

Albury Retail Action Plan

2023 – 2027

Prepared by
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AlburyCity



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Background information and data has also been included from the Albury Retail Floorspace & Industry Review (October 2021) prepared by Aneta Ramos and Adrian Hack of HillPDA Consulting.

Executive Summary

Albury's retail sector is a key contributor to the city's economic and social performance. Of all land uses, retail is used by every market segment, so its performance is fundamental to perceptions of a prosperous city. At a local level, the retail sector is one of our largest employers, supporting over 3,000 jobs and providing economic uplift of \$241M annually.

In the last two years there has been significant change in the retail landscape, prompting the need to review and update Council's actions in response to these changes. The impacts of the pandemic have changed consumer behaviours and a number of retail developments have consumed Albury's retail floorspace projections ahead of forecast.

The Albury Retail Action Plan emphasises the importance of ensuring that Albury remains a key service centre for a broad region of southern New South Wales and north-eastern Victoria. For this reason, a focus is placed on ensuring that the Albury City Centre undergoes a continuing process of investment and renewal that confirms its role as the highest order retail offering in the region, meeting the needs of a wide geographic area that extends well beyond municipal boundaries. Likewise, the Plan recognizes the importance of Lavington, Thurgoona and the bulky goods precinct in East Albury as complementary retail offerings.

Albury has a resilient retail community with a strong mix of national brands and local traders, with shopping options able to meet the needs and expectations of residents and visitors. Growth of the retail sector will create benefits for Albury in terms of investment, business development and employment. Development of a vibrant retailing sector is also closely associated with on-going development of tourism, events and cultural activities, all of which are part of the broader appeal for the city.

The delivery of the Plan's actions cannot be achieved in isolation. Council will seek to create strong partnerships and networks with industry, government and other stakeholders so that through our combined efforts more can be achieved. It is however hoped that the momentum built through implementation of this Action Plan still spur additional industry initiatives.

Four objectives have been identified that will be the focus areas for Council's support of the retail sector and specifically relate to improved walkability, capacity building, removing barriers and enhancing sector engagement. Actions grouped in these areas respond to the issues, challenges and opportunities identified by the research and consultation undertaken by external consultants and AlburyCity.

It is anticipated that the initiatives identified through development of the Albury Retail Action Plan will increase the vibrancy and ongoing success of the Albury CBD and the differing needs of other supporting retail centres.

1.0 Background

As a precursor to the development of the Albury Retail Action Plan (Action Plan), HillPDA was commissioned by AlburyCity Council (Council) in 2021 to prepare an Albury Retail Floorspace and Industry Analysis report. This report provides a comprehensive assessment of the demand and supply for retail development in the city’s major retail precincts.

Key information from the HillPDA study will be included throughout this Action Plan to provide context and qualify drivers of demand.

The Action Plan, developed largely from work undertaken by Urbacity in 2022, reviews and updates the Albury Retail Development Strategy 2015 – 2025, which has served to highlight the importance of Albury’s retail sector to the local economy and its significance as a regional hub.

Since 2015, there has been large-scale change in the retail landscape at a local, national and international level. Locally, a number of developments have occurred, notably the Bunnings relocation from the City Centre and establishment of A-Mart and Harris Farm Markets, which have consumed Albury’s retail floorspace projections ahead of forecast. Additionally, Albury’s retail sector has been significantly impacted by the COVID-19 pandemic.

The Action Plan provides a clear direction and pathway forward in terms of the future of retail development opportunities and capacity across the Albury Local Government Area (LGA). The Action Plan is bespoke to Albury, addresses current and emerging impacts on the local retail sector and most importantly, is actionable.



Source: John Russell Photography

1.1 Study Area

The study area for the Action Plan is the Albury LGA, with a focus on Albury’s major retail precincts being the City Centre, Lavington, Thurgoona and the East Albury Bulky Goods Precinct (refer to Figure 1 below).

Figure 1 - Albury Retail Centres



Source: Google Maps



1.2 Definitions

ABC	Albury Business Connect
Built Form	The function, shape and configuration of buildings
Catchments	Areas from where the majority of trade is drawn for a centre
Footfall	Numbers of pedestrians
LFR	Large Format Retail/Bulky Goods Retail
LGA	Local Government Area
Pedestrian Amenity	The features of an area, street or building that contribute to pedestrian comfort.
Placemaking	Interventions that reinforce the qualities of places. Placemaking is a people-centred approach to developing public spaces. It helps connect people and place.
Retail sector	The purchase of goods (excluding garden supplies, marine equipment and motor vehicle and related trade) and services (including food services) by customers for personal and household consumption.
Study Area	The geographic locations identified in section 1.1.
Urban Quality	The partnership between buildings and the street.
Visual Complexity	The characteristics, number of visual features present, level of colour differences and contrast of buildings and natural surrounds.



1.3 Retail Delivery Form

There are three different retail delivery vehicles within the Study Area:



- **Urban (street-based) retail**
 - City Centre (predominantly on Dean, Olive, Kiewa, David and Swift Streets)
 - Lavington (Mate and Griffith Streets, Urana and Wagga Roads)



- **Shopping Centres**
 - Myer Centrepoint and Westend Plaza – City Centre
 - Lavington Square Shopping Centre
 - Thurgoona Shopping Centre



- **Bulky goods / Large Format Retailing**
 - East Albury, Borella Road

The economic and social capacities of these forms is influential in the ability of the city to attract and retain business (retail and non-retail).

Urban retail switches on civic pride, especially if a city retains retail in its older buildings. A benefit of urban retail is the diversity of physical settings and rental levels. Not every part of the street environment has the same movement dynamic and as rental levels are correlated to footfall, the quieter parts of the urban environment have lower rents. This allows for incubator businesses at lower price points and encourages creative business establishment. As these start-ups grow and flourish, they are able to take more prominent positions within the urban retail continuum.

Shopping centres are the most functionally efficient means of shopping (designed to reduce levels of walking). Being single-use, shopping centres do not facilitate the wider mix of activities that make up urban centres and their internal focus results in blank walls, car parks and service docks addressing the public realm.

Shopping centre design also facilitates even distribution of foot traffic, so as to maximise rents across all tenancies. Relatively high rents tend to shut out new entrants and business risk-takers. Shopping centre values and lending ratios are conditional upon the number of national tenants (chains) and the strength of their leases.

Bulky goods precincts represent destination shopping opportunities, with like retailers co-located for shopping convenience. Geographically located on major thoroughfares, the emphasis is on high exposure for brands and ample parking to facilitate bulky purchases.

1.4 How We Look at Centres

The purpose of this Action Plan is to evaluate retail across the LGA and determine what actions, and by whom, will improve retail performance. Retail sits within an inter-related economic system and its performance affects and is affected by other non-retail activities and behaviours. We know urban retail (street) vibrancy is an inspirer of non-retail jobs and civic pride is a function of the extent and quality of the city's buildings and their maintenance.

In developing the Action Plan, we have split the retail environment into three segments.



1. The PHYSICAL environment (buildings and infrastructure)



2. The FUNCTIONAL environment (land use and their interrelationships)



3. The MANAGEMENT environment (investment attraction, relationships, education etc).

Council has the capacity to positively influence the physical environment of the city, not only with regulations, but also through targeted infrastructure spending and partnerships with the private sector. Cities use the physical environment to improve the user experience and this enjoyment attracts more people to centres. The qualities of ‘place’ are an important factor in economic performance.

The functional environment is fixed by zoning, but in any growing city there will be land use challenges. The Action Plan will consider potential land use challenges and opportunities across the Study Area.

Council has one of the more successful examples (across Australia) of a management partnership with Albury Business Connect (ABC). This report will provide recommendations to build on the existing partnership with both ABC, local retail operators, building owners and investors to improve the performance of established retail, attract investment and provide education to improve retail business appeal. Additionally, Council has a role in activating city spaces to the benefit of the retail industry.

1.5 Consultation

The engagement undertaken to inform this report took place over two targeted periods; in August 2021 as part of the Retail Floorspace Review and in December 2021 in development of the Action Plan.

Engagement methodologies for this study included:

- one-on-one interviews
- meetings
- presentations
- a ‘Have your Say’ opportunity on the AlburyCity website
- an online survey
- information stands in the City Centre, Thurgoona and Lavington.

Key stakeholders included Council officers and Councillors, retail industry representatives, Albury Business Connect, Albury CBD, retail business owners, real estate agents, developers, interested locals and shopping centre management.

Consolidated feedback from the various engagement periods is included in Appendix 1 – Engagement Summary.

2.0 Strategic Overview

A number of plans, policies and strategies have been considered in development of the Action Plan. A high-level appraisal of the impact of these documents on Albury's retail sector is included at Appendix 2.

The following documents have been included in the strategic context review:

- Albury Retail Sector Development Strategy 2015-2025
- Albury Local Strategic Planning Statement (LSPS) September 2020
- Albury 2030 Community Strategic Plan
- Albury Cultural Precinct Master Plan
- Creative Economy Strategy 2015 - 2025
- East Albury Industrial Precinct Master Plan
- Albury CBD Parking Strategy
- Albury Wodonga Destination Management Plan 2019-2023
- Albury Wodonga Regional Economic Development Strategy
- NEXUS – Albury Industrial Hub Master Plan
- AlburyCity's Commercial Activities on Public Land Policy
- Thurgoona Wirlinga Precinct Structure Plan
- Planning for the future of retail: Discussion paper, HillPDA.
- NSW Department of Planning, Infrastructure and Environment – Employment Zone Reforms



Source: John Russell Photography

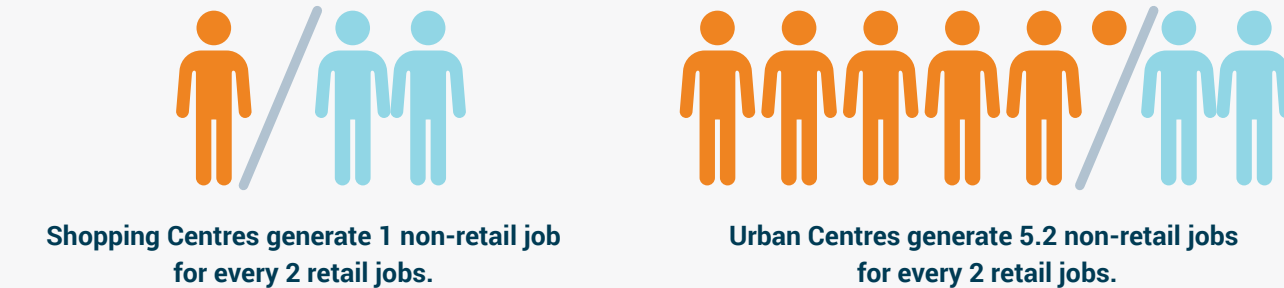
3.0 Contextual Overview

The population of the Albury trade area is estimated at >200,000 persons, including 99,346 people in the Albury Wodonga primary sector. Total retail spending per capita in NSW (measured in 2021 dollars) is around \$1,100 - \$1,200 per month. The key centres in the Albury LGA accommodate approximately 199,000sqm of occupied retail floorspace and a further 17,000sqm of vacant retail floorspace. The Albury CBD currently accounts for 56% of the total retail floorspace in Albury. This reflects the importance of the Albury CBD in the regional economy and its dominance in the retail hierarchy. The activity centre hierarchy reflects the role of the Albury CBD as the highest-order retail centre for a wide geographic area, and the role of Lavington, Thurgoona and the East Albury Bulky Goods Precinct act as important supporting retailing destinations.



3.1 Urban Centre Retail Employment

While retail is the second largest employing sector in Albury², retail and food and beverage services wages are some of the lowest in the country³. An analysis undertaken by Urbacity across 100 centres in Australia and New Zealand⁴ found the following with respect to job creation, relative to centre types:



Note the urban centre job ratio is conservative, given the study excluded CBD's in Urban Centre settings. If included, the ratio of non-retail jobs in urban centres would increase substantially.

2. REMPLAN Economic Modelling, Albury LGA 2021 release
3. REMPLAN Economic Modelling, Albury LGA 2021 release
4. Urbacity, Australia & New Zealand job ratio to centre type study

This lesson is important for Thurgoona. In order to ensure that the growth corridor does not become a low-wage hub, with low employment levels, development controls must require future Thurgoona retail precincts to be urban retail, not inward focused, with interfaces to surrounding uses and people in streets.

For the economic future of Albury it is also important that shopping centres (such as Centrepoint and West End Plaza) do not grow to dominate the retail environment in the City Centre.



4.0 Retail Trend Analysis

4.1 Changing consumer expectations

The future of retail is shifting strongly towards experience and convenience, with technology driving the change. Consumers are also becoming more environmentally conscious, time poor and value conscious. Retailers are being forced to adapt to changing consumer expectations such as:

-  • Hyper-personalisation – retailers are forensically analysing data to deliver hyper-personalised experiences and products.
-  • Price savvy consumers – price no longer encompasses the product alone but the whole user experience.
-  • Enhanced efficiency and experience through automation – customers are increasingly expecting automation to be blended into the retail experience to deliver seamlessness and increased satisfaction
-  • Experiential retailing – the promotion of experience and placemaking through various platforms to drive customers to purchases.
-  • Environmentally conscious products – growing sentiment towards environmentally friendly products.
-  • Social currency – social media presence is an important measure of a brand’s credibility for many customers and also a tool used in the retail experience.
-  • Buying local – growing support for locally designed and manufactured products to support Australian businesses.

4.2 National retail trends

The retail industry’s innovative nature is driven largely by the need to anticipate and respond to its customers’ needs and desires and changing socio-demographics and lifestyles. Individual retailers are required to constantly monitor shifts in demand and reposition their offer, and in some instances, their mode of operation and distribution.

Some emerging national retail trends include:

-  • Full line supermarkets (over 3,000 sqm) are increasingly anchoring smaller centres.
-  • Reduced traction for department stores, such as Myer, David Jones, Target and Big W, due to online competition and reduced demand for physical space.
-  • Transitioning bulky-goods or traditional out-of-centre retailers seeking opportunities in local or shopping centres (i.e. Ikea trialling a small scale, shop front store in Warringah Mall).
-  • Integration of residential and other commercial and community uses above shopping centres.
-  • Strengthening ‘retail placemaking’ with a stronger focus on community, dining, events and entertainment.
-  • Greater integration of indoor and outdoor environments.
-  • Pop-up, creative and market style uses that generate higher-turnover and ‘destination’ factor in their own right.
-  • The emergence of ‘dark’ and ‘last mile’ stores for online sales. This type of retailing comprises of warehouses or distribution centres that cater to online shopping. They do not require sales areas and are designed for easy product picking.
-  • Growing online grocery market and specialised food stores.
-  • Reinvesting in shopping centres to reinvent offerings and overhaul purpose with a view to changing the way customers and wider community interact in the space.

4.3 The retail business model is changing

The COVID-19 pandemic has significantly disrupted the physical retailing paradigm globally and nationally. It has dramatically increased the adoption and use of online platforms, with many retailers moving towards a more digitalised business model. COVID-19 has forced many retailers to quickly develop capabilities and invest in online fulfillment; omnichannel retailing; home delivery; data analytics and process automation in order to remain trading.

The rapid shift to a more digitalised operating model and partnerships with online platforms has and will continue to keep certain retailers more competitive and will help to engage customers and improve their shopping experience. Those retailers who do not make the switch are at greater risk of store closures and/or administration over the longer term.

It is important to note, in considering the local context, stakeholder feedback identified that omnichannel retailing in Albury is largely complementary to traditional retailing. The attitude expressed was that bricks and mortar stores will remain a competitive form of retailing in Albury for the foreseeable future.



Source: Shutterstock

5.0 Gap Analysis

To understand the demand for additional retail floorspace in Albury we need to consider the existing supply of retail floorspace, including vacant space. A comparison of supply and demand by retail category is outlined in Table 1 below.

Table 1 - Additional Shopfront Floorspace Required Gross Lettable Area (sqm)

Source: HillPDA Consulting

	Super-markets and Groceries	Specialty Food	Bulky Goods	Department Stores	Restaurants and Takeaway	Other Specialty Stores*	Vacancies**	Additional non-retail uses***	TOTAL
Demand for floor space									
Year 2021	28,474	7,795	65,412	24,867	25,409	50,512	10,123		212,593
Year 2026	30,985	8,405	70,202	25,538	27,585	54,416	10,857		227,988
Year 2031	33,523	9,015	74,934	26,103	29,824	58,316	11,586		243,302
Year 2036	36,231	9,659	79,909	26,668	32,220	62,438	12,356		259,481
Current Supply	20,679	11,342	66,300	27,038	27,565	46,294	17,115		216,333
Net increase in demand									
Year 2021	7,795	-3,547	-888	-2,171	-2,516	4,218	-6,992	414	-3,326
Year 2026	10,306	-2,937	3,902	-1,500	20	8,122	-6,258	1,401	13,506
Year 2031	12,844	-2,327	8,634	-935	2,259	12,022	-5,529	2,386	29,355
Year 2036	13,522	-1,683	13,609	-370	4,655	16,144	-4,759	3,430	46,578

* Includes apparel, other non-food specialties and selected personal services (dry cleaning, optometry, clothing alterations, hair and beauty)
** Assumes demand for vacancies = 5% of demand for occupied space
*** Assumes 10% of retail space is shop front space for non-retail commercial uses such as real estate, financial, medical and travel services.

An analysis of the data reveals:

- Current demand and supply of total occupied retail space is roughly in equilibrium;
- Bulky goods supply is currently roughly in equilibrium;
- There is currently an undersupply of supermarket and groceries and other non-food retail floorspace, with continued population and expenditure growth set to exacerbate this deficit further. It should be noted that some of the demand for food and groceries is likely to be met by specialty food stores (bakeries, delis, butchers etc), for which there is currently some over-supply;
- There appears to be an over-supply of department store floorspace currently. This oversupply of department floorspace continues through to 2036.
- There also appears to be an oversupply of restaurant and takeaway floorspace currently. It is suspected that there is some underperformance of these businesses combined with some undisclosed expenditure. Over time however, this oversupply dissipates and there is a need for additional restaurant and takeaway floorspace as the population grows;
- Some of the current and future shortfalls in retailing (e.g. apparel, non-food retailing) can be accommodated in the current vacant floorspace;
- Allowing for a target vacancy rate of 5% there will be demand for an additional 11,700sqm of retail floorspace by 2026 increasing to 27,000sqm by 2031 and 43,150sqm by 2036; and
- Allowing for another 10% of shop front space (excluding bulky goods) to be occupied by non-retail tenants (e.g. banks, real estate agents, travel agents, etc) would suggest that a further 13,000sqm shopfront space would be required by 2026, 29,000sqm by 2031 and 46,600sqm by 2036.

5.1 Undersupply in a retail segment

It is important to note that the stated undersupply in retail categories is not necessarily a negative. Retailer’s “overtrading” indicates a healthy sector, whereas a sector that achieves an industry average is not necessarily flourishing. Given the recent pandemic, there is a preference for retail operators to build financial reserves, providing resilience in an industry with as many failures as successes. The City Centre, in particular, is a desirable place for retailers to “overtrade”, leading to thriving businesses and vibrancy.

5.2 Floorspace Growth and Demand

The City Centre’s retail component will be a significant beneficiary of broader regional growth as (unlike the suburban centres) the City Centre draws from the entire Albury population and the surrounding catchment population of close to 200,000 people.

The City Centre has significantly more retail floorspace than would be determined as necessary under today’s standards for the Albury urban catchment. As a general guide, retail floor space sits at around 2.2 sqm per person in Australia . On that basis, the entire retail provision for the Albury LGA is within the City Centre. See Section 11 – Benchmarking & Case Studies for further detail.

As the regional and LGA catchment grows, pressure will increase to find sites for more commercial activity and retail stores. The key issue for consideration is the location, quality and urban character of the development. This must preclude the demolition of historic buildings and the creation of any further internalised shopping centre (mall) developments, if Albury wishes to enhance the economic capacity of its City Centre.

Changes to the existing CBD retail offer will come through redevelopment of older retailers and centres as opposed to major floorspace increases. This Action Plan also agrees that additional floorspace will be directed towards the new residential areas in Thurgoona and to a lesser extent Lavington.

Some expansion of the Albury CBD retail core is warranted given that new residents will spend a large proportion of their discretionary shopping in the City Centre. However, this expansion should not include expansion of the existing retail footprint. Rather infill development within the City Centre will add to vibrancy.



5 Shopping Centre Council of Australia, 2018

6.0 Albury City Centre

The City Centre’s culture, art and architecture signify its (predominantly) European heritage. The older buildings and tree-lined streets are the heroes of the City Centre and stamp its character as a walkable and visually rich city.

6.1 Urban Vibrancy

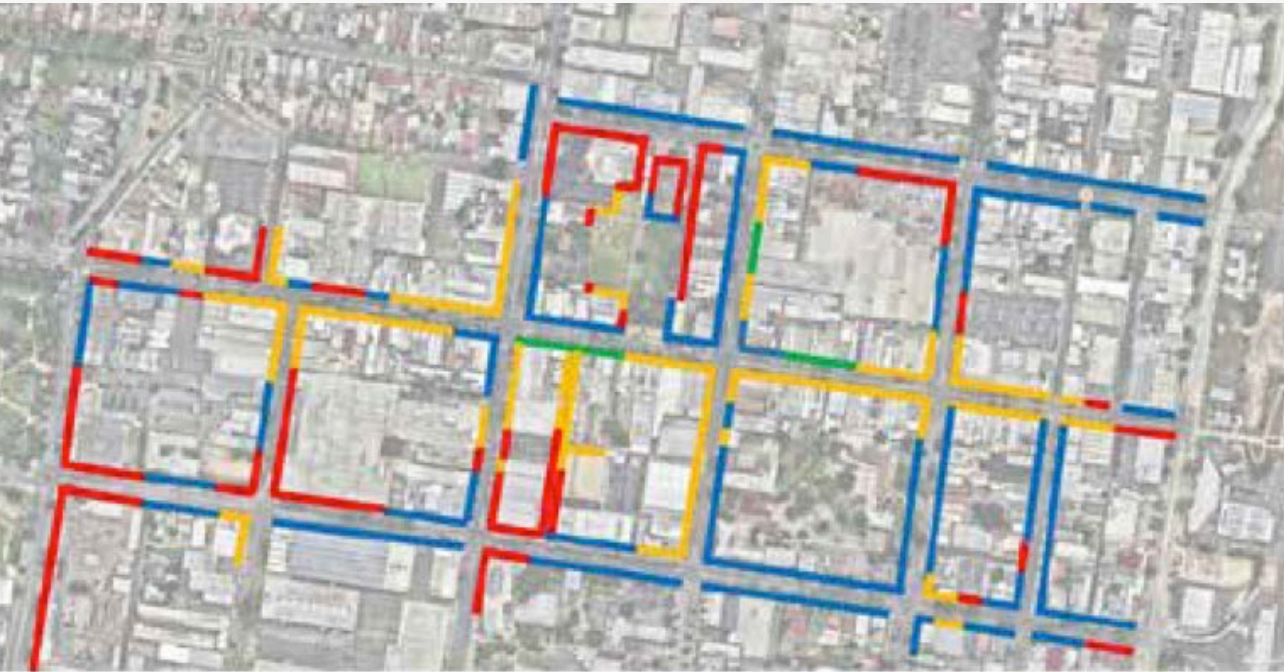
Improving the desire to walk in the City Centre is one of the more important tasks to be achieved through implementation of the Action Plan. In economic development terms, increased walkability is shown to have positive impacts on placemaking, increases in retail spend, rental income, land value and perceived safety.

Research has shown that walking interventions can increase the number of people entering shops and trading by up to 40% and retail rents by 20% .

A high-quality walk is partly a function of the architectural detail of buildings, their relationships with each other and people in the street. Dominant vertical proportions and visual detail are features of the City Centre’s older buildings and improve the desire to walk. Flat facades, and a lack of detail and interest in the City Centre’s modern buildings and reduce the desire to walk.

Figure 2 - City Centre Retail Dynamics and the Desire to Walk

Source: Design Urban



Key

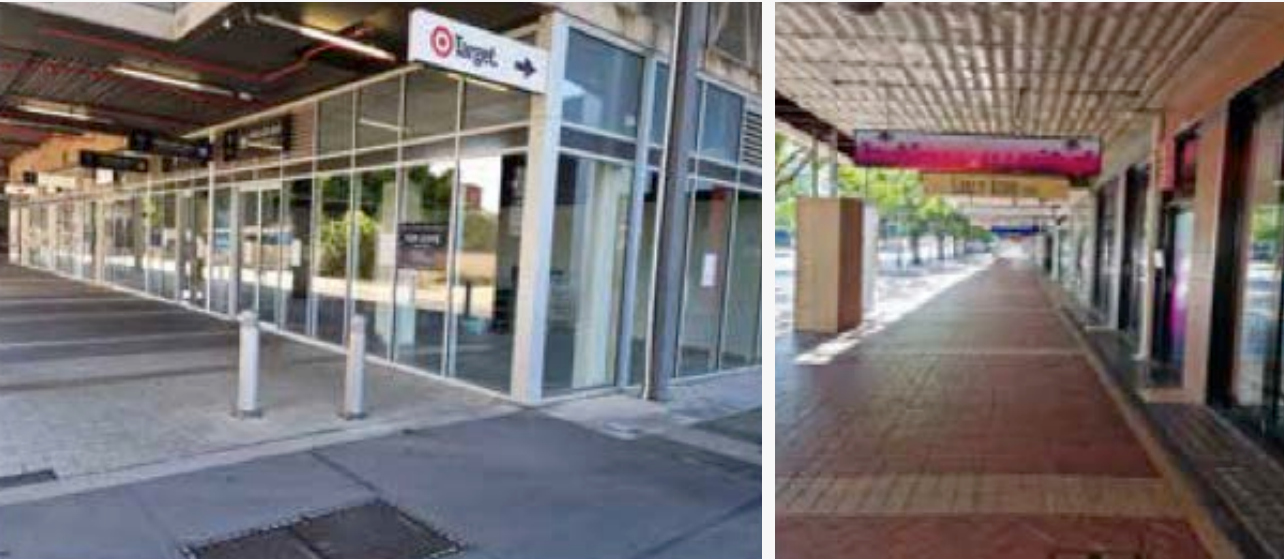
- Dynamic – inviting, active, safe and conducive to retail spending
- Warm – predominantly retail, reasonably active and interesting pedestrian environment.
- Cold – commercial, non-inviting, reduced relationship with pedestrians.
- Non-Engaging – blank facades and carparks

6 Lawler, E, The Pedestrian Pound: The Business Case for Better Streets and Places - 2013

In the retail vibrancy assessment undertaken as part of the project, ‘Green’ indicates a quality retail cluster with optimum store and shopfront presentations. In most cities, a defined central retail core is present with high rental levels. As distance from the core increases, retail tends to become more eclectic and destination focused, and rental levels generally decrease. This pattern is muted in Albury, with retail “hot spots” occurring across a large portion of Dean Street as a result of the ‘ant trail’ between Myer Centrepoint and West End Plaza. Signature retailers appear out of the core and away from Dean Street.

However, ground-level presentation of shops in a long view in (Figure 3) can be improved, with over-glazing present and little differentiation between windows and doors. The following images of the City Centre show the visual dominance of the pavement compared to the building edges. Best practice design dictates that pavement should be muted, simple (not “busy”) and not compete for attention with the buildings and shop fronts.

Figure 3 - Examples of poor retail long views in the City Centre



Source: AlburyCity

In contrast the examples below show the success of the framed windows in AMP lane, the historic long view of Yackandandah’s main street and Mornington’s visually rich and interesting urban retail environment.

Figure 3 - Various: Visually Rich & Interesting to People Walking



Source: AlburyCity

6.2 Carparking impacts on the retail environment

While there has been a focus by Council in recent years to move toward a pedestrian prioritised environment, the car is still king in the City Centre. A focus on ease of parking and parking numbers can result in a city that is easy to get to... but not worth getting to.

In main streets, including in regional cities like Albury, oversupply of free parking does not drive significant economic gains for local shops and businesses. In fact, when fewer people walk past shops there is less chance of ‘incidental or impulse purchasing’. More than parking, improved walkability of main streets, including improved amenity and activation, has been shown to increase retail spend, rental income, land value and economic development.

A reduction in on-street parking in the City Centre will increase levels of walking within the city and is supportive of retail performance, especially in a place such as the City Centre, where shopping alternatives are further away and not as attractive.

While consumer feedback obtained through consultation identifies a desire to park in close proximity to a retail destination, the “ideal” relationship to improve retail performance is for parking to be at a distance from where people want to go. This means more people walking past more shops. Best practice denotes a walking distance of approximately 400m is ideal⁷, because walking is likely to be just as quick as driving over this distance. In the City Centre context, this distance equates to two ‘Dean Street blocks’.

This ‘ease of access’ approach is also evident in the current parking regime in the City Centre with a dominant portion of angle parking.

Angle parking delivers more parks in a street, however surveys have shown the configuration reduces pedestrian satisfaction⁸. Whilst not fatal to the performance of the City Centre, it is a negative in supporting the walking experience. The effect of angle parking on the street is threefold.

- 1. The motion of cars driving into parking spaces, heading towards the footpath, is uncomfortable for pedestrians.
- 2. Outdoor dining is more difficult to implement with dining space decreased as its forced away from the kerb⁹. It is important to note that outdoor dining cannot be supported at the building edge in order to comply with disability inclusion measures.
- 3. Even while parked, car engines and bonnets represent the more aggressive elements of a car and do not support diner/pedestrian comfort.

As a result, consideration of parallel parking as an alternative is identified as a recommendation in this Action Plan.



Source: VisitVictoria

7 Urban Design for Walking, Victoria Walks 2020
8 Waimakariri District Council NZ, Customer Satisfaction Surveys 2010-2016
9 Fred Kent, Projects for Public Spaces New York

6.3 Footpath and road configurations to support retail

Behavioural mapping studies undertaken by William H (Holly) Whyte¹⁰ demonstrated that the best performing retail streets were on those with narrow footpaths, with A-frame signage and merchandise on the footpath, resulting in a degree of pedestrian crowding. For the application of this theory in the City Centre, a balance must be struck to ensure adequate access for all abilities is maintained (minimum 2.4m clear-way) and ensuring pedestrian safety through the ability to socially distance.

The resulting consideration for the City Centre is repurposing of the under-utilised space present in the footpaths across the city that exceed 4.5m in width. While it is clear their intended design was to support retail activation, the lack of activity in these spaces is currently resulting in a reduction in vibrancy. The activation of these footpaths can be achieved through the installation of micro-tenancies, fixed or movable planters, increased outdoor dining and pop-up activities.

The desire to make a street walkable and pedestrian friendly should not automatically inspire footpath widening. Closing a street and conversion to a pedestrian mall is the most obvious sign of this misunderstanding. Examples of pedestrian only malls that have or are being converted back to shared transport thoroughfares include the Little Malop Street Mall in Geelong and the Maude Street Mall in Shepparton.

The same too can be said for wide road reserves, that are not supporting large traffic volumes. A reduction in road pavement to be repurposed into spaces for bike lanes, additional tree plantings and other activations creates a narrowing effect, providing improved linkages for pedestrians to move across the street.

One Australian study that has examined the relationship between street width and retail performance is “The Impact of Street Width and Footpath Width on Retail Sales in Brisbane, Australia” by Ryan Lister, Jake Martin, and William Young (Journal of the American Planning Association, vol. 84, no. 2, 2018). This study analysed the relationship between street and footpath width and retail sales in Brisbane, Australia, and found that wider streets and footpaths were associated with higher levels of retail sales. Specifically, the study found that for every 1% increase in street width, there was a corresponding 0.6% increase in retail sales, and for every 1% increase in footpath width, there was a corresponding 1.4% increase in retail sales.

Another Australian study that has looked at this relationship is “The Impact of Street Width on Retail Sales: An Empirical Analysis of Australian Streets” by Chris Leinberger and Michael Rodriguez (Journal of the American Planning Association, vol. 77, no. 2, 2011). This study analysed the relationship between street width and retail sales in a number of Australian cities, and found that streets with wider sidewalks had higher retail sales per square foot compared to streets with narrower sidewalks.

Overall, these studies suggest that wider streets and footpaths may be more conducive to retail performance in Australia, possibly because they provide more space for pedestrians, which can attract more customers to storefronts. However, it is important to note that other factors, such as the availability of parking and the overall vibrancy of the neighbourhood, can also influence retail performance.



Source: AlburyCity
10 William H Whyte, The Social Life of Small Urban Spaces

7.0 Lavington

Lavington comprises four precincts with the shopping centre providing the majority of the retail offer. The functional separation of the four precincts within Lavington is reinforced by building character and the dominance of vehicles over pedestrians. Lavington has a dominant shopping centre, Lavington Square, with its urban retail environment comprising an eclectic mix of destination and convenience stores.

Precinct 1 – Lavington Square

Lavington Square by design actively prevents integration with surrounding uses. The images in Figure 5 highlight the poor street interface with the shopping centre building. The area defined by the south-east side of Griffith Road (opposite the shopping centre) and the south-east side of Wagga Road) provides an eclectic collection of physically and functionally independent buildings.

Figure 5 - Lavington Plaza street interface



Source: Urbacity

Precinct 2 – Wagga Road

Considerable public realm and traffic calming improvements implemented over the last 10 years have resulted in increased investment and new developments. The precinct functions well as a highway retail environment with a collection of trades, semi-industrial and commercial uses, plus bulky goods and fast food stores.

Precinct 3 - Urana Road Precinct

Urana Road urban retail has a weak relationship with Lavington Square due to its retail mix, but also in a physical sense due to the 40m roadway between it and the Coles supermarket. Retail on Urana Road comprises commercial and personal services tenants, local shops and destination-based retailers, most of which have minimal crossover with each other.

Precinct 4 - Mate Street

Currently under-performing as a retail precinct, but offering a number of well patronised retailers, including a large Salvos Op Shop, florist, news agency and take away food. It is anticipated that the Five Ways Medical Centre development will inject additional pedestrian movement in the area, leading to increased vibrancy.

The Albury Development Control Plan assumes that Lavington has a singular “Retail Core” This definition results in an understandable desire to link the precincts. Whilst a worthy objective, the design and priorities of intersections, traffic volumes, poor urban interfaces and lack of urban continuity within and between these precincts, makes the task insurmountable.

Figure 6 - Lavington’s functionally divorced zones



Source: Lavington CBD Master Plan

8.0 Thurgoona

Thurgoona has a small shopping centre anchored by a full-service Woolworths supermarket. The Thurgoona catchment contains around 11,300 people but is projected to grow to 17,600 by 2036 and ultimately to 50,000 people¹¹.

The supermarket is positioned to cater to the existing Thurgoona population and is accessible to residents of neighbouring suburbs including Table Top and Wirlinga.

The built form of the Thurgoona Shopping Centre did not take its cues from the City Centre urban retail environment and as a result has not expanded as an economic catalyst for the suburb. The desire to walk is diminished, increasing the requirement drive.

Figure 7 - Thurgoona Shopping Centre



The Thurgoona development area is geographically separated from the urban continuum of Albury. Almost all Albury suburbs are contiguous with each other, which means that supermarket catchments tend to overlap. This is not the case at Thurgoona.

As Albury’s growth corridor, substantial population increases are projected for Thurgoona (more than half the city’s projected growth to 2036)¹². Over the longer term, the growth pattern requires more Large Format Retailing, more supermarkets and more centres in Thurgoona (Refer to section 5.0 Gap Analysis).

Source: Urbacity




The anticipated increase in supermarket and grocery floorspace identified will take place in Thurgoona with residents and investors currently expressing an interest in additional supermarket offerings in the quickly growing catchment.

AlburyCity’s Thurgoona Wirlinga Precinct Structure Plan (2013), provides recommendations for a number of future neighbourhood and village centre locations. One of the sites identified for future retail locations (including the ideal location for the next supermarket) is on the corner of Kerr Road and the Riverina Highway. This location has been supported through consultation with retail consultants, supermarket industry investors and local residents. Significant residential development along Kerr Road and proposed development to the

¹¹ Forecast ID population modelling, 2022 release
¹² Forecast ID population modelling, 2022 release

south of the Riverina Highway in the future will provide convenience commuting for residents, as well as strong highway exposure for supermarket brands.

In addition to urgent rezoning required to support additional retail uses in Thurgoona, an overhaul of the Thurgoona Wirlinga Precinct Structure Plan will be required to address retail priorities. Given the importance of a vibrant urban retail environment to the success of Thurgoona as a major retail precinct for the LGA, it is recommended that the new plan include a specific retail and centres strategy, giving consideration to the following principles:

- 
 - Village Centre - threshold around 1,600 dwellings (4,000 people)
- 
 - Town Centre - threshold around 5,000 dwellings (12,500 people)
- 
 - District Centre - threshold the Thurgoona development area.

Village centres can accommodate a small supermarket of 1,000+ sqm, plus ~600sqm of specialty retail, personal and professional service space. This makes these centres shopping and social meeting places in their own right.

The retail centres strategy for the Structure Plan renewal will require justification of the centre’s location, focusing on structural connections and intersections, “home domain” patterns of flow (for smaller centres), neighbourhood density and composition, recognition of the paths to and locations of schools, spatial separation from other centres and a clearly defined catchment.



9.0 Large Format Retailing

Albury’s LFR cluster is well established on the Riverina Highway and comprises the Homemaker Centre, the Bunnings complex and the Peards Complex. The customer experience of these places, unlike the City Centre, is functionally dominant. Customers go to these places for a specific purpose, but are not designed to support long dwell times or engagement with culture, public space, art, architecture or even climate.

The controls for LFR in Albury currently sit within several different zones, including Industrial, Business and Mixed-Use. LFR clusters must be true to their foundational justification, with clusters formed on the basis of high-value, infrequent, mostly capital asset Item sales. This means they are best suited to large sites outside of centre zones.

If true to their foundation, these retailers are not a threat to the City Centre, however, when the controls for these centres allow supermarkets and smaller retailers (less than 1,000sqm), the justification for their location (or qualification as LFR/Bulky Goods) disappears. The exception to this is a food and beverage operator, seeking to serve on-site consumers.

The LFR market is currently in “equilibrium”, with around 14,000 sqm GLA (3 to 4 ha) required by 2036¹³. Development of a LFR site above 4ha will likely have a negative impact on the primacy of retail in the City Centre. Larger format retailers currently within the City Centre may relocate to an expanded LFR precinct where rents are generally less expensive and highway brand exposure is high.

Support is provided for development of (no more than 4ha) LFR on the Riverina Highway site as shown in Figure 8 (an extract of the East Albury Industrial Precinct Master Plan). It should be noted that the 4ha area should not be covered exclusively in LFR floorspace. Rather, the 4ha should encompass carparking, loading zones and other complementary amenities. It is important to note that this parcel of land is currently zoned IN1 (General Industrial) and will require future rezoning to support LFR redevelopment.

While this site is a gateway to and from the airport, appropriate urban and architectural design elements can be employed as appropriate treatments for the dual function.

Future development of LFR in the East Albury Industrial Precinct should be guided by the revision of the East Albury Industrial Precinct Master Plan for the site’s appropriateness including contemporary consideration of gateway amenity and environmental and heritage constraints.

Alternative suitable locations in the Albury Local Government Area to supply additional bulky goods retail space over the next 20 years as per retail floorspace projections should also be explored.

Figure 8 - Potential LFR site, Riverina Highway

Source: East Albury Industrial Precinct Master Plan



13 HillPDA, Albury Retail Floorspace & Industry Review, 2021

10.0 Night time economy

Nightlife is a critical component of economic prosperity and encapsulates elements including services, infrastructure, safety and planning / regulations. There is an ongoing emphasis regarding arts, music, retail and hospitality in the night time economy space and how this can be encouraged as an economic stimulus¹⁴.

More diverse night-time offerings across retail, food and entertainment will be important to support growth in retail trade, driving creative business development and attracting domestic tourists and new residents¹⁵.

Most evening activities are interrelated, with events and performances more heavily subscribed when there is a wide variety of dining options and bars nearby. A survey of the City Centre's night time economy¹⁶ suggests that the current dining out environment (quality of food, experiences and outdoor dining infrastructure) could be improved in the City Centre. However, the urban conditions of Dean Street and the potential of QEII Square offer enhanced dining opportunities.

Figure 9 - Existing outdoor dining locations



Source: Design Urban

Benchmarking with other successful night-time economies has identified a number of barriers to new quality food and entertainment market entrants as:

- Onerous parking conditions within the Albury Development Control Plan (DCP):
- DCP Part 17 - Off Street Parking

1 per 5 seats or 1 per 10m² GFA, whichever is the greater, plus 1 per 2 employees (or 1 space per 40m² Gross Floor Area for development in the B3 Commercial Core & B4 Mixed Use Zones).

The DCP provisions for Off Street parking should recognise the dynamic supply of street parking in the City and provide for reciprocal parking arrangements that recognise the differences in parking demand between land uses in the Centre's activity cycle. Food service business operating hours have implications for street-parking availability and parking occupancy rates. Note: Albury DCP 2010 Part 17 is subject to a current review.

¹⁴ NSW Government, *Guide for Establishing and Managing Night Time Economy Uses*, 2018

¹⁵ Urbis, *How Australia's Night-Time Economy Could Boost the Coronavirus Recovery*, 2020

¹⁶ Urbacity, *Albury Retail Action Plan Study*, 2021



- Less than adequate quantities of quality outdoor dining infrastructure (eg. awnings for weather protection).
- High cost of annual outdoor dining permits.
- Dining is dispersed with no concentration of a dedicated 'Eat Street' in the City Centre.

A further success factor for development of the night time economy relates to the density of the walk-able catchment area to the City Centre. Encouraging more people to live within easy walking distance of the City Centre will improve retail performance and extend the City Centre's activity cycle. However, the City Centre lacks a critical mass of residents living within an easy walk.

A contributing factor is the absence of a public transport service at night, which makes it difficult for residents outside of the walkable catchment to rely on transport modes other than cars.

Targeting growth in the proximity of the City Centre will strengthen and support retail and add to the following categories:

- Food and beverage services (cafes, bars, clubs and restaurants)
- Entertainment venues (galleries, cinema, active public space such as skate parks, kids play etc.)
- Fine food (delicatessens, bakeries, specialist grocers etc.)
- Homewares
- Fashion

This will challenge the State Highway designation for Hume Street. The Transport for NSW management regime for Hume Street is restricting a more seamless relationship between South Albury and the City Centre. Originally constructed for highway traffic travelling between Melbourne and Sydney, Hume and Young Streets no longer serve this function.

The Average Daily Traffic (ADT) volumes on Hume and Young Streets are now 7,500 vehicles. This is less than half of the 18,000 vehicles per day 'rule of thumb' volume for dual carriageways. While it is noted that this corridor still forms part of the Riverina Highway, much can be done through the NSW Movement and Place Framework¹⁷ principles to improve connectivity and improved built environment.

Improved connectivity to South Albury will assist in increasing density. This is also supported through the notion that the variable quality of dwellings in South Albury favour redevelopment at scale, whereas instances of late 19th and early 20th-century housing to the immediate north of the City Centre is a character asset for the city, which should be retained.

¹⁷ - NSW Government, *Practitioners Guide to Movement and Place*, 2022

11.0 Benchmarking and Case Studies

While Albury is one of the geographically smallest LGAs in the region, its catchment stretches into north-east Victoria, Greater Hume and Federation Shire Councils in NSW.

Floorspace per person across Australia sits at 2.2 - 2.4 sqm on average. Albury has the highest per person provision of retail floorspace of the major centres considered in Table 2 below. The city acts as the highest order retail centre for the region. This level of service means that the retail spend is relatively self-contained compared with people living in larger cities who need to travel further to access the same level of retail resources.

Table 2 - Floorspace Benchmarking with Major Regional Centres

Council Area	LGA Area	Population	M² Retail Floor Space LGA	M² Retail Floor Space CBD	M² Floor Space Per Person	CBD Floor Space as % of Total	Workforce LGA POR#	Workforce CBD POW#
Albury	305.9 KM²	56,500	199,200	112,200	3.53	56%	12,600	48%
Dubbo	7,356 KM²	54,100	165,000	92,700	3.05	56%	9,750	41%
Tamworth	9,892 KM²	62,600	183,500	70,000	2.93	38%	9,920	32%
Shepparton	2,422 KM²	67,100	218,200	85,000	3.25	39%	13,200	25%
Wagga Wagga	4,825 KM²	66,400	164,200	110,000	2.47	67%	12,700	24%
Wangaratta	3,645 KM²	29,400	73,600	60,000	2.50	82%	9,800	42%
Wodonga*	433 KM²	45,000	107,000	52,000	2.38	50%	12,189	55%

(POR) Place of Residence and (POW) Place of Work
* Retail Floorspace is for the Wodonga Urban Area only

Source: ABS, HillPDA, Essential Economics, City of Greater Shepparton, City of Wodonga, Urban Enterprise, Dubbo City Council, Tamworth Regional Council, Centrum Planning, Urbacity

Albury’s City Centre floorspace provision is similar to large cities that have two to three times the urban population as detailed in Table 3 below.

Table 3 - Floorspace Benchmarking Major City Centres

City	Population	CBD Retail Floorspace (sqm)	Avg CBD Retail Floor space per person (sqm)
Bendigo	110,000	115,000	1.05
Ballarat	123,000	110,000	0.89
Geelong	255,000	105,000	0.41
Albury	56,000	112,200	1.98

11.1 Case Study: Volt Lane Eat Street

Albury has an exciting opportunity in redevelopment of its CBD Masterplan to investigate the development of Volt Lane for the purpose of an Eat Street.

The success of AMP Lane and development of the Volt Lane precinct, with the addition of a multi-storey carpark, Australian Taxation Office, Service NSW and Mantra Hotel has generated increased foot traffic in the area.

Dean Street retailers with staff and customer parking to the south of their properties (facing Volt Lane), Figure 10, offer a meaningful opportunity for redevelopment into additional retail, food and beverage services. With improved interface onto Volt Lane, an Eat Street would build on the success of businesses including Hot Bake and Chopsix House restaurant by adding complexity, energy and critical mass

Figure 10 - Dean Street Properties with Carparks Facing Volt Lane



While it will be important to maintain a servicing area for the Dean Street tenancies behind the carpark redevelopment, new tenancies can be designed to accommodate food and beverage retailers with ample outdoor dining space.

Shipping container installations as a means to testing the Eat Street concept on these properties, are a relatively inexpensive approach. It is however important to note that containers are suited to retail and cafes but not ideal for restaurants, which would be the ultimate goal of the Eat Street. Working directly with interested landowners there is potential to seek grant funding for redevelopment of this area upon finalisation of the Albury CBD Masterplan.

Any development of the carpark adjacent to Target at 482 Kiewa Street, should also be required to provide at grade retail and food and beverage opportunities, with limited parking, to ensure continuation of the Volt Lane activation.



11.2 Case Study: New Urbanism

As discussed in 1.3 – Retail Delivery Form, urban retail is a critical design form for modern shopping precincts. Rouse Hill Town Centre in Sydney is generally recognised as a benchmark of this new form. It is a large 65,000sqm centre completed in a single stage in the northwest release area of Sydney.

Rouse Hill Town Centre has the benefits of a small indoor centre with quasi-basement car parking under the shopping centre. Above is a main street themed centre with a street that permits cars and short-term kerbside parking. There are other streets that are pedestrian-friendly, with most of the common area located outdoors, with shops featuring awnings fronting the streets.

The centre is largely square shape with the major tenants (two full-line supermarkets and two discount department stores) anchoring the corners. The retail is all on one level but a number of the buildings have shop top apartments and commercial suites up to eight stories high (see image below).

This type of development is particularly important for Thurgoona, where greenfield development opportunities exist to support broader community objectives.



11.3 Case Study: Mixed Use Development

Mixed use developments are becoming increasingly common, particularly in capital cities whereby retail is provided on the ground floor in a multi-use (predominately residential) building. This enables a centre to expand outwards keeping the retail on the ground level. The residential component makes the development viable and also provides an added supply of customers for the retail. In turn, the retail provides the amenity to help market the residential.

Major shopping centre owners like Westfield, QIC, AMP and GPT are now looking at such options for future expansion and/or renewal of their existing centres, given the decline in shopping centre appeal as a growth model.

While this form of development has not had significant traction in the regional areas, the Hamilton building on Hume Street in Albury is a good example of this trend taking hold. Interest from land owners and investors in mixed use development is strong, and it should be incorporated into any future options considered for remaining development sites in the City Centre including Young Street and the Council depot site. Procurement costs remain an issue but long term we can expect to see more mixed use development in Albury in the future.

Action Plan

This Action Plan is intended to be flexible and evolve through the recovery and growth of the sector. Progress towards the achievement of the Action Plan's objectives will be reported on a regular basis. Priorities will be assessed annually, based on the outcomes achieved and as new information becomes available. A major review will be undertaken to coincide with the end of the Action Plan in 2026.

The delivery of this Plan cannot be achieved in isolation. Council will seek to create strong partnerships and networks with industry, government and other stakeholders so that through our combined efforts more can be achieved. The actions identified in this plan are deliverable by Council and key partners. It is however hoped that the momentum built through implementation of this Action Plan still spur additional industry initiatives.

Four objectives have been identified that will be the focus areas for Council's support of the retail sector. Actions grouped in these areas respond to the issues, challenges and opportunities identified by the research and consultation described in the first half of this Plan.

The four objectives of the Action Plan are:

-  **Objective 1**
Improve walkability
-  **Objective 2**
Build capacity
-  **Objective 3**
Remove barriers
-  **Objective 4**
Enhance engagement



Objective 1

Improve Walkability

Why?

One of the most essential measures for retail store success is foot traffic volumes. The more people entering or walking past your store, the more opportunities for sales and engagement.

The more people walking, the greater the city's vibrancy and the more attractive the destination becomes as an investment proposition.

People will walk longer distances if the quality of the journey is high. More and more retail is considered an experience, and as such all aspects of the retail destination matter – including convenience, safety, trading hours, amenity, entertainment, architecture and vibrancy.

How?

Council can play a role in public domain improvements that support the walkability of the city's retail precincts. The amenity of public places is delivered through investment in assets including street furniture, paving and wayfinding signage.

Other elements including master-planning and redevelopment of public meeting places, integrated transport options, traffic calming, public art and activated laneways will encourage positive retail interfaces and increase on-street activity.

Food and beverage and other hospitality businesses are integral to the retail experience, with improved settings for dining a key requirement to improve walkability.



Source: Google images

#	Retail Centre	Action	Partners	Timeframe
1.1	All	Adopt the 'NSW Movement and Place' principles in public domain improvements in order to encourage walkability, accessibility and good design to meet the needs of diverse users.		Ongoing
1.2	City Centre	Explore ways to improve pedestrian safety and comfort on Dean Street by reducing the speed and volume of traffic.		Ongoing
1.3	City Centre	Limit the expansion of the retail footprint by promoting infill development in under-utilised or under-developed sites.	Developers	Ongoing
1.4	City Centre	Prepare a masterplan for the development of Young Street Railway Precinct ensuring mechanisms are in place to support high-value entrants. Ensure the Masterplan prioritises a mix of commercial offices, residential and minimal retail. Ensure the precinct includes multi-deck carparking to support businesses in the City Centre's east.		Short
1.5	City Centre	As part of the Albury CBD Masterplan review, consider the inclusion of green space in the Young Street development, to facilitate multi-purpose visits in support of retailers at the eastern end of Dean Street.	Retailers	Short
1.6	City Centre Lavington	Develop a co-funded shop front improvement fund to support retail façade upgrades, design and placement of business identification signage and building regeneration.	Retailers Albury Business Connect (ABC)	Short
1.7	City Centre	Deliver an annual workshop and develop online tools for local event organisers, buskers, entertainers and stall holders to assist them in understanding development consent requirements, permits, fees and grants available in order to increase pop-up events.	Private event operators Entertainers	Short
1.8	City Centre	Undertake a merchandise mix assessment to form an asset register of retailers and businesses, with a view to assisting investment attraction efforts.	Retailers	Short
1.9	City Centre	Improve way-finding signage in the City Centre acknowledging the different needs of day time and night time users.	Retailers Hospitality Entertainment	Short
1.10	City Centre	Increase tree planting in the retail core to provide improved customer experience as part of the Urban Forest Strategy development.		Short
1.11	City Centre	Deliver a Christmas Shopping promotional campaign annually incorporating events, decorations, retail initiatives and targeted advertising to position Albury as a shopping destination experience.	Retailers Event organisers AlburyCBD	Medium

#	Retail Centre	Action	Partners	Timeframe
1.12	Lavington	Undertake a trial conversion of the Griffith Street Carpark into a green space with pop-up retailers in order to support walkability in Lavington outside of Lavington Square.	Residents Retailers Business owners	Medium
1.13	City Centre	Develop a Masterplan of potential outdoor dining areas along Dean Street, identifying the investment required for permanent outdoor dining infrastructure.	Business owners	Medium
1.14	City Centre	At the time of any future streetscape redesign, consider the appropriate on-street parking arrangements (e.g. parallel and/or angle parking) and opportunities to reallocate space for dining and street activities in line with best practice guidelines to prioritise vibrancy, safety and amenity in our City Centre.	Residents Business owners Retailers	Medium
1.15	Lavington	Improve pedestrian comfort and safer traffic movements in Mate Street through consideration of reduced number of carriageway lanes, more substantial landscaping and inbuilt seating in support of city greening, improved visual amenity and activation.		Medium
1.16	All	Identify under-utilised Council and private property for potential venues for pop-up events.	Property owners	Medium
1.17	Lavington	Investigate reducing the number of carriageway lanes of Urana Road with additional kerbside plantings or inclusion of a linear park along the length of the Urana Road retail precinct in order to promote connectivity with the Lavington Square precinct.		Long
1.18	All	Continue to advocate for connectivity and frequency improvements to the provision of public transport in order to reduce car travel in and to the City Centre.	State Government authorities Transport companies	Long
1.19	City Centre	Increase the vibrancy of the City Centre’s footpaths through installation of (moveable) garden beds or micro-kiosk operators on footpaths wider than 4.5m.	Micro-kiosk retailers	Long
1.20	City Centre	Continue promoting the availability of shopper and commuter parking across the CBD, encouraging the use of off-street parking options. Consider the use of smart technology (e.g. digital signage, phone applications) to show parking availability in real-time	ABC, Business owners	Ongoing
1.21	City Centre	Implement initiatives to improve the safety of key CBD car parks including the Volt Lane car park	ABC, Business owners	Short

Short Term	Medium Term	Long Term
2023 to 2024	2024 to 2025	2025 to 2026





Objective 2 Improve Capacity

Why?

Albury is the major retail hub for the wider region, providing an essential service well beyond the boundaries of the LGA. Thriving retail centres are a key indicator of our city’s success. With significant changes in the retail environment, support for capacity building in the sector is critical.

Development of a diverse, innovative retail sector will have benefits across economic and social indicators. Gaps in our retail and food and beverage offerings have provided us with opportunities to explore.

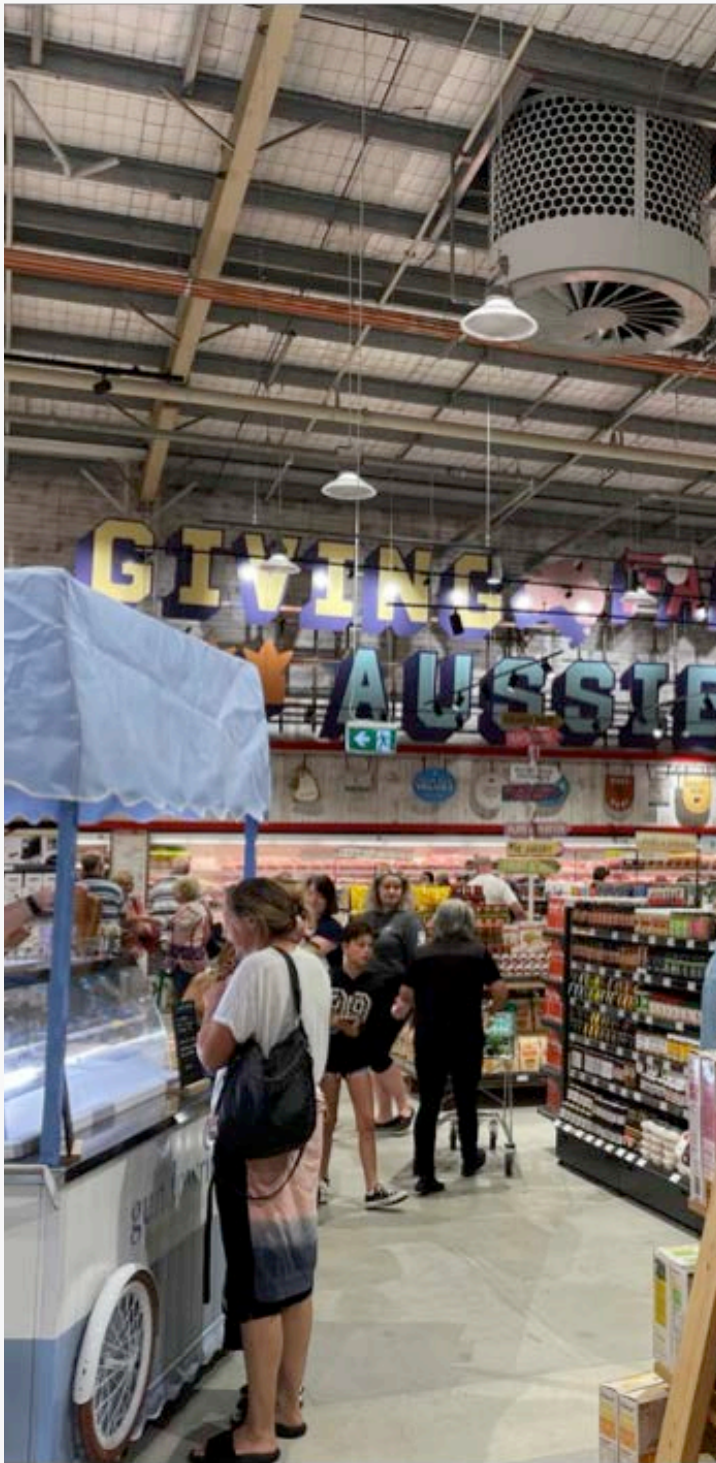
Acknowledging the primacy of the City Centre in the retail hierarchy while encouraging the different functions of our supporting retail precincts are important distinctions to make.

How?

In conjunction with property and business owners, we will work on short and long term solutions to activate under-utilised properties and identify areas for development. We also have a role to play in undertaking targeted investment attraction campaigns in order to retain the right mix of tenants across our retail precincts.

Our growth corridor in Thurgoona requires immediate attention to plan and cater for viable retail options to support a rapidly expanding population.

We will work with businesses and Albury Business Connect to collect data and develop plans that respond to the unique conditions of each retail precinct.



#	Retail Centre	Action	Partners	Timeframe
2.1	City Centre	Regularly benchmark population increases in South Albury in order to maintain supportive density provisions.	Residents	Ongoing
2.2	All	Promote integration of other land uses (including residential) in any major retail development in order to support increased footfall in the area.	Developers Property Owners Real Estate Agents	Ongoing
2.3	City Centre	Promote independent or niche retailing by investigating avenues to encourage micro or online retailers in the region to establish a shop front presence in the city.	Albury Business Connect (ABC) Online businesses	Short
2.4	City Centre	Consider the Volt Lane area for an ‘eat street’ concept as part of the Albury CBD Masterplan review.	Group GSA F&B operators	Short
2.5	All	Develop case study video material of businesses undertaking sustainable retail practices, in order to promote innovation in this space and objectives of the wider circular economy movement.	Business owners ABC	Short
2.6	Thurgoona	Undertake a specific urban development study as part of the Thurgoona Wirlinga Structure Plan review to ensure that provisions are included to require an urban, mixed used response to retail demand, rather than a shopping centre approach to Thurgoona’s retail development.	Urban designers	Short
2.7	Thurgoona	Lock in the retail centre pattern for Thurgoona and undertake appropriate rezoning to support the hierarchy covered in this Action Plan.	Property owners	Short
2.8	City Centre	Identify premises and drivers of demand to attract or develop additional high quality food and beverage operators (eg. Jamie Oliver, Din Tai Fung etc) in the City Centre in order to improve the night time economy, destination brand and retail appeal.	Building Owners Local Real Estate Agents	Medium
2.9	Thurgoona	Undertake targeted investment attraction for restaurants, cafes and bars, as well as younger apparel retailers (Topshop, Cotton On, Sephora etc) in order to leverage and grow the student population	Charles Sturt University Retailers	Medium
2.10	Thurgoona	Work with Charles Sturt University to develop their land for retail purposes on Thurgoona Drive, to provide connection between the two existing retail zones.	Charles Sturt University	Long

Short Term	Medium Term	Long Term
2023 to 2024	2024 to 2025	2025 to 2026



Objective 3

Remove Barriers

Why?

Some government regulations can be a barrier to market entry, or processes and procedures can be difficult to navigate. In the spirit of creating a competitive environment for new business entry and existing business success, its important to undertake regular reviews of Council's regulatory environment with respect to retail.

Balancing the needs of the sector, with appropriate regulatory requirements is complex.

In development of this Action Plan a number of areas have been benchmarked against other well-performing retail cities and its been identified that some retail precincts may benefit from re-zoning, a reduction in carparking requirements and other changes to the city's Development Control Plans in order to stimulate retail investment.

How?

Where we can simplify application processes for permits and approvals for the retail sector. Where regulatory processes cannot be changed, we'll work with our local retailers to provide clarity and offer efficiencies through a business concierge service.

We'll be flexible to support changes in retail trends from, delivery on demand, to dark kitchens, and we'll work with developers to understand the importance of urban retail best practice.



#	Retail Centre	Action	Partners	Timeframe
3.1	All	Review and update Development Control Plans to ensure barriers are removed for emerging retail trends including dark kitchens, out of hours operations, pop-up tenancies to fill vacancies.		Ongoing
3.2	All	Simplify the outdoor dining application process and reduce the financial obligation to an application fee, to encourage more outdoor dining operators	Food and Beverage operators	Short
3.3	Bulky Goods	Consider suitable locations in the Albury Local Government Area to supply additional bulky goods retail space as per retail floor space projections.		Short
3.4	All	Provide greater guidance in the DCP for recommended indoor and outdoor trading hours for commercial uses.		Medium
3.5	City Centre	As part of the current ADCP 2010 Part 17 Review, investigate removal of all parking requirements for food and beverage operators in order to facilitate new entrants and encourage expansion of existing operators. Also consider the role of reciprocal parking arrangements across multiple businesses	Food and beverage operators Developers	Short
3.6	Thurgoona	Work with relevant landholders to rezone land identified for future commercial activation upon finalisation of the Thurgoona Wirlinga Structure Plan review.	Landowners Shopping Centre Operators	Medium
3.7	All	Implement local planning controls, to ensure new retail premises, reinforce the existing or desired future character of their location (For example, Albury, Lavington and Thurgoona will have different approaches).	Developers Property owners	Medium
3.8	All	Reduce parking requirements for developers looking to repurpose historic buildings.	Developers Property owners	Medium
3.9	Lavington	Investigate rezoning Mate Street retail precinct to Mixed Use, with an obligation to retain ground floor retail, in order to facilitate additional uses (including residential) and subsequently increase footfall.	Property owners Residents Tenants	Medium
3.10	All	Reduce minimum glazing requirements in development controls – to encourage developers and building owners to incorporate framed windows and doors on their shop fronts.	Developers Building owners Retailers	Medium
3.11	All	Include a map of required street front activation for Albury and Lavington CBD in the DCP to prevent vehicle access or services diminishing footpath amenity.		Long

Short Term	Medium Term	Long Term
2023 to 2024	2024 to 2025	2025 to 2026



Objective 4 Retail Industry Engagement

Why?

Often retail business owners are so busy working in their business that it’s difficult to step away to investigate trends, upskill or strategically plan for future growth.

Council has the opportunity to facilitate the flow of information directly to our retailers, in collaboration with Albury Business Connect.

We’ve laid the foundations for great success in retail marketing and promotion through the establishment of initiatives including the Promotional Special Rate Levy and development of the Albury CBD campaign.

How?

We’ll continue to promote Albury as an important retail destination in the wider region through our business, events and tourism channels.

We’ll gather and share information and provide education support for our local businesses and open up lines of communications with our anchor tenants across the city. We’ll find various channels to promote two-way dialogue and keep abreast of sector issues.

As part of our advocacy efforts, we’ll also ensure our local retailers are represented through government and business associations to address sector issues.



#	Retail Centre	Action	Partners	Timeframe
4.1	City Centre	Continue to work with Albury Business Connect in delivery of the Albury CBD campaign as a means of highlighting Albury’s retail offer outside of the Albury LGA	Albury Business Connect (ABC)	Ongoing
4.2	All	Establish benchmarks for pedestrian activity and economic infrastructure to inform public domain improvements. Items for consideration should include safety, visual interest, traffic, culture, landscape and on street activities.	Retailers Pedestrians	Ongoing
4.3	All	Engage quarterly with Shopping Centre Management to understand anchor tenant plans and ways Council can assist to facilitate building reinvestment.	Shopping Centre Management	Ongoing
4.4	All	Monitor sector issues/opportunities for improvement to support advocacy efforts to government and industry representatives.	Albury Retailers	Ongoing
4.5	All	Communicate information and data relevant to the sector via e-newsletters, through special events and on social media. Establish a dedicated retail distribution list.		Ongoing
4.6	City Centre	Link retail activities with cultural events and festivities through marketing, increased consumer awareness and connection between event organisers and retailers as well as hospitality venues.	Albury Retailers F&B operators Event organisers	Ongoing
4.7	All	Support the development and implementation of programs to increase the level of First Nations employment in the retail sector and retail business start-ups.	First Nations organisations and service providers	Ongoing
4.8	City Centre Lavington	Provide specialist training for local retailers to upskill in diversifying their sales channels.	ABC, Albury retailers	Short
4.9	City Centre Lavington	Deliver retail merchandising training to upskill retailers on the importance of shop front presentation and product mix and placement.	ABC, Albury Retailers	Short
4.10	City Centre	Work with Professional Conference Organisers and the Business Conference market to communicate the retail offering to delegates as part of conference material.	PCOs	Short
4.11	City Centre	Identify barriers for food and beverage operators to establishing outdoor dining.	F&B operators	Short
4.12	All	Grow the #My Local Pledge campaign to put a spotlight on locally made and produced goods and services through case studies and additional funding.	ABC	Medium
4.13	City Centre	Work with local retailers to increase trading hours across the city, in collaboration with other night-time economy activation efforts and hospitality venue hours. Provide assistance in changes to development consents where extended trading hours are supportive of retail purposes.	Retailers Hospitality venues ABC	Medium

Short Term	Medium Term	Long Term
2023 to 2024	2024 to 2025	2025 to 2026

Appendix 1 – Consultation Summary

Stakeholder consultations – Key Messages

Overarching

- Movement towards supporting local produce (with low milage) and local industries
- Visitor economy should recover post covid
- Pop up stores could activate areas and encourage new starters to test the water
- Strong spend in few months to March 2021 may in part have been a result of job seeker / keeper
- Significant trade from Victoria as much 60% for some retailers, many retailers have been severely impacted by the VIC lockdown
- New F&B operators coming to town, but staffing and pay are major issue.
- Attracting more tourists would also help to support retailers
- Residential development has sharply increased 30-40% in Albury
- Local trade has increased however this has been offset from lost trade from VIC due to the lockdowns
- Online retail is key competitor and will have an impact on traditional retail and reduce demand
- During COVID - a number of retailers are re-negotiated their commercial leases, then there was job keeper /seeker there is also a number of retailers using their own capital – this maybe disguising the vacancy rate -anticipate that this will increase by the end of the year
- Restaurants have responded to COVID by implementing home delivery
- Border closures have a huge impact on Albury – as the centre is VIC orientated
- Once borders reopen anticipate a big rebound as it has previously done
- Trade in CBD is 60% from Albury, 40% from VIC
- Planning approvals too slow - much easier in Wodonga
- Pedestrians and their length of stay are the most important
- There's a disconnect between planning requirements and practicality (fire hydrants, heritage conversion triggers, contributions) - need greater flexibility to consider community benefits and offset costs
- Parking requirements should be relaxed
- Albury has no connections to major cities so must go it alone.

City Centre

- Increased interest in investment and movement into Albury as a result of COVID-19, with centres driven by their own communities.
- Online spending impacts have been less pronounced, the people of Albury prefer an experiential based shopping experience – it's also a social experience this has been even more evident after COVID with a trend back to bricks and mortar as people crave human contact.
- We are seeing more omni-channel retailing with COVID accelerating this trend, with more pressure on retailers to improve the in-store experience.
- Opportunities to improve parking – use of streets for parking and changes to the length of stay.
- Tourists are not a dominant market for Albury CBD
- Myer is a key anchor for the CBD, the Albury Myer is only Myer between Wagga Wagga and Bendigo and serves the wider region including the smaller townships of northern VIC.
- Myer highly unlikely to close as reflected in the plans to refurbish the store.
- Retail trade in Albury is good when people are free to move (i.e. when no lockdowns).
- Food services offer is limited in Albury.
- The CBD lacks a strong food and beverage offer with indoor/outdoor food options and a lack of lunch time trade
- Quality outdoor dining seen as a major amenity driver.
- Woolworths appears to be trading strongly.
- Quality of retail in the main street has “gone backwards” there is over supply of beauty bars which have replaced good quality food retailers and there has been a loss of diversity.
- Plan for commercial trade after 5:30pm to stimulate the night time economy e.g. pedestrianize the streets create structured community meeting spots, night clubs, more parking.
- Online spend is considered a key competitor for centre managers – key problem for Albury has been aligning the stock with the area’s demographic.
- Myer and supermarkets are using click and collect services.
- The CBD would benefit from green space.
- The eastern side of Dean Street is less attractive than the western side and could do with some improvements.
- Opportunities for improvements (e.g. green space, lifestyle attractors) near Regent cinemas and towards the station.
- The CBD requires more parking and cycleways as well as boutique stores.
- Coffee shops and cafes were having record sales in 6 months to March/April however with the latest lockdowns a number won’t survive – 2 to 3 are known will close shortly.
- Dean street – apparel retailers (including jewelry stores) are rapidly disappearing, and the mix is becoming increasingly service based.
- The CBD would greatly benefit from an entertainment offer (and somewhere to sit).
- Improve the connection in Dean Street and create a thoroughfare.
- Peripheral office spaces would also support retailers
- Prime rents e.g. in the core retail strip (ie Dean Street) achieve \$600-\$700 dropping off to \$200 - \$300 in the secondary locations
- Longer term – Albury will need to adopt place-making designs and become a destination in its own right
- Dean Street is parts tired and loved – needs to be revamped and needs an activation Mall or tenant
- CBD will also benefit from mixed use with higher density residential
- Consider electronic parking “vacancy” indicators
- Lack of vacant retail space
- Some buildings not well maintained (Three Legged Dog)
- Constant circulation of people looking for a carpark in Dean St is an issue
- Footpaths too wide and under-utilised
- Consider parklets
- South Albury evolution options, retail/industrial/ housing?
- South Albury evolution options, retail/industrial/ housing?

Lavington

- Lavington took a large hit due to the bypass however has since recovered and witnessing a lot more investment nowadays
- Lavington’ centre performance has been more stable over the COVID-19 period compared to the CBD and that may be a function of the centre being less reliant on Victorian markets – notwithstanding this Albury attracts significantly more trade with a wider catchment and superior offer
- COVID has led to more vacancies which has a negative impact on the centre
- Lavington is a difficult centre – perceived as downmarket with several vacancies (some vacant for 3-4 years)
- Lavington is challenged centre and services a different socio demographic.
- Rents are significant cheaper in Lavington, however that is not the case for Lavington Square rents.
- Woolworths is open 24/7 to meet online orders
- Development along Wagga Road has been successful and seeing activity pick up along that Road
- Lots of commercial properties are locally owned. Consider further industrial zonings along Wagga Rd and at the old Ettamogah sanctuary area.

Bulky Goods

- Demand for large floorspace retailers i.e. department stores are limited and typically require a high exposure profile
- Retailers (i.e. 40-60sqm) seeking larger retail spaces ie 150sqm
- Big box retailers are also downsizing

Thurgoona

- Thurgoona Plaza trading well – benefits from public schools, tradie population and university
- Thurgoona Plaza trade area goes beyond Thurgoona due to the school facilities drawing people into area from further afield as well as the ease of getting there



Appendix 2 – Strategic Document Literature Review

1 Albury Retail Sector Development Strategy 2015-2025

The Albury Retail Development Strategy was prepared by Essential Economics and Michael Baker Consulting in 2015 and provides recommendations to guide the future prosperity of the retail sector. The key objectives for the Strategy are as follows:

1. To retain Albury CBD’s role as the highest-order retail destination in the region;
2. Increase the retail sector’s trade from residents and visitors beyond Albury;
3. Ensure that Albury’s hierarchy of retail centres function in a complementary manner;
4. Use the retail sector to drive further investment and economic development; and
5. Build and promote a retail sector that supports Albury and enhances the Albury ‘brand’.

A summary of key actions that support the delivery of the five objectives are as follows:

- Consolidate Lavington’s role as the ‘second centre’ for Albury which services a strong sub-regional catchment;
- Support the growth of appropriate homemaker and large-format retailing in East Albury;
- Support smaller centres and neighbourhood centres in Albury (e.g. neighbourhood centres at East Albury and Springdale Heights and at Hamilton Valley) through only permitting new development within these existing centres;
- Council to meet with representatives of the owners of West End Plaza, Myer Centrepont, City Walk and Lavington Square to inform them of their support for redevelopment of retail and other activities at these sites;
- Facilitate the development of laneway retailing in the Albury CBD and ‘laneway culture’ as part of the council’s wider placemaking activities;
- Target small niche and independent traders (including food and beverage) for laneway locations outside the traditional core commercial areas of the CBD; and
- Improving Albury’s retail offer through: targeting new international retailers in Australia; improving the quality of the food and beverage (and include more fine dining options), the inclusion of a contemporary mix of fashion stores, including labels aimed at those aged 18 to 25 years; and introducing pop up shops, food vans and other opportunities to temporarily activate underutilised spaces.

The above objectives are ongoing and still relevant to date. Targeting international retailers and contemporary mix of fashion shops may be increasing more difficult in the current challenged environment and growing presence of online retailing.

The Strategy identifies that total requirement for additional retail floorspace in Albury is forecast to be between 22,800 sqm and 39,400 sqm by 2036 based on forecast growth of the trade area population and real growth in retail expenditure per capita.

The Strategy also identifies that Thurgoona which is expected to accommodate 50,000 residents could expand to include a ‘district centre’ (which typically has a population threshold of 40,000 residents) consisting of a discount department store, two full-line supermarkets, speciality stores and office floorspace.

The HillPDA study largely agrees with the thresholds and with the area being able to support a district centre once the residential population is well established (and assuming the projected population levels are realised).

The Strategy suggests that the majority of Albury’s retail floorspace growth will be located in residential areas to the north in and around Lavington and Thurgoona and will predominantly service the resident population.

The Strategy also suggests major changes to the existing CBD retail offer will come through

redevelopment of older retailers and centres as opposed to major floorspace increases.

This Action Plan also agrees that additional floorspace will be directed towards the new residential areas in Thurgoona and to a lesser extent Lavington. Some expansion of the Albury CBD retail core is warranted given that new residents will spend a large proportion of their discretionary shopping in the City Centre. However this expansion should not include expansion of the existing retail footprint. Rather infill development within the City Centre will add to vibrancy.

2. Albury Local Strategic Planning Statement (LSPS)

The aim of the LSPS is to guide future land use planning and influence public and private investment so that it enhances the wellbeing of the Albury community and environment. It sets out a 20 year vision to guide land use planning and its priorities future strategic activities, in the form of studies and strategies.

In terms of centres and the retail and hospitalities industries the LSPS largely reinforces the Retail Strategy. The CBD is recognised as the highest order centre for destination retailing in the wider region with Lavington and Thurgoona as important supporting retail centres.

Priority 6 is titled “Vibrant CBDs and strong local centres”. The actions under that Priority are as follows:

- 6.1 Continue to support a hierarchy of retail centres that operate in a complementary manner, including retaining Albury CBD as the highest-order retail destination in the region (as per the Retail Strategy).
- 6.2 Review the Retail Strategy in response to the changing retail environment.
- 6.3 Review the Albury and Lavington CBD Master Plans (2009) and Cultural Precinct Master Plan.
- 6.4 Develop a night-time economy strategy.
- 6.5 Support higher density living and increased housing choice, including town houses, villas and apartments, within and close to our centres.
- 6.6 Reinforce the grid pattern and street hierarchy of Albury CBD, including the significant Dean St axis.
- 6.7 Continue to evolve Lavington CBD noting the changing environment following the Hume Freeway bypass and the opportunities to enhance streetscapes and improve commercial, community and visual characteristics of the centre.

- 6.8 Encourage development of the existing Thurgoona centre to support our growing community, improve integration with Charles Sturt University and explore further civic, commercial, retail, higher density residential and education opportunities.
- 6.9 Implement our CBD Parking Strategy.
- 6.10 Work with Transport for NSW on implementing the Movement and Place Framework for our CBDs, recognising the important ‘place’ role streets have in the life, economy and enjoyment of our City.
- 6.11 Explore opportunities to activate our laneways and other public spaces.
- 6.12 Consider efficient local freight and loading access in our CBDs whilst protecting urban amenity

The Action Plan addresses most of these Statements with recommended actions.

3. Albury 2050 Community Strategic Plan

The purpose of the Albury 2050 community strategic plan (CSP) is to identify the community’s main priorities and aspirations for the future, and plan strategies to achieve them. The CSP is based on four principal themes that have emerged from community consultation that was conducted in 2022, including:

- A growing sustainable economy
- An enhanced natural environment
- A caring community
- A leading community.

Of relevance to the retail sector are the community goals and actions including:

- Albury has a national reputation as a place to do business (Outcome 1.4) through improving productivity and competitiveness in both existing and future employment sectors (Action 1.4.2) and ensuring high quality support infrastructure and services are available. The retail sector is a key industry and employer in Albury. Growing this industry will generate new jobs and will help to service other industries as well as improve worker amenity;
- Outcome 1.1 identifies a need for residential and commercial development for our growing city. To achieve this outcome, the provision of retail will need to be commensurate and support the growth throughout the city;
- A strong retail offer (i.e. quality food and beverage offer) will be key to offering ‘diverse and innovative tourism experiences to attract new and repeat visitation’ (Outcome 1.3);
- The existing and future retail offer within the Albury LGA would benefit from an integrated transport network (as proposed in Objective 1.2) and improved accessibility (as proposed in Action 1.2.3);
- Increased participation in a diverse range of art and cultural activities (as proposed in Objective 3.6) in Albury centres will help to increase patronage which in turn has the flow on benefits for existing retailers.

4. Cultural Precinct Master Plan

Albury City Council developed a master plan for the QEII Cultural Precinct located on the block bounded by Swift Street to the north, Olive Street to the east, Dean Street to the South, and Kiewa Street to west. The master plan provides a collective vision and long-term plan for the Cultural Precinct. QEII Square is at the heart of the precinct, surrounded by cultural institutions such as St Matthews Anglican Church, Albury Library Museum, Albury Entertainment Centre and Murray Art Museum Albury (MAMA).

The master plan includes the redevelopment of the convention wing of the Albury Entertainment Centre to meet the current capacity of the Theatre wing. This development will have a positive impact on the immediate surrounding retailers, with opportunities for a quality food and beverage to front and support the Cultural Precinct. The Master Plan also identifies potential additional cafes or ground-floor retail uses with possible future building redevelopments to assist in activating the cultural precinct.

5. East Albury Industrial Precinct Master Plan

The master plan prepared in 2012, estimated almost 85,000sqm of bulky goods retailing in Albury/ Wodonga which equated to a shortfall of almost 30,000sqm. Outside the existing centres the plan identified a 5.9ha site in East Albury for bulky goods retailing and recommended restricting additional bulky goods retailing to 20,000sqm. The purpose was to encourage some bulky goods retailing to expand in the existing centres. We are of the view that this study overstated the undersupply of bulky goods.

HillPDA analysis suggests that the city will need 4ha of land for this use, (not the 5.9ha shown in the Masterplan). This should be reflected in the Masterplan.

6. Albury Destination Management Plan (DMP) 2019-2023

The DMP was prepared in 2019 and is a four-year plan for guiding sustainable growth and ensuring the viability and resilience of the tourism industry in the region. The plan is centred around five key objectives:

- Grow visitor numbers (especially during non-peak times)
- Increase visitor spend
- Grow the average length of stay of visitors
- Introduce more commissionable (paid) product
- Increase profile by State tourism agencies.

as these markets are higher yielding and generate greater spend. Although not stated in the plan, meeting the above objectives requires the support of the retail sector.

Providing a strong retail offer (including food services) is essential for attracting additional visitation, increased visitor spend and length of stay. To achieve these objectives and attract additional tourists, Albury may benefit from targeting additional food and alcohol manufacturers (e.g. beer and whisky) and retail operators to establish in the CBD; or expanding existing businesses to provide unique experiences. Increased tourism will in turn drive further demand for retail.

The plan focuses on overnight visitors (domestic and international) rather than domestic day trippers

7. Albury Wodonga Regional Economic Development Strategy (REDS) 2018 - 2022

The REDS sets out the long term economic vision and associated strategies for the Albury-Wodonga. The Functional Economic Region includes the Albury LGA. The EDS identifies tourism as an engine of growth sector for the region's economy, and a major employer in the region as reflected in the high number of workers employed in the Accommodation and Food Services and Retail Trade (i.e. 3rd largest employing industry as at 2016) sectors.

Developing and growing the sector and visitor economy is a key element of the REDS. The REDS also identifies the 'Food and Beverage Services' as an emerging sector, which could potentially develop into regional specialisation. As such the tourism and retail trade industry are a key strength for Albury, with opportunities for the region to capitalise on this strength and grow these industries further.

8. NEXUS – Albury Industrial Hub Master Plan

Construction of the infrastructure for the Nexus Industrial precinct is now complete, with the Davey Road Interchange also finalised. The Davey Road Interchange provides freight and logistics with greater access to the NEXUS Industrial Precinct.

The 450-hectare Industrial Precinct at Ettamogah has been transformed over the last 10 years. This project is expected to generate an annual \$1.5 billion in Gross Regional Product (GRP) for the Albury regional economy and create 9,400 local jobs over the next 30 years and beyond (AEC Group Nexus Industrial Precinct Enabling Infrastructure - Economic Analysis, 2018).

Given the site's proximity to Lavington and Thurgoona, the retail centres within these regions are likely to benefit from additional trade from these future workers. The ongoing viability, physical beauty, spatial intimacy and pedestrian amenity of the city centre is a major inspirer of industrial business attraction. Entrepreneurs and employees prefer to live and setup business in places with vibrant city centres and a strong culture and arts scene.

9. Thurgoona Wirlinga Precinct Structure Plan

The Thurgoona Wirlinga Precinct Structure Plan (TWSP) investigates, identifies and creates a framework that facilitates the development of land in the short, medium and long term. The plan considers the land provision and location of activity centres for the region. The TWSP focuses on the entire Thurgoona Wirlinga area, which is over 4,500 hectares, and will support an ultimate population of almost 50,000 people over the next 50 years. The plan suggests that the region could accommodate:

- One district centre of 35,000sqm GFA, which includes a discount department store of 7,000sqm, 2 full line supermarkets, 10,000sqm of speciality stores and 10,000sqm of commercial floorspace on a five hectare site. This could be an expansion of the existing neighbourhood centre or new centre;
- Three major neighbourhood centre, including Thurgoona Plaza, of 6,000sqm GFA. The neighbourhood centres would each require a 1.5 to 2.5 hectare site and could include a supermarket, post office, newsagent, pharmacy, food and beverage and around 1,000sqm of commercial floorspace; and
- Four village centres, each approximately 2,000sqm, and each comprising a 1,000sqm small supermarket and 1,000sqm of specialty retail. The village centre's role will be to primarily serve the local convenience retail needs of local residents.

The TWSP centre hierarchy is covered in Chart 4 (P41), which states the population threshold for a "Village Centre" is 10,000 people (4 of these proposed), a "Major Neighbourhood Centre" is 15,000 people (3 of these proposed) and a District Centre for 40,000 people (1 of these proposed). A difficulty with these thresholds is that a 10,000 person "Village Centre" catchment is on the margin of feasibility for a full size (3,000 sqm+)supermarket.

This raises an issue of location and the organisational structure of the TWSP. The TWSP requires an urgent refresh, particularly with respect to the retail / centres proposition and their locations.

The District Centre will likely attract one or more supermarkets and a discount department store. The built form of these centres is important if we wish Thurgoona to be more than a commuter suburb of Albury. These centres need to offer more than just retail and their built and urban form is extremely important in this respect.

The current Thurgoona centre is an example of a built form design approach that denies density, mixed use and integration. The current centre is one building, with blank walls and car park interfaces to every public space. It represents the industry standard of shopping centre developers. All the centre's neighbours turn away from the centre due to its poor quality edges and interfaces. This design and development approach reduces the social and commercial capacity of the centre and the desire for other complementary uses to co-locate.

Arterials are also a major source of employment, if designed correctly. Currently the Thurgoona arterials are a product of outdated and discredited NCDC planning of the 1960 and 1970s urban development method of “an established repetitive, industrialised sequence.” With travel times (in the NCDC method) expressed in dollars. The NCDC and Thurgoona arterials were designed for friction-free movement based on travel times to the city. Such arterials facilitate long but quick trips to elsewhere, which may have been acceptable in those times but are unacceptable under just about every measure today. The Thurgoona arterials were also designed to sit in landscape affording the future possibility, if travel times got too long, of adding additional lanes to the arterial.

That characteristic is evident in Thurgoona Drive, Table Top Rd and Elizabeth Mitchell Drive. Regional arterials have enormous economic capacity, as can be seen in Borella Rd.

In Melbourne’s 2030 Growth Strategy, it was identified that around 30% of Melbourne’s total employment (outside of the CBD) was in the arterials. The refreshed TWSPS needs to find new employment corridors.

HillPDA raised a concern around the current zoning of the additional centres in Thurgoona “to ensure they are quarantined for future centres and would not be developed for housing in the interim.” However, a refreshed structure plan (on Council’s current agenda) should be able to sort these centres and their locations and role.

10. CBD Parking Strategy

The Strategy seeks to balance all modes of movement, to transition from two private motor vehicle dominant CBDs. It recognises relatively low occupancy rates across the city and seeks to bring a range of new and more efficient management mechanisms into consideration. Key recommendations include:

- assess and review all parking precincts and facilities in both the Albury and Lavington CBDs in accordance with the Parking Rationalisation Guidelines;
 - bring forward the Wilson Street multi-deck extension works, and consider the possibility of extending by two levels;
 - investigate opportunities for the construction of additional All- Day multideck facilities in the eastern end of the Albury CBD;
 - consider interim measures to increase availability of off-street All-Day parking in the Albury CBD;
 - investigate a formalised Residential Parking Permit Scheme in the Albury CBD;
- support the development of AlburyCity’s Urban Forest Strategy;
 - review parking provision rates for new developments in the Albury DCP
 - review the Albury DCP to include greater provision for cycle parking at new developments, and requirements for the provision of end-of-trip facilities at developments within the CBD; and
 - investigate opportunities for the implementation of on-route parking guidance systems in the Albury and Lavington CBDs.
- The Action Plan also seeks to rebalance the current weighting towards maximising street parking in favour of maximising pedestrian amenity.

11. Planning for the Future of Retail: Discussion Paper (HillPDA)

The discussion paper describes how the NSW planning system could address the State’s dynamic retail sector. The paper asserts that the retail sector’s outlook is positive because it is supported by strong economic conditions and forecast economic and population growth). However NSW retailers will face significant competitive pressure from globalisation and technology, land price increases as well as vacancies due to retailers consolidating their store networks. The competitive pressures and levels of vacant spaces are likely to be higher now due to impacts of COVID-19.

The paper identifies five outcomes that will serve the needs of the contemporary retail sector and today’s customer (as at 2018):

1. Clustering of retail to provide easy, multipurpose, frequent shopping’ – meeting the needs of empowering customers who require immediacy, choice and convenience;

2. Orderly development of new retail formats – catering to customers choosing to shop in places that offer specific or unique experiences. Time poor customers want frictionless shopping for essentials, same day delivery, one-tap purchases, reserving in-store visits for experiential shopping and entertainment

3. Strategic planning and zoning flexibility – responding to new and innovative retail formats. New retailing includes:
 - large format showrooms developing in former industrial sites when they cannot secure space in centres;
 - ancillary retailing being established to support primary manufacturing, industrial or warehousing to not only service workers, but attract a wider customer base and shorten supply and distribution chains (e.g. microbreweries, factory outlets);
 - pop up retailing filling vacant space;
 - supermarkets operating beyond typical opening hours to fulfil online grocery orders;

4. Better planning for last mile distribution and innovative supply chains – enabling convenient delivery models with less congestion for local communities;

5. Strategic planning that revitalises regional centres – supporting regional communities and customers who welcome investment and want to protect their main streets and centres. Out-of-centre retail developments can have more pronounced negative impacts as they draw social, cultural and economic activity away from the established shopping strips. Regional centres are also more sensitive to the arrival or exit of a major anchor tenant such as a department or supermarket.’

To address these outcomes the plan identifies three key directions:
 - Direction 1: better local strategy planning of retail. For example, establishing longer term place-based outcomes for retail; updating local retail strategies to reflect current and future retail trends; and align strategic narrative and strategic planning controls.
 - Direction 2: orderly development of new retail formats in centres. For instance plans for new retail; renewing main streets; and providing centre guidance.
 - Direction 3: adaptability and certainty for retailers, that is, an emphasis for strategic planning for controlling retail land use outcomes to be matched with changes to current statutory controls e.g. increasing flexible open zones; establishing a retail innovation provision; and introducing a strategic plan aligned zoning framework (longer term).’

These outcomes and directions are relevant for Albury LGA.

12. DPIE Employment Zones Reform

Department of Planning, Industry and Environment (DPIE) is currently undertaking a suite of reforms which includes the delivery of a simplified employment zones framework that suits the future of work, is fit for purpose, supports productivity and jobs growth while facilitating delivery of strategic plans and planning priorities.

From stakeholder consultation (which has included Councils) there was criticism directed at the current

employment zones under the standard instrument regarding inflexibility with the land use tables and land use definitions, outdated definitions and inconsistencies in implementation and development assessments.

There are a number of objectives that the reform aims to achieve but mainly DPIE intend to simplify and reduce the number of different zones and widen permissible uses.

13. Local Planning Instruments

Land uses and development standards are controlled through the LEP, DCP, the Albury CBD and Lavington CBD Master Plans. It is important to enhance commercial activity in the B zones, and that residential-only development continues to not be permitted in the B3 zone but mixed use development or shop top housing be permitted as per current controls.

The DCP should include a map for Albury and Lavington CBD to identify required street front activation. This is to identify the active main street

and ensure that inappropriate development does not disrupt or break the continuity of the street. Activation is also available in a building’s form and detail (a DCP issue).

There are numerous examples of walkable streets created by buildings that enhance the experience of people walking. Many such examples exist in Albury. Functional activation (shopfronts) without considering and composing the built elements of facades results in a dull long view from the pedestrian perspective.

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Albury Retail Action Plan

2022 – 2026

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