas	60m x 80m	8	4 hectares
car spaces with floats	5m x 5m	200	0.5 hectares
Day yards	10 sqm each	55	0.055 hectares
Clubrooms	300 sqm	1	0.03 hectares
Goulburn Valley Equestrian Club			
Arenas	80m x 40m	3	0.1 hectares
Day yards	10 sqm each	70	0.07 hectares
Clubrooms	300 sqm	1	0.03 hectares
Retarding basin	2 hectares	1	2 hectares

9. MASTERPLAN

9.1. OVERVIEW

The masterplan has been designed to develop a strong integrated precinct which leverages off the existing equine and greyhound events and training role of the Kialla Paceway. Expansion of equine uses including a new purpose designed recreation equine area and rural equine residential will create a strong home for the equine sector uses in Greater Shepparton.

Commercial accommodation uses are proposed to leverage from visitation to the precinct, but will also meet accommodation gaps in the Greater Shepparton Region.

Low density residential uses will provide diversity in the dwelling stock for Shepparton, creating a high quality residential precinct.

Key elements of the masterplan include:

- Expansion of recreational horse facilities will create stronger demand for rural lifestyle allotments. The recreation equine area will support purpose built facilities for the Shepparton Pony Club and Goulburn Valley Equestrian Club and provide opportunities to grow outdoor equine events.
- Relocation of training track into the centre of the harness racing track allows additional land for increased stabling and facilities for on-site trainers. This will also provide improved management of the training facilities by collocating training in one location.
- The large high quality accommodation establishment identified to the south of the precinct has the potential to capture overnight visitation from the harness and greyhound racing precinct and become a key piece of tourism infrastructure in the region, supporting a number of market segments. It is envisaged that this infrastructure may be staged overtime, aligned to a quality masterplan for the site.
- Commercial uses on the corner of River Road and the Goulburn Valley Highway can fill a market gap in the provision of large service centres which cater for heavy vehicles

and further allowance is provided for other large format uses that may service the transport industry such as a truck wash;

- The masterplan satisfies the Greater Shepparton Housing Strategy by providing a viable mix of low density residential and rural living residential allotments, without interrupting the operations from the Kialla Paceway;
- Rural equine residential uses provide opportunity for horse trainers and other recreational equine enthusiasts to locate in a strongly focused equine precinct with equine trails and links to equine training facilities;
- An internal trail network will support the equine residential properties and provide direct access to the Harness Racing area and recreational equine area;
- Rural living provides a buffer between equine residential uses and low density residential uses;
- A village centre next to a newly developed indoor equine training centre will be established to service residents and visitors to the precinct. It is envisaged that this would house a café/general store and feed store.
- Road entry points are minimised on Goulburn Valley Highway and River Road;
- A caravan park is identified along River Road to support the equine uses within the broader precinct including the harness racing track and recreation equine events. If the Caravan Park is not pursued the Low Density Residential Zone should be applied to this land.

Two versions of the masterplan are included on the following pages. Version two includes an indicative lot layout to demonstrate how the precinct may be delivered. This layout is likely to change with further detailed design during the implementation phase.

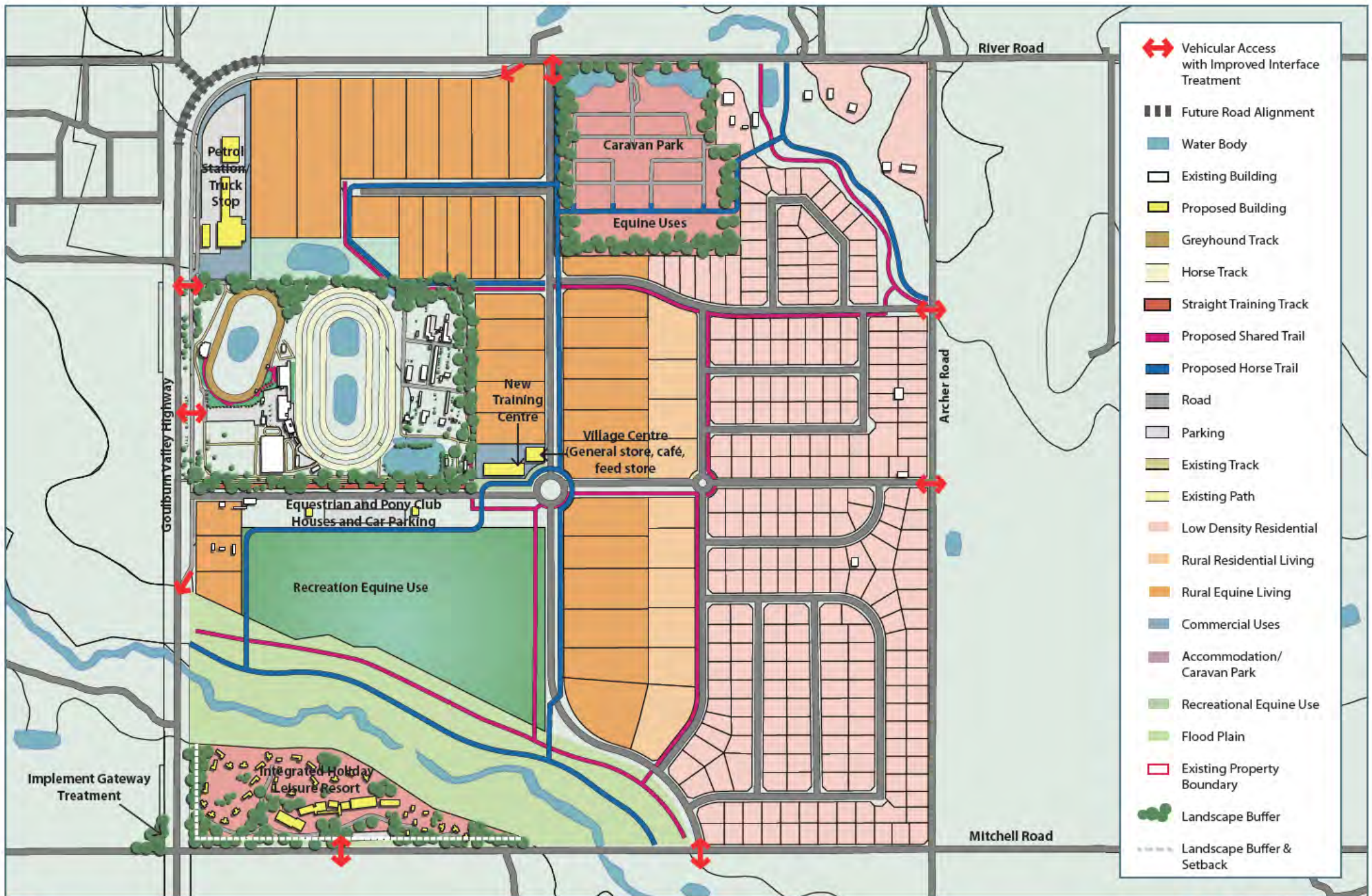


- Vehicular Access with Improved Interface Treatment
- Future Road Alignment
- Water Body
- Existing Building
- Proposed Building
- Greyhound Track
- Horse Track
- Straight Training Track
- Proposed Shared Trail
- Proposed Horse Trail
- Road
- Parking
- Existing Track
- Existing Path
- Low Density Residential
- Rural Residential Living
- Rural Equine Living
- Commercial Uses
- Accommodation/Caravan Park
- Recreational Equine Use
- Flood Plain
- Existing Property Boundary
- Landscape Buffer
- Landscape Buffer & Setback



MASTER PLAN

Goulburn Valley Equine and Greyhound Precinct



10. ECONOMIC IMPACT

10.1. INTRODUCTION

An economic impact assessment is provided below which identifies the estimated benefits of the proposed masterplan once fully developed.

The economic impact assessment provides an economic analysis of the following:

- **Economic impact during construction phases.** This estimates the economic impact from construction expenditure within the precinct and calculates direct and indirect output and jobs generated.
- **Economic impact during operational phases.** There are a number of facilities in the precinct which will drive ongoing economic benefit for Greater Shepparton. This includes a new training centre, events conducted within the equine recreational area, revenue generated from the integrated resort facility and caravan park. The below assessment analyses estimated output and jobs generated from these uses.

Urban Enterprise utilises input output modelling for Victoria to determine the flow on (indirect) benefits of expenditure and jobs.

KEY FINDINGS

The proposed masterplan for the Equine and Greyhound precinct will enable the following economic benefits to the Victorian economy:

- \$287 million in output and 744 jobs during the construction phases of development;
- A minimum ongoing impact of \$12 million in output and 73 jobs.

The vast majority of these jobs will be within Greater Shepparton due to the large scale of Shepparton's construction industry and population base to support ongoing service sector jobs.

The ongoing economic impact identified is conservative as it does not include ongoing jobs generated from the proposed service centre nor does it account for additional expenditure to Greater Shepparton by attracting new visitors to the region outside of accommodation expenditure and expenditure within the Equine and Greyhound Precinct.

10.2. CONSTRUCTION PHASE IMPACTS

Table 17 summarises the estimated cost during the construction phase which will implement the masterplan. This is likely to be staged and occur over a long time period, potentially up to 10 years. The source for the cost estimates provided in the table below. Further detailed design and documentation is required to arrive at more accurate costs, however for the purpose of a broad economic impact assessment a general allowance is useful to understand the scale of economic impact that the masterplan will enable.

The delivery of the masterplan concept is estimated at around \$183 million based on the assumptions included in table 17. Using Urban Enterprises input-output model this will deliver around 474 direct full time equivalent jobs during the construction phase in the Victorian economy.

The flow on benefits are estimated to be \$104.3 million in output which equates to an additional 270 jobs in the Victorian economy.

In total during the construction phase the output from delivery of the masterplan is estimated at \$287 million and will deliver 744 jobs to the Victorian economy. Due to Shepparton's large and well developed construction sector it is anticipated that majority of the jobs identified will be locally based.

TABLE 17 CONSTRUCTION PHASE COST ESTIMATES

Item	Cost Estimate	Notes	Source
Equine Rural Living and Rural Residential Allotments	\$18 Million	Includes 42 newly established allotments, with one dwelling per allotment. Includes allowance for services, driveway landscaping, fencing and shedding Servicing: \$30,000 Dwelling: \$350,000 Landscaping, fencing, driveway, sheds \$50,000	Rawlinson's Construction Cost Handbook, Urban Enterprise
Low Density Allotments	\$106 Million	Includes approximately 265 newly established low density allotments with one dwelling per allotment. Includes allowance for servicing, driveway and landscaping Servicing: \$25,000 Dwelling: \$350,000 Landscaping, fencing, driveway, sheds \$25,000	Rawlinson's Construction Cost Handbook, Urban Enterprise
Road Network	\$3.5 Million	Approximately 10 kilometres of sealed road and drainage, excludes drainage as this is an unknown requirement 6m road = \$350 per metre	Rawlingsons
Caravan Park	\$5.9 million	This includes allowance for: \$500,000 in servicing (power, sewer, water etc) 40 cabins @ \$80K each = \$3.2 million Reception building \$800,000 Recreation facilities \$600,000 Amenities block \$800,000	Victoria Lake Caravan Park Masterplan (Urban Enterprise)
Integrated Resort	\$40 Million	This is based on the costs of a similar resort: RACV Inverloch Resort	Source: RACV
Village Centre and new Training Centre	\$2.5 Million	There are no concept plans for the indoor equine training centre. An allowance has been made of \$2 million for the training centre and \$500,000 for the village centre complex.	
Service Centre	\$5 Million	Total cost estimated from service centre components including fuel tanks, building, shelter and large sealed car park. This is a broad estimate and will depend on the specific size and nature of the service centre/Petrol station	Source: Unit costs from Rawlingsons

Equine Recreation	\$2.26 Million	<p>This includes:</p> <ul style="list-style-type: none"> 2 club houses (\$500,000 for each clubhouse). [\$1 million] 50 acres for a cross country course [allowance \$85,000] 8 arenas approximately 60m x 80m [\$300,000] 3 all-weather surface arenas (one covered) approximately 80m x 40m each [\$250,000]; 200 car parking spaces with floats (level with drainage and crushed rock) [\$200,000] 70 day yards approximately 10m2 (\$4000 per day yard) [\$280,000] External power outlets, PA system and lights for arenas [allowance \$150,000] 	Source: Various Growth area DCPs, Kinglake Equestrian Centre Feasibility Study (Urban Enterprise)
Total Construction Cost	\$183 Million		

10.3. OPERATIONAL PHASE IMPACTS

Unlike a conventional residential subdivision in the growth areas of Shepparton the proposed masterplan will provide strong ongoing economic benefits delivered from the various uses that attract and service visitors to Greater Shepparton.

Specifically the following uses will drive new jobs in Greater Shepparton's economy:

- The training centre at the Kialla Paceway, through the attraction of new and visiting trainers;
- Additional events conducted within the recreation equine precinct, which would not have been attracted previously to Shepparton due to the lack of facilities;
- Visitors staying in the proposed caravan park;
- Visitors attracted by the proposed integrated resort.

Table 18 steps out the additional visitors/expenditure as a result of these proposed facilities that are supported by the masterplan.

The annual economic impact from the above uses is estimated to be \$7.5 million as shown in table 18. This is a highly conservative figure for the following reasons:

- Does not include revenue from additional trainers attracted to Shepparton through the strengthening of the harness and equine precinct;
- For accommodation establishments only takings from accommodation is included and not revenue from food and beverage and other visitor expenditure;
- Revenue generated from retail uses within the precinct such as the service centre and village centre concept;
- Expenditure attributed to visitors to the precinct spend outside of the precinct, such as food, beverage and retail expenditure.

Annual revenue of \$7.5 million in the precinct will support 46 full time equivalent jobs directly within the precinct.

Flow on indirect impacts will lead to an additional \$4.5 million in regional output and 27 jobs.

Total economic impact from businesses and organisations proposed for the Equine and Greyhound Precinct is estimated at a minimum of \$12 million in output and 73 jobs to the Victorian economy. The vast majority of these jobs are service sector related within the Greater Shepparton.

TABLE 18 ONGOING ECONOMIC DRIVERS

Facility	Discussion	Additional Direct Expenditure in Region
Training Centre	It is estimated that a purpose built indoor training centre would require two new full time staff to service the facility. Based on input output modelling this would equate to an annual turnover of around \$500,000 for the facility. It is likely that the training centre would also attract new trainers to be locate in Shepparton, however further detailed investigation is required to determine the precise impacts of this.	\$500,000
Recreational Equine Uses	It is estimated that the recreational equine precinct would draw in 6000 visitors from outside Shepparton for various events conducted. Based on the National Visitor Survey, visitors would spend around \$153 per day. We may estimate that the average length of stay is a low 1.5 nights with around half of the events being one day events and the other half being multi-day events.	\$918,000
Caravan Park	Based on a caravan park that has 40 cabins and 80 sites, with an occupancy of 65% for the cabins and 35% for the sites, the annual turnover for the caravan park would be in the order of \$1.3 million for the cabins (@ \$140 per night) and \$357,700 for sites (@ \$35 per site night).	\$1,657,700
Integrated Resort	Based on a facility that has the equivalent of 100 guest rooms in various formats and an occupancy rate of 70% the takings from accommodation would be \$4.5 million. (@ \$180 per room per night). Additional revenue is likely to be delivered by food and beverage on site not accounted for.	\$4,500,000
Revenue/Expenditure		\$7,575,700

APPENDICES

Appendix A ACCOMMODATION ASSESSMENT

INTRODUCTION

This section provides an assessment of current accommodation supply in Greater Shepparton, as well as demand for accommodation establishments. There is an opportunity to provide accommodation within the investigation area to leverage off the harness and greyhound operations as well as taking advantage of the favourable location and aspect of the Seven Creeks, in the south west corner of Investigation Area 1.

HOTELS, MOTELS

SUPPLY

There are 19 hotels, motels and motor inns in Shepparton equalling a total of 523 rooms.

TABLE 19 HOTELS, MOTELS AND MOTOR INNS IN SHEPPARTON

Shepparton	Number of Establishments	Number of Rooms
Shepparton	19	523

Source: Urban Enterprise, Greater Shepparton Accommodation Opportunities Study, 2012

SIZE

The two largest motels are the Quality Hotel Parklake with 82 rooms available and the Quality Hotel Sherbourne Terrace, with 55 rooms available.

QUALITY

There is a broad range of accommodation ranging from AAA ratings between 3 & 4 stars. In addition, a number of smaller establishments are unrated, but are predominantly considered

to rate at the lower end of the quality scale. Whilst there are a number of establishments that have four star ratings, this does not reflect the age of the facilities on offer; many of which are aging and outdated.

AVERAGE ROOM RATES

Advertised room rates range from \$95 per standard double room per night to \$168 per standard double room per night. There is a significant difference in price based on the quality of establishments.

FACILITIES

The facilities provided range from basic amenities expected in 3 star establishments and below, to a more luxury offering in higher quality establishments; such as swimming pools, spas, a la carte restaurants and corporate function and conference facilities.

GAPS

There is a wide variety of motel, hotel and motor inn accommodation in Shepparton. The motel and hotel stock is generally becoming dated, with a distinct lack of new or modern quality stock coming to market in recent years. There is no large format, high quality international branded hotel in Shepparton which services the significant business and conference market (other than the quality inn).

SERVICED APARTMENTS

NUMBER AND TYPE OF ESTABLISHMENTS

There are five serviced apartment establishments operating within Shepparton. Establishments ranged from the high quality Quest apartment complex, to single self-contained units and apartments.

ROOMS

There are 101 apartment rooms identified in Shepparton. The majority of these rooms are provided by Quest Apartments, supported by smaller establishments across the area.

SIZE

The single largest serviced apartment provider in Shepparton is Quest, who operates 69 rooms on Welsford Street in a self-contained 4 storey building. Smaller establishments provide self-contained units, such as In-Style Apartments, who operate 4 apartments across 4 different sites in Shepparton.

QUALITY

Two apartment providers in Shepparton are AAA rated - Quest Apartments (4.5 star) and Central Shepparton Apartments (4 star). These providers account for 84 of the 101 apartments within the catchment. These establishments provide a high quality of serviced apartment accommodation in Shepparton to meet the needs of business and luxury leisure travellers. These establishments are located in close proximity to Victoria Lake. Central Shepparton Apartments is opposite the lake and some rooms have views over the lake. Quest is located within walking distance north of Victoria Lake. The remaining serviced apartments in Shepparton are small scale, unrated establishments, though the offer provided is considered to be of a good quality based on facilities and price.

AVERAGE ROOM RATES

Advertised room rates range from an average of \$165 to \$240 per standard double room apartment per night. All establishments are within a medium to high price bracket, representing the quality of the facilities on offer.

FACILITIES

All apartments feature fully equipped kitchen and other facilities, alongside other household products/appliances expected in a serviced apartment unit. The higher quality apartments offer a range of facilities such as a gymnasium, pool and spa; and provide service aimed at the business traveller, such as shopping, business administration services and conference facilities.

GAPS

Shepparton is served by an adequate supply of serviced apartments relative to its size.

Serviced apartment accommodation is primarily targeted at the business stay market and is reflected by the supply of apartments in Shepparton, which is the business and trade centre of the region.

Serviced apartments do not suit the market within this precinct, as they are generally service the business sector.

BED & BREAKFAST & GUEST HOUSE ACCOMMODATION

NUMBER AND TYPE OF ESTABLISHMENTS

There are currently 2 bed and breakfasts/guest house establishments operating in Shepparton, totalling 7 rooms.

ROOM RATES

Advertised room rates range from \$140 to \$150 per standard double room / establishment per night. These establishments are within a medium to high price bracket, representing the quality and boutique nature of the offer.

FACILITIES

Facilities within the B&B and guest house establishments provide facilities that create a more intimate, homely experience such as lounges, outdoor courtyards and BBQ facilities.

GAPS

The supply of bed and breakfast /guest house accommodation is relatively low in Shepparton; however this is reflective of the business role of Shepparton and visitor market. This type of accommodation is generally more suited to rural areas of the region.

CARAVAN PARKS

The following section provides an audit of Caravan Park accommodation in Shepparton. The audit is intended to assess the supply of Caravan Parks in the Shepparton area, their accommodation capacity, rates and general attributes.

There are seven caravan parks in close proximity to the Shepparton CBD. These parks have formed the basis of the assessment.

The majority of the Caravan Parks cater to visitors, apart from Aspen Lodge Caravan Park which is primarily for permanents/annuals. This Caravan Park has therefore not been assessed as a competitor.

The majority of parks offer a base level of services and amenities including amenity blocks, camp kitchens, shared facilities, accommodation cabins, powered and unpowered sites.

Parks such as BIG4 offer a greater level of services and amenities and cater to the holiday and leisure and in particular the family market.

Pricing of accommodation (cabins and sites) is generally consistent across the Caravan parks. However, parks that provide a higher level of services, amenities and higher quality cabins generally charge a premium rate for accommodation.

The majority of the parks are rated 3 star (AAA), with the two BIG4 parks rated 4 stars.

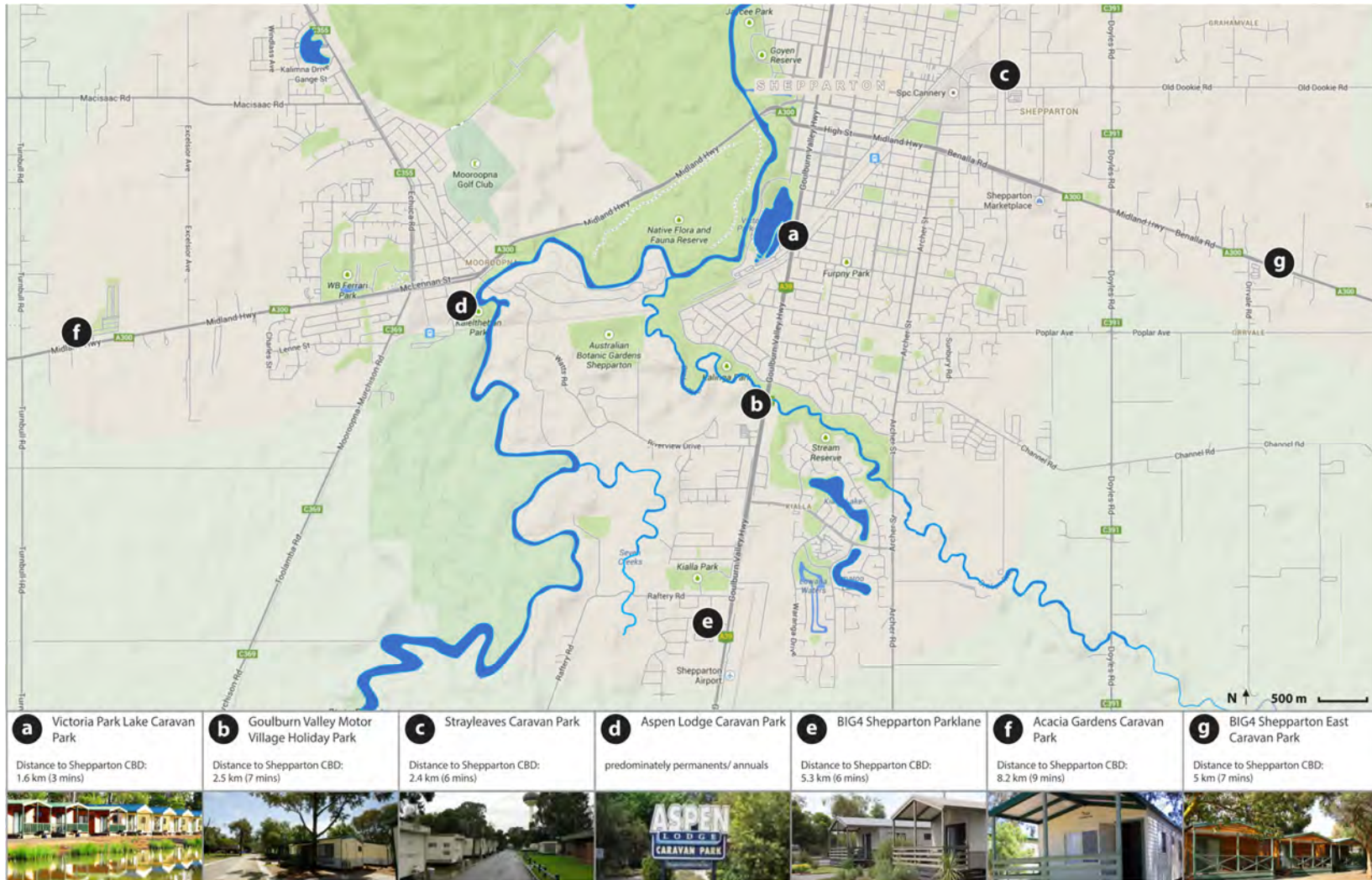
LOCATION

Using the Shepparton CBD as a reference point, there are seven Caravan Parks within close proximity to the Shepparton CBD. These parks include:

- Victoria Lake Caravan Park (south of Shepparton CBD);
- Goulburn Valley Motor Village Holiday Park (south of Shepparton CBD);
- Strayleaves Caravan Park (north east of Shepparton CBD);
- Aspen Lodge Caravan Park (west of Shepparton CBD);
- BIG4 Shepparton Parklane (south of Shepparton CBD);
- Acacia Gardens Caravan Park (west of Shepparton CBD); and
- BIG 4 Shepparton East Caravan Park (east of Shepparton CBD).

The map on the following page shows the location of the above Caravan Parks and their distance from the CBD in kilometres and drive time. The Victoria Lake Caravan Park is in the closest proximity to Shepparton CBD and is the only park that is within close walking distance to the CBD. This is a major point of difference for Victoria Lake Caravan Park when compared to other parks.

FIGURE 19 MAP OF CARAVAN PARKS NEAR SHEPPARTON



CARAVAN PARK ACCOMMODATION

There are currently 7 caravan parks operating within close proximity to the Shepparton Area. These parks offer a broad range in accommodation and quality, from luxury cabins to unpowered sites. Table 10 summarises the number of sites and cabins for each Caravan Park. A more detailed analysis of these parks can be found on the following page in Table 11. There are approximately 403 powered sites and 115 cabins available across the seven Caravan Parks.

The Victoria Lake Caravan Park is the largest park in Shepparton, providing 129 powered sites and 17 ensuite cabins. Goulburn Valley Motor Village provides the largest amount of cabin accommodation, operating 27 separate cabins. The following table illustrates the number of unpowered sites, powered sites and cabins in the 5 caravan parks.

TABLE 20 SUPPLY OF CARAVAN PARK ACCOMMODATION NEAR SHEPPARTON

Name	Powered Sites*	Cabins**	Star Rating
BIG4 Shepparton East Caravan Park	52	23	4
BIG4 Shepparton Parklane	26	29	4
Goulburn Valley Motor Village Caravan Park	26	30	3
Strayleaves Caravan Park	120	7	3
Victoria Lake Holiday Park	129	17	3
Acacia Gardens Caravan Park	50	9	3
Aspen Lodge Caravan Park	Predominately permanents		
TOTAL	403	115	

Source: compiled by Urban Enterprise using RACV Accommodation Guide, Greater Shepparton VIC Data and website research

*Powered Sites include ensuite sites

**Cabins are for holiday and leisure purposes - this figure does not include permanent or annual accommodation cabins

QUALITY

The quality of caravan parks within close proximity to Shepparton range from 3 to 4 star (AAA). There are two 4 star parks, operated by BIG4, at Shepparton East and Shepparton Parklands. There are four 3 star parks, including Victoria Lake Caravan Park.

ROOM RATES

Rates for camping/caravan sites range from between \$12 and \$50 for powered, en-suite and un-powered sites; and \$50 to \$150 for cabins and villas. The price range reflects the diversity of offer available on caravan parks in Greater Shepparton.

FACILITIES

The facilities on offer in Shepparton's caravan parks reflect the diversity of the offer and differences in quality available. Four star parks, operated by BIG4, provide a range of facilities which are additional to those provided in 3 star parks, such as swimming pools, adventure playgrounds and sporting/recreation facilities. Three star parks provided the range and breadth of facilities expected in a standard caravan/camping park, such as communal washing, kitchen, toilet and BBQ facilities.

GAPS

There is a significant supply of caravan park accommodation in Shepparton, providing a range of accommodation options including cabins, villas, powered sites, powered en-suite sites and unpowered sites.

If the recreation equine component within the precinct is realised, this would provide additional demand for caravan park accommodation.

TABLE 21 SUPPLY OF CARAVAN PARK ACCOMMODATION NEAR SHEPPARTON

Name	Address	Township	Cabins/Villas	Sites	Average Price per Double	Star Rating	Facilities	
BIG4 Shepparton East Caravan Park	15 Orrvale Road, Shepparton	Shepparton	23 Cabins	12 Ensuite Sites 40 Powered Sites 14 Mobile Homes	Cains: \$95 to \$168 Sites: \$35 to \$53	4	Solar-heated swimming pool, giant jumping pillow, pedal go-karts, adventure playground, recreation room with table tennis, pool table, video games & DVD, giant chess, tennis/ basketball court, new camp kitchen/BBQ area, wireless internet & licensed kiosk.	
BIG4 Shepparton Parklane	7835 Goulburn Valley Hwy , Kialla	Shepparton	29 Cabins	8 Ensuite Sites 18 Powered Sites 62 Resident Sites	Cabins: \$99 to \$166 Sites: \$33 to \$56	4	Solar-heated swimming pool, giant jumping pillow, pedal go-karts, adventure playground, recreation room with table tennis, pool table, video games & DVD, giant chess, tennis/ basketball court, new camp kitchen/BBQ area, wireless internet & licensed kiosk.	
Goulburn Valley Motor Village Caravan Park	8049 Goulburn Valley Hwy , Shepparton South	Shepparton	30 Cabins	26 Powered Sites	Cabins: \$90 to \$149 Sites: \$29 to \$35	3	Barbecue, Camping Sink, Drive through caravan sites, Guest Laundry, Individual Sullage, LPG, Shared Washing Machine, Wireless internet access	
Strayleaves Caravan Park	1 Mitchell St, Shepparton	Shepparton	7 Cabins	120 Powered Sites	Cabins: \$90 Sites: \$25 to \$28	3	BBQ Facilities, Ground Floor, Playground, Clothes Dryer, Kitchenette Shop / Kiosk, Cooking Facilities, Laundry Facilities, Off Street Parking	
Victoria Lake Holiday Park	536 Wyndham St, Shepparton	Shepparton	17 Cabins	4 Ensuite Sites 125 powered Sites	\$30-\$50 for sites and \$90 to \$160 for cabins	3	Walking and bike paths, Kidstown playground, Aquamoves aquatic centre, S-cape skate park, BBQ facilities, LPG Refills, Guest Laundry	
Acacia Gardens Caravan Park	6705 Midland Hwy, Mooroopna	Mooroopna	9 cabins	60 (50 powered and 10 unpowered sites)	Cabins: \$90 to \$100 Sites: \$20	3	Barbecue, Cafe/Coffee Shop/Tea Room, Campers Kitchen, Camping Sink, Communal Refrigerator, Guest Laundry, Internet Access, Swimming Pool	
Aspen Lodge Caravan Park	1 Lawson Street, Mooroopna	Mooroopna	Predominately catering to permanents/ annuals					

DEMAND FOR ACCOMMODATION

The following section provides a demand assessment for hotel and caravan park accommodation in Shepparton. This is achieved by comparing the accommodation choices of overnight domestic visitors to regional Victoria to the accommodation choices of domestic overnight visitors to Greater Shepparton and by benchmarking provision of accommodation in Shepparton with other regional centres.

TRAVEL PARTY ACCOMMODATION CHOICES

The table on the following page shows the five year average of accommodation choices for domestic overnight travellers to regional Victoria compared to domestic overnight visitors to Greater Shepparton between 2009 and 2013 calendar years. The table is segmented by accommodation types and travel party.

The data reveals the following accommodation choices for domestic overnight visitors to regional Victoria.

- Friends or Relatives travelling together with Children are most likely to stay in a Caravan Park or Commercial Camping Ground. This differs however for Friends or Relatives travelling together without Children who are more likely to stay in a Hotel/Resort/Motel or Motor Inn.
- Family Groups (with Children), are likely to stay in a Caravan Park or Commercial Camping Ground, closely followed by a Hotel/Resort/Motel or Motor Inn.
- This data reveals that Caravan Parks and/or Camping Grounds are an important accommodation choice for the family market, particularly when travelling with children.

This highlights the need for Caravan Parks to provide facilities and amenities that cater to the family market.

- The data also highlights the importance of Hotels/Resorts/Motels and Motor Inns for Business Travellers, Adult Couples and Sole Travellers.

The table reveals key points relating to accommodation choices:

- 7% of Family Groups (parents and children) are staying in Caravan Parks or Commercial Camping Ground in Shepparton compared to 16% across regional Victoria;
- 5% of friends or relatives (with children) are staying in Caravan Parks or commercial camping ground in Shepparton compared to 19% across regional Victoria.
- 72% of business travellers are staying in a hotel/resort/motel or motor inn across regional Victoria compared to 76% in Shepparton.
- Most market segments have a higher propensity to stay in hotels/resorts/motels and motor inns across Greater Shepparton, excluding friends or relatives (without children) and business travellers which are comparable. However, this data is not reflective of the quality of supply, which is a significant limitation to the data.
- There is also a higher proportion of visitors to Greater Shepparton who are staying with friends and relatives compared to regional Victoria.

TABLE 22 ACCOMMODATION CHOICES FOR DOMESTIC OVERNIGHT VISITORS TO REGIONAL VICTORIA – 5 YEAR AVERAGE

Travel Party	Sole Traveller		Adult couple		Family group (parents and children)		Friends or relatives (with children)		Friends or relatives (without children)		Business Travellers		Travel Group (school, sporting, community)	
	Gr. Shep	Reg. Vic	Gr. Shep	Reg. Vic	Gr. Shep	Reg. Vic	Gr. Shep	Reg. Vic	Gr. Shep	Reg. Vic	Gr. Shep	Reg. Vic	Gr. Shep	Reg. Vic
Hotel/resort/motel or motor Inn	35%	22%	41%	26%	25%	16%	19%	14%	21%	21%	76%	72%	81%	24%
Guest house or Bed & Breakfast	0%	1%	1%	4%	0%	1%	0%	1%	0%	2%	0%	3%	0%	1%
Rented house/apartment/flat or unit	0%	2%	0%	7%	0%	11%	11%	17%	0%	12%	0%	5%	0%	9%
Caravan park or commercial camping ground	1%	4%	10%	14%	7%	16%	5%	19%	3%	12%	18%	4%	19%	22%
Backpacker or hostel	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	3%
Other commercial accommodation	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%
Own property	1%	5%	0%	11%	0%	9%	2%	8%	12%	6%	0%	1%	0%	0%
Friends or relatives property	54%	57%	45%	33%	65%	40%	57%	26%	54%	33%	2%	6%	0%	3%
Caravan or camping - non commercial	4%	4%	3%	3%	2%	5%	7%	12%	9%	11%	0%	3%	0%	18%
Other Private Accommodation	1%	2%	0%	1%	0%	1%	0%	1%	0%	1%	0%	4%	0%	10%
Other Accommodation	4%	2%	1%	0%	0%	0%	0%	1%	0%	1%	4%	2%	0%	10%

Source: Tourism Research Australia, NVS, 2014

4 STAR + ACCOMMODATION

The following table shows the number of 4 star+ accommodation establishments in Greater Shepparton and compares this with key regional towns including Bendigo, Ballarat and Warrnambool. The table highlights the key points:

- Greater Shepparton has the lowest supply of 4 star+ accommodation establishments, whilst Ballarat has the highest;
- Bendigo has almost double the number of 4 star+ accommodation establishments;

- Ballarat has more than double the number of 4 star+ accommodation establishments;
- Warrnambool has double the number of 4 star+ accommodation establishments and has comparable domestic overnight visitation with Shepparton and
- Bendigo, Ballarat and Warrnambool have two establishments rated 4.5 stars whilst Shepparton has only one.

TABLE 23 4 STAR+ ACCOMMODATION ESTABLISHMENTS

Shepparton	Star Rating	Bendigo	Star Rating	Ballarat	Star Rating	Warrnambool	Star Rating
Overnight Visitors 2013: 228,000*		Overnight Visitors 2013: 488,000*		Overnight Visitors 2013: 546,000*		Overnight Visitors 2013: 278,000*	
Quest Shepparton	4.5	Quest Bendigo	4.5	Lake Inn	4.5	Gallery Apartments	4.5
Quality Hotel Parklake Shepparton	4	Quest Bendigo Central	4.5	Quality Inn Heritage on Lydiard	4.5	Quest Warrnambool	4.5
Best Western Plus The Carrington	4	Comfort Inn Julie-Anna	4	Lake Wendouree Luxury Apartments	4	Comfort Inn on Raglan	4
Addison Motor Inn	4	The Schaller Studio	4	Seymours on Lydiard	4	Quality Suites Deep Blue	4
		All Seasons Quality Resort	4	Comfort Inn & Suites City Views	4	Mid City Hotel Warrnambool	4
		Alexandra Place	4	Craig's Royal Hotel	4	Comfort Inn Warrnambool International	4
		Hotel Shamrock	4	Oscar's Hotel & Café Bar	4	Best Western Tudor Motor Inn	4
				Ballarat Lodge and Convention Centre	4	Lady Bay Resort	4
				The Ansonia on Lydiard	4		
				Mid-City Motel	4		
Total: 4		Total: 7		Total: 10		Total: 8	

* Domestic Overnight Visitors - NVS, 2013 - Tourism Research Australia

KEY FINDINGS: ACCOMMODATION NEED

Compared with other benchmarks set by other regional Victorian centres, there is a limited supply of 4 star+ accommodation. Shepparton is smaller in population and visitation compared to Bendigo and Ballarat, which accounts for the larger discrepancies. However, Shepparton is larger than Warrnambool and has similar domestic overnight visitation levels and Warrnambool has double the quantity of 4 star + accommodation establishments.

Should Shepparton continue to develop as a key event, business and holiday leisure destination, a new quality branded hotel will be required to meet visitor need.

The Shepparton Harness and Greyhound racing precinct draws large numbers of overnight visitors each year, through the numerous race meets held each week. A branded accommodation establishment would be able to capture much of this visitation.

In addition equine recreational uses in the precinct will provide additional demand for group accommodation and camping sites.

In order to meet the various accommodation needs of the precinct and given the gaps in accommodation supply in Shepparton an integrated resort/accommodation offer should be explored in the precinct. This will include:

- Large cabin accommodation for groups;
- Caravan /camping sites;
- High quality amenity;
- Complimentary recreation facilities such as tennis courts etc.

The accommodation facility should be identified in a high amenity area along the seven creeks.

Appendix B OUTCOMES FROM DISCUSSION PAPER EXHIBITION

OVERVIEW

Greater Shepparton City Council carried out further consultation for the Goulburn Valley Harness and Greyhound Racing Precinct Feasibility Study and Masterplan. The Background Discussion Paper was released for public consultation and thus the general public were invited to submit in support or opposition of an alternative considered for Investigation Area 1, provided by Urban Enterprise.

Submissions were to be made in writing, giving the submitter's name and contact address, clearly stating the grounds on which the Discussion Paper and Concept Plan(s) are supported or opposed and indicating what changes (if any) the submitter wishes to make. Respondents were prompted to fill out a number of questions to complete a formal submission. Feedback was received until 5pm, Tuesday 23 December 2014. An extension was provided to submitters which concluded on the 28th January 2015.

The Background Discussion Paper and alternative concepts considered, received a total of 24 submissions. Submissions are summarised in the following table.

SUMMARY OF SUBMISSIONS

Submission Number	Submitter	Preferred Concept Option
1	Ms Wendy Jones (Goulburn River Valley Tourism)	None of the Proposed Concepts
2	Mr Michael and Mrs Suzanne Toll	None of the Proposed Concepts
3	Mr Gordon Hamilton	None of the Proposed Concepts
4	Ms Judy Fry (Goulburn Valley Equestrian Club)	Concept 3
5	Mr Richard McAliece (Public Transport Victoria)	Did not specify
6	Mrs Faye Jasper (Goulburn Valley Equestrian Club)	Concept 1
7	Mr Guy Tierney (Goulburn Broken Catchment Management Authority)	Did not specify
8	Mr Paul Kerrins (Goulburn Valley Water)	Did not specify
9	C and J Aloï	None of the Proposed Concepts
10	Mr Michael Toll (Kialla Investigation Area 1 Association Inc prepared by Mr Peter Hawkins of PM Planning Pty Ltd)	None of the Proposed Concepts
11	Mr Tim Anderson	Did not specify
12	Solid Property Investments PL	None of the Proposed Concepts

Submission Number	Submitter	Preferred Concept Option
13	Ms Faye Farrant	Concept 1
14	Mr Michael D'Amore	None of the Proposed Concepts
15	Ms Kerrie Lee	Concept 3
16	Mr Vince Page	None of the Proposed Concepts
17	Mss Helen Parsons	None of the Proposed Concepts
18	Mrs Mandy Whitfort	Concept 1
19	Mrs Tracey Hamilton (Greater Shepparton Pony Club)	None of the Proposed Concepts
20	Neil Repacholi (Goulburn Murray Water)	Did not specify
21	VicRoads	Did not Specify
22	Shepparton Harness Racing Club	Concept Option 3
23	Harness Racing Victoria	Concept Option 3
24	APA GasNet	Did not Specify

SUMMARY OF SUBMISSIONS

This section provides a summary of the key supporting and opposing comments provided by the submitters to the Background Discussion Paper and alternatives considered for Investigation Area 1 prepared by Urban Enterprise.

KEY OPPORTUNITIES SUPPORTED

The following section summarises the key opportunities that were supported through the submissions made to Council.

PROTECT A MAJOR COMMUNITY, HERITAGE AND ECONOMIC ASSET

The expansion of the Harness and Greyhound racing precinct and the protection of the clubs racing environs should be encouraged. The Goulburn Valley Racing precinct has received major State and Local Government funding to improve and expand facilities. The precinct has experienced major upgrade to infrastructure including the development of the Greyhound Racing track, construction of new dining complexes and the development of an undercover stable complex. This investment is to protect a major cultural asset, as the Goulburn Valley Region is renowned for its breeding and training industries, as 60% of all Australian foals originate from the area on an annual basis.

An Economic Impact Assessment of the Harness Racing Industry in the Goulburn Valley region was prepared by Essential Economics in 2007. The Goulburn Valley region's harness racing industry consists of:

- 500 registered breeders (commercial and non-commercial);
- 280 licensed trainers (commercial and non-commercial);
- 100 drivers or trainer / drivers
- 1,000 working horses; and
- 3,000 brood mares.

The findings of the Economic Impact Assessment from 2007 shows that the Goulburn Valley region's harness racing industry is a key driver of regional economic activity in terms of regional expenditure, support for local businesses and employment generation.

A summary of Economic Value associated with the Goulburn Valley Harness Racing Industry includes:

- Harness Racing Industry Assets (\$140 million);
- Value of Industry Activities (\$36 million pa);
- Gaming Revenue (\$24 million pa);
- Taxation Revenue (\$12 million pa);
- Employment (1,200 jobs);
- Multiplier (indirect or flow-on) employment (1,800 jobs);
- Volunteerism (50-100 persons).

FURTHER DEVELOPMENT OF RACING AND TRAINING FACILITIES

Both racing clubs have invested significantly in upgrading current facilities and are hoping to enhance current infrastructure in the racing precinct.

Harness Racing Victoria's Strategic Plan proposes the development of new communal training facilities in Northern Victoria which would be perfectly situated in the Goulburn Valley Precinct. A new state of the art training centre would procure new participants and attract certified equine training courses which would complement commercial operations.

MAXIMISE TOURISM AND COMMERCIAL OPPORTUNITIES

Submissions are generally content with the proposed accommodation and tourism options proposed for Investigation Area 1. There is support for a large visitor accommodation and proposed tourism options (farm gate) for the Investigation Area. Due consideration must be given to the Goulburn River Valley Destination Management Plan in terms of tourism references for this area.

RECREATIONAL EQUINE GROUPS

The Goulburn Valley Equestrian Club has experienced steady growth and would like to see a partnership with the Shepparton Pony Club, in order for both organisations to utilise the proposed equine facilities to the south of the Harness and Greyhound racing precinct.

The GV Equestrian Club has stated that WB Hunter reserve is providing use conflicts with sport and recreation users and that a designated equine precinct will be beneficial for the community and attract high visitation numbers through the provision of equine events.

RURAL LIFESTYLE/LOW DENSITY ALLOTMENTS

Some submissions were in favour of the low density and/or rural lifestyle allotments, as standard lot residential development would not be possible due to the Harness and Greyhound Racing precinct and the noise, light, odour and dust issues that these residents would be subject to.

KEY ISSUES RAISED

The following section summarises the key issues raised with the alternative concepts considered through submissions made to Greater Shepparton City Council.

BIAS TOWARDS HARNESS AND GREYHOUND RACING CLUBS

Submissions are concerned that there was bias in the Background Discussion Paper and that the Harness and Greyhound Clubs have had far too much influence in the decision making process. Submissions also suggest that the study is merely focussed on the operations of these clubs and not on the greater community.

The Harness and Greyhound Racing Clubs presence on the Project Steering Committee is attributed to the fact that they are a major stakeholder within Investigation Area 1 and operate a major tourist and community asset for Greater Shepparton. The Kialla Paceway attracts major daytrip and overnight visitation and contributes value to the local economy.

The City of Greater Shepparton express that the Shepparton and Harness Racing Club's manifestation on the Project Steering Committee is to provide input into the strategic outcome of the study and provide suggestions on improving and fulfilling operations of the racing clubs. The Steering Committee provided strategic input and recommendations into the project, but are in no way involved in the decision making process, this is solely the responsibility of Greater Shepparton City Council. The racing clubs presence on the Project Steering Committee is partly due to the Greater Shepparton Municipal Strategic Statement which states:

Investigation Area 1 - Kialla Paceway and Shepparton Greyhound Racing environs. This area surrounds and includes the greyhound and trotting facilities and is directly adjacent to the Shepparton South Growth Corridor. There is potential to extend services to this land. However, future residential development within this area will be dependent on amenity issues such as lighting, noise, odour and dust being addressed to **ensure that the long term interests of the racing facilities are protected.**

As aforementioned, there are major encroachment issues that need to be addressed for future residential development in this Investigation Area. Future development in Investigation Area 1 needs to take into consideration the daily operations of the Kialla Paceway.

Urban Enterprise conducted a workshop with the Project Steering Committee to understand existing conditions for the racing precinct, and understand current operations. The workshop also helped understand physical constraints and potential opportunities for the precinct.

IMPACTS ON HARNESS AND GREYHOUND RACING OPERATIONS

There is concern that the any proposed future development will have an impact on the racing operations at the Kialla Paceway. One submission discusses that the Background Discussion Paper fails to recognise that the Harness and Greyhound Racing clubs were previously located at the Shepparton Showgrounds, and have relocated to the Kialla Paceway in order to protect surrounding residents and reduce the impact of noise, odour, light and dust arising from racing operations.

It is important that the future development of Investigation Area 1 protects the continued operation of the Harness and Greyhound Racing clubs, and allows future development opportunities for racing greyhound and equine infrastructure. There is a requirement that no more additional constraints are placed on the operations compared to those that currently exist.

The racing clubs are particularly concerned with any proposed residential development directly surrounding the Kialla Paceway. The potential of future residents in these areas will result in ongoing complaints in regards to:

- Dust generation from training and racing operations and horse and vehicle movements;

- Noise from operation of facilities including public address systems on race days and evenings, and general noise from crowds and vehicle movements;
- Traffic to and from the site during race days and evenings;
- Light spill from the track lighting; and
- The presence of horses and feed on site can result in some unpleasant odours.

Any residential or commercial development proposed surrounding the Kialla Paceway will require suitable planning controls, and ensure that potential residents are made fully aware of the racing precinct operations.

CONSULTATION PROCESS

A number of submissions from affected landowners express their dissatisfaction with the lack of consultation with primary stakeholders. Submissions argue that landowners should have been included on the Project Steering Committee as they are the property owners and stakeholders most affected by this investigation.

Greater Shepparton City Council sent letters to affected Landowners within and adjoining the Investigation Area 1 a number of weeks prior to the scheduled one-on-one meetings and group workshops held on Tuesday 22nd and Wednesday 23rd of April 2014. Shepparton Harness and Greyhound Racing Clubs, Recreational Equine Clubs, Referral Authorities and affected landowners were notified of the project and were invited to participate in the consultation process by contacting Urban Enterprise and arranging a designated time to meet and discuss key issues and constraints with the area, as well as potential opportunities for the future use of the area. Further details can be found in Section 1.3 of the Background Discussion Paper, which discusses the consultation methodology in detail.

In addition, for those landowners who did not have time to respond to the consultation invitation or who could not attend the workshops were invited to phone Urban Enterprise to conduct a one-on-one meeting over the telephone.

It would be highly impractical to include all affected landowners (approximately 60) on the Project Steering Committee. This would cause major conflicts with regard to project outcomes.

Greater Shepparton City Council invited the general public to submit issues and opportunities in an additional consultation process. The general public, notably affected landowners, the Harness and Greyhound Racing clubs, referral authorities and recreation equine groups were invited to submit in support or opposition of the proposed concept options. Submissions supported aspects of the alternatives considered and also issues and concerns were raised. The additional consultation process will allow Urban Enterprise to provide a recommended concept to further satisfy relevant issues.

GREATER SHEPPARTON HOUSING STRATEGY

A number of submissions were concerned with the inadequate consideration given to the Greater Shepparton Housing Strategy, notably that the proposed concept options did not give considered reference to future residential development within Investigation Area 1, as identified in the Greater Shepparton Housing Strategy.

Section 2.3 of the Background Discussion Paper provides a literature review, whereby Urban Enterprise researched strategic context for Investigation Area 1.

Urban Enterprise noted the Investigation Area's significance for future residential development. Urban Enterprise stated:

The Greater Shepparton Housing Strategy was prepared in order to provide a guide for the future provision and long term identification of residential land within the municipality.

The Greater Shepparton Housing Strategy (2011) has predicted that accommodating the growing population will require an additional 9,100 dwellings by 2031. This means that an average of 365 new dwellings will be needed every year to meet demand. Additional land for residential development will be required. While there is more than sufficient residential zoned land to accommodate conventional residential development over the next 10-20 years, opportunities for low density and rural living are quite limited.

Some of the relevant strategic directions of the Greater Shepparton Housing Strategy (2011) are:

- Locate residential development in locations appropriate to its intended use;
- Create sustainable living environments which conserve land and energy and are integrated with existing networks and systems; and

- Provide a diversity of housing options which become long-term assets to their neighbourhood.

The Housing Strategy plans for a mix of housing into locations proximate to shops, jobs, public transport, entertainment and open space. This will allow the most amount of people to take advantage of these local uses and spread the benefits of these areas as widely as possible.

Greater Shepparton currently has approximately 5,000 ha of zoned residential land which consist of 2,400 ha of Residential Zone 1 (R1Z), 775 ha of Low Density Residential Zone (LDRZ), and 1,000 ha of Rural Living Zone (RLZ).

The Greater Shepparton Housing Strategy also acknowledges that the investigation area is a potential location for future low density residential and rural living:

"Low Density Residential and Rural Living development has been limited in Greater Shepparton in recent times. There is anecdotal evidence that the current minimum lot size of 8ha within the Rural Living Zone (RLZ) is inhibiting further development. Other explanations include the reluctance of landholders to subdivide land where there is a perception that there could be further development and rezoning opportunities for higher densities".

And;

"There is some potential for rural living and low density within the current growth boundaries of Shepparton, Mooroopna and Kialla, however the location of these developments should not inhibit the future growth of the urban area and encourage land banking or leapfrogging. One example is the Kialla Paceway precinct that will require careful planning to minimise land use conflicts between this facility and future residents".

As mentioned above, Urban Enterprise recognises and acknowledges the investigation area as a potential location for future low density residential and rural living, and is reflected in the proposed concept options detailed in the Background Discussion Paper. The three concept options provide a high level of low density and rural residential development for the investigation area. More than half of the investigation area is set aside for such development. The logic behind having this type of development is informed by the Greater Shepparton Housing Strategy Background Report and Key Issues Paper, which states:

- There is a need for an increase in the supply of rural living opportunities which entail larger lots that are a lifestyle choice.
- Development should complement existing, surrounding infrastructure.

In addition, the Housing Strategy makes the following statement:

*“Six investigation areas were identified for future residential growth, however, these areas have significant issues or constraints such as **environmental, flooding, infrastructure and/or land use conflicts**. The relevant issues are to be resolved on a site-by-site basis through as more detailed analysis.”*

This statement is particularly relevant to Investigation Area 1, whereby there is a Flood Overlay and Land Subject to Inundation Overlay throughout the majority of the South East of the Investigation Area, which completely restricts areas of the Investigation Area for residential development.

Reticulated water stops at River Rd and is pumped into the Harness Racing Club. The same conditions apply for the sewerage line.

The water mains are most likely to continue further down the Goulburn Valley Highway with the subsequent residential development potentially occurring opposite the Shepparton racing precinct.

Capacity constraints exist in relation to the water mains and sewerage drains into this part of Shepparton. Significant medium density, standard lot development will require significant infrastructure upgrades. These infrastructure upgrade costs would fall on the developer.

The Greater Shepparton Housing Strategy acknowledges that these services can be extended to Investigation Area 1.

Investigation Area 1 - Kialla Paceway and Shepparton Greyhound Racing environs. This area surrounds and includes the greyhound and trotting facilities and is directly adjacent to the Shepparton South Growth Corridor. There is potential to extend services to this land. However, future residential development within this area will be dependent on amenity issues such as lighting, noise, odour and dust being addressed to ensure that the long term interests of the racing facilities are protected.

From a demand perspective, there are adequate land reserves to accommodate conventional residential growth in the south of Shepparton with a number of areas already prioritised for conventional residential development to accommodate in advance of 15 years supply.

Discussions with servicing agencies (Goulburn Valley Water) in Shepparton highlight the current restrictions on the capacity of existing sewer to the south of Shepparton and that it is Goulburn Valley Water's preference that higher order residential development be concentrated to areas of Shepparton closer to the treatment plant.

In addition there are limited synergies that can be drawn between the Goulburn Valley Harness and Greyhound Racing Precinct and conventional residential activity. It is likely that conventional residential activity in close proximity to the Harness and Greyhound Precinct will be affected by excess light and noise from the events held at the precinct which may cause conflict in the future.

Based on the above, there is limited requirement for parts of the investigation area to be used for conventional residential activity and there are adequate growth fronts in Shepparton to accommodate this type of residential use.

AM C93 – IMPLEMENTING THE GREATER SHEPPARTON HOUSING STRATEGY

Amendment C93 implements the Greater Shepparton Housing Strategy 2011 amending Clause 21.04 to include the strategic directions and framework plans and Clause 21.09 to include the strategy as a reference document.

Amendment C93 refers to the provision of future residential developments in Greater Shepparton, notably within the major growth corridors of Shepparton, in particular the six investigation areas. In addition, the amendment defines average lot sizes within their corresponding zones.

The amendment mentions the requirement for the provision of additional residential zoned land. The amendment refers to the future provision of Low Density living (15%) and Rural Residential living (5%).

The panel acknowledged that flooding constraints affect extensive areas in Southern Shepparton and that development in the corridor relies on engineered solutions and the

operational integrity of these solutions must be maintained. This adds to costs, environmental impacts and risks to future residents and infrastructure as flood events are expected to be more frequent and more extreme due to climate change.

The Housing Strategy predicts that for the Rural Living Zone (RLZ), there is an estimated 71% of future requirements to 2031 (14 years supply).

In reference to the six investigation areas as mentioned in the Greater Shepparton Housing Strategy, the panel has concerns that the inclusion of such expansive areas for potential developments could establish unreliable development expectations that may never eventuate. This can undermine planning strategies by inflating property values with effects on farm viability, discouraging appropriate land management, and contributing to pressures for premature rezoning and dispersal forms of urban development.

The panel discusses mandatory lot sizes. Low Density Zone (LDZ) was amended to include lot sizes between 2,000 - 8,000 m² and Rural Living Zone (RLZ) was amended to include lot sizes between 2 and 8 hectares.

Low density residential developments should be intended in unsewered areas around existing townships, whereas rural living is significantly different from LDRZ as it is intended to provide for residential use in a rural environment.

The requirements give justification to the recommended concept provided in Section 11. Low Density residential and rural lifestyle allotments are the viable mixture of residential development for Investigation Area 1 giving consideration to aforementioned aspects of the Greater Shepparton Housing Strategy via Amendment C93.

10.3.1. EPA GUIDELINES

Several submissions are concerned with the allocated area for rural lifestyle/greyhound allotments in the North West corner of Investigation Area 1. The Environmental Protection Authority states that a buffer of 500 metres should be put in place between dog kennels and residential properties located in the GRZ1 and NRZ1.

It is interesting to note that the Kialla Paceway, which includes the racing operations of the Greyhound and Harness Racing Club is less than 500 metres from residential properties to the east of the Goulburn Valley Highway.

The Masterplan will closely consider buffer techniques to shield surrounding residents from the Kialla paceway's operations and any animal keeping/boarding in rural allotments. Techniques such as vegetation, acoustically baffled kennels, visual screens and electronic masking noise devices would be investigated.

However, this is a valid issue, and one that will need significant consideration. The recommended concept provided in the following section revises alternative concept 3 to disallow dog kennels on the residential properties to eradicate the potential for nuisances from barking, odour of dogs/kennels on surrounding residential areas. There is potential to allocate the North West corner of Investigation Area 1 to be set aside for low density residential living or commercial uses (see Section 9: Future Land Use Opportunities).

FLOOD OVERLAY AND LAND SUBJECT TO INUNDATION OVERLAY

The Goulburn Broken Catchment Management Authority raised the issue of the Flood Overlay and Land Subject to Inundation Overlay that exists in the investigation area. These areas are liable to flooding in a 100-year ARI type flood event. Pathways are required to incorporate a 15 metre setback from waterways, this includes the Seven Creeks. The Goulburn Broken CMA urge that the recommended concept protect waterways and incorporate sound water management systems.

Urban Enterprise have allowed for a buffer of the Seven Creeks, which runs through the south west corner of the investigation area. The alternative concepts considered show that recreation reserves and pathways are to be input at least 15 metres from the waterway. In addition, stands of trees and native vegetation will be kept to contribute to natural ecological processes.

GROUND AND SURFACE WATER

Goulburn Murray Water (GMW) are concerned with the management and quality of surface and groundwater within Investigation Area 1. The recommended concept must provide development scenarios whereby there is no detrimental impact on the flow and quality of surface and groundwater.

GMW noted that the water channel which traverses through Investigation Area 1, is able to be realigned or converted to an underground pipeline. If the allotments detailed in the recommended concept are to access raw water, it is GMW's preference that the allotments

are serviced via a single service point on the precinct boundary. The proposed retention basin (which could be utilised as a winter storage basin - with appropriate licencing) should be included in any design considerations to enable it to be used as a discharge point for a bulk water supply.

The water channel is able to be realigned and converted to pipeline, wherever any residential development (low density/rural lifestyle) allotments are proposed. This will ensure the water channel will not enter any private property. Depending on the sequencing of development, there may be an opportunity to reduce the length of the channel.

Overall, GMW does not object to any of the alternative concepts considered.

USE CONFLICTS

Submitters are concerned with the potential use conflicts that may arise between the proposed equine precinct users and the Harness Racing Club. The Shepparton Pony Club argue that multiple recreation equine users in the one location will cause use conflicts, thus clear guidelines must be set out or a manager be put in place to oversee scheduling and use of resources.

Also, there are concerns that the increased number of harness racing trainers on site will cause issues between the Harness Racing Club and the recreational equine user groups.

The area designated for the expansion of the equine precinct is much larger than the Shepparton Pony Club's current facilities. There will be ample space to accommodate a number of recreational equine groups. The purpose of expanding this equine precinct to the south is to give recreation equine groups an independent space to utilise for club rallies and events, eradicating any current conflicts that exist between the Pony Club and the Harness Racing Club.