bathurst cbd & bulky goods

business development strategy

Supported by :

NSW GOVERNMENT Trade & Investment

BATHURST REGIONAL COUNCIL

Final Report
December 2011

RENAISSANCE planning
understand | envision | plan | sustain

RENAISSANCE Planning Pty Ltd
307/91 Murphy Street
Richmond Victoria 3121
ABN 91 796 676 210 ACN 094 933 972

Project Reference 10-054

Tel: (03) 9428 1116
Fax: (03) 9428 9077

admin@rplan.com.au
www.renaissanceplanning.com.au

Supported by :

table of contents

table of contents (cont.)

table of contents (cont.)

figures

Supported by :

NSW Government Trade & Investment

Bathurst Regional Council

photos

TERM	ACRONYM	DEFINITION
Bulky goods		*"bulky goods premises means a building or place the principal purpose of which is the sale, hire or display of bulky goods, being goods that are of such size or weight as to require:* *(a) a large area for handling, display or storage, and* *(b) direct vehicular access to the site of the building or place by members of the public for the purpose of loading or unloading such goods into or from their vehicles after purchase or hire,* *and including goods such as floor and window supplies, furniture, household electrical goods, equestrian supplies and swimming pools, but does not include a building or place used for the sale of foodstuffs or clothing unless their sale is ancillary to the sale or hire or display of bulky goods."* (refer Dictionary, Standard Instrument - Principal Environmental Plan) In the Strategy bulky goods is an expenditure based category and refers to large format premises used to sell or hire: • automotive parts and accessories, • camping equipment, • electric light fittings, • equestrian supplies, • floor coverings, • furnishings, • furniture, • household appliances, • party supplies, • sporting goods, • swimming pools, • videos, or • office supplies.
Central Business District	CBD	The central business district is the principal commercial district in a town, regional or metropolitan city. It is usually also the historic centre of the town or city. The Bathurst CBD is the City's principal district for retail activity, commercial and professional services, government and public administration, legal services and justice and hospitality and entertainment services. The boundaries of the Bathurst CBD and component precincts were based on the General Business Zone (Zone No. 3a) and modified on the basis of the land use and floorspace inventory undertaken in July 2010 (refer Figure 4.2).

TERM	ACRONYM	DEFINITION
Core Retail		Encompasses all food, grocery and liquor retailing, department and discount department store retailing, other retail non-food uses (including apparel and small format household goods) and retail services. Core retail excludes bulky goods, vacant retail and office uses.
Department Stores		Large format stores focused on the sale of core retail goods. The principal differentiation between department and discount department stores is the focus on personal service at department stores and the absence of a centralised checkout sales system.
Discount Department Store	DDS	Large format store usually incorporating a checkout sales system and providing a wide range of discretionary and household goods together with limited food items. Examples usually include Big W, Kmart and Target. These stores usually have sub-regional or regional catchments and typically vary in size between 4,500 – 8,500m² GLA.
Estimated Supporting Population		The estimated supporting population for any good or service is the assessed component of the residential populations in the RCA that regularly or irregularly patronise Bathurst for the specified good or service under assessment.
Food, groceries and liquor	FGL	Specific type of retail activity, encompassing supermarkets, cafes and restaurants and other food stores (including fresh food stores and liquor store retailing).
Gross Leasable Area	GLA	Gross Leasable Area (GLA) is applied in the retail development industry. Specifically, it is defined as the total floor area dedicated for tenants and includes upper floors and basements. GLA is the measure used in this Study.

Glossary (cont)

TERM	ACRONYM	DEFINITION
Smaller Format Household Goods Stores		Smaller format household goods stores are retail outlets that encompass the following retail goods groups: • Clothing, footwear and fabric stores; • Houseware retailing; • Computer and computer peripheral retailing; • Sport and camping equipment stores; • Entertainment retailing (CDs, DVDs, records); • Toy and game retailing; • Watch and jewelry retailing; • Pharmaceutical, cosmetic and toiletry retailing; • Stationery goods retailing; • Antique and used goods retailing; • Flower retailing; • Other store based retailing (not elsewhere classified). In the analysis, this category excludes department and general stores and bulky goods and generally pertains to stores that are under 350m² GLA
Major Retail Attractors		Significant retail anchor stores including department stores, discount department stores and supermarkets. Department stores and discount department stores are regional attractors and supermarkets are district level attractors.
Market Share		Refers to the proportion of resident-based retail expenditures in defined geographic areas bound to Bathurst Regional Council, or other defined destinations.
Office Service Activities		These encompass professional and commercial services and government administration. It also includes medical and healthcare services conducted from an office.
Primary Catchment Area		The primary catchment area encompasses the urban area of Bathurst. It is the area that generates most of the City's weekly and daily food and groceries trade. Within this area almost all food and groceries trade, and the majority of non-food purchases are directed to Bathurst (refer Figure 4.1).

TERM	ACRONYM	DEFINITION
Professional and Commercial Services		Professional and commercial services encompass a range of office based services including: • Publishing services; • Telecommunication services; • Financial services; • Real estate services; • Architectural, surveying and mapping services; • Legal services; • Accounting services; • Advertising services; • Employment services; • Engineering design and consulting services; • Rental and hiring services; • Computer system design and maintenance services; • Building cleaning and pest control services; • Management and related consulting services; and • Other administrative services.
Regional Catchment Area	RCA	The Regional Catchment Area encompasses the Bathurst primary, secondary and tertiary catchments, and is the geographic area from which the City draws almost all of its regular and irregular trade.
Retail Floorspace		Retail floorspace in this study is measured as Gross Leasable Area (GLA) and encompasses the following activity groups: • Food, grocery and liquor stores; • Department and general stores; • Small format household goods stores (that is, excluding bulky goods); • Retail services; • Bulky goods.

Glossary (cont)

TERM	ACRONYM	DEFINITION
Retail Services		Retail services are activities undertaken from a shopfront environment where the predominant activity is service based rather than being focused on the retail sale of goods. Examples of retail services include: • Beautician services; • Retail banking services (excludes banking administration); • Dry cleaning and laundering services; • Hair dressing services; • Tailoring and clothing repairs; • Shoe repair services; • Key cutting services; • Travel agencies and tour operator services; • Clothes hire services; • Video hire; and • Computer hire.
Retail Expenditure Profiles		These are average rates of expenditure on an annual per capita basis for a range of broad commodity groups, including: • Food retail; • Food catering; • Apparel; • Homewares; • Bulky goods; • Leisure A goods (includes books, CDs, DVDs, photographic equipment, musical equipment, sports and camping goods; • Leisure B goods (includes newspapers and magazines, stationery, pharmaceutical goods and animal care products; • Services (including retail services such as hairdressing and beauty services, optical services and goods, and repairs and maintenance services). They have been prepared by Market Data Systems, a Queensland consultancy and are based on household expenditure surveys along with a range of other factors.

TERM	ACRONYM	DEFINITION
Retail Turnover Density	RTD	• Retail turnover density is a measure of the productivity of retail floorspace. It is the ratio of annual retail sales to total gross leasable area for each commodity group. There are typical RTD's for major commodity groups.
Secondary Catchment Area		The secondary catchment area extends approximately 50 kilometres to the north and south and around 25 kilometres to the east and west. This significant area encompasses Sofala, Blayney and Oberon. The secondary catchment is the area from which residents tend to visit the municipality for regular shopping. Bathurst is the destination for most weekly expenditures generated from this area and the majority of discretionary expenditures.
Supermarket (Small)		Small supermarkets are typically less than 1,200 square metres GLA in size. Smaller supermarket tenancies are generally held by Foodworks and include a significant range of groceries and fresh food and a small range of non-food goods.
Supermarket (Medium)		Medium sized supermarkets are typically in the range of 1,200 – 2,500 square metres GLA. They offer a wider variety of groceries, fresh food and non-food goods than small supermarkets and are generally tenanted by Foodworks and IGA.
Supermarket (Large)		Large scale (or full line) supermarkets are typically tenanted by either Coles or Woolworths and are generally greater than 2,500 square metres GLA in size. They offer the widest range and diversity of groceries, fresh food and non-food goods compared to small and medium sized supermarkets.
Tertiary Catchment Area		The tertiary catchment of Bathurst extends beyond Lithgow to the east, Cowra to the south west, Orange to the west and Mudgee to the north over a range of approximately 75 – 100km from the Bathurst CBD. The tertiary catchment is the area which generates irregular and occasional trips for core retail goods, professional and commercial services and purchases of bulky goods. The tertiary catchment area marks the broad limit of the extent of regular trade drawn to the Bathurst LGA.

EXECUTIVE SUMMARY

The Bathurst CBD and Bulky Goods Business Development Strategy ("The Strategy") is a comprehensive and detailed review of retailing and bulky goods development in Bathurst. It has examined the role, structure and function of the existing system and assessed future floorspace requirements to meet the needs of the city and its regional catchment area (RCA) over the period 2010 – 2036.

Regional Context

Bathurst is an important regional city in the Central West region of New South Wales (NSW). It has a population of approximately 39,920 people (Estimated Resident Population, preliminary estimate for June 2010, Australian Bureau of Statistics). It serves a regional catchment with a population of approximately 146,000 people (2010 estimate). The city is located west of the Great Divide, approximately 200 kilometres from Sydney.

The gateway role of Bathurst is an important locational characteristic. The city is located at the junction of the Mitchell and Mid Western Highways where these form the Great Western Highway, the only main road link connecting the Central West region to metropolitan Sydney.

Settlement Context

The current structure and the direction and growth of the Bathurst urban area is a major consideration in the identification of future floorspace needs and activity centre requirements. Work undertaken for the Bathurst Region Urban Strategy (BRUS) adopted in 2007 by Bathurst Regional Council, identified future land use requirements for residential, business activities and industrial land use. The BRUS (2007) is the key strategic framework for the physical development of the Bathurst urban area. The planned future structure of residential land uses and other activities that provided the settlement context for the Strategy is clearly defined by the BRUS. It provides the land use structure to meet the needs of the city over the period to 2036 and beyond.

Policy Context

The Bathurst Retail Strategy (1999) is the cornerstone of current retail policy in the Bathurst Regional Council local government area (LGA). It recommended:

- a policy framework and development initiatives to maintain and consolidate a strong regional retail role at the Bathurst CBD;
- opportunities for limited neighbourhood centre development;
- major expansion of bulky goods in suburban Bathurst;
- supporting role of convenience retailing in isolated areas and other locations.

There are two significant draft State Policies of high relevance to this study. The Draft Centres Policy (2009) has guided the Strategy in terms of principles for activity centres and impact assessments. It also canvassed standard definitions for retailing terms and for activity centre types. The Draft SEPP (Competition 2010), provides guidelines to ensure retail competition.

The administration of land use has been through the Bathurst Regional (Interim) LEP (2005, as amended 2008) and the application of development guidelines and controls governing store size in neighbourhood and local centres were administered through the Bathurst Regional Council DCP – Business Development (2005, effective 2006).

The ongoing evolution of land use development in the Bathurst urban area is being facilitated through the DCP process. The recent Eglinton Planning Proposal provides a clear framework for the consolidation of this residential area. Significantly, this underlies one of the recommendations for neighbourhood centre development in the Strategy. In addition the preliminary planning Council has undertaken for its new comprehensive LEP / DCP and Ministerial approvals for the associated Concept Plan in the Sydney Road precinct (south) provide significant opportunities for future major transport related industry and logistic development and also for future major bulky goods development. This initiative also forms an important part of the recommendations of the Strategy.

Population Growth and Demographic Change

The forecast population levels in Bathurst and its regional catchment area (RCA) are significant as they impact on forecast retail floorspace requirements. Two sets of population forecasts were examined for the Strategy, one prepared by the Department of Planning (NSW) in 2008, and one prepared in 2010 by .id Consulting for Bathurst Regional Council. A third set of population forecasts was prepared by Renaissance Planning as part of their review for the Strategy.

The analysis indicated that the forecast prepared by the Department of Planning indicated falling population growth rates for the Bathurst urban area to approximately half the historic level. There was no meaningful rationale for this pattern. For the purposes of the assessment of retail floorspace requirements, the forecasts prepared by Renaissance Planning and .id Consulting were used to identify a retail floorspace demand range with the .id Consulting projections being at the upper end of the range.

The estimated current population (ERP, June 2010) of the Bathurst Regional Council LGA is 39,920 persons. This is forecast to grow to 50,470 – 55, 250 persons by 2036 according to the Renaissance and .id Consulting forecasts.

Retail Expenditure Growth

Research undertaken for the Strategy has provided forecasts of real expenditure growth by commodity group. This work forms part of the modelling of future retail expenditures in Bathurst and its regional catchment area (RCA).

The Growing Significance of Online Retailing

Online retailing is a growing phenomenon in Australia and other countries. There is a broad consensus by a number of researchers that online retail trade which currently constitutes less than 5 per cent of Australian retail goods and services (by value) will continue to grow at a significantly higher rate than traditional shop based retail trade. The Strategy makes provision for the effects of online retailing on floorspace demand and provision.

Bulky Goods Definitional Issues

Currently bulky goods as defined in the Bathurst Regional (Interim) LEP 2005 (refer Clause 5A, Part 1) is focused on the single "bulkiness" of goods for sale. This approach is also reflected in the Standard Instrument – Principal LEP (current version 30 April 2010) which is a template provided by the NSW Government which all councils in NSW are required to follow to ensure a consistent approach. The advice of the Strategy is that the current definitional approach to bulky goods does not provide a sufficient narrative or understanding of the driving impetus and underlying rationale for the emergence of bulky goods precincts and homemaker centres throughout Australia and the ongoing demand for further development of these precincts and centres.

The Strategy recommends the development of a definition of bulky goods similar to that applied in Victoria based on the predominant activities of bulky goods precincts and homemaker centres. This approach provides an underlying understanding of the types of activities in bulky goods precincts and centres and provides a higher level of confidence for retailers, developers and the community as to the type of development that should be expected in bulky goods precincts and homemaker centres.

Supermarket Definitional Issues

For the purposes of the Strategy a broad differentiation of supermarket types based on store sizes is important. A full line supermarket catering for more than 30,000 line items will generally exceed 3,200 square metres GLA. In the context of Bathurst and other regional cities of this size, these are district and regional attractors and are best located in the CBD (as is generally the case). It will be noted that the new major shopping centre development in the Bathurst CBD (Bathurst City Centre) is a regional level shopping centre anchored by a full line Woolworths supermarket.

Medium sized supermarkets are generally in the range 1,201 – 2,500 square metres GLA. These stores carry up to 20,000 line items and are suitable as major attractors for large neighbourhood activity centres serving several suburbs in metropolitan areas or regional cities. Sustainable threshold populations to support these types of large neighbourhood centres are in the range of 8,000 – 12,000 people.

Small supermarkets are less than 1,200 square metres GLA in area. These stores usually carry all of the required product types for daily and weekly requirements but have restricted brand choices. These types of facilities can anchor small neighbourhood activity centres. Sustainable threshold populations to support these types of stores in small neighbourhood activity centres are in the range of 3,000 – 6,000 people.

It will be noted that niche discount supermarkets present a special case in regional cities. Stores such as Aldi, although trading from floor areas of less than 1,500 square metres GLA typically have district and regional catchments. They focus on discount offering and provide a comprehensive range of product types with limited brands. In the case of Bathurst the Aldi store is located in the CBD which is the most appropriate location for this type of store in a city the size of Bathurst.

Convenience Stores

In areas where population thresholds do not justify supermarkets such as some of the outlying villages of Bathurst together with highway locations the development of modern convenience stores has been an important trend over the past 15 years. The most notable outcome of this pattern has been:

- the emergence of multi-purpose convenience stores providing groceries, fresh food and takeaway meals together with a limited range of newsagents goods;

- the development of an extensive network of convenience stores, usually co-located with service stations and service centres. These convenience stores provide supermarket type display areas with a single point of sale and may include a take away food area. The Strategy recommends that convenience stores should not exceed 300 square metres GLA.

The Existing Bathurst Retail Commercial System

The Bathurst retail commercial system is comprised of the Bathurst CBD, several neighbourhood and convenience centres, together with highway based bulky goods precincts located in suburban Bathurst. At June 2010 the city's retail commercial system occupied approximately 162,030 square metres GLA of retail and office floorspace, comprised of:

- 83,000 square metres GLA of retail goods and services;
- 31,450 square metres GLA of bulky goods floorspace;
- 47,580 square metres GLA of office floorspace.

The floorspace is distributed across a network of centres comprised as follows:

- The Bathurst CBD. This is the principal shopping destination for Bathurst and its regional catchment area (RCA). The principal focal area is the retail core precinct. This is comprised of three regional level shopping centres anchored by discount department stores and/or three full-line supermarkets, together with the recently developed Aldi store which is a discount supermarket with a district level catchment. The retail core precinct is in supported by several shopping and mixed use precincts that provide a broad diversity of stores and services for Bathurst and its RCA and complement and reinforce the core precinct.

- Several supermarket based neighbourhood activity centres that service the growing suburbs of Bathurst. These are:
    - Trinity Heights shopping centre, located at Marsden Lane and Gilmour Street in Kelso;
    - Westpoint shopping centre, located at Suttor Street and Wark Parade in Windradyne;
    - Kelso Centrepoint, located at Boyd Street and Allambie Boulevard in Kelso.

These centres provide for daily food needs together with some convenience household goods, and medical and other services (at Trinity Heights and Westpoint).

- convenience local centres and stores do not accommodate a supermarket function and provide for a limited range of day-to-day food and other requirements. These convenience facilities include:
    - Stewart Street precinct (Mid Western Highway, vicinity of Lambert Street);
    - Mitre Street (at Suttor Street); West Bathurst;
    - Perthville;
    - Eglinton.

- bulky goods precincts that provide regional level goods and services. There are three district clusters of activity located along Sydney Road (Great Western Highway, east of the Macquarie River). These are:

- the Bunnings development, located on the south side of Sydney Road, west of Lee Street;
- a bulky goods strip located on the north side of Sydney Road, (vicinity of Pat O'Leary Drive);
- the Harvey Norman precinct, located on the north side of Sydney Road (west of Ashworth Drive).

Functional Precincts in the Bathurst CBD

The analysis found in excess of 91 per cent of core retail goods and services (that is, retailing floorspace excluding bulky goods) was located in the Bathurst CBD. A similar pattern of high concentration was observed for office floorspace. By contrast bulky goods floorspace is significantly decentralised with less than 40 per cent occupied floorspace located in the CBD.

The study identified a number of important functionally based precincts in the Bathurst CBD. These were:

- the Core precinct focused on four city blocks within 200 metres of the intersection of Howick and William Street. This precinct is Bathurst's pre-eminent shopping district. It contains the city's two discount department stores and three full line supermarkets which anchor three inter-related shopping centres. It also contains the highest concentrations of national chain stores.

- The other CBD precincts provide a critical complementary supporting role to the Core precinct. Approximately half of Bathurst's non-bulky goods retail stores are located in the Core precinct (57 per cent of floorspace and 46 per cent of tenancies). However, 34 – 40 per cent of these stores are located in the adjoining CBD precincts outside the Core.

The analysis indicates that the Core precinct plays a regional retail role and is Bathurst's premium retail district. However this is extensively supported by a broad diversity of retail stores and services in the wider CBD outside the Core. These precincts play a dominant role in relation to office and community services and continue to play a highly significant role in relation to bulky goods and services.

Bathurst Regional Catchment Area

One of the most significant characteristics of Bathurst is its role as a regional trading city. The city provides a range of services to an extensive catchment area west of the Great Divide. These include:

- provision of retail goods and services;
- commercial services;
- professional services;
- education services;
- government administration, legal services and justice;
- hospitality and tourism;
- entertainment, sporting facilities and events;
- health and medical services.

Bathurst derives most of its employment growth and investment through these services and a large part of the city's future prosperity is closely tied to its regional city role in a wide range of fields. Thus Bathurst's role as a regional retailing city is part of the wider regional service role that is of critical significance to its future development.

The Bathurst regional catchment area (RCA) is the geographic area surrounding the city from which almost all of its retail trade is drawn. In 2010 the Bathurst RCA accounted for approximately 96 per cent of the city's retail trade. It encompassed a population of approximately 146,000 people and extended:

- approximately 120 kilometres north to Mudgee and surrounds;
- some 80 kilometres south east to Lithgow and surrounds;
- 100 kilometres south west to Cowra;
- 80 kilometres north west to Orange and surrounds.

Patronage Patterns

A large sample in-centre survey was undertaken for the Strategy in July 2010. The survey provided information on patronage to the CBD for shopping and related purposes. It was found that multiple store visitation was the rule rather than the exception for most patrons. Almost 80 per cent of patrons were visiting at least two stores and some 50 per cent were visiting three stores or more.

It was also found that major stores were influential for a significant proportion of visitors. Over 40 per cent of patrons visited the Big W store on the day of survey, almost 30 per cent the Target store and 20-25 per cent of patrons visited the Coles supermarket or (either or both) the Woolworths supermarkets at Stockland Bathurst or at Bathurst City Centre.

Third, very high levels of interaction were found between Bathurst City Centre and Stockland Bathurst. The two centres were virtually operating as a supercentre with 46-55 per cent of patrons at each centre visiting the other. Significant interactions were observed between Bathurst Chase, Stockland Bathurst, William Street and Centrepoint arcade, and a wider pattern of low level interactions was observed between each of the three centres, William Street, Howick Street and the adjoining precincts.

The findings clearly indicated that most shoppers tend to link stores and services together on the one trip. They also indicated the importance of major stores in underpinning shopping trips to the Bathurst CBD. The findings highlighted the significant success of Bathurst City Centre and the observation that it has become an integral part of the Core precinct with Bathurst City Centre and the pre-eminent Stockland Bathurst virtually operating as a supercentre.

Finally, the findings indicated a wide pattern of relatively low interactions between each of the three centres and the adjacent street system and adjoining precincts. They point the direction for future retail planning and development in the CBD, and the need to improve the offering at Bathurst Chase and facilitate improvements to the connections to the street network and adjoining precincts. These findings informed the objectives and direction for the CBD Strategic Framework for Retail Development that forms part of the recommended Strategy.

Retail and Office Floorspace Requirements

In relation to **core retail floorspace** (that is, non-bulky goods retailing), the assessed floorspace requirements for the Bathurst urban area were:

- 13,300 – 17,370 square metres GLA for the period 2010 – 2021;
- 22,420 – 29,240 square metres GLA for the period 2021 – 2036;

For **bulky goods floorspace**, the assessed requirements for the Bathurst urban area were:

- 8,230 – 9,820 square metres GLA for the period 2010 – 2021;
- 16,460 – 19,850 square metres GLA for the period 2021 – 2036.

For purposes of long term planning provision has been recommended for a minimum 34,270 square metres GLA.

For **office floorspace,** the assessed requirements for the Bathurst urban area were:

- 6,140 – 8,360 square metres GLA for the period 2010 – 2021;
- 10,510 – 13,440 square metres GLA for the period 2021 – 2036.

Vision Development

Community and stakeholder workshops were undertaken as part of the Strategy to inform and guide the future of retailing in the city. These workshops consisted of two four hour facilitated sessions held in Bathurst on Monday 9 August 2010. Approximately 40 stakeholders participated in the workshops. The stakeholders were representative of Bathurst's retail 'whole system' being the network of people and organisations that influence or maybe influenced by the future development of retailing in Bathurst.

Community vision

The community envisaged the future development of retailing in Bathurst to have the following characteristics:

- choice and diversity;
- relaxed and invigorating;
- the heartbeat of our country life and living.

Choice and diversity

Retailing in Bathurst offers choice and diversity in the mix of locally owned specialty shops and national chains in the CBD and in the neighbourhood centres and bulky goods outlets.

Relaxed and invigorating

Retail and cultural activities take place against the backdrop of beautiful and elegant heritage buildings and streetscapes. This part of our identity creates the special atmosphere of our City. People enjoy being together outside in pavement cafes, under the leafy canopies of the Town Square or in the specially created spaces of the neighbourhood precincts.

Parking and getting around the CBD is easy. The city loop bus, walking and cycling tracks connect our neighbourhoods and bulky goods area with the CBD.

The CBD is linked and well connected in all ways. Pedestrians come first so walking between the different themed precincts is safe and accessible. The city is also digitally connected with broadband. This makes it easy for people to do business in and out of Bathurst.

The heartbeat of our country life and living
Our CBD is our ‘heart’ and its ‘beat’ comes from a shopping experience supported by cultural, recreational and learning activities.

The Recommended Strategy

The principal components of the Strategy encompass the following:

- strategic directions to guide the Strategy;
- a recommended activity centre hierarchy;
- indicative floorspace requirements for activity centres;
- supporting policies for implementation;
- a CBD strategic framework for retail development;
- recommendations for monitoring and review;
- impact assessment framework.

Strategic Directions

A set of directions were identified to guide the Strategy. These provide the city wide principles and underlying rationale for the Strategy. The directions were:

- Direction 1: Maximise Bathurst’s regional retail and service role;
- Direction 2: Ensure that retail and bulky goods development occurs as part of a network of activity centres and precincts;
- Direction 3: Provide a framework of planning for growth and change;
- Direction 4: Recognition that the provision of retail and bulky goods floorspace will occur through a market based system of supply and demand;
- Direction 5: Ensure that the city’s growing residential areas are served by a network of defined sustainable neighbourhood centres.
- Direction 6: Ensure that the Strategy provides for activity diversity, amenity and economic viability;
- Direction 7: Ensure that significant retail and commercial development proposals requiring re-zoning are assessed through a consistent application of net community benefit.

Recommended Activity Centre Hierarchy

The Strategy sets out a recommended activity centre hierarchy, together with indicative floorspace requirements over the next 15 years and beyond. A summary is set out below:

Centre Type	Role	Indicative Net Additional Retail Floorspace Requirements m^2 Gross Leasable Area	Highest Order Retail Attractor
Regional City CBD			
Bathurst CBD	Regional shopping and services centre for Bathurst and its regional catchment area (RCA)	**11,000**	Department Store (potential) Discount Department Store Full Line Supermarket
Large Neighbourhood Activity Centre			
Westpoint Neighbourhood Activity Centre	Comprehensive neighbourhood centre providing for all daily and most weekly purchases. The centre provides a range of supporting medical and community services.	**4,930**	Medium sized Supermarket
Small Neighbourhood Activity Centres			
Trinity Heights	Centres providing for most daily and a range of weekly purchase requirements. The centres offer supporting medical and community services.	870	Small sized Supermarket
Eglinton		1,470	
Stewart Street		2,320	
Total Small Neighbourhood Activity Centres		**4,660**	
Convenience Centres and Stores			
Bathurst Retail Hub (at regional bulky goods precinct)	Centres and facilities providing for a range of daily requirements	1,100	Convenience Store
Bathurst Trade Centre (ancillary service centre)		850	
Convenience centre, Kelso		500	
Convenience store, Perthville		100	
Total Convenience Centres and Stores		**2,230 ***	
Total Indicative Core Retail Floorspace Requirements		**22,820**	

* Proposed convenience centre at Kelso will replace existing retail floorspace

Centre Type	Role	Indicative Net Additional Retail Floorspace Requirements m^2 Gross Leasable Area	Highest Order Retail Attractor
Regional Bulky Goods Precinct			
Sydney Road (South) precinct (DCP site)	Primary regional bulky goods and transport precinct for Bathurst and its region	**34,270**	National chain bulky goods superstores
Supporting Bulky Goods Precincts			
Bunnings precinct, Sydney Road Kelso	Supporting district and regional level bulky goods precincts	No additional requirements	National chain superstore
Kelso bulky goods precinct, Sydney Road (vicinity Pat O'Leary Drive)			Bulky goods stores
Harvey Norman bulky goods precinct, Sydney Road (vicinity Ashworth Drive)			
Total Indicative Regional Bulky Goods Floorspace Requirements		**34,270**	

Recommended CBD Retail Development Framework

A strategic framework for the co-ordinated retail development and consolidation of the Bathurst CBD is proposed by the Strategy. Key initiatives proposed by the framework encompass the following:

- improving the attraction and amenity of the Core precinct:
  - improving pedestrian-space connectivity through activation of Pedrottas Lane and improved pedestrian safety crossings at William Street and Howick Street.
  - Revitalisation Program for Bathurst Chase (lower ground level entry area at William Street) and Centrepoint arcarde.

- opportunities for new major retail investment:
  - recommended visioning, master planning and DCP process for the George Street car park and surrounds. Opportunities for a department/discount department store, homewares centre and themed specialty shopping building on the existing strengths of George Street. Opportunities for mixed use development including residential hotel and on site structure car parking.
  - vision master planning and DCP process for the potential joint use of the library car park at Keppel Street. Opportunities for a small supermarket/ convenience store and new public space with active shopfront edges to interface with the library;

- city heart project:
  - opportunity for visioning, master planning and DCP process for the south west quadrant of the Core precinct. Concept could include a town square and community focus. Potential for the creation of a unique external/ internal public space, possible incorporation of a farmers' market and University of the Third Age. Potential to improve east west linkages to William and George Streets;

- linkages to connecting precincts:
  - creation of a slow street network encompassing the principal retail and commercial streets of the CBD,
  - extension of pedestrian crossings to George Street,
  - extension of signalisation to George/Howick and George/Russell Streets.

- gateway opportunities:
  - vision, master planning and DCP process for Durham Street,
  - potential for boulevarding of Durham Street and high quality urban design gateways at Bentinck, William and George Streets,
  - potential for new major development project that could encompass hospitality and residential development opportunities.

- heritage values
  - protection and enhancement of the unique character and heritage values of the Bathurst CBD,
  - protection of the visual integrity and scale of the established historic streetscapes.

Key Elements of the Strategy

Revised Hierarchy

The Strategy recommends a revised activity centre hierarchy comprised of:-

- a regional city CBD: The Bathurst CBD;
- a large neighbourhood centre: Westpoint, a consolidated activity centre at Windradyne;
- a network of small neighbourhood activity centres:
  consolidated neighbourhood centres at Trinity Heights and Stewart Street,
  and a new activity centre at Eglinton;
- convenience centres and stores:
  - retail hub to be co-located at the recommended regional bulky goods precinct at Sydney Road Intermodal Site),
  - service and convenience centre to be co-located at an expanded Bathurst Trade Centre
    Precinct,
  - proposed new convenience centre at Kelso,
  - convenience store at Perthville,
  - existing convenience centre at Mitre Street, West Bathurst.
- regional bulky goods precinct at Sydney Road Intermodal Site;
- supporting network of bulky goods precincts.

Policy Focus of the Strategy

- maintaining a strong regional retail and services role for the Bathurst CBD;
- providing a strategic framework for new major retail and mixed use investment in the Bathurst CBD;
- providing a land use framework for the long term accommodation of bulky goods development in Bathurst;
- providing a network of robust neighbourhood activity centres to meet the needs of the existing and future suburban population;
- providing a supporting network of convenience centres and stores to enable essential retail stores and services to be accessible at key employment and bulky goods precincts and to service smaller residential communities;
- providing planning and design principles for neighbourhood activity centres;
- providing principles for the co-location of convenience stores to service significant community nodes such as schools and hospitals;
- applying the principles of the Draft Centres Policy (2009) and the Draft SEPP (Competition Policy, 2010).

ADDENDUM *15 December 2011*

Trinity Heights Neighbourhood Activity Centre

The Bathurst CBD and Bulky Goods Business Development Strategy recommended a large neighbourhood activity centre to be developed at Westpoint with a maximum floorspace provision for a supermarket to be set at 2,500 square metres GLA.

Based on the residential catchment areas presented to the consultants the Strategy recommended that the supermarket at the Trinity Heights Neighbourhood Activity Centre be limited to 1,200 square metres GLA. In November 2011 in response to an information request from Council, the consultants indicated that the Trinity Heights Neighbourhood Activity Centre could support a supermarket function to a maximum of 2,500 square metres GLA on the basis that future demands would also need to be drawn from the Macquarie Plains / Kelso area (Laffing Waters).

Implementation of this recommendation will have impacts on the size requirements for a future supermarket and activity centre to service the Macquarie Plains area. This matter should be reviewed at the next scheduled major review of the Bathurst Retail Strategy prior to 2020.

On 14 December 2011 Bathurst Regional Council adopted the Bathurst CBD and Bulky Goods Business Development Strategy. It also adopted an amendment to allow for the Trinity Heights supermarket to expand to a maximum floor area of 2,500 square metres GLA.

1 introduction

introduction

1

1.1 The Bathurst Retail Strategy (February 1999)

In 1998/1999 Council commissioned a Retail Strategy to provide policy guidance for retail development within the City of Bathurst over the period 1999-2020. In the period since the Retail Strategy was adopted in 1999 significant changes have occurred, generally in line with that Strategy. These encompassed:

- creation of a new neighbourhood shopping centre in Kelso (Trinity Heights);
- development of new bulky goods precincts adjacent to the Bathurst Central Business District (CBD), and at Kelso;
- development of a new major regional shopping centre in the CBD (Bathurst City Centre) on the site of the former William Street Car Park. This development directly followed a major recommendation of the 1998/1999 Retail Strategy;
- conceptual approval for an intermodal freight terminal to be located on the south side of Sydney Road between Kelso and Raglan (approved by the Minister for Planning on 12 August 2006). As indicated in the Consultants Brief '*the Minister for Planning is currently considering a modification to this proposal which if approved will introduce a substantial bulky goods retail component and increase the supply of bulky goods retail floor space*' (refer Consultants Brief, page 1);
- in December 2007 Council approved a Development Application for a small shopping centre with 13 specialty shops and a supermarket of 1850 square metres of gross leasable area (GLA). As the Consultant's Brief indicates while '*It is considered unlikely that this centre will be built any time in the near future given the recent completion of a regional shopping centre across the road, however the consent remains valid. The consent could therefore be acted upon anytime within the five year validity period and should therefore be acknowledged by the Strategy.*'

1.2 Aim of the Strategy

The Consultant's Brief sets out the aim of the Bathurst CBD and Bulky Goods Business Development Strategy (referred in the report as 'the Strategy') which is to,

'*...........examine the existing retail hierarchy in Bathurst (including business location and activity) and make recommendations as to the most appropriate hierarchy (including business location and activity) for the City to meet the anticipated demands of the Bathurst trade area population for at least the next 20 years (i.e. to the year 2030 and to a population of 40,000-50,000. The aim of the Strategy is also to provide specific guidance in the timing and location of the next major development within the CBD.*'

1.3 Strategy Requirements

The Consultant's Brief sets out the strategy requirements as follows,

'The Strategy is to examine the existing retail hierarchy in Bathurst (including business location and activity) and make recommendations as to the most appropriate hierarchy (including business location and activity) for the City to meet the anticipated demands of the Bathurst trade area population over the next 20 years (i.e. to the year 2030 and to a population of 40,000-50,000).

This analysis is to include, as a minimum, an examination of the following factors:

a) existing retail floor areas, retail spending, trade population, commercial rent characteristics and capacity of existing zoned land;
b) floorspace demand/requirements for Bathurst;
c) growth in available retail spending in Bathurst;
d) likely impact of online shopping on floorspace demand;
e) population growth of Bathurst;
f) the effect of escape spending;
g) opportunities for redevelopment and/or expansion of the CBD (note that a number of large Council carparks are available for future business development in the heart of the Bathurst CBD);
h) regional shopping opportunities for Bathurst;
i) land availability and ownership patterns in the CBD;
j) infrastructure needs and heritage qualities of the Bathurst CBD;
k) characteristics of the existing business centres in the City and particularly the structure and character of existing commercial areas and their capacity to meet future business needs; and
l) the potential impact of urban expansion on the accessibility of the CBD to the suburban areas.

The Strategy should make clear recommendations in respect of:

a) the suitability or otherwise of the existing business centres and the existing retail hierarchy;
b) future requirements for business areas to meet the anticipated demands of the future trade population;
c) the development potential of the CBD taking into account land availability;
d) whether growth should continue to be concentrated in the traditional city core or dispersed over other areas in the City;
e) appropriate boundaries of the CBD;
f) future role and size of neighbourhood centres in Bathurst (in particular floor space size for individual tenants) and how that role should relate to and support the CBD; and
g) the size (population/trade population/retail spending/floor space) at which Bathurst would have the capacity to accommodate regional or 'out-of-centre' developments (of a form and size similar to the Orana Mall in Dubbo) and the most appropriate location for such a centre.

The Strategy should also examine the appropriateness of the existing planning controls under the Bathurst Regional (Interim) Local Environmental Plan 2005 and the Development Control Plan - Business Development.

In determining the most appropriate retail hierarchy the Strategy should consider the land use planning recommendations of the Bathurst Region Urban Strategy 2007.

Consideration of the Department of Planning's Draft Centres Policy must be included, particularly in relation to floor space demand. Council may refer a draft of the Strategy to the Department of Planning to ensure consistency with the Draft Centres Policy. If the Centres Policy is implemented and subsequent guidelines become available during the course of the preparation of the Strategy these should be acknowledged.'

(Pages 3 and 4, Consultant's Brief)

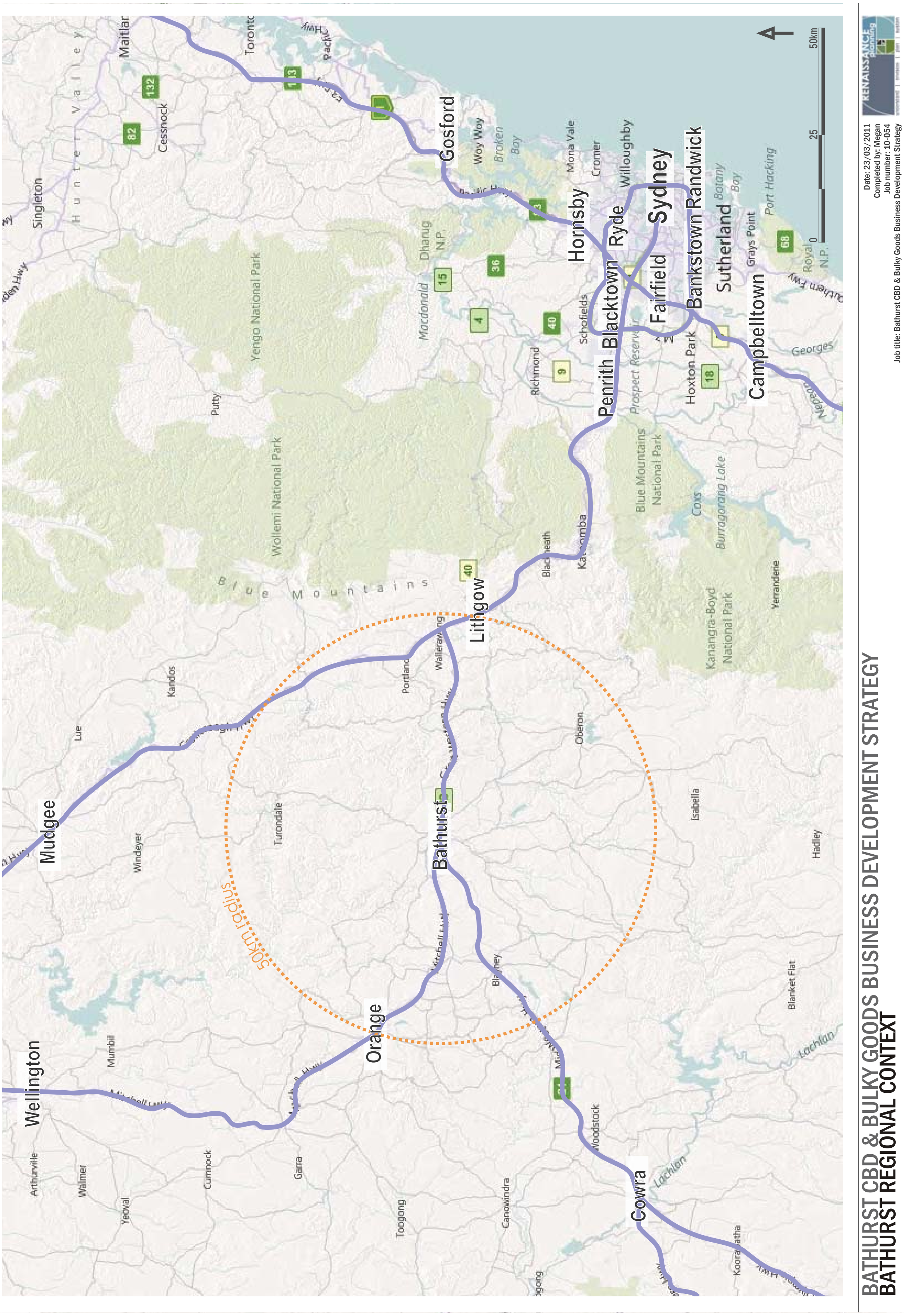
In summary, the requirements for the Strategy as set out in the Consultants Brief identified five sets of assessments which the Strategy was to required to address:

- the appropriateness of Bathurst's existing retail hierarchy, particularly in the light of the City's projected population over the next 25 years and beyond (principal aim of the Strategy);
- current structure and performance characteristics of the existing retail commercial system;
- projected population and expenditure growth;
- floorspace and land requirements for retail activities;
- specific recommendations for the Bathurst CBD, suburban neighbourhood and local centres and bulky goods precincts

settlement and policy context

2

Figure 2.1: Regional Location of Bathurst



Supported by:

NSW GOVERNMENT Trade & Investment

BATHURST REGIONAL COUNCIL

settlement and policy context 2

2.1 Purpose of the Context Review

The purpose of this section is to set out the key contextual issues that are fundamental to the scope, direction and structure of the Strategy. These are:-

- the settlement and population context of Bathurst ;
- the policy context;
- the statutory context for retail and activity centre development.

2.2 Regional Location

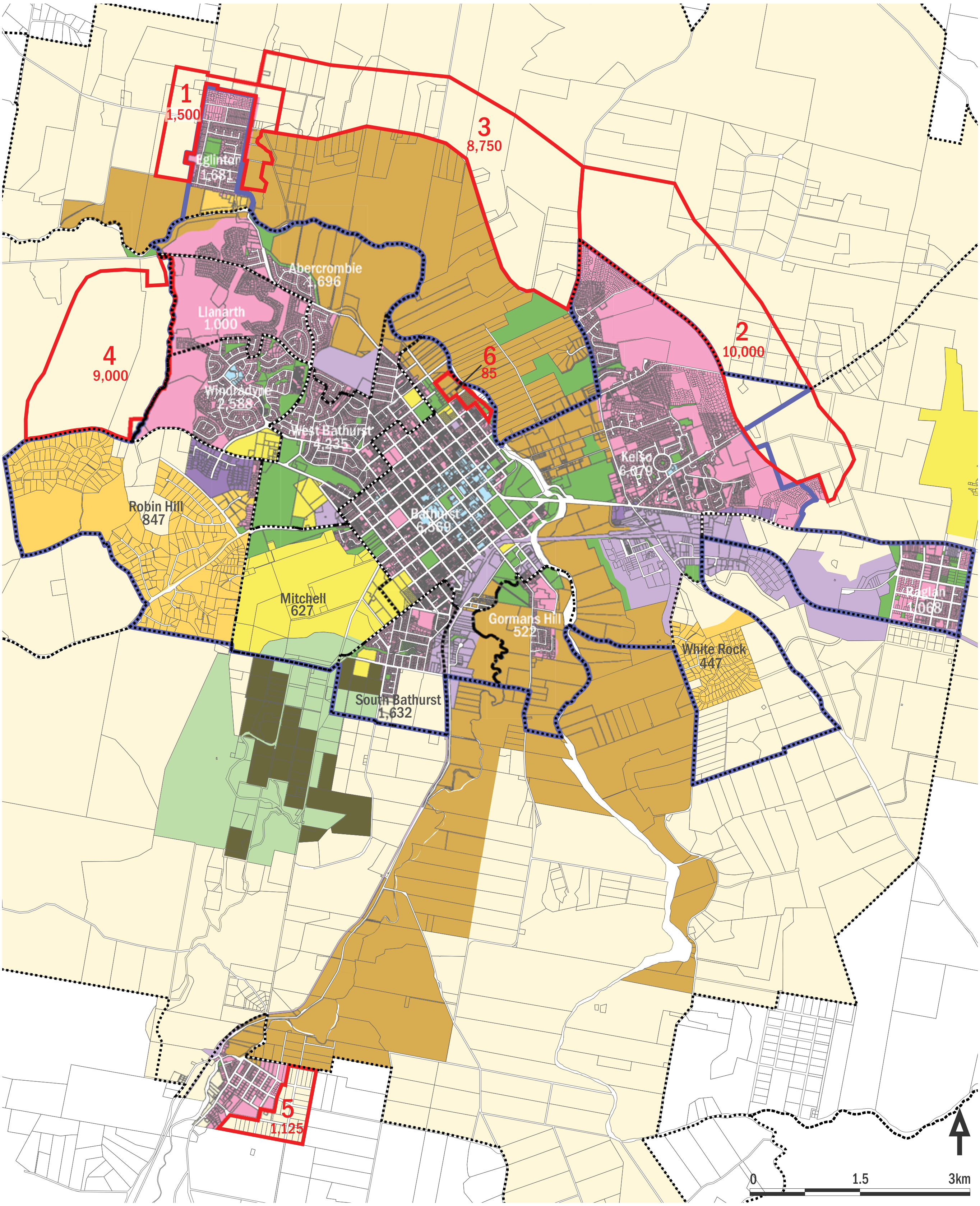
Bathurst is an important regional centre in the Central West region of New South Wales (NSW). It has an Estimated Resident Population (ERP) of approximately 39,920 persons (estimated resident population at June 2010[1] for the Bathurst Regional Council area) and serves a regional catchment with a population of approximately 146,000 people (2010 estimate). The city is located west of the Great Divide approximately 200 kilometres from Sydney. Bathurst was planned to be the administrative centre of the western plains. It was Australia's first inland settlement with its foundation dating from 1815. Bathurst grew rapidly with the discovery of gold in the district in the early 1850s and was proclaimed a city in 1885. During the 20th century Bathurst evolved as a manufacturing and service centre with an increasing focus on education, health and administrative services and tourism.

The gateway role of Bathurst is n an important locational characteristic. The city is located at the junction of the Mitchell and Mid Western Highways where these form the Great Western Highway, the only highway road link connecting the Central West region to metropolitan Sydney (refer Figure 2.1).

---

[1] Preliminary ERP for the Bathurst Regional Local Government Area (LGA) at June 2010, released by the Australian Bureau of Statistics (ABS), March 2011

Figure 2.2: Residential Growth Area Options (Bathurst Urban Strategy, 2007)



LEGEND

- Residential Growth Area Option
- Suburb Boundary
- Bathurst Urban Centre
- ### Total Suburb Population at 2006
- ### Serviceable Residential Capacity (No. Persons)

1. Eglinton Expansion
2. East of the City
3. North of the City
4. West of the City
5. Perthville Expansion
6. Morrissett Street Area

Source: Bathurst Region Urban Strategy 2007

Updated: 4/07/2011
Completed by: Megan
Job number: 10-054
Job title: Bathurst CBD & Bulky Goods Business Development Strategy

RENAISSANCE planning
understand | envision | plan | sustain

Supported by :

NSW GOVERNMENT Trade & Investment

BATHURST REGIONAL COUNCIL

2.3 Settlement Context: The Bathurst Urban Area

The Bathurst Region Urban Strategy (BRUS) adopted in 2007 by Bathurst Regional Council is a key reference document for this study. The policies and strategies which have influenced the preparation of this Strategy are set out in Section 2.4 - 2.11.

The current structure and the direction and growth of the Bathurst urban area is a major consideration in the identification of future floorspace needs and activity centre requirements. Work undertaken for the BRUS has identified future land use requirements for residential, business activities and industrial land use. Strategic planning analysis for the BRUS identified land use opportunities and constraints and provided a set of potential areas to accommodate the projected long term residential requirements of the city. This is set out in the BRUS (refer to Figure 15 in the BRUS documents, page 173) and has been reproduced as Figure 2.2 in this study.

The long term plan for the Bathurst urban area identified future residential areas to accommodate projected growth requirements for at least a thirty year period into the future. The plan (refer Figure 2.2) shows six potential residential areas (that is areas that appear to be suitable for residential development but are as yet unzoned). These are:-

1. **Eglinton expansion**:
   - residential land capacity: 100 hectares;
   - population capacity: 1,500 people;
2. **Macquarie Plains / Kelso expansion**:
   - residential land capacity: 485 hectares;
   - population capacity: 10,000 people;
3. **Vicinity of Eleven Mile Drive**:
   - residential land capacity: 380 hectares;
   - population capacity: 8,570 people;
4. **Stewarts Mount**:
   - residential land capacity: 400 hectares;
   - population capacity: 9,000 people;
5. **Perthville expansion**:
   - residential land capacity: 50 hectares;
   - population capacity: 1,125 people;
6. **Morrisset Street Precinct**:
   - residential land capacity: 3.8 hectares;
   - population capacity: 85 people.

These areas total approximately 1,420 hectares and have the potential to accommodate an additional 30,280 people.

Advice from Council indicates that the Eglinton area (refer Area 1, Figure 2.2) is a high priority residential development area and is intended to progress rezoning and subdivision planning within the immediate future. The Strategy has taken this priority into account and has provided recommendations of floorspace and land requirements for a new neighbourhood activity centre to be developed at Eglinton (refer Sections 5.7.2 - 5.7.4, 7.2.5, 7.3, 7.4.1 and 7.5).

The Macquarie Plains / Kelso area is next in priority (refer Area 2, Figure 2.2). It is envisaged that the area will be progressively developed after 2020. However it is unlikely that the area would be sufficiently developed to sustain a neighbouhood activity centre until after 2025. Future floorspace requirements for this activity centre were considered to generally lie outside the horizon of the Strategy (up to 2036). The procedure adopted by the Strategy was:-

- to provide a broad assessment of the floorspace and land requirements for a future neighbourhood activity centre to service the long term requirements of Macquarie Plains / Kelso (refer Section 7.2.8);
- to provide recommendations in relation to planning and location guidelines for the future activity centre (refer Section 7.2.8);
- not to account for the future floorspace requirements in this Strategy given that future implementation is likely to occur at the end of the time period designated for the Strategy (up to 2036).

It will be noted that the Eleven Mile Drive and Stewarts Mount areas (refer Figure 2.2. Areas 3 and 4) are considered by Council to be long term future development areas, well beyond the scope of the Strategy. Accordingly no assessments of future requirements have been undertaken for the Strategy

In addition to these future potential residential areas the Bathurst urban area, there were significant existing zoned residential areas that were yet to be developed at the time of the preparation of the BRUS (2007). These amounted to in excess of 450 hectares at the time of the BRUS. More recent analysis by Bathurst Regional Council identified that at June 2010 approximately 390 hectares of zoned residential land remained. These are located as follows:

- **Windradyne / Llanarth:**
  - residential land capacity: 230 hectares;
  - population capacity: 5,250 people;
- **Macquarie Plains / Kelso:**
  - residential land capacity: 160 hectares;
  - population capacity: 3,600 people.

The total accommodation capacity in existing zoned residential areas is therefore approximately **8,850** people and the overall capacity of both zoned residential areas and unzoned potential residential areas is approximately **29,190** people. The preliminary ERP (June 2010) for the **Bathurst urban area for** is approximately **34,300** people (corresponds to estimate of 34,300 by Renaissance Planning and 34,170 people by .id consulting). On this basis all of the potential population that could be accommodated in both existing zoned areas and future potential residential areas is in excess of **60,000** people. As the discussion on population projections indicates in the following section, this is well beyond likely requirements for the next 30 years (that is until after 2041).

It may be reasonably concluded that all of the potential future residential areas identified in the BRUS (that is areas 1 to 6 above) will not likely be required over the next 30 years. However, most of the areas will be required and strategic judgements will need to be made in terms of which areas are recommended for zoning and development. The recommended network of neighbourhood centres to serve the residential areas of Bathurst to 2036 provides a guide for the prioritisation of future areas for development (refer Section 7).

In summary the BRUS adopted in 2007 is the principal strategic reference document, governing the future physical development of the Bathurst urban area. It provides a broad framework for the physical development of the city and can potentially accommodate a future population in excess of 60,000 people. This is well beyond the time frame of this Strategy (to approximately 2036).

The Strategy seeks to provide a network of activity centres to meet the needs of current and future residential populations in the Bathurst urban area. It is noted that Council has prioritised the sequencing of future residential growth areas with highest priority accorded to the Eglinton area to be followed after 2020 by the Macquarie Plains / Kelso area. The Strategy has provided a framework for a future neighbourhood activity centre at Eglinton and has provided guidelines for the long term provision of a neighbourhood activity centre to service the Macquarie Plains / Kelso area.

2.4 The Bathurst Retail Strategy (1999)

The Bathurst Retail Strategy was a major retail study and strategy undertaken for the former Bathurst City Council by Ratio Consultants Pty Ltd. The study was undertaken in 1998 and completed in February 1999; it provided:

- an inventory and analysis of the existing retail commercial system in Bathurst including:
  - catchment area of Bathurst (termed Regional Catchment Area);
  - patterns of patronage to the CBD;
  - structure of existing retail floorspace;
  - estimated escape expenditure from the City of Bathurst;
  - patterns of market share in catchment areas;
- assessment of future population growth (1996 - 2021);
- assessments of retail floorspace requirements for the City of Bathurst (1998 - 2020/21);
- the recommended Retail Strategy, encompassing:
  - recommended objectives for the activity centre network as a whole and for each of its key components (the CBD, local centres and bulky goods precincts);
  - proposed allocations of retail and bulky goods floorspace in the City of Bathurst (1998 - 2011);
  - locational guidelines for new developments;
  - planning and development guidelines for local centres
  - recommended statutory changes.

The Bathurst Retail Strategy (1999) is one of the key reference documents for this Strategy and all key findings and recommendations have been examined in some detail to provide an informed context for the findings and recommendations of this study. In order to assist the clarity of this document, the discussion of all relevant elements of the Bathurst Retail Strategy (1999) are presented as follows:

- the **analysis findings** of the Bathurst Retail Strategy (1999) are examined in Section 4 as part of the discussion of the findings of the current study;
- the findings in relation to **future floorspace requirements** are examined in Sections 4 and 5;
- the **policy guidelines** that comprise the recommended Retail Strategy are discussed below.

2.4.1 Policy Guidelines

City-wide Policy Objectives

The recommended policy guidelines for the Bathurst Retail Strategy (1999) are set out in Section 11 of the consultants document (refer Bathurst City Council Retail Strategy, February 1999, Ratio Consultants). The Bathurst Retail Strategy (1999) provided **general policy objectives** for retail and bulky goods floorspace development in the city as a whole. In brief, these encompassed the following:

- facilitate opportunities for new retail development and bulky goods, which **maximised the regional trade and service role of Bathurst;**
- achieve a **reasonable balance between demand and supply for retail and bulky goods floorspace** over the medium term (of the order of 10 years);

- ensure **equity of access to local facilities** by future residents in the developing suburbs;

- ensure that new retail and bulky goods development (where possible) **optimises the utilisation of existing public infrastructure**;

- new / potential future development to be structured to **add value to exisitng retail and bulky goods investments where possible;**

- provide **opportunities and flexibility for ongoing development of small business and employment growth** in designated precincts and activity centres in the City;

- ensure that the retail system is encouraged to maintain high quality and up to date retail and bulky goods facilities which are **competitive with comparably sized regional cities elsewhere in Australia.**

Policy Objectives for the CBD

The Bathurst Retail Strategy (1999) set out policy objectives to guide future retail development in the CBD. These encompassed:

- plan and maintain the Bathurst CBD to maximise a diversity of regional functions including:
  - major retail stores;
  - commercial, entertainment and retail services;
  - community and government services;
  - sports and recreation;
  - cultural and arts activities;
  - education services.

- maximise Bathurst's regional retail trade role through new major investment to consolidate its retail core precinct;

- facilitate the progressive upgrading of the pedestrian and shopping environment in the retail core precinct;

- facilitate new major undercover car parking facilities;

- minimise through traffic on the CBD's major shopping streets (William and Howick Streets);

- provide for safe and attractive spaces and thoroughfares which will link the retail core precinct to surrounding professional services, governmental and cultural precincts.

Policy Objectives for Local Centres

- provide appropriately zoned sites for the development of new local centres to service the needs of growing and future residential areas;
- encourage and facilitate viable local centres through:
    - reinforcing existing local centres where possible;
    - focusing new local centre development where there is likely to be significant population growth;
    - ensure that new centres are located to maximise visibility and access;
    - the incorporation of social and community facilities into the lay out guidelines for new local centres;

Policy Objectives for Bulky Goods Precincts

- ensure that the regional trade role of future bulky goods precincts is maximised through:
    - site planning, access and presentation to main roads;
    - co-location of information facilities and other amenities;

- site planning should allow for a high degree of flexibility in terms of possible bulky goods and other commercial, industrial and agricultural (supply) tenancies to achieve an integrated regional centre;

- requirement for master planning for the management and development of designated bulky goods precincts (to be reviewed on a five year basis).

2.4.2 Locational Guidelines for New Developments

The Bathurst Retail Strategy (1999) sets out a number of locational guidelines for proposed and future development for each of the principal centre types . These guidelines are set out below.

New Regional Level Shopping Centre for the CBD

The consolidation of a site in the CBD for the purposes of a new regional level shopping centre was recommended in the Bathurst Retail Strategy (1999). A set of location principles was provided to guide the siting of the proposed centre; these encompassed:-

- the principle of consolidating the retail core precinct by ensuring that the future retail development would be within approximately 200 metres of the intersection of the two major shopping streets (William and Howick Streets);

- utilisation of a significant potential site in the block bounded by William, Howick, Bentinck and Russell Streets (known as the William Street car park);

- potential arcade and pedestrian linkages to both Howick and William Streets;

- incorporation of new structure car parking as part of the shopping centre development to be accessed from Bentinck Street;

- in the event that the IGA supermarket was retained, the recommended principle that direct and attractive pedestrian access should be a required condition for the new development.

In the period since the Bathurst Retail Strategy was undertaken and adopted (1999) a new major retail centre was developed on the William Street car park site that also incorporated the adjoining former IGA supermarket. The new development is entirely consistent with the principles as set out in the Bathurst Retail Strategy (1999) and surveys undertaken in 2010 as part of the current Strategy indicate that it operates as a significant component of the retail core precinct with high levels of interaction with other areas of the precinct and particularly with the Stockland Bathurst centre (further detailed in Section 4.12.6).

New Local Centres

The following locational guidelines were provided to guide the development of new local centres (that is new activity centres with a broad range of shops and services anchored by a small supermarket not to exceed 700 square metres GLA). These encompassed:-

- no new local centres within a 2.5 kilometre radius of the CBD, with the exception of the site recommended at Gilmour Street, Hereford Street and Marsden Lane (Trinity Heights);

- for areas beyond a 2.5 kilometres radius from the CBD, approximately 1 square metre GLA of retail goods and services floorspace per resident household (as a maximal rate) should be supplied. On this basis:
  - a maximum provision of 3,600 square metres GLA of local and convenience floorspace should be allowed for the West Bathurst/Eglinton areas through to 2011;
  - a maximum provision of 2,730 square metres GLA of local and convenience floorspace by 2011 for Macquarie Plains, Kilacloran, Raglan and Kelso areas;
  - other neighbourhood areas, including Mt Panorama, South Bathurst and Gormans Hill are within 2.5 kilometres of the CBD and would therefore not require an allocation of new/additional local and convenience centre floorspace;
  - Perthville is only expected to require a convenience centre by 2011;

- specific recommendations for the location of new local centres included the following:-
  - the reservation of two sites for new local centres. One in the west of urban Bathurst to complement the Windradyne local centre and one in eastern urban Bathurst;
  - the western site should be located on the Mitchell Highway at the intersection of a

future north-south road (indicated in the City of Bathurst Structure Plan, 1994). The site should be approximately 5 hectares to allow for a range of facilities;

- the eastern site should be located at the intersection of Gilmour Street, Hereford Street and Marsden Lane. A site of approximately 5 hectares should be provided to allow for a range of facilities to be co-located with the proposed centre.

It is noted that the recommended eastern site for a local centre was adopted and has since been developed (the Trinity Heights local centre). However, the recommendation for a 5 hectare site to be set aside for the centre, though reflected in the BRUS (2007) were not followed through as a conditon of the development. It is understood that there were significant development pressures at the time. However, the limited scope for additional consolidation of the Trinity Heights neighbourhood activity centre is an unfortunate legacy of the constrained site that did not reflect the recommendations of the 1999 Retail Strategy.

New Convenience Stores

No specific locations were recommended for convenience centres in the Bathurst Retail Strategy (1999). However locational principles are set out, these encompass:

- co-location with service stations or other service, recreational or community facilities;

- no siting of convenience centres within 800m of either the Windradyne or Kelso local centres, or the proposed local centre sites and established convenience centres;

- Preference should be given to convenience centres which are located at main road junctions, on routes to the City's village centres.

New Bulky Goods Development

The City of Bathurst Structure Plan (1994) set out two key areas for future bulky goods development:

- one located in the western suburbs of the City on the Mitchell Highway; and
- one located on the Great Western Highway at Kelso.

The Bathurst Retail Strategy (1999) endorsed these locations. It did not recommend additional land for bulky goods requirements over the period 1998 - 2021 however it provided planning objectives for the development of bulky goods precincts

2.4.3 Planning and Development Guidelines for Local Centres

The Bathurst Retail Strategy (1999) recommended that structure plans be developed for the local centres proposed at West Bathurst and Macquarie Plains. These structure plans should take account of the following considerations:

- at the locations identified for local centre development in Section 11.3, sites should be not less than 5 hectares;

- the development of local shopping centres at these sites should include provision for:
  - approximately 1,600 square metres GLA to be anchored by a supermarket (not exceeding 700 square metres GLA);
  - areas for car parking, landscaping and building development;
  - approximately 5,000 square metres to accommodate each of the local centres.

- the local centres should be designed as a strip development (either linear or L shaped). The centre should front onto a common external verandah which would in turn be focused on either a small park area and car park;

- provision for a service station should be made. An information centre as part of a service centre should also be provided at the West Bathurst site.

- provision should be made for the incorporation of community facilities in the local centre structure plans, these facilities may encompass:
  - a child minding centre;
  - medical centres;
  - community-based recreational facilities, including for example tennis clubs or bowling clubs;
  - a branch library;
  - a tavern;
  - a Council shop front facility for paying rates and other accounts.

- the facilities above should be incorporated into the local centres through good pedestrian accessways and a verandah system. These centres should form a pedestrian focal point for the surrounding residential areas.

2.4.4 Planning Controls

The Bathurst Retail Strategy (1999) proposed no new amendments to the existing planning controls with the exception of an increase in the permissable floor area of stores at neighbourhood centres to 700 square metres GLA to enable supermarkets of this size to be located in neighbourhood centres. This recommendation was adopted in the Bathurst Regional DCP - Business Development and again in the recently adopted Bathurst Regional (Interim) DCP 2011

The Bathurst Retail Strategy (1999) is a considered and comprehensive document which has provided a clear policy framework for the development of retailing and bulky goods in the Bathurst urban area over the past decade. The work identified:

- the requirements for additional retail and bulky goods floorspace over the period 1998 - 2011;
- a policy framework to guide retail development in the city. The focus of the policy recommendations was on maintaining the regional primacy of the Bathurst CBD through the consolidation of new regional level retail development within an identified core precinct area. This policy was adopted and applied by Council and provided the basis for the development of the Bathurst City Centre development on the site of the former William Street car park;
- the policy provided for the ongoing development of neighbourhood centres. It recommended a limited relaxation in the existing floorspace restriction on supermarkets in suburban Bathurst (from 500 - 700 squares metres GLA per store). This policy was adopted and applied by Council and provided the basis for the development of the Trinity Heights neighbourhood activity centre;
- it provided policy support for a major bulky goods development in suburban Bathurst at Kelso. This development has since been undertaken. It accommodates the Bunnings development and a major white goods supplier.

The Bathurst Retail Strategy (1999) was incorporated into the BRUS (2007) and is the cornerstone of retail and activity centre policy in Bathurst at present. It has provided a strong, competitive and regionally focussed CBD. This Strategy has identified certain areas for the modification of the original 1999 policies. These are set out in Section 7.

2.5 Bathurst Region Urban Strategy (2007)

2.5.1 Scope of the BRUS

The Bathurst Region Urban Strategy (BRUS) is a detailed , broadly based and comprehensive document. It constitutes the single most significant strategic framework to guide the future development of the Bathurst urban area. Key components of the BRUS encompassed the following:-

- an overview of the economic profile of the city and the identification of significant recent and anticipated investments;

- environmental issues of significance to the future planning of Bathurst together with the mapping of recognised environmental opportunities and constraints;

- the demographic structure of the population and population projections;

- the policy framework for the Study including reference to all major studies undertaken over the previous ten year period, including strategic studies for the former Bathurst City Council;

- the consultation process with the community and state agencies;

- land use and physical infrastructure requirements for economic development. These encompassed:
  - industrial land use,
  - retail and business land uses,
  - transport and road planning requirements,
  - parking needs
  - utilities and services infrastructure;

- social provisioning requirements and strategic planning for:-
  - education facilities,
  - cultural and community services,
  - pedestrian and cycle access,
  - open space and recreation,
  - public transport,
  - residential areas and subdivision design and development.

2.5.2 Relationship of the Bathurst Retail Strategy (1999) to the BRUS

The key policy, locational and planning recommendations set out in the Bathurst Retail Strategy (1999) were incorporated in the BRUS (refer Bathurst Region Urban Strategy, op cit. Section 5.2). Significantly the BRUS has in effect refined and further developed some of the key recommendations and underlying principles of the Bathurst Retail Strategy (1999) in particular:-

- the use of the William Street car park for future retail development as advocated in the Bathurst Retail Strategy (1999) was supported within the wider context of other key public car park sites being identified as potential sites for future major retail development (refer BRUS op. cit. Section 5.2.2);

- the preferred development site for a new major retail development in the block bounded by Howick, Bentinck, Russell and William Streets in the CBD was fully supported (refer BRUS op cit. Section 5.2.3);

- the BRUS revised the original recommendation in the Bathurst Retail Strategy (1999) to provide a new local centre site on the Mitchell Highway to serve the western suburbs of Bathurst. The principle as set out in the BRUS is solely focused on complementing the existing Windradyne local centre. The review undertaken for the current Strategy concurs that the Bathurst Retail Strategy (1999) was in error on this point and that the consolidation of the Windradyne local centre is the most effective policy guideline to meet the local requirements of the West Bathurst area;

- there is clear recognition and an understanding of the underlying principle that guided the Bathurst Retail Strategy (1999) not to support new major shopping centre development (of a higher order than local or neighbourhood centres) other than a bulky goods precinct outside the Bathurst CBD. To quote the BRUS (refer BRUS op cit. Section 5.2.3 Part 1) *"The Bathurst Retail Strategy emphasises that Bathurst cannot support key shopping facilities (other than neighbourhood shopping centres and bulky goods developments) located outside the CBD. The location of a major centre outside of the CBD would have serious detrimental impacts on the economic viability of the existing*

CBD. The strategy suggests that Bathurst would need a population in excess of 100,000 to support such a centre."

- an outcome of the BRUS was a recommendation to extend land zoned 3(b) Service Business that adjoins the Bunnings site. This land is currently zoned 4(a) Industrial. The objective of the extended zone is to provide opportunities for additional bulky goods development;

- a further outcome is the recommendation to rezone the intermodal terminal site at Sydney Road for Service Business purposes

In summary the BRUS (2007) fulfils several important roles. It is the coordinating physical framework to guide the future development of the Bathurst urban area. It is also an important coordinating policy document bringing together key elements of social and infrastructure provision, and its incorporation, and in some cases modification, of the recommendations of the Bathurst Retail Strategy (1999) should be viewed in this context. It provides for the clear application of retail and activity centre policy within a broader physical and social framework.

2.6 State Policy

A Draft Centres Policy has been prepared by the NSW Department of Planning (April 2009). At the current date of this Strategy (March 2011) no revised or final draft is available. The Draft Centres Policy provides:-

- key Principles to guide retail activity centre development;
- the recommended planning approach for the establishment of retail activity centre planning and policy in municipalities;
- guidelines for regional and local planning;
- application of the net community benefit test;
- proposals for monitoring and review of activity centre networks;
- definitions of retail and commercial development.

2.6.1 Key Development and Location Principles

The Draft Centres Policy sets out six key principles to guide activity centre location and development. These encompass:-

- Principle 1 - Retail and commercial activity should be located in centres
  "This principle is designed to bring benefits by managing urban sprawl including:-
  - helping simulate economic activity by co-locating retail and commercial development;
  - ensuring the most efficient use of existing infrastructure;
  - providing jobs closer to home (State Plan Priority E5);
  - reducing car journeys by co-locating residential, retail and commercial development, with health, education, and community facilities in one location;

- healthier lifestyle opportunities with better walking, cycling and public transport access to goods and services;
- providing a focal point for the community and creating a sense of place"
(refer Draft Centres Policy, op. cit., page 2)

- Principle 2 - Centres should be able to grow and new centres form
  This principle is drafted to ensure that there is sufficient flexibility within the retail commercial system to allow land use changes to respond to changes in market demand and to allow for business growth and new business entries.

- Principle 3 - Market determines need for development, planning regulates location and scale
  This principle is based on the view that the market is best placed to determine the need for retail and commercial development, and that it is the place of planning to assess the locational benefits of proposed developments.
  The planning system can play a key role through"-
  - "setting out the broad spatial pattern of growth to help provide certainty for public and private investment;
  - ensuring the supply of available floorspace accommodates market demand in a way that balances economic, social and environmental objectives;
  - restricting development that imposes a net cost on society or is poorly designed".
  (Draft Centres Policy, op. cit., page 4)

- Principle 4 - Ensuring the supply of floorspace accommodates market demand
  The role of the planning system is to ensure that there is sufficiently zoned and appropriately located land to allow the market to function. This entails examining **"***the current supply of and future demand for floorspace in different retail and commercial sectors to ensure that the supply of available floorspace in centres always accommodates the market demand."* (refer Draft Centres Policy, op. cit., page 4)

- Principle 5 - Support a wide range of retail and commercial premises and contribute to a competitive retail market
  This principle is based on the view that there are significant public benefits to allow competition between different types of retailing and between retailing and other activities. The objective is to promote innovation and to provide customers with access to a wide variety of quality products and services at competitive prices.

- Principle 6 - Contributing to the amenity, accessibility, urban context and sustainability of centres
  This principle is based on the view that **"***centres need to be well designed and well integrated with surrounding areas, in particular residential areas, and provide for a range of uses to service the local and/or wider population. If centres are well thought through in urban design terms then the community tends to use centres more and stay longer, creating a sense of community and place and delivering increased patronage for businesses"* (refer Draft Centres Policy, op. cit., page 4)
  To support this principle the view is taken that the **"***design of centres also needs to be functional, including:-*
  - allowing easy access whether walking or arriving by car or public transport;
  - providing for the needs of business with sufficient well located parking;
  - appropriate infrastructure and facilities for delivery vehicles" (refer Draft Centres Policy,

op. cit., page 4)

The clear extension and implication of this principle is the observation that "*the planning system should consider urban design opportunities and the amenity of centre as part of strategic planning and in the rezoning and development assessments processes*" (refer Draft Centres Policy, op. cit., page 4)

2.6.2 Net Community Benefit

The concept of net community benefit was advanced in the Draft Centres Policy (op. cit.) to provide a consistent framework in the evaluation of major retail and commercial developments where a rezoning is required. The Draft Centres Policy (op.cit.) recommended that the assessment should be prepared by the proponent in conjunction with the relevant planning authority to be submitted to the council prior to submission to the Department of Planning as part of the "Gateway Test". This is a comprehensive evaluation of all of the key issues relevant to the development, prior to commencement of the rezoning process. It was further recommended that the assessment should only evaluate external costs and benefits of the proposal (that is, the externalities). It should not consider private costs and benefits or changes in costs and benefits between individuals and businesses (transfer effects).

The Draft Centres Policy (op.cit.) provides a set of evaluation criteria that should be examined when considering the merits of the proposal against a base case, *"including retaining the existing zoning on the land and/or locating the development on appropriately zoned land in the centre"* (refer Draft Centres Policy op.cit. Section 8) .

"For rezoning proposals for retail and commercial developments, the following key criteria should be examined when assessing the merits of the proposal against the base case:

- *Will the LEP be compatible with agreed State and regional strategic direction for development in the area (eg land release, strategic corridors, development with 800 metres of a transit node)?*
- *Is the LEP located in a global/regional city, strategic centre or corridor nominated within the Metropolitan Strategy or other regional/sub-regional strategy?*
- *Is the LEP likely to create a precedent or create or change the expectations of the landowner or other landholders?*
- *Have the cumulative effects of other spot rezoning proposals in the locality been considered? What was the outcome of these considerations?*
- *Will the LEP facilitate a permanent employment generating activity or result in a loss of employment lands?*
- *Will the LEP impact upon the supply of residential land and therefore housing supply and affordability?*
- *Is the existing public infrastructure (roads, rail, utilities) capable of servicing the proposed site? Is there good pedestrian and cycling access? Is public transport currently available or is there infrastructure capacity to support future public transport?*
- *Will the proposal result in changes to the car distances travelled by customers, employees and suppliers? If so, what are the likely impacts in terms of greenhouse gas emissions, operating costs and road safety?*
- *Are there significant Government investments in infrastructure or services in the area whose patronage will be affected by the proposal? If so, what is the expected impact?*

- *Will the proposal impact on land that the Government has identified a need to protect (e.g. land with high biodiversity values) or have other environmental impacts? Is the land constrained by environmental factors such as flooding?*
- *Will the LEP be compatible/complementary with surrounding land uses? What is the impact on amenity in the location and wider community? With the public domain improve?*
- *Will the proposal increase choice and competition by increasing the number of retail and commercial premises operating in the area?*
- *If a stand-alone proposal and not a centre, does the proposal have the potential to develop into a centre in the future?*
- *What are the public interest reason for preparing the draft plan? What are the implications of not proceeding at that time?*" (refer Draft Centres Policy op.cit. Section 8).

2.6.3 Other issues encompassed by the Draft Centres Policy

The other issues encompassed by the Draft Centres Policy include:-
- a suggested typology for activity centres and regional strategies;
- the need for the application of floorspace supply and demand assessments (FSDAs);
- guidelines for the identification of land for retail and commercial development in local planning;
- guidelines for selecting the most appropriate zone in local planning;
- draft definitions of activity, floorspace and land use types;

This information has been noted and where applicable referenced in the Strategy.

In summary the Draft Centres Policy (2009) is an important reference for the Strategy:

- the principles to guide activity centre location and development set out in the Draft Centres Policy have been applied in the Strategy (refer Section 7);
- issues for consideration in the assessment of net community benefit have been addressed in the preparation of an assessment framework for the Strategy (refer Section 7);
- the typology for activity centres as set out in the Draft Centres Policy is referenced in the recommended hierarchy (refer Section 7);

Photo 2.1
Store in Keppel Street

2.7 Bathurst Regional Council: Bathurst Regional (Interim) Local Environmental Plan (April 2005, as amended 15 December 2008)

The Bathurst Regional (Interim) Local Environmental Plan (LEP) is the principal statutory instrument that governs the administration of land use within the Bathurst Regional Council Local Government Area. The purpose of the LEP is to administer adopted strategic policy of Council within the overarching framework of approved State policy and statutory procedures.

Zone No 3 (a) (General Business Zone) governs the use of land for development in the CBD and neighbourhood centres. The purpose of the Zone is to:

- provide a diverse range of development opportunities including retailing, commercial and professional land uses;
- reinforce the role of the Bathurst CBD as the '*retail, commercial and administrative centre of Bathurst and its region';*
- '*protect and conserve the historic and scenic quality of the Bathurst Central Business District'*;
- provide for neighbourhood centre development '*compatible with the amenity of the surrounding residential areas'* and undertaken in a way so as to '*not prejudice the Bathurst Central Business District as the retail, commercial and administrative centre of Bathurst.'*
- ensure that commercial development is consistent with the provisions of any Development Control Plan adopted by Council for administration of the Zone.

Zone No 3 (b) (Service Business Zone) governs the use of land for development of service business activities and associated land uses. Key objectives of the purpose of the Zone encompass:

- *'to encourage the establishment of service business activities (such as bulky goods salesrooms or showrooms) away from the Bathurst Central Business District,*
- *to ensure that the type of retail activity does not prejudice the status and viability of the Bathurst Central Business District as the retail centre of Bathurst,*
- *to ensure that commercial development or other permitted development is consistent with the provisions of any development control plan adopted by the Council for localities within the zone.'*

2.8 Bathurst Regional Interim Development Control Plan 2011 - Chapter 5: Business Development (February 2011, effective implementation February 2011)

The Bathurst Regional Interim Development Control Plan 2011 - Chapter 5: Business Development provides design and development controls for the management of lands zoned Business under the Bathurst Regional (Interim) Local Environmental Plan (2005). It reflects earlier provisions provided by the former Bathurst Regional DCP - Business Development. The purpose of the Development Control Plan is to:

- '*provide guidance for potential developers';*
- ensure '*high quality developments in the business areas of the city';*
- ensure that '*developments do not have an adverse impact'* on streetscapes and conservation areas;
- *'ensure that a high standard of visual amenity is provided along major roads servicing commercial areas';*
- '*control the subdivision of certain commercial lands'.*

The DCP provides for:

- varying intensities of development in the CBD, neighbourhood centres and in the service business areas;
- height restrictions for buildings in the General Business and Service Business Zones;
- building set back and siting requirements;
- use of building materials;
- specific parking requirements for defined store and activity types;
- requirements for access and vehicle loading;
- landscaping requirements;
- advertising standards and requirements;
- provision of fencing and screen walls;
- environmental infrastructure design and management;
- provision of neighbourhood shopping centres;
- requirements for a new Service Trade Centre;
- requirements for the subdivision of land in specified Service Business areas.

The DCP defines the Bathurst Central Business District (CBD) as generally comprising land '*zoned 3 (a) General Business and generally bounded by Durham, Rankin, Keppel and Bentinck Streets.'*

In relation to neighbourhood centres the DCP specifies the location of the centres and places a floorspace limit on any individual shop tenancy: '*Council shall not grant consent to individual shops within a neighbourhood shopping centre having a floor area exceeding 700 square metres.'* Although the restriction applies to all retail tenancies within a neighbourhood shopping centre it was framed to prevent the development of supermarkets in excess of 700 square metres in local centres. This was based on the recommendations of the Bathurst Retail Strategy (1999) which resulted in an increase in the permissable maximum floor area for individual stores from 500 to 700 square metres. The restriction has assisted the further consolidation of the Bathurst CBD. It is extremely unlikely that the Bathurst City Centre which required a full line supermarket as its anchor tenant would have occurred had this type of supermarket been able to develop in suburban Bathurst.

This Strategy has undertaken a detailed examination of supermarket requirements relevant to local centres in Bathurst over the next 20 years and beyond. It makes provision to further increase the maximum floorspace provision for supermarkets in local centres (refer Section 7). It is also noted that the Bathurst Retail Strategy (1999) recommended a minimum site requirement of 5 hectares for designated future local centres. This recommendation was reflected in the BRUS but not specified in the DCP - Business Development and not made a requirement for the development of the Trinity Heights local centre. The issue of a minimum site requirement for future local centres is addressed in the Strategy and forms part of the recommendations for this study (refer Section 7).

The Bathurst Regional (Interim) Local Environmental Plan (April 2005, as amended December 2008) and the Development Control Plan - Business Development (April 2005, effective implementation April 2006) are the key statutory instruments that manage land use and development for the city's activity centres and bulky goods precincts within the wider context of other required land uses and development. The policy objectives for land use development are set out in the LEP. The effective controls for development that differentiate activity centre requirements for the CBD and the neighbourhood centres are set out in the DCP - Business Development. Similarly the DCP - Business Development provides guidelines to ensure high quality and high amenity bulky goods precincts.

The Strategy has reviewed development requirements for the CBD, neighbourhood centres and bulky goods precincts. It provides a set of recommended principles and policies to support the implementation of the Strategy (refer Section 7).

2.9 Bathurst Regional Council: Eglinton Expansion Planning Proposal (Draft as exhibited November 2010)

Council has placed on exhibition a Draft LEP and DCP for the future planning and development of Eglinton. The Planning Proposal provides for:

- the expansion of the existing Eglinton Village. The current population is approximately 1,900 persons (based on the 2006 Census) and the proposal will result in the capacity to double the population to approximately 3,800 people;
- '*The implementation of new land use buffers around the expansion area* (to) *better manage the existing rural-urban land use conflict and act as a continuous open space corridor with cycle/pedestrian paths connecting into the surrounding cycle network.*
- *Rural land between the village and Saltram Creek which is no longer viable for agricultural production will be rehabilitated and developed for a more appropriate use.*
- *Provision of growth boundaries around the proposed expansion area will curtail potential village sprawl.'*

(DCP Residential Subdivision Eglinton, Draft as exhibited, op. cit., refer Summary Statement)

The Strategy examines the opportunities provided by the future residential population to be developed in the consolidated Eglinton Village and provides an assessment of activity centre requirements and guidelines for future development (refer Sections 5 and 7).

2.10 Sydney Road (South) - Intermodal Terminal Site

In August 2006 the Minister for Planning granted Concept Plan approval for the construction and operation of a rail and road intermodal terminal with associated storage and business facilities. The intermodal terminal would be used to transfer goods and produce from the Bathurst region. Goods would be conveyed by road to Bathurst and transferred to rail for transport to Sydney, Melbourne and Brisbane.

The proposed intermodal development is a major project with an estimated capital value of approximately $100 million and to be constructed in four stages over a ten year period. The general location of the proposed development is shown in Figure 2.5. Figure 2.5 is a preliminary concept plan prepared by Council to control future development of the site following its possible future rezoning for service business / business park use as recommended by the BRUS. The major components of the approved Concept Plan (refer Figure 2.3) include the following:

- *"two private sidings, each 630m in length, extending from the south-eastern boundary of the site to the north-western corner of the site with turn-around facilities at either end;*
- *containerised goods storage areas with a total area of 52,180 m^2;*
- *eight development sites for warehousing and open storage facilities, with a gross floor area (GFA) of approximately 52,000 m^2 over two levels;*
- *twenty development sites located along the Great Western Highway frontage for use as bulky goods storage, warehousing and rural produce supplies, with a GFA of 11,250 m^2;*
- *a service station with 24 hours operation;*
- *access and internal service roads and 428 car parking spaces;*
- *administrative and maintenance facilities; and*
- *landscaping of the Great Western Highway frontage and public areas and rehabilitation of riparian areas."*

(refer NSW Government, Department of Planning, November 2009, 'Modification to the Concept Plan Approval for the Road/Rail Freight Terminal at 213 Sydney Road Kelso', proposed by Gateway Land Corporation, Modification 05_0047_ Mod 1, Modification of Minister's Approval under Section 75W of the Environmental Planning and Assessment Act 1979, page 6)

The approved Concept Plan (refer Figure 2.3) was modified in November 2009 (refer Figure 2.4) It included the following elements:

- *"a revised footprint layout for individual allotments and buildings on site;*
- *introduction of two (2) fast food restaurants with 24 hours operation;*
- *a reduction in hardstand area storage;*
- *a revised rail siding and loading area;*
- *a small reduction in total gross floor area;*
- *changes to site access;*
- *changes to the riparian corridor and a revised stormwater management strategy;*
- *consolidation of the approved truck refuelling facility, railway engineer's facility and forklift maintenance facility into the administrative facility;*

- *subdivision;*
- *revised Concept Plan staging;*
- *exclusion of a portion of the site from the Concept Plan approval."*

(refer NSW Government, Department of Planning, November 2009 op cit page 7)

The BRUS (op. cit.) recommended that the intermodal terminal site be rezoned 3(b) Service Business under the next LEP to enable its development as a bulky goods precinct. A preliminary DCP to control the development of the site was prepared by Council (refer Figure 2.5).

The approved Concept Plan is of great significance for the Strategy in terms of its potential to address the long term bulky goods requirements of Bathurst. It provides a significant site with extensive highway frontage and visibility. It would be suitable to accommodate the long term bulky goods requirements for Bathurst if the current Concept Plan could be further modified to accommodate approximately 30,000 square metres of bulky goods development, requiring approximately 9 hectares of land. Details of the requirements and recommendations of the Strategy are set out in Section 7.

Figure 2.3: Approved Concept Plan

Figure 2.4: Proposed Concept Plan

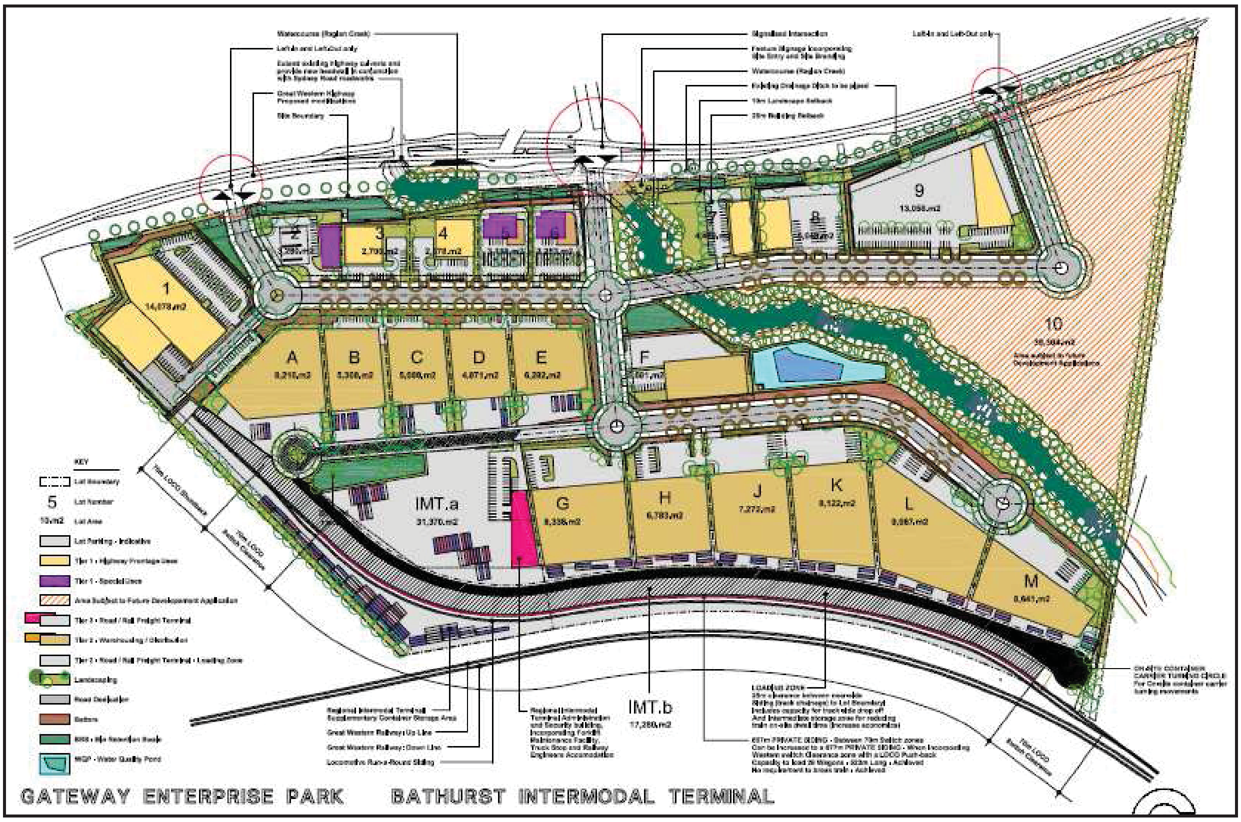
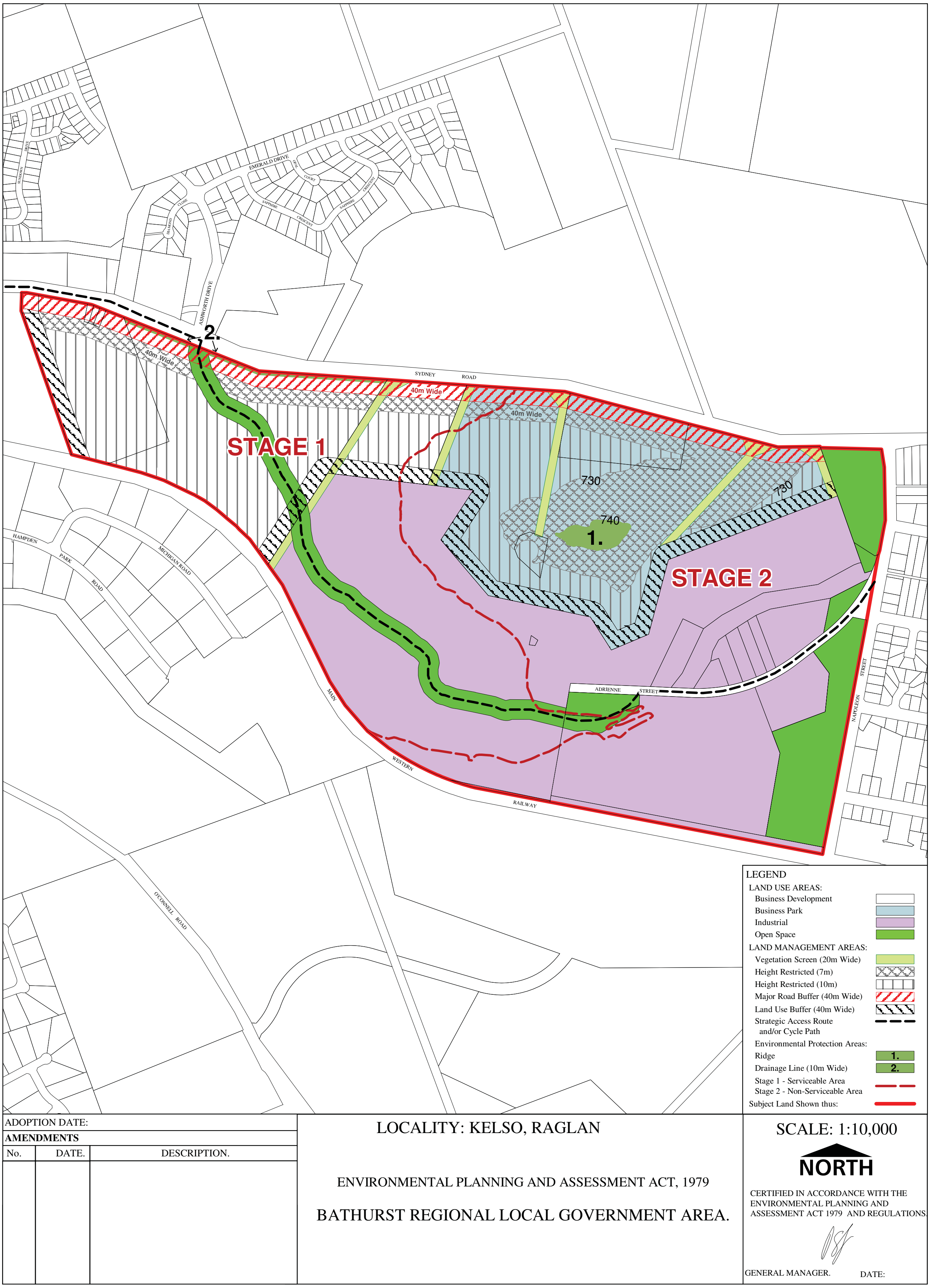


Figure 2.5: General Area for Potential Bulky Goods Future Major Precinct

BATHURST REGIONAL DEVELOPMENT CONTROL PLAN 2009
MAP No. 10 - SYDNEY ROAD PRECINCT (SOUTH)

BATHURST REGIONAL COUNCIL



2.11 Draft SEPP (Competition) 2010

In July 2010 the NSW Government released a draft policy intended to remove artificial barriers on competition between retail businesses. At this time (March 2011) the policy is still in draft form. The principal aims of the draft policy are:

- to promote economic growth and competition, and
- to remove anti competitive barriers in planning and development.

The key points to the draft policy are that:

- "*the commercial viability of proposed commercial development is not a matter that may be taken into consideration by consent authority for the purposes of determining a development application ......*"

- "*any such likely impact may be taken into consideration if the proposed development is likely to have an overall adverse impact on the extent and adequacy of facilities and services available to the local community*"

- no restrictions are allowed on the number of a particular type of retail premises, however, development controls may apply to the scale of the development;

- planning instruments which restrict the number of a particular type of retail premises in any particular area will "*not have effect*".

The Draft SEPP (Competition) Policy, together with the Draft Centres Policy have important implications for policy development in the Strategy:

- the Strategy has provided an assessment of retail floorspace requirements to meet the needs of the Bathurst urban area over the next 20 years and beyond, however, these assessed needs are only indicative to assist long term planning and policy development for activity centres. It is not intended that the identified floorspace requirements are in any way limiting in a statutory sense (discussed in Section 7);

- in preparing an assessment of net additional retail and bulky goods floorspace requirements approved developments which in the judgment of the Strategy were likely to proceed, or seriously entertained proposals which also in the judgment of the Strategy were likely to proceed to development were deducted from the gross additional floorspace requirements at future years in order to provide a realistic assessment of additional floorspace requirements which took these proposals into account. This is a technical accounting process and does not in any way imply development rights or a form of 'floorspace banking' by virtue of a DA having been granted (refer Section 5.2.8). In the case where a DA has been granted and is considered not likely to proceed it was not deducted from future floorspace requirements. This approach is entirely consistent with the intent of draft State policy.

In summary, there is a significant policy framework that provides an important guiding context for the Strategy:

- the Bathurst Retail Strategy (1999) is the cornerstone of current retail policy in the Bathurst Regional Council local government area. It has guided the significant consolidation of major retailing in the CBD, the development of a new bulky goods precinct and the consolidation of existing precincts and provided the framework for a new neighbourhood activity centre at Trinity Heights. The key issue for this Strategy is whether the controls and directions are to remain the same for the next 10 - 20 year period or whether modifications and directions are required. This is addressed by the Strategy;

- the BRUS (2007) is the key strategic framework for the physical development of the Bathurst urban area. It is a coordinated physical plan and policy framework and provides the strategic context for the Strategy;

- the administration of land use and development has been achieved through the Bathurst Regional (Interim) LEP (2005, as amended 2008) and the Bathurst Regional Interim DCP 2011 - Chapter 5: Business Development. It is understood that further modifications to allowable maximum floorspace for single tenancies in neighbourhood centres would need to be reflected in an amendment to the Bathurst Regional Council DCP;

- there are two significant draft State policies of high relevance to this study. The Draft Centres Policy (2009) has guided the Strategy in terms of principles for activity centres and impact assessments. In addition the development of a recommended hierarchy of activity centres (refer Section 7) has applied recommended standard definitions for activity centre types. The Draft SEPP (Competition) 2010 policy provides important guidance for the Strategy and underpins the importance of many of the assessments of floorspace requirements being only advisory. Care has been taken to ensure that a competitive market is being pursued within the broader framework of a socially and environmentally based land use system;

- the ongoing evolution of land use development in the Bathurst urban area is being facilitated through the DCP process. The recent Planning Proposal for Eglinton (2010) provides a clear framework for the consolidation of this residential area and has formed the basis for a recommended new neighbourhood centre to service this area. The preliminary Bathurst Regional DCP concept plan (2009) and Ministerial approvals for the associated Concept Plan in the Sydney Road Precinct (South) provide significant opportunities for future major transport related industry and logistics development and also for the future long term resolution of bulky goods needs in Bathurst.

3 retail demand and definitional issues

retail demand and definitional issues

3

3.1 Purpose of the Review of Retail Demand and Definitional Issues

The purpose of this section is to provide a considered review of the key retail demand and definitional issues that have influenced the scope, direction and key findings of the Strategy. The issues encompassed:

- population growth and demographic change,
- patterns and ongoing trends in real retail expenditure growth,
- the growing significance of online retailing,
- patterns of change in the evolution of retail stores and services,
- bulky goods definitional issues,
- supermarket definitional issues.

3.2 Population Projections

Population growth is one of the principal factors that drives future retail expenditure and floorspace demand (the other key factor is ongoing real consumption growth, refer Section 5). An analysis and assessment of the likely future population growth in Bathurst and its regional catchment area (RCA) was a key requirement of the study. Analysis undertaken for the Strategy:-

- provided an overview of historic population trends in the City of Bathurst over the period 1991 - 2006;

- assessed trends in dwelling unit approvals in the City of Bathurst and Bathurst Regional Council area;

- reviewed population projections prepared by the NSW Department of Planning (2004 and 2008);

- reviewed population projections prepared by .id Consulting for Bathurst Regional Council (2010);

- provided population projections for Bathurst and its RCA (analysis by Renaissance Planning, 2010).

Research undertaken for the BRUS (2007) found that the resident population of the former Bathurst City Council area grew from approximately 29,150 persons in 1996 to approximately 31,560 persons in 2004, a growth rate of approximately 1 per cent per annum over the period. Analysis undertaken by Renaissance Planning for this Strategy also confirmed an approximate **1 per cent per annum historic population growth rate** for the Bathurst urban area over a longer time period **(1991 - 2006).**

Population projections were prepared by the NSW Department of Planning in 2004 and 2008. The 2004 projections were for the former Bathurst City Council area. The 2008 projections were for the Bathurst Regional Council area comprising the Bathurst urban area and the balance (essentially rural areas surrounding the urban area). Renaissance Planning and .id Consulting prepared separate population projections for the Bathurst urban area and the rural balance in 2010.

A comparison of the historic and forecast population growth rates is shown in Table 3.1. The following findings are significant:-

- the historic population growth rate for the Bathurst urban area was approximately 1.0 per cent per annum over the period 1991 - 2006 and of a similar order for the rural Bathurst area;

- the 2004 projections undertaken by the NSW Department of Planning identified a growth rate of 0.9 per cent per annum for the period 2006 - 2021 and 0.89 per cent per annum for the period 2021 - 2031 for the former City of Bathurst council area;

- the 2008 projections undertaken by the NSW Department of Planning showed markedly lower projected population growth rates for the Bathurst urban area (being 0.73 per cent per annum over the period 2006 - 2021 falling to 0.52 per cent per annum over the period 2021 - 2031);

- projections were also prepared by the NSW Department of Planning in 2008 for the Bathurst rural area (being the balance of the Bathurst Regional Council area outside the Bathurst urban area). The projections indicated forecast growth rates of approximately 0.60 per cent per annum for the period 2006 - 2021 and approximately 0.51 per cent per annum for the period 2021 - 2031;

- projections prepared in 2010 by .id Consulting for Bathurst Regional Council indicated a forecast population growth rate of 1.40 per cent per annum for the period 2006 - 2021 for the Bathurst urban area and 1.38 per cent per annum for the period 2021 - 2031. For the rural Bathurst area the forecast population growth rates were 0.40 per cent per annum for the period 2006 - 2021 and 0.39 per cent per annum for the period 2021 - 2031;

- projections prepared in 2010 by Renaissance Planning as part of the research for the Strategy, assessed forecast population growth rates of 1.03 per cent per annum for the Bathurst urban area for the period 2006 - 2021 and 1.02 per cent per annum for the period 2021 - 2031. For the rural Bathurst area, the forecast population growth rates were 0.61 per cent per annum for the period 2006 - 2021 and 1.01 per cent per annum for the period 2021 - 2031.

The research and analysis undertaken for the preparation of the Strategy has found that:

- the population projections by the NSW Department of Planning were marginally lower than the historic population growth rates exhibited by the former City of Bathurst in 2004 and dramatically lower in 2008. In our judgment the 2008 projections cannot be meaningfully explained against the long term historic pattern and are likely to be well below actual future growth rates;

- the population projections by .id Consulting show a dramatic increase of approximately 40 per cent in the annual growth rate over long periods of time for the Bathurst urban area and a significant fall in the projected growth rate in the rural Bathurst area to very low levels in the period 2010 - 2021 and to less than half the historic rate in the longer term period (2021 - 2031). In our view the projections for the Bathurst urban area are excessively high and cannot be justified by recent and current population trends. Similarly the population projections for the Bathurst rural area appear to be far too low and there is no apparent rationale for the sustained low population growth rate of Bathurst rural areas in the current projection term (2006 - 2021 and in the subsequent term 2021 - 2031));

- the population projections by Renaissance Planning were based on long term projections in the stock of occupied dwellings in both the Bathurst urban area and the rural areas of Bathurst, together with forecasts of long term trends in household size. The resultant modelling indicated long term population forecast growth rates of approximately the same order as that observed historically. It is emphasised that the population growth rates were outcomes of the modelling and were not simply adopted or modified. These outcomes appear to be meaningful and indicate a steady long term population growth outcome for the Bathurst urban area and surrounding rural areas. The forecast growth rates by Renaissance Planning fall into a middle range (between the forecasts by the NSW Department of Planning and those of .id Consulting), and indicate a long term growth rate of approximately 1 per cent per annum for the Bathurst urban area and approximately 0.6 - 1 per cent per annum for the Bathurst rural areas.

The population modelling and forecasts prepared by the NSW Department of Planning, Renaissance Planning and .id Consulting indicate the following forecast populations for the Bathurst Regional Council area (refer Table 3.2):

- at 2010 an average of approximately 39,400 persons for the three projections with an approximate 2 per cent variation between the highest and lowest estimates;

- for 2021 population projections in the range 41,800 (Department of Planning), 43,460 (Renaissance Planning) and 45,410 (.id Consulting);

- for 2031 population projections in the range 44,000 (Department of Planning), 47,900 (Renaissance Planning) and 51,490 (.id Consulting).

The forecast populations adopted for the Strategy are significant as they impact on forecast retail floorspace requirements. In the consultant's judgment the forecast by the Department of Planning are far too low to be applied as the basis for the assessment of retail floorspace requirements, and attention is drawn to the low population forecast rates which are well below historic levels. As indicated above, there is no justifiable rationale for these low growth rates.

For the purposes of the assessment of retail floorspace requirements the projections prepared by Renaissance Planning and .id Consulting were used to identify a retail floorspace demand range with the .id Consulting projections being at the upper end of the range (refer Section 5).

Table 3.1: Population Projections: Historic Trends and Growth Forecasts (1991-2031)

Sources: NSW Department of Planning, 2004, 2008, Population Forecasts by .id Consulting for Bathurst Regional Council (2010), Analysis and Population Forecasts by Renaissance Planning (2010)

LGA Component Area	Historic Population Compound Growth Rate (1991 - 2006)	Forecast Compound Growth Rates							
		2006 - 2021				2021 - 2031			
		Department of Planning		Renaissance Planning (2010)	.id Consulting (2010)	Department of Planning		Renaissance Planning (2010)	.id Consulting (2010)
		(2004)*	(2008)			(2004)**	(2008)		
Bathurst Urban Area	0.99	0.90	0.73	1.03	1.40	0.89	0.52	1.02	1.38
Rural Bathurst	1.03	n.a	0.60	0.61	0.40	n.a	0.51	1.01	0.39
Total Bathurst Regional Council Population	1.00	n.a	0.71	0.97	1.27	n.a	0.51	1.02	1.26

* Projected growth rate is for former Bathurst LGA and for the period 2006 - 2021

** Projected growth rate is for former Bathurst LGA

Table 3.2: Population Projections: Bathurst Regional Council Area

Sources: As for Table 3.1

LGA Component Area	Bathurst Regional City Estimated Resident Population (ERP) Projections (2010 - 2021 - 2036)																	
	Department of Planning						Renaissance Planning						.id Consulting					
	2006	2010	2021	Change 2006 - 2021	2036	Change 2021 - 2036	2006	2010	2021	Change 2006 - 2021	2036	Change 2021 - 2036	2006	2010	2021	Change 2006 - 2021	2036	Change 2021 - 2036
Bathurst Urban Area	32,300	33,260	36,000	3,700	38,600	2,600	32,250	33,650	37,620	5,370	43,700	6,080	32,390	34,170	39,890	5,720	49,440	9,550
Rural Bathurst	5,300	5,460	5,800	500	6,300	500	5,330	5,280	5,840	510	6,770	930	5,200	5,460	5,520	60	5,810	290
Total Bathurst Regional Council Area	**37,600**	**38,720**	**41,800**	**4,200**	**44,900**	**3,100**	**37,580**	**38,930**	**43,460**	**5,880**	**50,470**	**7,010**	**37,590**	**39,630**	**45,410**	**5,780**	**55,250**	**9,840**

LGA Component Area	Historic Bathurst Regional Council Estimated Resident Population (ERP)			
	1991	2006	Change 1991 - 2006	% / Annum Growth
Bathurst Urban Area	27,820	32,260	4,440	0.99
Rural Bathurst	4,570	5,330	760	1.03
Total Bathurst Regional Council Area	**32,390**	**37,590**	**5,200**	**1.00**

3.3 Review of Recent Trends in the Retail Industry

As part of providing a comprehensive context for the preparation of the Strategy a review was compiled of recent and emerging trends in the retail industry in Australia. The review is presented in terms of the following considerations:

- national significance of retailing;
- factors underlying retail demand;
- key influences in the supply of retail stores and services;
- trends in retail store development;
- online retailing and implications for retail stores and services;
- conclusion.

3.3.1 National Significance of Retailing

Retailing is of particular significance in activity centre planning. It is Australia's largest single employment industry providing more than 10 per cent of national employment. In 2010 Australian retail trade generated annual revenue of approximately $242 billion, employing approximately 920,000 people at a cost of $30 billion in wages and salaries (refer Retail Trade Australia, ABS Catalogue No. 8501.0 and Employee Earnings and Hours, ABS Catalogue No. 6306.0). Most of this employment and trade occurs within mixed use activity centres or in freestanding shopping centres located in metropolitan and regional cities. Shopping is a socially necessary activity undertaken by almost all households. A notable and growing proportion of retail needs are provided by internet shopping. This is examined in Section 3.4.

3.3.2 Factors Underlying Retail Demand

Retail demand is the measure of the value of goods and services consumed nationally by residents and tourists. There are several factors that influence the value of demand, patterns of consumption and changes over time. These are:

- **Household Needs:** Households consume goods and services to meet daily and weekly needs, together with a wide range of discretionary purchases that encompass clothing, household goods, hospitality expenses and purchases of services. Household demands are measured by the Australian Household Expenditure Survey undertaken at approximately five yearly intervals. The most recent survey (2003/04) found that more than 55 per cent of all the retail purchases by low income household groups were for food, groceries, alcohol and tobacco (compared to about 45 per cent for the highest income groups);

- **Disposable Household Income:** The most significant single determinant of the level of retail expenditure is disposable household income. Most forms of retail expenditure rise directly with household income (purchases of tobacco products and personal care are notable exceptions);

- **Retail Preferences and Market Share:** Retail preferences refers to the choices displayed by households for particular types of goods and services which reflect lifestyle choices, cultural background of households and the perceived utility of particular goods and services.

Market share refers to the proportion of household expenditures or retail sales regularly achieved by retailers, shopping centres or activity centres. Patterns of market share by retailers are an accurate reflection of market dominance and influence. The food and grocery industry in Australia for example is highly concentrated; and approximately 75 per cent of the trade is serviced by two retailers. Shopping centre market shares tend to be far more diverse, with overlapping trade catchments and high levels of competition between shopping and activity centres the rule, rather than the exception in metropolitan areas.

- **Time Scarcity and Lifestyle:** A small, but growing proportion of goods and services are purchased online. This is examined in some detail in Section 3.4. However, most goods and services are purchased from direct visitations to retail stores. A limiting factor to purchases is time scarcity, activity and personal commitments of households and lifestyle patterns. The influences of time scarcity and lifestyle tend to further reinforce habitual patterns of behaviour and narrow the exercise of choice in the selection of goods and services in activity centres. It also influences multi-purpose trips to activity centres.

- **Mobility and Access:** Patterns of purchases, particularly for regularly consumed goods and services, are highly influenced by household mobility and comparative accessibility to retail stores and services in shopping and activity centres. In Australian metropolitan areas, neighbourhood activity centres, for example, generally underpinned by a supermarket function tend to draw 80-85 per cent of their trade from approximately three kilometres of their sites. Patterns of patronage particularly to supermarkets, tend to be profoundly influenced by comparative proximity and access.

3.3.3 Key Influences in the Supply of Retail Goods and Services

The supply of retail stores and services in Australian cities and in regional locations is influenced by:

- **Roles of Stores and Shopping Centres:** Retail stores and shopping centre functions tend to display a hierarchy of roles that reflect regular and discretionary purchases. At the lower end of the scale, convenience and local centres cater for day-to-day purchases of regularly consumed items.

  Neighbourhood centres tend to be the mainstay of a wide range of food and grocery trips, together with regularly consumed household goods. Sub-regional and regional centres cater for a broad range of goods and services that encompass both food and non-food retail goods and tend to be focussed particularly to higher order discretionary purchases in a diversity of household goods and clothing; bulky goods and trade supply stores.

  Bulky goods stores and precincts, direct factory outlet centres and trade supply stores tend to have regional catchments and diverse patterns of patronage. These stores also tend to attract a notable proportion of business based purchases.

- **Store Formats, Product and Merchandising Characteristics:** Within the context of the broad service roles provided by stores, shopping and activity centres, the floorspace requirements of stores are influenced by a number of factors. These include:
  - the types of goods being merchandised and display requirements. For example, part of the rationale for large format bulky goods stores is the extensive display requirements that retailers require, that reflect the types of goods being merchandised and the need for a wide range of choice;
  - levels of personal service required;
  - loading and distribution requirements for goods.

- **Economic Concentration in Retail Provision Sectors:** Retail floorspace provision in Australian cities is approximately 2 square metres per capita. This is approximately half the rate of provision in the United States and significantly higher than the rate in the United Kingdom. An important influence on the level of retail floorspace supply in Australia is the limited domestic market, coupled with high levels of economic concentration in key retail sectors. These factors largely explain the relatively restrained supply of retail floorspace in Australia in comparison to the United States. The high concentration in the Australian retail system pertains not only to retailers, but also to shopping centre ownership of the regional malls and the wholesale distribution system.

In summary, demand and supply for retail stores and activity centres should be viewed as a dynamic equilibrium where the types of stores and services, and even the products being retailed, are changing over time. There are several contributory factors that largely explain underlying patterns of retailing demand and supply in Australia. At any point in time, there is an approximate balance between the demand and supply of retail floorspace at both the shopping centre and tenancy level. Moderate or low vacancy levels tend to be the rule in most metropolitan and regional city locations. In a more open competitive market such as that which exists in the United States, higher vacancy levels are common and the incidence of vacant shopping centres is not an unusual phenomenon.

3.3.4 Trends in Retail Store Development

Retail stores in Australia and in the wider western world have continued to evolve since the 1950s. A range of factors indicated in Sections 3.3.2 and 3.3.3 have driven these changes. The major types of retail stores encompass the following:

- **Department and Discount Department Stores:** Department stores are major retail attractors located in regional level centres in metropolitan and large regional cities. They provide a broad range of discretionary goods including clothing, fabrics and footwear, cosmetics and personal accessories, homewares, furnishings and selected household goods and may include a food hall offering fresh produce and gourmet foods. Floor areas generally exceed 10,000 - 12,000 square metres GLA.

  The traditional department store was the recognised major retail attractor in regional centres and cities has been impacted by a number of significant changes including the trend to discount retailing and the rise of specialised category based retailers. The traditional store has evolved to cater for changing needs and the rapid suburbanisation of Australian cities encompassing:
  - ‘house of brands’ department stores where the main pedestrian areas of the store have been redesigned as a concourse with designated areas for recognised brands within an overall product theming concept. The two major department stores (Myer and David Jones) have developed the ‘house of brands’ concept in major store redevelopments;
  - discount department stores that employ a supermarket type layout with checkouts for payments. These are the most common retail attractors for major and regional shopping centres and include KMart, Target and Big W. Typical floor areas are in the range 4,500 - 8,500 square metres GLA;
  - integrated household goods stores with an extensive range of furniture and furnishings, computers, other electrical and white goods are important attractors in both shopping centres and bulky goods precincts. Harvey Norman is the recognised leader for this type of store and there are a number of brands specific to individual states.

  Department and discount department stores are regional attractors and in the context of Bathurst should only be contemplated for the CBD in the foreseeable future. This is consistent with the advice set out in the Bathurst Retail Strategy (1999) and cited in the BRUS.

- **Supermarkets:** Supermarkets evolved from grocery and liquor stores in the pre war period and early 1950s. They provide generally standardised environments and service levels and are the mainstay retail outlets for most purchases of packaged food and groceries. Supermarkets are characterised by:
  - a large single space rectangular area subdivided into aisles and display shelves;
  - themed product group areas including designated areas for frozen foods and fresh foods;
  - check out payment systems with some supermarkets including express checkout for limited items and self service checkouts.

For the purposes of the Strategy a broad differentiation of supermarket types based on store size is important. A full line supermarket catering for more than 30,000 line items will generally exceed 3,200 square metres GLA. In the context of Bathurst and other regional cities of this size these are district and regional attractors and are best located in the CBD (as is currently the case). It will be noted that the new major shopping centre development in the Bathurst CBD (Bathurst City Centre) is a regional level shopping centre anchored by a full line Woolworths supermarket.

Medium sized supermarkets are generally in the range of 1,200 - 2,500 square metres GLA. These stores carry up to 20,000 line items and are suitable as major attractors for large neighbourhood activity centres serving several suburbs in metropolitan areas or regional cities. Sustainable threshold populations to support these types of large neighbourhood centres are in the range of 8,000 - 12,000 people (analysis and findings in relation to local centre provision in suburban Bathurst are discussed in 7).

Small supermarkets are less than 1,500 square metres GLA in area. These stores usually carry all of the required product types for daily and weekly requirements but have restricted brand choices. These types of facilities can anchor small neighbourhood activity centres (further discussed in Section 7.5). Sustainable threshold populations to support these types of stores in small neighbourhood activity centres are in the range of 3,000 - 6,000 people (analysis and findings in relation to local centre provision in suburban Bathurst are discussed in Section 7.5).

It will be noted that niche discount supermarkets present a special case in regional cities. Stores such as Aldi , although trading from floor areas of less than 1,500 square metres GLA typically have district and regional catchments. They focus on discount offerings and provide a comprehensive range of product types with limited brands. In the case of Bathurst the Aldi store is located in the CBD which is the most appropriate location for this type of store in a city the size of Bathurst.

- **Convenience Retailing:** The growth of demand for convenience retailing has been an important trend over the past 15 years, The most notable outcome of this pattern has been:
  - the emergence of home catering services in retailing, essentially stores providing prepared and packaged meals;
  - the development of an extensive network of convenience stores, usually co-located with services stations and service centres. These convenience stores provide supermarket type display areas with a single point of sale and may include a take away food area. Floor areas typically range from 150 - 400 square metres GLA.

- **Longstanding Demand for Markets:** Markets are places of retail trade conducted in market halls or other premises or in outdoor locations. They are characterised by public access aisles serving a number of small tenancies (market stalls). Markets have retained their popularity during the emergence of modern retailing in the post war period. A wide range of different types of markets have developed in metropolitan areas, regional cities and rural areas. They include:
  - market halls catering for fresh food and produce;
  - broadly based leisure markets that sell clothing, leather goods, stationery,

bric-a-brac and giftware and may offer attractions for children;
- farmers markets that provide a venue for direct selling by farmers of their produce.

The Strategy has identified a potential for a market in the Bathurst CBD (refer Section 7).

- **New Technology Products and Services:** The rapid growth of new technology and demand for mobile phones and digital technology products has maintained a sustained high rate of growth for consumer demand in new products and services. These have been reflected in the development of new types of stores (including specialty stores and new mini majors with floor areas in excess of 400 square metres GLA). They have also been reflected in new specialised areas in existing department and general stores.

- **Leisure Products and Services:** Over the last 15 years there has been sustained significant growth in leisure and lifestyle products and services. These encompass:
  - homeware and giftware;
  - outdoor living and garden products;
  - camping and sporting goods;
  - outdoor leisure equipment and clothing;

- **Fresh Food Retailing:** A significant growth area in retailing has been the emergence of specialised fresh food outlets. This reflects growing consumer demand and preferences for healthier food choices and fresh produce.

- **Specialised Theming in Shopping Centres:** A key strength of internal shopping malls has been the development of specialised activity themes within these centres. New centre development has taken this trend further with a higher focus on lighting, signage and interior design to achieve quality distinctive places to define (for example) fresh product and gourmet food areas, cafe and food court areas, fashion areas and electronic product areas.

Demand Trends driving growth in Bulky Goods Retailing

Over the past ten years, there has been substantial and growing consumer demands for a wide range of bulky goods retailing commodities. This growth reflects a number of important trends generated by lifestyle-based expenditure changes and the rapid growth in new product development based on new technology. These trends were identified in an assessment of bulky goods retailing undertaken as part of a major review in Victoria (refer Out of Centre Assessment Criteria, Final Report, Department of Sustainability and Environment Victoria, April 2005, Ratio Consultants et al, Section 2.1):

'***Emphasis on furnishings and home improvements***: *The rise of smaller format stores has provided more flexible shopping outlets for home improvements and life style purchases. Much of this growth may be described as lifestyle-based. This market segment is also driving the home improvement market that encompasses the demand for attractive and functional living spaces, indoor-outdoor spaces for entertaining guests and 'time saving' appliances in the kitchen and laundry.*

Rise in sports and leisure expenditure: *The growth in this market reflects a greater social emphasis on health and fitness related activities and a greater diversity of leisure activities. This has been expressed through expenditure in sporting wear and equipment, camping gear, outdoor furnishings and BBQs.*

The development of entertainment retailing: *Television has long been established as a mass medium in Australia. This has provided a significant market for the adoption of home-theatre products made available through new technology and product development.*

Development in the internet and broadband technology: *With the growth of the internet and broadband technology, computers have become an essential part of the daily lives of households. The growth of the internet and significant improvements in digital technology have fuelled sustained higher growth in a wide range of computer-based and communications products.*

The wider application of digital technology: *There has been significant new product development where existing products have been superseded by a digital equivalent. This has provided major new product markets (for example mobile phones, digital cameras and new digital formats for music and video entertainment).*

The emergence of new formats of stores: To cater for these lifestyle-based trends, new types of stores have emerged. These stores include:

- *Specialist retailers and 'category killers'. These stores sell a wide range of products from a specialist category (for example electrical/white goods specialist stores);*
- *'Super stores' selling a broad range of products from various categories including homewares, furnishings, electrical, appliances and white goods. This is evident in the development of stores such as Harvey Norman and Megamart."*

In summary, significant and sustained new product development have fuelled real growth in a wide range of household products. This has in turn underpinned the growth in demand for bulky goods retailing, particularly in out-of-centre locations.

3.4 Online Retailing in Australia

A review of online retailing in Australia indicates several important themes:

- **Value of online retailing in Australia**: There are currently no recognised official statistics on the value of online retailing in Australia (that is research either by the Australian Bureau of Statistics, Australian Productivity Commission or surveys commissioned by the Reserve Bank of Australia). This is confirmed in a recent publication by the Reserve Bank of Australia (refer Statement on Monetary Policy, February 2011).

  Two recognised research companies, Access Economics and Frost and Sullivan have separately estimated the value of online retailing in Australia at approximately $12 billion at current prices for 2010 (refer www.smartcompany.com.au/sales, report by Patrick Stafford, Monday 19th July 2010 for Frost and Sullivan report and The Weekend Australian, January 8-9, 2011, page 6 for the Access Economics information). The report by Access Economics indicates that:-

  - approximately $536 per capita was spent by Australians on online shopping during 2010;
  - 25 per cent of Australian commercial businesses undertook online orders.

  The ABS reports that retail goods trade for 2010 was approximately $242.8 billion at current prices (refer ABS Cat. No. 8501.0). Estimates of retail services for 2010 are approximately $23.1 billion at current prices (based on estimates by MarketInfo and analysis by Renaissance). This places the estimate of total Australian retail, goods and services trade at approximately $265.9 billion for 2010 at current prices. On this basis it is estimated that currently (2010) the value of online retailing in Australia is approximately:-

  - 4.5 per cent of all Australian retail goods and services trade,
  - less that 1 per cent of food retailing and cafes and takeaway food purchases,
  - approximately 7.8 per cent of non-food purchases were made online.

  In-centre surveys undertaken in July 2010 in the Bathurst CBD for the Strategy provided a large sample observation (498 visitors) of expenditures by patrons made outside the Bathurst urban area either as trips to other regional centres and metropolitan areas or as purchases online. Applying Australia-wide information it was estimated that approximately 6 - 8 per cent of non-food and non-services retail purchases by Bathurst residents were made online (detailed in Section 5.3).

- **Growing significance of online retailing:** There are various estimates by online research companies and these point to significantly higher online retail growth than in traditional retailing.

  The Australian print media and various online sites report significant growth in online retailing in Australia. According to Forrester Research online retailing in Australia the value of online retailing was projected to double between 2009 and 2015 (Forrester Research, January 2011).

The range in estimates of the value of online retailing by researchers and the lack of official data indicates that the estimates need to be treated with caution. There is also a clear need for the adoption of standard definitions consistent with terms used by the ABS in its analysis of retail trade (for example inclusion of bookings for travel and accommodation would not form part of the ABS definition of retail trade).

There appears to be general industry agreement that online retailing is growing at a significantly faster rate than traditional retailing. According to the RBA, online purchases using credit cards (which encompasses payments for expenses other than retailing) grew by approximately 15 per cent per annum since 2005. The projected rates of growth in online retailing are in the range of 10 - 12.5 per cent per annum over the next five years (Forrester and Frost and Sullivan), or about double the long term rate of growth in retail trade in Australia.

- **Most significant categories in online retailing:** As in the case of general measures of the value of online retailing there are no official statistics in relation to particular types of purchases. Indicative reports by market researchers indicates that the most significant categories purchased online encompassed (refer Nielson Online Retail Monitor):
  - bookings for travel and accommodation;
  - computer purchases;
  - books;
  - music and movies;
  - electrical appliances;
  - clothing.

- **Growth of specialised online traders:** Recent information (refer Table 3.3 following) shows that online retailing is dominated by new specialised traders that have emerged outside of the traditional retailing network. A survey by Hitwise, an internet based researcher found that approximately 58 per cent of all online retail purchases were made to companies that did not have a traditional retailing base. Nonetheless, some 42 per cent of purchases were still undertaken at sites maintained by the major retail chains (Big W, Target, KMart, Myer and David Jones). About 32 per cent of online purchases were directed to sites maintained by Coles and Woolworths.

- **Implications for retail stores and services:** The research indicated several implications for activity centre based retailing in Bathurst relevant to the preparation of the Strategy. It is likely that the significantly higher growth rates of online retailing will result in a higher proportion of retail expenditures being directed to online purchases. High differential growth rates are likely to be sustained by improvement in the National Broadband Network (NBN).

  For the purposes of the Strategy, provision has been made for real growth in purchases either made on the internet or at locations outside Bathurst; the assessment of future retail floorspace requirements takes this into account (refer Section 5.3). The research indicated that certain categories as indicated above are more highly exposed to online retailing. The effect of this analysis is to reduce the level of future additional retail floorspace requirements for Bathurst (refer Section 5.3).

Source: Google Images

Table 3.3: On-Line Retailing in Australia: Major Traders (Week ended 1 January, 2011)

Source: Hitwise Internet Researchers, published in "The Age" Melbourne, January 8th, 2011

Rank	Trader	Estimated Market Share Value Based % of Australian based on-line retail sales
1	Catch of the day.com.au	12.04%
2	Dealsdirect.com.au	11.22%
3	Big W	10.90%
4	KMart Australia	10.66%
5	Target Australia	7.36%
6	Myer	6.70%
7	oo.com.au	6.53%
8	Crazy Sales	5.22%
9	Shopping Square	4.06%
10	Big W - Reviews	3.28%
11	David Jones	3.08%
12	BigPond Shopping	2.80%
13	One Day, Three Deals	2.15%
14	TVSN	1.51%
15	Topbuy.com.au	1.41%
16	FactoryFast Australia	1.08%
17	Peter's of Kensington	.98%
18	SoldSmart.com.au	.85%
19	dStore.com.au	.84%
20	Deals2U.com.au	.56%
Total market share of top 20 traders		93.23%
Other traders		6.77%
Total all traders		100.00%

- **Other implications of the growth of online retailing:** A clear implication of the significant growth of online retailing will be an increased demand for logistics systems and facilities to deliver products to customers in an efficient and timely way. The leading online retailer in the country (catchoftheday.com.au) undertakes all of its trade from a warehouse in suburban Melbourne. It is likely the continued growth of online retailing will have implications for further storage and dispatch facilities in the major population centres. Possible development opportunities will emerge in metropolitan Sydney and along the eastern seaboard. In the absence of new major routes connecting Bathurst to Sydney or other major population centres, logistics opportunities are likely to be limited.

- **Impact of online retailing on franchise stores:** A significant component of specialty stores in the major retail malls are national franchise stores (including specialty stores at Bathurst Stockland and Bathurst City Centre). A recent report by Judith Tydd indicates that national franchise stores have yet to work through marketing and profit access issues arising from the establishment of online selling channels attached to a franchise brand. The report quotes the executive director (Steve Wright) of the Franchise Council of Australia, acknowledging that online selling had to be integrated into future franchise business planning incorporating sales, profit access and marketing. However he expected that franchises would adopt an effective online model in the future and that growth in online marketing and sales would reflect the broader growth of the small business economy (refer Judith Tydd, "Sharing is Not Easy", BRW, February 17 - 23, 2011).

- **Decline of Borders and Angus and Robertson:** In mid February 2011 the booksellers Borders and Angus and Robertson were placed in voluntary administration. Several reports have attributed a number of factors including:-
  - impact of online retailing and in particular the ability of individual consumers to purchase books overseas at cheaper prices and without the GST component (as reported by The Saturday Age, 19th February 2011);

  - a prohibition on Australian booksellers to purchase books from overseas where the edition is published in Australia within one month of it being released overseas (restrictions on "parallel importing"). In the words of Bob Carr, former premier of New South Wales and currently a director of Dymocks, a national book franchise chain, the banning of parallel importing is "the lunacy of protectionism writ large" (refer the Weekend Australian, February 19-20, 2011 The Nation, page 3). The restrictions on Australian booksellers to import books from the cheapest source has amplified the effect of online retailing. It is a restriction that is unique to bookselling and does not apply, for example to CDs and DVDs;

  - the business model of Borders has been criticised by a number of independent booksellers. It applied a discount department store model to book retailing and the appropriateness and logic of this model has been criticised (refer The Saturday Age, February 19, 2011, Business Day, page 4);

  - the private equity owners of RED Group Retail who managed Borders and Angus and Roberston (Pacfic Equity Partners) bought the booksellers by writing up a significant debt for both companies, placing them in an unsustainable situation (refer The Saturday Age, February 19, 2011, op. cit.)

In summary the current difficulties of Borders and Angus and Robertson have been attributed to a number of factors of which online retailing is one. It appears that the competitive effects of online retailing have been exacerbated by restrictions on parallel importing by Australian retailers, by the business model applied by Borders in particular and by the actions of the private equity group in funding their purchase of the booksellers with excessive amounts of debt.

- **Potential for a Mixed Online - Shop Based Model:** Recent research indicates that the future of retailing may not be a question of online **or** shop based purchases but rather a combination of both. Research by the Australian Centre for Retail Studies indicates that there are different types of consumers in terms of the use of the internet and in-store shopping. They identified four distinctive shopping styles including:-
  - *"**Functional** - Hit-and-run shoppers who buy what they need with the least hassle. Mostly men. About 17 per cent;*
  - ***Store loyals** - Stick with their favourite stores; often older shoppers (34 per cent);*
  - ***Multi-channel** - Baby boomers and Gen Xers who like traditional shopping but enjoy surfing the internet and flicking through catalogues before they buy;*
  - ***Channel adopters** - Price-conscious Gen X and Y shoppers who use the internet to find the best deal"* (refer "Selling Goes Social as Net, Malls Merge", The Weekend Australian, January 8-9, 2011, The Nation, Page 6)

  Dr. Sean Sands a research fellow at the Australian Centre for Retail Studies has predicted a *"seamless integration of real world and cyber-shops with stores hosting online kiosks for customers to research products and interact with friends. You could be in a shop trying on a top, and press a button to show your friends and get a thumbs-up or a thumbs-down in real time"* he said (refer The Weekend Australian, January 8-9, 2011, op. cit.)

  In summary the research by the Australian Centre for Retail Studies provides an interesting contribution to the online retail debate and has posed the question as to whether a more integrated and adaptive future for retail stores may not already be beginning to occur and whether these types of actions might help secure a more sustainable future for retail stores in potentially exposed sectors.

- **Implications for online retailing in the Strategy:** The following steps were undertaken to account for current and likely future effects of online retailing on store sales in Bathurst over the period 2010 -21 and following period:-

  - a large sample in-centre survey undertaken in the Bathurst CBD (July, 2010) provided information on purchases made outside Bathurst for selected goods, either on the internet or made in person at cities outside Bathurst;

- research was undertaken of expenditure by Australian consumers online;

- modelling was applied to provide current and future estimates of escape expenditure from Bathurst by Bathurst residents, including expenditure online and expenditure made in person at other cities.

The results of this analysis are presented in Section 5.3. **They have the overall effect of providing for a significant and increasing component of escape expenditures from Bathurst for a wide range of household and bulky goods** (refer Section 5.3).

The work confirms current observations by Neilson Online Research Monitor that the most significant retail goods incurring online expenditure were in descending order of significance:-

- books, CDs and DVDs,
- electrical goods and computers,
- furniture and furnishings,
- clothing, footwear and accessories,
- cosmetics and perfume,
- toys and sporting goods

In summary, online retailing is a growing phenomenon in Australia and other countries. There is a significant difficulty in obtaining consistent, empirically based and verifiable measures of internet retailing trade. There are no value measures at present provided by the ABS or the Australian Productivity Commission and information provided by the RBA applies to a wide range of credit card purchases.

Nonetheless it would appear that online retailing at present comprises approximately 5 per cent of retail trade as measured by the Australian Bureau of Statistics. There is a broad consensus by online researchers that online retail trade will continue to grow at a significantly higher rate than traditional shop-based retail trade.

A new structure of online traders has emerged that is likely to ensure higher levels of price competition in Australian retailing.

The Strategy makes provision for the effects of online retailing on floorspace demand and provision (refer Section 5.3).

3.5 Bulky Goods Definitional Issues

- **Definitional Issues for Bulky Goods Retailing:** The NSW Government has adopted a Standard Instrument - Principal LEP (current version, 30 April 2010), which all Councils in NSW are required to follow when preparing new LEPs. This Instrument provides a template for LEPs ensuring consistency is achieved in their development. It provides for:
  - compulsory inclusions in all LEPs (for example name, commencement, aims, definitions and maps);
  - permitted or prohibited development options;
  - land use table;
  - exempt and complying development requirements;
  - principal development standards, and
  - miscellaneous provisions.

  Of particular relevance to this Strategy the Principal LEP defines bulky good as follows:
  *"**bulky goods premises** means a building or place the principal purpose of which is the sale, hire or display of bulky goods, being goods that are of such size or weight as to require:*
  (a) a large area for handling display or storage, and
  (b) direct vehicular access to the site of the building or place by members of the public for the purpose of loading or unloading goods into or from their vehicles after purchase or hire,
  and including goods such as floor and window supplies, furniture, household electrical goods, equestrian supplies and swimming pools, but does not include a building or place used for the sale of foodstuffs or clothing unless their sale is ancillary to the sale or hire or display of bulky goods."
  (refer Dictionary, Standard Instrument - Principal Environmental Plan)

  The definition currently in place in the Bathurst Regional (Interim) LEP (2005, refer Clause 5A, Part 1) though not identical in every respect to the Standard Instrument definition, is very close and there appear to be no substantive differences in the definition. Both the Standard Instrument definition of bulky goods and that used by the Bathurst Regional (Interim) LEP focus on the 'bulkiness' of goods for sale. This approach does not provide a sufficient narrative or understanding of the driving impetus and underlying rationale for the emergence of bulky goods precincts and homemaker centres throughout Australia and the ongoing demand for further development of these precincts and centres.

  According to Jones Lang LaSalle (News Release 1 April, 2004), the bulky goods sector has been the fastest growing retail market in Australia since 1996. Significant continuing growth is likely for the bulky goods retail industry, driven by household formation and technological advancements that will generate new product development, and over time lower real costs of a range of products.

  The definition of 'Restricted Retail Premises', as set in the Victoria Planning Provisions (refer VPP as amended 13 September 2010, Clause 74) provides a category based definition of bulky goods and reasonably reflects the types of tenancy demands exhibited in bulky goods precincts and homemaker centres. 'Restricted Retail Premises' encompasses '*land used to sell or hire:*

(a) automotive parts and accessories;
(b) camping equipment;
(c) electric light fittings;
(d) equestrian supplies;
(e) floor coverings;
(f) furnishings;
(g) furniture;
(h) household appliances;
(i) party supplies;
(j) sporting goods
(k) swimming pools;
(l) videos, or
(m) office supplies.'

In addition to these activities the VPPs have also classified a range of business support activities as 'Trade Supplies'. These activities may locate in a Restricted Retail Zone or in an industrial zone. Trade supplies refers to land use activities that essentially serves the construction and other industries. It is defined as:

'land used to sell by both retail and wholesale, or to hire materials, goods, equipment, machinery or other goods for use in:
(a) automotive repairs and servicing;
(b) building;
(c) commerce;
(d) industry;
(e) landscape gardening;
(f) the medical profession;
(g) primary production; or
(h) local government, government departments or public institutions.'

In addition a minimum floorspace criterion is applied in the use provisions for the relevant commercial zone most generally associated with restricted retailing in Victoria (the Business 4 Zone). The Table which sets out permissable uses for the Zone (refer VPP Clause 34.04-1 as amended 2 August 2010) states that Restricted Retail Premises (other than equestrian supplies, lighting shop and party supplies):

'Must be in one occupation with a leasable floor area of at least the amount specified in the schedule to this zone. If no amount is specified, the leasable floor area must be at least 1000 square metres'

The minimum required floor area for a 'lighting shop' is 500 square metres and minimum areas are required to be separately specified in Schedules to the Zone for party supplies and equestrian supplies.

In relation to the definition of bulky goods to be applied at Bathurst it is recommended that :-

- the general definition as set out in the Standard Instrument - Principal Environmental Plan form part of the definition of bulky goods;
- a more detailed activities based definition as set out above be included in the explanation of bulky goods activities .

The implications of the definition recommended for Bathurst are that a number of stores such as discount pharmaceutical stores are not to be considered as bulky goods stores. There is sufficient flexibility in the Strategy to allow these types of stores to locate either in the CBD or at any of the neighbourhood activity centres subject to the floorspace limitations for individual stores that will apply to the neighbourhood centres (being 1,200 square metres GLA for small neighbourhood activity centres and 2,500 square metres for the proposed large neighbourhood activity centre at Westpoint). It is highly likely that the floor areas for these types of stores is of the order of 300 - 400 square metres per store.

Photo 3.1: Bulky Goods Precinct, Kelso


kers
edding
FANTASTIC
FURNITURE
entrance

4 Bathurst Retail Commercial System

Bathurst Retail Commercial System

4.1 Purpose of the Analysis

An important component of the Strategy is the assessment of the current structure, roles and function of the Bathurst retail-commercial system. The purpose of this section is to set out the findings and implications of the analysis for the development of the Strategy. The findings have been presented in terms of the following considerations:

- an overview of the activity centre hierarchy;
- Bathurst as a regional trading city and its regional catchment area (RCA);
- the effective supporting population of Bathurst;
- assessment of the overall provision of floorspace in the current system;
- structural change in the Bathurst retail commercial system (1998 - 2010);
- spatial distribution of floorspace (comparative analysis with other cities);
- land use and functional analysis of the CBD;
- identification of precincts;
- detailed analysis of centres and precincts;
- patronage characteristics of the CBD;
- online and other escape expenditure patterns;
- patterns of market share in the RCA;
- comparative gap analysis of national brand stores and services in Bathurst in relation to other regional cities.

4.2 Overview of the Activity Centre Hierarchy

The Bathurst retail commercial system is comprised of the Bathurst CBD, several neighbourhood and convenience centres, together with highway based bulky goods precincts located in suburban Bathurst. At June 2010 the city's retail commercial system occupied approximately 162,030 square metres GLA of retail and office floorspace, comprised of:

- 83,000 square metres GLA of retail goods and services (termed 'core retail' floorspace which excludes bulky goods floorspace, refer Glossary);
- 31,450 square metres GLA of bulky goods floorspace (refer Glossary);
- 47,580 square metres GLA of office floorspace (principally professional and commercial services and government administration, refer Glossary).

This floorspace is distributed across a network of centres comprised as follows:

- the **Bathurst CBD**. This is the principal shopping destination for Bathurst and its regional catchment area (RCA). The principal focal area is the retail core precinct (defined in Section 4.11.1). This is comprised of three regional level shopping centres anchored by discount department stores (refer Glossary) and / or three full-line supermarkets, together with the recently developed Aldi store which is a discount supermarket with a district level catchment. The retail core precinct is in turn supported by several shopping and mixed use precincts that provide a broad diversity of stores and services for Bathurst and its RCA and complement and reinforce the core precinct.

- several supermarket based neighbourhood activity centres that serve the growing suburbs of Bathurst. These are:
  - **Trinity Heights** shopping centre, located at Marsden Lane and Gilmour Street in Kelso;
  - **Westpoint** shopping centre, located at Suttor Street and Wark Parade in Windradyne;
  - **Kelso Centrepoint**, located at Boyd Street and Allambie Boulevard in Kelso.

These centres provide for daily food needs together with some convenience household goods, and medical and other services (at Trinity Heights and Westpoint).

- convenience local centres and stores do not accommodate a supermarket function and provide for a limited range of day-to-day food and other requirements. These convenience facilities include:
  - Stewart Street precinct (Mid Western Highway, vicinity of Lambert Street);
  - Mitre Street (at Suttor Street), West Bathurst;
  - Perthville;
  - Eglinton.
- bulky goods precincts that provide regional level goods and services. There are three distinct clusters of activity located along Sydney Road (Great Western Highway. east of the Macquarie River). These are:
  - the Bunnings development, located on the south side of Sydney Road, west of Lee Street (refer Figure 4.9);
  - a bulky goods strip located on the north side of Sydney Road, (vicinity of Pat O'Leary Drive), refer Figure 4.10;
  - the Harvey Norman precinct, located on the north side of Sydney Road (west of Ashworth Drive), refer Figure 4.11.

An important characteristic of the Bathurst retail commercial system is the dominance of the CBD for core retail stores and services and office activity. At 2010 approximately 91 per cent of occupied core retail floorspace was located in the Bathurst CBD, and a similar level of concentration was observed for office activity (approximately 91.4 per cent of occupied office floorspace was in the CBD). By contrast bulky goods floorspace is significantly decentralised with less than 40 per cent of occupied floorspace located in the CBD. Given the significance of the CBD for core retail floorspace and office activities it was important to provide an understanding of the clustering of activities in different precincts and how these nodes of activities add to the attraction and amenity of the CBD as a retailing and service district of regional significance. A detailed analysis of retailing and other activities is presented at a precinct and centre level in Section 4.11.

Photo 4.1: Coles Supermarket Bathurst Chase


coles
Bathurst Chase
Health & Beauty
Health & Beauty
Made with 40% choc chips
new

Table 4.1: Bathurst Floorspace Inventory by Precinct

Sources: , Bathurst Land Use and Floorspace Inventory, Renaissance Planning Pty Ltd, June 2010

Precinct / Activity Centre	Core Retail Floorspace								
	Supermarkets	Cafes and Restaurants	Other Food Stores[1]	Department and Discount Department Stores	Clothing, Footwear and Fabrics	Smaller Format Household Goods Stores*	Total Core Retail Goods Floorspace	Retail Services	Total Core Retail Floorspace
Bathurst CBD									
Core Precinct									
Stockland Bathurst	*2,940*	*180*	*380*	*12,470*	*1,370*	*1,090*	*18,430*	*190*	*18,620*
Bathurst City Centre	*3,780*	*210*	*1,190*	*90*	*2,220*	*2,000*	*9,490*	*0*	*9,480*
Bathurst Chase	*4,290*	*60*	*150*	*0*	*320*	*430*	*5,250*	*270*	*5,520*
Bathurst Centrepoint Arcade	*0*	*100*	*190*	*0*	*270*	*160*	*720*	*80*	*810*
Core Precinct Other	*0*	*1,960*	*1,010*	*370*	*2,270*	*2,130*	*7,740*	*5,290*	*13,030*
Core Precinct Total	11,010	2,510	2,920	12,930	6,450	5,810	41,630	5,830	47,460
George Street Precinct	0	2,610	1,590	0	820	3,790	8,810	4,180	12,990
William Street South Precinct	0	0	350	0	260	230	840	180	1,030
Keppel Street Precinct	0	470	550	0	520	1,450	2,990	1,780	4,770
South East Precinct	1,270	660	130	0	0	980	3,040	620	3,670
Durham Street Precinct	0	1,850	2,920	0	0	400	5,170	480	5,640
Bathurst CBD Total	**12,280**	**8,100**	**8,460**	**12,930**	**8,050**	**12,660**	**62,480**	**13,070**	**75,560**
Suburban and ex-urban Bathurst									
Local Centres									
Trinity Heights Shopping Centre	*700*	*0*	*360*	*0*	*0*	*240*	*1,300*	*60*	*1,360*
Westpoint Shopping Centre, Windradyne	*370*	*0*	*310*	*0*	*0*	*240*	*920*	*70*	*990*
Stewart Street Precinct	*0*	*40*	*280*	*0*	*0*	*210*	*530*	*120*	*650*
Kelso Centrepoint	*240*	*0*	*420*	*0*	*0*	*80*	*740*	*80*	*820*
Mitre Street Precinct	*0*	*100*	*210*	*0*	*0*	*0*	*310*	*0*	*310*
Perthville	*0*	*80*	*0*	*0*	*0*	*0*	*80*	*0*	*80*
Eglinton	*0*	*0*	*90*	*0*	*0*	*0*	*90*	*0*	*90*
Local Centres Total	**1,310**	**220**	**1,670**	**0**	**0**	**770**	**3,970**	**330**	**4,300**
Bulky Goods Precincts									
Bunnings Bulky Goods Precinct	*0*	*0*	*540*	*0*	*0*	*0*	*540*	*0*	*540*
Harvey Norman Bulky Goods Precinct	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*
Kelso Bulky Goods Precinct	*0*	*0*	*510*	*0*	*0*	*0*	*510*	*0*	*510*
Bulky Goods Precincts Total	**0**	**0**	**1,050**	**0**	**0**	**0**	**1,050**	**0**	**1,050**
Sydney Road Commercial Strip	0	0	340	0	0	90	430	90	510
Isolated Stores and Services	0	0	90	0	360	650	1,100	480	1,580
Suburban and ex-urban Bathurst Total	**1,310**	**220**	**3,150**	**0**	**360**	**1,510**	**6,550**	**900**	**7,440**
TOTAL	**13,590**	**8,320**	**11,610**	**12,930**	**8,410**	**14,170**	**69,030**	**13,970**	**83,000**

* Smaller format household goods stores:

- applies to stores generally less than 350 square metres GLA per tenancy
- includes homewares and housewares, computer goods, sporting and camping equipment, entertainment media, toys and games, newspapers and books, stationery, watches and jewellery, pharmaceutical goods, antiques and news goods and florists.

** Vacant shop/office. Note that in the Core precinct 1,290 square metres of vacant floorspace in the former TAFE site is included in this inventory. It does not form part of the analysis of vacant shop and office floorspace

1 Other foodstores includes fresh food, liquor and take away food stores

Gross Leasable Floor Area (m^2)

Bulky Goods	Total Shopfront Floorspace	Office Services			Other Services			Total Services Floorspace	Vacant	Total
		Professional and Commercial Services	Medical and Healthcare Services	Total Office Services	Education, Sports and Community Development Services	Entertainment, Recreation and Accomodation	Total Other Services		Shop / Office**	
0	*18,620*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*18,620*
1,210	*10,690*	*40*	*0*	*40*	*0*	*0*	*0*	*40*	*520*	*11,250*
0	*5,520*	*140*	*0*	*140*	*0*	*0*	*0*	*140*	*1,680*	*7,340*
0	*810*	*50*	*0*	*50*	*0*	*0*	*0*	*50*	*740*	*1,600*
70	*13,100*	*8,510*	*3,050*	*11,560*	*2,450*	*1,640*	*4,090*	*15,650*	*3,380*	*32,130*
1,280	48,740	8,740	3,050	11,790	2,450	1,640	4,090	15,880	6,320	70,940
1,200	14,190	9,630	910	10,540	7,710	6,770	14,480	25,020	2,120	41,330
0	1,030	12,640	140	12,780	5,170	14,480	19,650	32,430	620	34,080
2,940	7,710	4,500	860	5,360	160	3,290	3,450	8,810	1,600	18,120
6,690	10,360	1,170	1,370	2,540	1,640	1,500	3,140	5,680	360	16,400
350	5,990	470	0	470	860	4,370	5,230	5,700	720	12,410
12,460	**88,020**	**37,150**	**6,330**	**43,480**	**17,990**	**32,050**	**50,040**	**93,520**	**11,740**	**193,280**
0	*1,360*	*0*	*630*	*630*	*0*	*0*	*0*	*630*	*240*	*2,230*
0	*990*	*0*	*390*	*390*	*0*	*0*	*0*	*390*	*0*	*1,380*
170	*820*	*110*	*0*	*110*	*390*	*2,240*	*2,630*	*2,740*	*260*	*3,820*
0	*820*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*170*	*990*
0	*310*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*310*
0	*80*	*0*	*0*	*0*	*0*	*150*	*150*	*150*	*0*	*230*
0	*90*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*90*
170	**4,470**	**110**	**1,020**	**1,130**	**390**	**2,390**	**2,780**	**3,910**	**670**	**9,050**
8,030	*8,570*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*2,260*	*10,830*
7,910	*7,910*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*1,260*	*9,170*
2,770	*3,280*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*3,280*
18,710	**19,760**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**3,520**	**23,280**
0	510	0	0	0	0	710	710	710	1,000	2,220
110	1,690	2,710	260	2,970	3,340	5,340	8,680	11,650	110	13,450
18,990	**26,430**	**2,820**	**1,280**	**4,100**	**3,730**	**8,440**	**12,170**	**16,270**	**5,300**	**48,000**
31,450	**114,450**	**39,970**	**7,610**	**47,580**	**21,720**	**40,490**	**62,210**	**109,790**	**17,040**	**241,280**

4.3 Bathurst as a Regional Trading City and its Regional Catchment Area

One of the most significant characteristics of Bathurst is its role as a regional trading city. The city provides a range of services to an extensive catchment area west of the Great Divide (refer Figure 4.1). These include:-

- provision of retail goods and services;
- commercial services;
- professional services;
- education services;
- government, justice and administration;
- hospitality and tourism;
- entertainment and sporting facilities and events;
- health and medical services.

Bathurst derives most of its employment growth and investment through these services and a large part of the city's future prosperity is closely tied to its regional city role in a wide range of fields. Thus Bathurst's role as regional retailing city is part of a wider regional service role that is of critical significance to its future development.

The regional catchment area (RCA) is the geographic area surrounding a regional city or town from which most its retail trade is drawn. The Bathurst RCA was compiled from the results of the in-centre surveys undertaken for the Strategy in July 2010. The spatial extent of the RCA is shown in Figure 4.1 and the localities from which trade was drawn are detailed in Table 4.7. Bathurst's RCA accounts for approximately 96 per cent of the city's retail trade. It encompasses a population of approximately 146,000 people and extends:

- approximately 120 kilometres north to Mudgee and surrounds;
- some 80 kilometres south east to Lithgow and surrounds;
- 100 kilometres south west to Cowra;
- 80 kilometres north west to Orange and surrounds.

There are three component catchments of the RCA, these are the primary, secondary and tertiary catchments:

- **the primary catchment** is the urban and rural area within easy commuting distance or access of the Bathurst CBD. It is the area from which almost all daily shopping trips and the majority of weekly shopping trips are made. It contains the highest levels of market share attracted to Bathurst for all goods and services (including almost all food and grocery shopping). The study found that the market share of Bathurst in the primary catchment area was in the range 93 - 95 per cent for food and groceries, about 93 per cent for retail services and in the range 80-85 per cent for household goods and bulky goods (see Glossary for terminology). The primary catchment accounted for approximately 76 per cent of patronage to the Bathurst CBD and approximately 68 per cent of retail sales in the Bathurst urban area (refer Figure 4.1 and Table 5.4).

- **the secondary catchment** is the area that retains relatively convenient access to Bathurst in comparison with other competing cities. Most visits to Bathurst from the secondary catchment area are for weekly or less frequent shopping. It is exposed to competition from other cities and towns and the market share of Bathurst in the secondary catchment is typically approximately half of that generated by the city in its primary catchment.

  Research for the study found that market shares for food and groceries attained by Bathurst were in the range 45 - 50 per cent of relevant resident expenditures and approximately 45 per cent for retail services and in the range 35 - 40 per cent for purchases of household goods and bulky goods in Bathurst. The secondary catchment accounted for approximately 12 per cent of patronage to the Bathurst CBD and approximately 15 per cent of retail trade to the Bathurst urban area (refer Figure 4.1 and Table 5.4).

- **the tertiary catchment** encompasses a broad area extending beyond 70 - 100 kilometres from Bathurst. It is the area from which occasional trips are made to Bathurst for particular events, higher order services or discretionary expenditures. Bathurst draws a very low market share in this catchment area.

  The study found that market shares for food, groceries and retail services attained by Bathurst were in the range 1-2 per cent of relevant resident expenditures and in the range 2-4 per cent for purchases of household goods and bulky goods. The tertiary catchment accounted for approximately 6 per cent of patronage to the Bathurst CBD and approximately 15 per cent of retail trade to the Bathurst urban area (refer Figure 4.1 and Table 5.4).

Figure 4.1
Bathurst and its Regional Catchment Area
Source: Bathurst In-Centre Surveys, Renaissance Planning Pty Ltd, July 2010

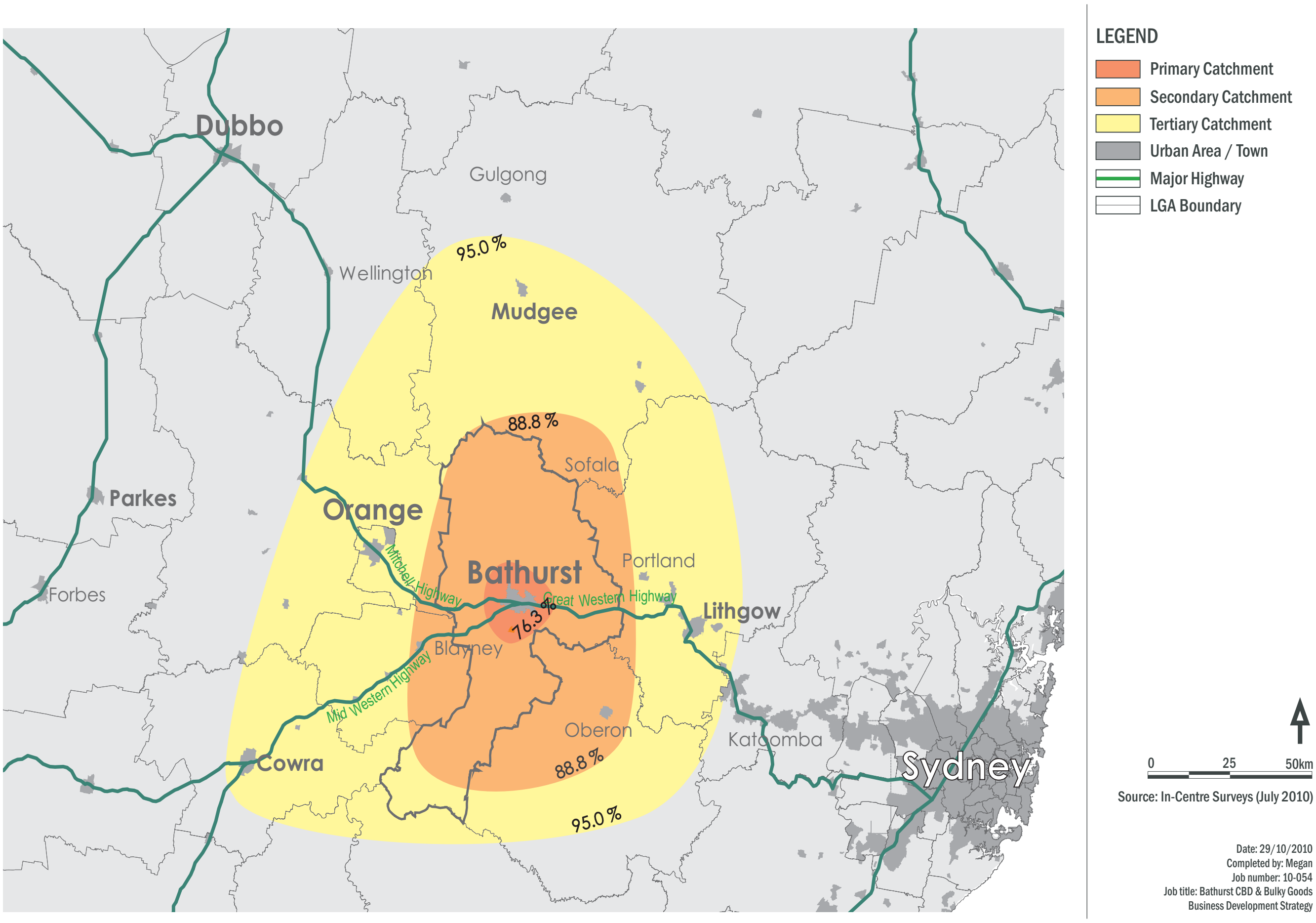


Photo 4.2:
View from West Bathurst looking eastward across the Macquarie River plan

4.4 Effective Supporting Population

It will be apparent that the Bathurst RCA also overlaps the trade catchments of other cities and towns and that only a proportion of the residents of the RCA will patronise Bathurst to varying degrees. The effective supporting population of Bathurst is defined as the equivalent permanent population that supports the retail trade and services of Bathurst, and was calculated as follows:

- a separate assessment was undertaken for each individual major retail good and service (that is, food and groceries, take away food, household goods, bulky goods and retail services);
- the current and future market shares obtained by Bathurst in each of the primary, secondary and tertiary catchments for each of the above major retail goods and services were assessed (refer Table 5.3);
- these were then multiplied by the resident populations in each of the component catchment areas (that is within the primary, secondary and tertiary catchment areas). The sum of these modified populations for the primary, secondary and tertiary catchments constituted the estimated effective supporting population.

The effective supporting population of Bathurst was approximately **42,000 - 47,000 people** for all goods and services, being lowest for retail services and highest for household goods (2010 estimate, refer Table 4.2). The estimated resident population (ERP) for the Bathurst urban area (ABS preliminary estimate, 2009) is approximately **33,800 people**. The study found that although the Bathurst urban area currently has a population of approximately 34,000 people, its trading performance reflects that of a city with a permanent population in the range of 42,000 - 47,000 people.

Measures of the effective supporting population are important for use in comparisons with other cities and to check floorspace provision assessed from other methods (in the case of this study expenditure methods).

Table 4.2:

Bathurst: Effective Supporting Population 2010-2036

Source: Renaissance Planning Pty Ltd, 2010

Major Commodity Group	Source Measure	2010[1]				2021				2036			
		Primary	Secondary	Tertiary	Total RCA	Primary	Secondary	Tertiary	Total RCA	Primary	Secondary	Tertiary	Total RCA
Supermarket good, fresh food and liquor	Medium*	32,220	7,840	4,840	**44,900**	35,740	8,430	5,140	**49,310**	41,520	9,370	5,600	**56,490**
	High**					37,900			**51,470**	46,970			**61,940**
Take away food and dining out	Medium*	31,540	7,050	4,840	**43,430**	34,990	7,580	5,140	**47,710**	40,640	8,430	5,600	**54,670**
	High**					37,100			**49,820**	45,980			**60,010**
Household goods	Medium*	28,820	6,270	9,670	**44,760**	30,100	6,740	10,280	**47,120**	30,590	7,490	11,190	**49,270**
	High**					31,910			**48,930**	34,610			**53,290**
Bulky goods	Medium*	28,820	5,480	9,670	**43,970**	30,100	5,900	10,280	**46,280**	34,960	6,560	11,190	**52,710**
	High**					31,910			**48,090**	39,550			**57,300**
Retail services (part)	Medium*	31,540	7,050	2,900	**41,490**	34,990	7,580	3,080	**45,650**	40,640	8,430	3,360	**52,430**
	High**					37,100			**47,760**	45,980			**57,770**
Total	Medium*	30,630	6,890	6,870	44,380	33,160	7,410	7,300	47,870	37,350	8,230	7,950	53,530
	High**					35,160			49,870	42,250			58,430

[1] Mid range of medium and higher projection used for 2010

* Renaissance Planning projections

** .id Consulting projections

4.5 Assessment of the Overall Provision of Floorspace in the Current System

The rate of provision of retail and office floorspace is a measure of the adequacy of occupied floorspace in defined categories in relation to the effective supporting population of a regional city or town. The rate of provision was calculated by dividing the stock of occupied floorspace for particular trade or activity categories by the effective supporting population for each relevant category.

The inventory of retail and office floorspace undertaken in the Bathurst urban area in July 2010 found rates of provision of occupied floorspace as follows:-

- **Food retail** (includes all supermarkets, fresh food stores, liquor stores, takeaway food stores, cafes and restaurants): approximately **0.74** square metres per capita (per effective supporting resident in the RCA);
- **Non-Food Retail** (all apparel and household goods excluding bulky goods): approximately **1.12** square metres per capita;
- **Total Core Retail Goods and Services** (all retail goods and services excluding bulky goods): approximately **1.86** square metres per capita;
- **Bulky Goods** approximately **0.69** square metres per capita;
- **Total Shopfront Floorspace** (that is all occupied retail goods and services floorspace including bulky goods): approximately **2.55** square metres per capita;
- **Office Floorspace** (includes professional and commercial services, government administration, medical and health care services): approximately **1.02** square metres per capita.

Provision information from other recent retail studies provided a comparative basis to assess the Bathurst findings (refer Table 4.5). As Table 4.5 shows when the findings for Bathurst were compared with observations drawn from four other regional cities, the rates of provision observed in the Bathurst urban area for all retail categories and for office floorspace were found to be close to the weighted average of all five regional cities. The provision of retail and office floorspace is essentially market based and the conclusion that the observed rates of retail and office floorspace provision in Bathurst lie close to the centres of each range reflects a balanced outcome for the Bathurst retail commercial system at 2010.

Table 4.3: Comparative Rates of Provision of Retail, Bulky Goods and Office Floorspace

Source: Ratio Consultants 2006-07, Renaissance Planning Pty Ltd 2008-2010

City / Region	Year	Food Retail	Non-Food Retail	Core retail goods and services	Bulky goods	Shopfront floorspace	Office floorspace	Source
		Occupied Retail Commercial floorspace / capita*						
Bathurst	2010	0.74	1.12	1.86	0.69	2.55	1.02	Bathurst CBD and Bulky Goods Business Development Strategy
Ballarat	2008	0.75	1.26	2.01	0.69	2.70	1.05	Ballarat Commercial Development Strategy: Issues and Directions Paper (January 2009)
Bendigo	2009 / 10	0.72	0.98	1.70	0.44	2.14	0.87	City of Greater Bendigo Commercial Land Strategy Review
Warrnambool	2007	0.58	0.99	1.57	0.66	2.23	1.00	Warrnambool Retail Strategy (2007)
Dubbo	2006	0.77	1.27	2.03	0.70	2.73	1.10	Review of the Commercial Areas Development Strategy (1996 - 2015)
Regional Cities studied	2006-2010	0.58 - 0.77 (0.71)	0.98 - 1.27 (1.11)	1.57-2.03 (1.82)	0.44-0.70 (0.63)	2.14-2.73 (2.45)	0.87-1.10 (1.01)	As above

4.6 Structural Change in the Bathurst Retail Commercial System

The Bathurst retail system has changed considerably since the Bathurst Retail Strategy (1999). Table 4.6 shows major retail developments approved and undertaken in the period 1999 - 2010. It will be noted that:

- approximately **34,440 square metres** of net additional retail and bulky goods floorspace was added over the period 1999 - 2010;
- there was approximately **2,830 square metres** of vacant floorspace in the new developments and a further **2,090 square metres** of non retail occupied floorspace (refer Table 4.6);
- the net additional occupied retail and bulky goods floorspace in new developments over the period 1999 - 2010 was approximately **29,520 square metres** (refer Table 4.6);
- it will be noted that the Bathurst Retail Strategy (1999) predicted that the net additional retail floorspace requirement for core retailing and bulky goods was approximately **28,050 square metres GLA** over the period 1998 - 2011; that is the actual pattern of development was of the same order as the predicted requirement.

A detailed analysis of core retail and bulky goods floorspace change over the period 1999 - 2010 indicated that:

- there was a further consolidation of core retail floorspace in the Bathurst CBD with the development of the Bathurst City Centre (approximately 15 per cent increase in occupied core retail floorspace in the CBD);
- the most significant change was in suburban Bathurst where core retail floorspace increased by approximately 52 per cent over the period and bulky goods floorspace increased by more than 200 per cent during this period;
- as a consequence there was a marginal change in the concentration of core retail floorspace in the Bathurst CBD (approximately 93 per cent in 1999 to 91 per cent in 2010);
- the new developments resulted in a significant change in the concentration of bulky goods floorspace in the CBD (from approximately 64 per cent in 1999 to 40 per cent in 2010).

In summary, the scale of new retail development over the period 1999 - 2010 was of the same order as predicted floorspace requirements indicated in the 1999 Bathurst Retail Strategy. Research undertaken for the Strategy has also found that the decentralisation of core retailing and bulky goods development is part of the long term transformation of these activities in the Bathurst urban area.

New neighbourhood centre requirements will likely result in the ongoing decentralisation of core retailing in Bathurst and as the comparative analysis of other regional cities indicates this outcome should be anticipated as part of the ongoing growth of the Bathurst urban area (refer Sections 5.7.4 and 7 for a discussion of recommended floorspace development). In addition future bulky goods floorspace requirements will likely result in the further decentralisation of bulky goods development in the Bathurst urban area (refer Section 7 for a discussion of the recommendations).

Table 4.4:
Bathurst Urban Area: Retail and Bulky Goods Developments undertaken in the period 1999-2010
Source: Bathurst Regional Council, Analysis by Renaissance Planning Pty Ltd, December 2010

Development	Floorspace m^2 GLA					
	1999	2010	Net Additional Change (1999 - 2010)	Vacant (2010)	Non -Retail Occupied Floorspace	Net Additional Occupied Floorspace (Retail)
Aldi	-	1,270	**1,270**	-	-	**1,270**
Bathurst Chase (extension to Coles)	3,720	4,290	**570**	-*	-	**570**
Bathurst City Centre	2,670	11,250	**8,580**	520	-	**8,060**
Bunnings Bulky Goods Precinct**	-	10,840	**10,840**	810	1,460	**8,570**
Dan Murphys	-	2,580	**2,580**	-	-	**2,580**
Liquor Land / Eagle Boys / Civic Video (Durham Street next to Bathurst Chase)	-	560	**560**	-	-	**560**
Trinity Heights Shopping Centre	-	2,230	**2,230**	240	630	**1,360**
Mitre 10 (relocation to larger store)	1,820	3,310	**1,490**	-	-	**1,490**
Harvey Norman Bulky Goods Precinct (excl. Harvey Norman)	-	6,320	**6,320**	1,260	-	**5,060**
Total	8,210	42,650	**34,440**	2,830	2,090	**29,520**

*Coles store only

** Includes approximately 2.190 m^2 GLA of non bulky goods floorspace

Table 4.5:
Bathurst Urban Area: Net Additional Occupied Retail and Bulky Goods Floorspace 1999-2010
Source: Analysis by Renaissance Planning Pty Ltd, December 2010

Location	Net Additional Occupied Floorspace in New Developments m^2 GLA		
	Core Retail Floorspace	Bulky Goods Floorspace	New Occupied Floorspace
CBD	13,040	1,490	**14,530**
Suburban Bathurst	1,360	13,630	**14,990**
Total Bathurst Urban Area	14,400	15,120	**29,520**

*Coles store only

** Includes approximately 2.190 m^2 GLA of non bulky goods floorspace

4.7 Spatial Distribution of Floorspace: A Comparison with other Regional Cities

At a city-wide level a first assessment of the spatial distribution of retail and office floorspace in regional cities and towns is an analysis of the proportion of floorspace in the CBD compared to the suburbs and outlying areas. Surveys and research for the Strategy found that retail and office floorspace is highly concentrated in the Bathurst CBD. This reflects the history and pattern of development of Bathurst. Importantly it also reflects an outcome of Council policy including the adopted Bathurst Retail Strategy (1999) that strongly supported ongoing consolidation of the regional retail and services role of the Bathurst CBD.

Table 4.8 shows the comparative levels of concentration of core retail, bulky goods and office floorspace in the CBDs of five regional cities taken from recent retail strategies and studies. It can be seen that at 2010 that approximately 91 per cent of occupied core retail floorspace in the Bathurst urban area was located in the CBD. This is significantly higher than the levels observed in other regional cities. It will be noted that Bendigo and Ballarat are much larger regional cities with effective supporting populations more than double that of Bathurst. As a general rule the proportion of core retail floorspace in the CBD tends to decline with city size. The proportion of occupied core retail floorspace in the Bathurst CBD has declined since the 1999 Retail Strategy where it was observed to be approximately 93 per cent. Further declines are likely with the need for future neighbourhood centre development in suburban Bathurst. This is discussed in Section 5.

The distribution of bulky goods floorspace shows that about 40 per cent of occupied bulky goods floorspace in Bathurst was located in the CBD in 2010. This appears to be within a common range when compared with other regional cities including the much larger regional cities of Bendigo and Ballarat. There has been considerable decentralisation in the spatial distribution of bulky goods floorspace in Bathurst due to significant new developments that have occurred in suburban Bathurst over the period 1999 - 2010. It is also likely that future bulky goods floorspace development needs will result in the further decentralisation of bulky goods floorspace in the Bathurst urban area. This is discussed in Section 5.

Office floorspace is highly concentrated in the Bathurst CBD. Surveys undertaken for the Strategy in 2010 found that about 91 per cent of occupied office floorspace was located in the Bathurst CBD. As a general rule office floorspace tends to be highly concentrated in the CBDs of regional cities. The stated figure for Ballarat (31 per cent) is misleading; the Ballarat CBD is formally defined in the Planning Scheme and a large proportion of office floorspace lies immediately to the west of the defined boundary. It is likely that for the foreseeable future the Bathurst CBD will be the most appropriate location for almost all of the future office floorspace requirements of the city. This is further discussed in Section 5.

Table 4.6:

Comparative Spatial Distributions of Floorspace in Regional Cities (2006-2010)

Source: Ratio Consultants 2006-07, Renaissance Planning Pty Ltd 2009-2010

City	Year	Resident Population			Floorspace					
		City	Regional Catchment Area		Core Retail		Bulky Goods		Professional and Commercial Services	
			Total Resident Population	Effective Supporting Population	m^2 GLA	% CBD Floorspace	m^2 GLA	% CBD Floorspace	m^2 GLA	% CBD Floorspace
Bendigo (Victoria)	2009	101,140	228,420	121,980	199,900	58	56,100	43	108,170	86
Ballarat (Victoria)	2010	94,440	208,530	113,920	229,450	52	73,300	34	146,570	31
Warrnambool (Victoria)	2007	32,020	96,180	53,580	86,860	81	34,610	40	68,680	99
Dubbo (NSW)	2006	39,390	96,570	52,130	110,980	70	42,530	23	61,560	91
Bathurst (NSW)	2010	39,280	146,290	44,380	83,000	91	31,450	40	47,580	91

In summary, an analysis was undertaken of the concentration of retail and commercial floorspace in the Bathurst CBD in comparison with observations made in other regional cities. As the comparison encompasses much larger regional cities than Bathurst it provides a broad indication as to the possible future distributional pattern for Bathurst. In broad terms it can be seen that:

- the proportion of core retail floorspace in the CBDs of regional cities tends to decline with city size and as Bathurst continues to grow long term reductions in the proportion of core retail floorspace in the CBD should be seen as part of the long term evolution of the city's activity centre system. This Strategy recommends the further development and consolidation of neighbourhood centres and further reductions in the proportion of core retail floorspace in the CBD will be a natural outcome of this process;

- as the analysis has indicated regional cities tend to retain a high proportion of office floorspace in their CBDs. This pattern should be reasonably anticipated to continue for Bathurst and be reflected in long term planning for the CBD. To the extent that the high concentration of office floorspace in the CBD can be maintained through the facilitation and planning of new developments then significant long term benefits will accrue to the CBD;

- the Australian regional cities provided as examples consistently indicated relatively high levels of decentralisation of bulky goods floorspace. Bathurst fits well within this pattern. This Strategy provides recommendations for further significant bulky goods development in suburban Bathurst in a new planned regional precinct. This further suburbanisation of bulky goods floorspace is to be anticipated as a logical and desirable outcome of strategic planning and policy.

4.8 Land Use and Functional Analysis of the CBD

As indicated in Section 4.2 a major characteristic of the Bathurst retail commercial system is the high concentration of core retail floorspace and other activities in the CBD. In this context, it was important to provide an understanding of the structure and function of the CBD particularly in terms of retail activities. In order to achieve this objective the following analyses were undertaken:

- a land use mapping analysis was undertaken of the CBD;
- the functional patterns and structure of the CBD were then assessed;
- this provided an understanding of how the CBD works;
- it also provided the basis for the delineation of precincts for further detailed analysis.

Land use mapping analysis was undertaken for the Bathurst CBD based on the floorspace inventory prepared in June 2010. A detailed floorspace inventory was undertaken of all premises in the 3 (a) General Business Zone and the 3 (b) Service Business Zone In the Bathurst urban area together with adjoining areas in the Bathust CBD. The survey was undertaken and analysed over the period June-September 2010. Aerial photographs and on-site field checks were used together with published information and Council Permits were utilised where possible. The classification system used for the inventory was based on the Australian and New Zealand Standard Industrial Classification System (ANZSIC). A copy of the classification system used is set out in the Appendix (refer Appendix A).

The land use map prepared for the study is shown in Figure 4.2 A functional analysis was prepared of the CBD based on the land use mapping (refer Figure 4.3). It indicated a highly structured and inter-dependent network of functional areas comprised as follows:

- the major retail presence in Bathurst and the regional retail focus for the city is concentrated in three shopping centres fronting Howick and William Streets. These contain most of the major retail stores of the city (Big W, Target, Coles and Woolworths supermarkets) together with an extensive range of national chain stores and form the key elements of the retail core precinct interlinked by a network of arcades and streets;

- a diversified retailing, restaurant and mixed use strip extends along George Street from Durham Street South to Piper Street. The street has a significant complement of offices, restaurants, community activities and food stores together with a number of clothing, household good stores and retail services;

- the retail core is linked south along William Street to the principal government administration area comprising the Bathurst Regional Council offices, entertainment centre, Law Courts and State Government offices;

- a supporting retailing, bulky goods and professional services area runs along Bentinck and Russell Streets south of the retail core. This includes the Aldi store, Mitre 10, medical services, trade services and restaurants;

- Keppel Street forms an important shopping strip providing specialised retail stores and a diversity of commercial and retail services together with community and medical facilities. It provides for local needs and has a number of district and higher order attractions;

- significant education and entertainment facilities extend along William Street south of the government administration area;

- the principal road network is formed by Durham and Stewart Streets that comprise part of the regional highway network and serve as a bypass around the CBD. Durham Street is flanked by an extensive cluster of cafes and takeaway food premises and accommodation that forms an important activity area on the north side of the CBD.

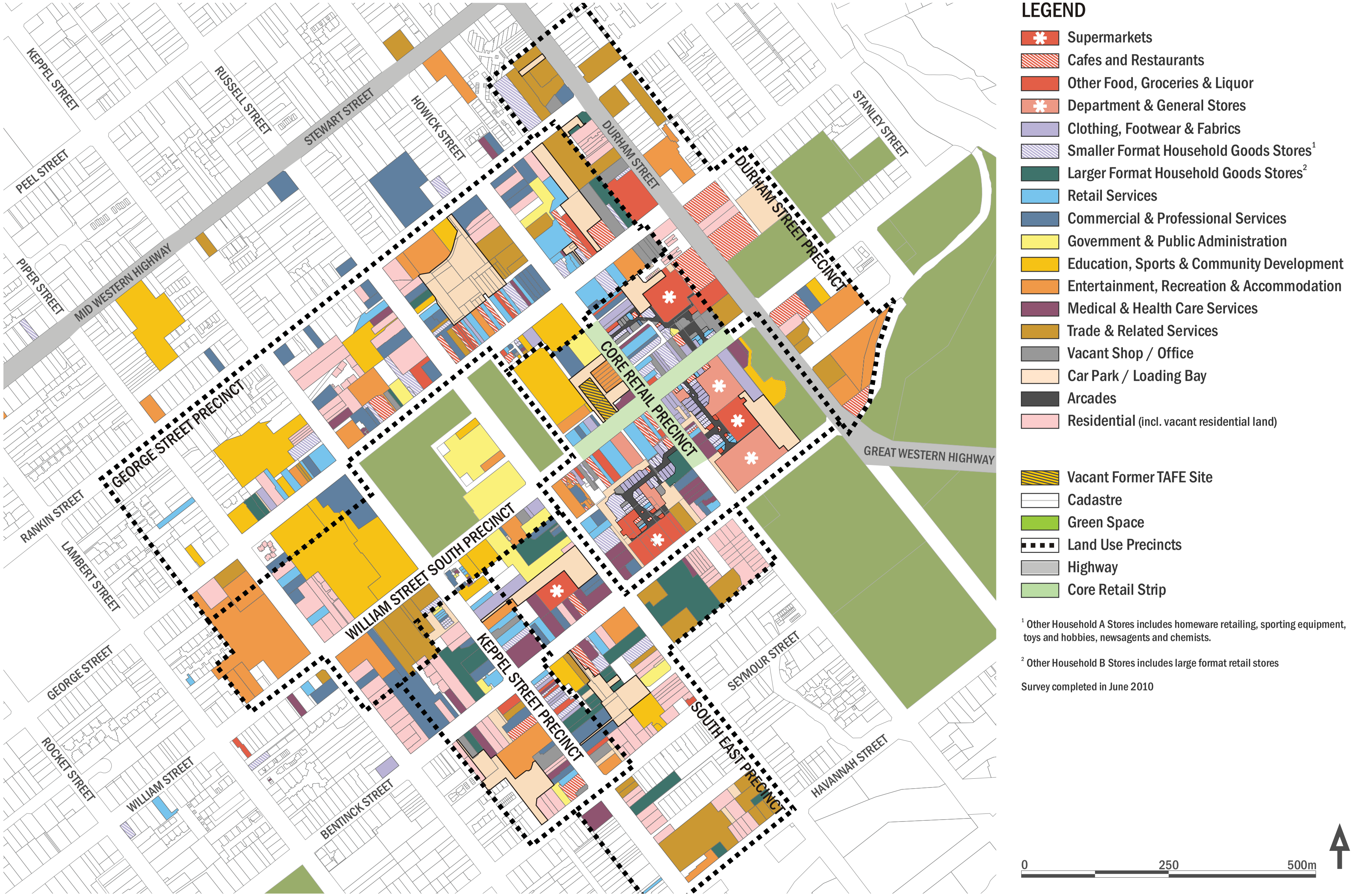
Photo 4.3: William Street

Photo 4.4: Cafe in William Street

Photo 4.5: Historic Marker in George Street


GEORGE STREET 1873
Photograph courtesy of The Mitchell Library, State Library of New South Wales.
The building on the right is the Bank of New South Wales, designed by Edmund Blacket, which opened in Bathurst in 1856 in rented premises (see below) and moved to this site in 1860.
The firm of E.Webb & Co, one of Bathurst's most successful, was established in 1852 by Edmund Webb, an immigrant from Cornwall. He started in a small rented shop in George Street and built the store with the white front and side in 1862, naming it the Western Warehouse. In 1870 he enlarged his business by erecting the large edifice next door. Webb manufactured some of his stock such as clothing and saddlery and sold his goods as far away as Western Australia and New Zealand.
The next building, with the small white sign, is the Court House Hotel which began in 1850 as the Elephant and Castle, was used as the Bank of New South Wales for a few years in the fifties, became the Court House Hotel in 1872 and from 1876 was known to Bathurstians as the Metropolitan Hotel. The site is now occupied by the Tavern Hotel (1997).
YOU ARE HERE
GENERAL WAREHOUSE
Bathurst City Council
Australia Foundation

Figure 4.2:
Bathurst CBD and Bulky Goods Business Development Strategy: Predominant Land Use Map
Source: Bathurst Land Use and Floorspace Survey, Renaissance Planning Pty Ltd, June 2010



BATHURST CBD & BULKY GOODS BUSINESS DEVELOPMENT STRATEGY
PREDOMINATE LAND USE MAP

Date: 20/08/2010
Completed by: Megan
Job number: 10-054
Job title: Bathurst CBD & Bulky Goods Business Development Strategy

RENAISSANCE planning

Supported by :

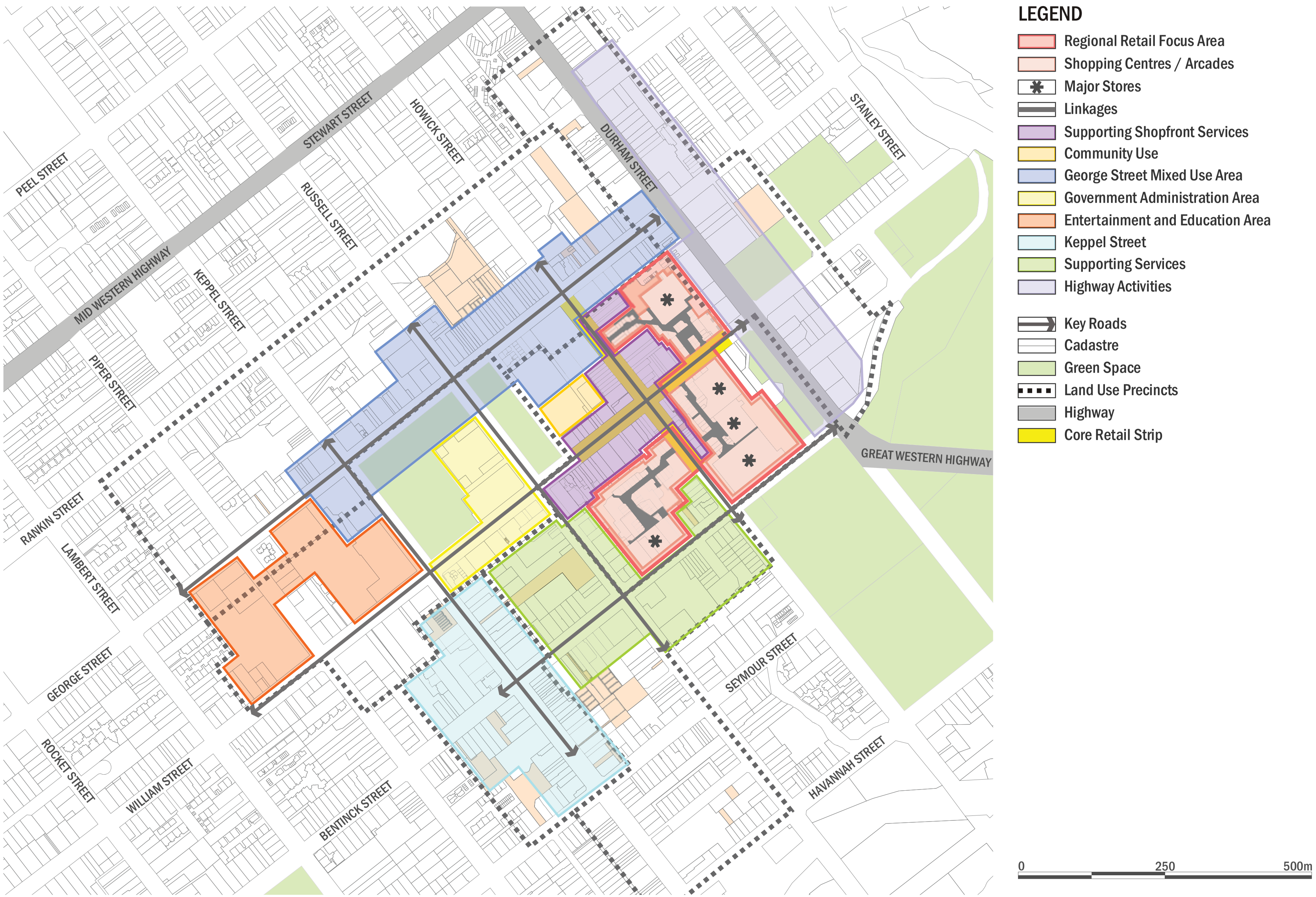
NSW GOVERNMENT Trade & Investment

BATHURST REGIONAL COUNCIL

Figure 4.3:

Bathurst CBD and Bulky Goods Business Development Strategy: Land Use Analysis of the CBD

Source: Bathurst Land Use and Floorspace Survey, Renaissance Planning Pty Ltd, June 2010



BATHURST CBD & BULKY GOODS BUSINESS DEVELOPMENT STRATEGY
FUNCTIONAL ANALYSIS OF THE CBD

Date: 29/03/2011
Completed by: Megan
Job number: 10-054
Job title: Bathurst CBD & Bulky Goods Business Development Strategy

4.9 Precincts and Activity Centres for Analysis

CBD Precincts

The functional analysis undertaken from the CBD land use study provided the basis for the definition of CBD precincts. A set of precincts was defined for detailed analysis based on the distinctive areas identified in the functional analysis. These were (refer Figure 4.3 for precinct boundaries):

- Core Retail Precinct;
- George Street Precinct;
- William Street South Precinct;
- Keppel Street Precinct;
- South East Precinct; and
- Durham Street Precinct.

Suburban Centres and Precincts

In order to provide a comprehensive and comparative analysis of all activity centres and precincts in the Bathurst urban area several groupings of suburban precincts were included in the analysis. These comprised:

- Bulky Goods Precincts, principally located in Kelso (refer Figures 4.8 - 4.10);
- Local Centres, including Westpoint, Trinity Heights, Kelso Centrepoint, Mitre Street, Stewart Street and Perthville (refer Figures 4.4 - 4.7);
- Isolated stores and services.

4.10 Overview of Floorspace Structure within the CBD

The identification of functional precincts in the Bathurst CBD provides a framework to understand the activity structure and roles of the various areas of the CBD and how they contribute to the regional role of Bathurst and its broad diversity of activities.

Figure 4.4 presents an overview of floorspace and tenancies by CBD precinct and for bulky goods precincts and local centres. The significant distinctive characteristics are reflected in the chart. It will be seen that:-

- the Core precinct is the most significant retailing area in Bathurst and also its most important commercial precinct. It contains over 70,000 square metres of floorspace including in excess of 48,000 square metres of occupied retail and bulky good floorspace and approximately 11,800 square metres of office floorspace;
- the Core precinct is the key shopping district of Bathurst. Almost all of the regional shopping functions of the city are located in the three centres that make up the precinct. In an important sense it is the “reference activity precinct” for the CBD: it is the core generator of activity, and in a functional sense draws the CBD together;
- the George Street precinct is the most important supporting services precinct in the CBD. It is a significant services district with a broad diversity of cafes, retail services and smaller format household goods stores. It is one of the most important office precincts in the CBD supported by extensive community, hospitality and leisure services;

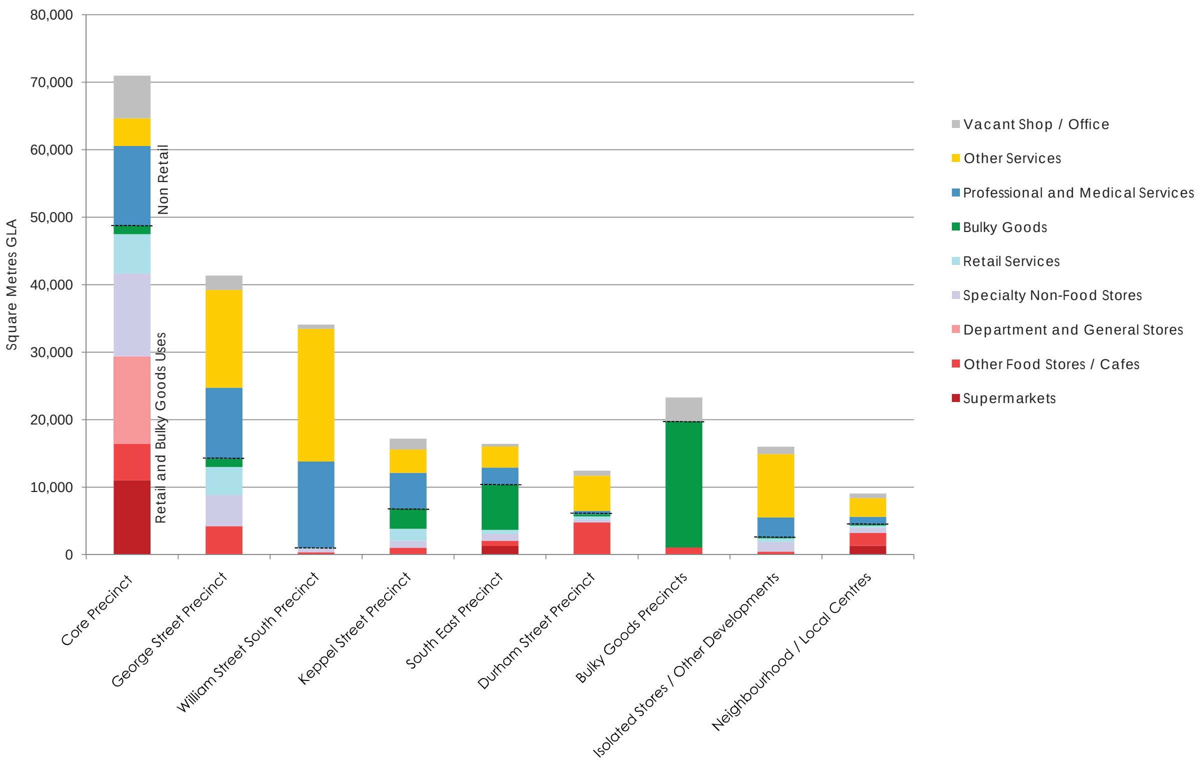
- the William Street south precinct extends from the core precinct south to Piper Street. It is the most important office precinct in the CBD underpinned by significant municipal and state administration services. The precinct also contains one of the city's most important entertainment venues;
- Keppel Street precinct is a mixed use services and shopping area. It has major community and medical services and provides a broad diversity of food stores and cafes together with specialist household goods and clothing stores;
- the South East precinct is located immediately to the south of the core precinct and extends along Russell and Bentinck Streets. It provides important complementary services to the Core precinct. Its key attractions include the new Aldi supermarket, the Mitre 10 store and extensive medical services;
- the Durham Street precinct is a highway based business area located immediately to the north of the Core precinct. A key contribution to the precinct is the concentration of family restaurants and cafes. These activities draw on the highway exposure and complement the tourist accommodation role of the precinct's motels.

A detailed comparative analysis of the Core precinct was undertaken in relation to the other precincts of the CBD and suburban Bathurst. The findings clearly demonstrated areas of absolute dominance by the Core precinct and areas of significant complementarity:

- the Core precinct is the regional shopping district for Bathurst. All of the discount department stores and full line supermarkets in Bathurst were located in the precinct;
- outside of these two store types there was significant complementarity between the Core precinct and the other precincts in the CBD for most store types and between the Core precinct and suburban Bathurst for bulky goods;
- for **(non-supermarket), food and liquor stores, cafes and restaurants:**
  - 27 per cent of floorspace and 39 per cent of tenancies were in the Core precinct;
  - 56 per cent of floorspace and 40 per cent of tenancies were in the other CBD precincts;
  - 17 per cent of floorspace and 21 per cent of tenancies were in suburban Bathurst;
- for **specialty non-food stores**:
  - 54 per cent of floorspace and 58 per cent of tenancies were in the Core precinct;
  - 38 per cent of floorspace and 34 per cent of tenancies were in the other CBD precincts;
  - 8 per cent of floorspace and 8 per cent of tenancies were in suburban Bathurst.
- for **retail services:**
  - 42 per cent of floorspace and 30 per cent of tenancies were in the Core precinct;
  - 52 per cent of floorspace and 58 per cent of tenancies were in the other CBD precincts;
  - 6 per cent of floorspace and 12 per cent of tenancies were in suburban Bathurst.
- for **all core retail floorspace** (that is retail goods and services excluding bulky goods):
  - 57 per cent of floorspace and 46 per cent of tenancies were in the Core precinct;
  - 34 per cent of floorspace and 40 per cent of tenancies were in the other CBD precincts;
  - 9 per cent of floorspace and 14 per cent of tenancies were in suburban Bathurst.
- for **bulky goods stores**:
  - only 4 per cent of floorspace and 4 per cent of tenancies were in the Core precinct;
  - 36 per cent of floorspace and 56 per cent of tenancies were in the other CBD precincts;
  - 60 per cent of floorspace and 40 per cent of tenancies were in suburban Bathurst.

- for **office services**:
  - 25 per cent of floorspace and 25 per cent of tenancies were in the Core precinct;
  - 66 per cent of floorspace and 68 per cent of tenancies were in the other CBD precincts;
  - 9 per cent of floorspace and 7 per cent of tenancies were in suburban Bathurst;
- for **community and other services:**
  - 7 per cent of floorspace and 16 per cent of tenancies were in the Core precinct;
  - 73 per cent of floorspace and 68 per cent of tenancies were in the other CBD precincts;
  - 20 per cent of floorspace and 17 per cent of tenancies were in suburban Bathurst.

Figure 4.4:
Bathurst Urban Area: Retail Bulky Goods and Office Floorspace Distribution by Precinct and Centre Type 2010
Source: Bathurst Land Use and Floorspace Survey, Renaissance Planning Pty Ltd, June 2010



The very high concentration of core retail (that is non bulky goods) floorspace in the Bathurst CBD is a key characteristic of the city's retail commercial system. More than 90 per cent of non bulky goods retail floorspace is located in the Bathurst CBD (Section 4.7).

There are several significant observations to be drawn in relation to retail activity in the CBD:

- it is highly clustered with concentrations of different types of retail and commercial floorspace having developed in different parts of the CBD (Section 4.8);
- the resultant pattern is characterised by a dominant highly focussed precinct: the Core precinct, with some 70,000 square metres of activity centre floorspace and more than 47,000 square metres of core retail floorspace and approximately 11,800 square metres of office floorspace;
- significantly, the Core precinct is Bathurst's pre-eminent shopping district. It contains the city's two discount department stores and three full line supermarkets which anchor three inter-related shopping centres. It also contains the highest concentration of national chain stores;
- there is a critical complementary supporting role that the other CBD precincts collectively play. Approximately half of Bathurst's non bulky goods retail stores are located in the Core precinct (57 per cent of floorspace and 46 per cent of tenancies). However, **34 - 40 per cent of these stores are located in the adjoining CBD precincts outside the core;**
- **t**he overall significance of the CBD precincts outside the Core is consistently reflected for specific commodity groups including fresh food and liquor stores, cafes and restaurants, specialty non food stores and retail services;
- in relation to bulky goods stores the Core precinct plays a non significant role (with 4 per cent of stores measured by floorspace or tenancies). The adjoining CBD precincts accommodate more than half of bulky goods tenancies in the city (and 36 per cent of floorspace) with the bulk of floorspace being accommodated in new precincts in suburban Bathurst (60 per cent of floorspace and 40 per cent of tenancies);
- in relation to office services and community and other services the CBD precincts outside the Core play a dominant role. Some two-thirds of offices are located outside the Core in the CBD (compared to 25 per cent inside the Core), together with some 70 per cent of community and other services.

In summary the analysis indicates that the Core precinct plays a regional retail role and is Bathurst's premium retail district. However, this is extensively supported by a broad diversity of retail stores and services in the wider CBD outside the Core, and 34 - 40 per cent of non bulky goods retailing is located in these CBD precincts. These precincts play a dominant role in relation to office and community services and continue to play a highly significant role in relation to bulky goods services.

4.11 Detailed Review of Activity Centres and Precincts

This section provides a detailed review of the individual precincts and activity centres that make up the Bathurst retail commercial system.

4.11.1 CBD Precincts

Core Precinct	
Type	City centre shopping mall and street-based precinct
Location	Generally comprises the four city blocks within approximately 200 metres of the intersection of William and Howick Streets.
Activities Structure	Almost all of the active retail core is confined to three city blocks:- • the principal shopping centre, **Stockland Bathurst** is a mall based centre with pedestrian access to William and Howick Streets. The centre has some 18,000 square metres of floorspace and anchored by two discount department stores and a full line supermarket that are complemented by a wide range of national brand specialty stores; • **Bathurst City Centre** is a new development. It is laid out as an internal mall with pedestrian access to Howick and William Streets. It is anchored by a full line supermarket and contains a fresh food discount store and supporting clothing, footwear and smaller format household goods stores; • **Bathurst Chase** is an internal mall development with pedestrian access to William and Howick Streets. It is prinicipally comprised of a full line supermarket with several supporting tenancies.
Role	Stockland Bathurst and Bathurst City Centre provide local, district and regional level services for Bathurst and its RCA. Bathurst Chase provides local and district level services. The roles currently played by these centres are examined in the findings on patronage characteristics (refer Section 4.12).
Catchment	The Core precinct serves a regional level catchment that extends well beyond the Bathurst urban area and encompasses an extensive rural area and a number of towns (refer Section 4.12.1).
Key Attractors	
Retail Stores	Major attractors include the Big W and Target discount department stores and the Woolworths and Coles supermarkets. Key supporting attractors include national brand mini majors and specialty tenancies. Two of the mini majors (Priceline and GoLo) are in excess of 340 square metres GLA, and there are four mini majors with floor areas in excess of 700 square metres GLA (Harris Farm, Rivers, Best and Less and Terry White Chemist). There is an extensive array of national brand clothing and household goods stores at Stockland Bathurst and Bathurst City Centre.

Cafes / Restaurants	Both Stockland Bathurst and Bathurst City Centre provide restaurant and food court facilities. There are several street based restaurants and cafes in the precinct.
Services	There is an extensive range of services available for shoppers and other visitors including banking, credit and ATM services, Medical insurance and basic household service requirements (including key cutting, shoe repairs, dry cleaning, hairdressing and beauticians).
Community Amenities	Each of the three centres maintains restroom and baby change facilities.
Centre Assessment	
Parking Access	The three main shopping malls that make up the bulk of the precinct have structure parking facilities that directly access each of the malls. Parking at Stockland Bathurst is accessed via Bentinck and Howick Streets and parking at Bathurst City Centre is accessed via Bentinck Street. Parking at Bathurst Chase is accessed via Howick Street and Durham Street.
Pedestrian Access	Each of the three shopping malls that underpin the precinct are interconnected by a network of arcades and street links. The Bathurst in-centre survey (2010) showed high levels of interaction between Stockland Bathurst and Bathurst City Centre and notable pedestrian flows to Bathurst Chase and other parts of the CBD.
Major Strengths	The major strengths are: • the high concentration of regional level retail stores; the Big W and Target discount department stores, the three major supermarkets and the significant range of specialty clothing, footwear and accessory stores (as clearly evidenced in Figure 4.2); • the high interaction between Stockland Bathurst and Bathurst City Centre. The two centres effectively operate as a super centre with shoppers parking at either centre and visiting both (refer Section 4); • on-site safe, undercover and accessible parking available at each of the three shopping centres; • easy pedestrian access to other precincts in the CBD; • excellent access by public transport (Howick Street).
Weaknesses	The notable weaknesses of the precinct include: • high levels of vacancies at Bathurst Chase and Bathurst Centrepoint Arcade; • lack of activity along Pedrottas Lane that provides an important pedestrian link between Bathurst City Centre and William Street; • under-utilisation of the western quadrant of the Core precinct with the departure of the TAFE campus from the CBD.

Opportunities for Improvement	Key opportunities for improvement include: • potential to broaden the complement of specialty stores and services at Bathurst Chase and Bathurst Centrepoint Arcade, building on the presence and attraction of the Coles supermarket, Core precinct location and undercover parking; • opportunity to activate Pedrottas Lane; • opportunity for a mixed-use and community attraction at the western quadrant (refer Section 7); • the long-term improvement of Durham Street will have beneficial effects for the Core precinct through the generation of additional pedestrian trips to the precinct (refer to the Durham Steet precinct in this section).
Possible Threats	Assessments for the Strategy have considered several theoretical potential or possible threats to the Core precinct including: • the establishment of a discount department store based shopping centre in suburban Bathurst. The Bathurst Retail Strategy (1999) was unambiguous in its opposition to a regional level shopping centre in suburban Bathurst for the foreseeable future given the limited population of the city and its RCA. The current Strategy fully endorses this stance and firmly recommends against any regional centre development or planning in the life of the Strategy (refer Section 7); • long term effects of regional retail development at Penrith. The city is approximately 2.5 hours driving time from Bathurst or an approximate 5 hour round trip. The most current available economic information for Penrith indicates that Bathurst does not form part of Penrith's trade catchment area (refer Hill PDA, February 2010, 'Riverlink Precinct: Economic Impact and Land Use Analysis', pages 44 - 46). The Strategy does not view Penrith as a major or notable threat to the Bathurst CBD and its core precinct; • Orange is an important growing regional city approximately 45 minutes drive west of Bathurst. It has a Myer department store and several fashion national chain stores that are not present in Bathurst (discussed in Section 4.15). The Strategy has identified minor levels of escape expenditure from Bathurst to Orange. However recent retail strategic analysis undertaken for Orange City Council does not regard Bathurst as part of the Orange trade area (refer Leyshon, 2005, 'Business Centre Strategy: Review Study: City of Orange'). It may be reasonably concluded that there are no notable threats to the established pre-eminent regional shopping role of the Bathurst CBD and particularly the role of the core precinct.
Significance for Bathurst	The Core precinct is Bathurst's outstanding regional shopping district. It underpins the activities, prosperity and amenity of the wider CBD. Long term planning and policy development have contributed to new significant investment and its consolidation as a high quality regional precinct. There are important opportunities for further improvement and these are identified in the Strategy (refer Section 7)

Photo 4.6: Stockland Bathurst Shopping Centre

Photo 4.7: Bathurst Chase Shopping Centre

Photo 4.8: Bathurst City Centre Shopping Centre

George Street Precinct	
Type	City centre shopping and services street.
Location	Area south of Durham Street to Piper Street (refer Figure 4.2).
Activities Structure	The George Street precinct extends over four city blocks. The retail activities structure of the street is characterised by a broad mix of activities that encompass cafes and restaurants, takeaway and fresh food stores, homewares and floor coverings stores, clothing and smaller format household goods stores together with an extensive range of retail services (including hairdressers, beauticians and clothing alteration and dry cleaning services). Almost two thirds of the occupied floorspace of the precinct is non-retail. There are more than 50 office establishments and a wide range of community and leisure services.
Role	George Street is a diversified business precinct providing a wide range of personal and commercial services together with household goods stores, leisure, entertainment and community services.
Catchment	The precinct's catchment encompasses the Bathurst urban area and secondary catchment area. The street's commercial services and the major leisure attractors have a regional catchment.
Key Attractors	
Retail Stores	The street has more than 80 shopfront establishments including some 24 retail stores. These include a diversity of stores encompassing homewares, antiques, toys and sporting goods, trade supplies, electronics store and artists supplies, together with a number of clothing stores. There are a number of fresh food and takeaway stores.
Cafes / Restaurants	George Street is one of the most important restaurant districts in the city with a range of eating establishments that includes smaller cafes and restaurants, hotel bistros and the RSL.
Services	George Street is Bathurst's most important services precinct:- • some 29 establishments provide a wide range of retail services, the largest single concentration of these services in the city; • in addition the street is an important office precinct with more than 10,000 square metres of occupied office floorspace and the largest aggregation of office establishments in the city; • there is also a broad range of community, leisure and entertainment services with more than 70 establishments occupying more than 14,000 square metres. Together with the William Street South precinct, George Street is a critical services precinct.
Community Amenities and Facilities	There is a broad network of leisure, education and community support organisations. These include several gyms, a community college and School of Jazz, church organisations, after care facilities for children and a women's and children's resource centre
Centre Assessment	
Parking Access	The precinct has extensive on-street and off-street parking provision, including the Rankin and George Street car parks.

Pedestrian Access	Most of the street's shop frontage is under verandah cover providing all weather pedestrian access. The street is readily accessible by foot with a number of parking spaces within close proximity. The core precinct and the adjacent William Street South precinct are within easy walking distance of George Street.
Major Strengths	The precinct's outstanding strengths lie in the range and diversity of its stores and services (refer Figure 4.2). These encompass: • education and community services; • cafes and restaurants; • retail services; • smaller format household goods stores; • professional and commercial services (office services); • entertainment and leisure services.
Weaknesses	The absence of an activity focus for the precinct is a possible weakness: there is no recognised major retail attractor or focal area for the Street.
Opportunities for Improvement	The proposed IGA development at Rankin Street north of Howick Street will provide an important new attractor for the precinct and complement the existing stores and services. The George Street car park is an important potential development site. It provides opportunities for future significant retailing, parking and mixed-use development. This is addressed in the Strategy recommendations (refer Section 7).
Possible Threats	Given the role that George Street plays as a diversified business and services precinct and given the scale of the activities in the street it is unlikely that these could be readily replaced elsewhere in Bathurst. There is a potential threat of a loss in momentum in new investment in the street.
Significance for Bathurst	George Street is the most important diversified services precinct in the Bathurst CBD. The proposed IGA development provides important new investment in the precinct. It is important to maintain momentum in new investment through the identification of significant opportunities. This forms part of the Strategy recommendations (refer Section 7).

Photo 4.9: View up George Street

William Street South Precinct	
Type	Street based services precinct.
Location	William Street south of the Core Precinct to Piper Street.
Activities Structure	William Street South is a services and business precinct with three principal clusters of activity: • the northern part of the precinct is dominated by Council and State government activities (including the Bathurst Court House, Council offices, entertainment centre and State government offices); • south of Piper Street, the principal activities include the Panthers Leagues Club and an extensive trade supplies area; • south of Keppel Street, the principal activity is the Catholic Primary School.
Role	William Street South is the key government administration and community services precinct of the CBD and a major leisure and entertainment precinct; with important supporting functions including education and trade services.
Catchment	The precinct serves a regional catchment.
Key Attractors	
Retail Stores	The precinct has a limited complement of retail stores (principally clothing stores).
Entertainment Functions	Hallmark attractions of the precinct are the Bathurst Memorial Entertainment Centre and the Panthers Leagues Club. Both facilities offer scheduled theatre events and performances and provide function facilities for private events.
Council and Government Services	Bathurst's key precinct for Council and State Government services. The precinct houses the Council chamber and administration building. A number of community services are provided at the precinct including accounts, planning and building advice, community services. The State Government offices are located in the precinct. Several government departments are represented including Education and Training, Department of Water, Ageing, Disability and Home Care and the Department of Local and Community Transport.
Hospitality Services	Tourist accommodation and dining services are provided by several facilities in the precinct
Community Amenities	The Council administration offices service an important venue for meetings of a number of community groups.
Precinct Assessment	
Parking Access	There is extensive on street parking available within the precinct together with a major off street car park at Bathurst City Centre within several minutes walking distance.
Pedestrian Access	Street based pedestrian access within easy walking distance of the core precinct.
Major Strengths	Established and recognised focus for government, community services and justice, entertainment and leisure.

Weaknesses	Absence of cafes and restaurants and convenience retailing to serve the government and community services facilities
Opportunities for Improvement	There is a need for increased accommodation to meet Councli's future service requirements. Opportunity for a new / shared Council and government administration centre. This opportunity could also be linked to provide for a new activity focus including cafes, restaurants and convenience retailling. This area could also serve the Bathurst Memorial Entertainment Centre.
Possible Threats	Possible relocation of Council administration out of the CBD.
Significance for Bathurst	The presence of the government and community precinct immediately adjacent to the Core precinct provides important benefits to the Bathurst community. It brings a wide range of services within easy access of the main shopping area and parking facilities, and strongly complements the Core precinct. There are opportunities to further improve and consolidate government and Council service functions and facilities.

Photo 4.10:
View of Bathurst Memorial Entertainment Centre and Council Offices, Russell Street

Keppel Street Precinct	
Type	Street based shopping and services precinct.
Location	Keppel Street south of William Street to Seymour Street. The focus of the precinct is at the Bentinck / Keppel Street intersection.
Activities Structure	Diversified retailing and services precinct. Has a balance of retailing and service functions (some 47 retail stores and shopfront services, 18 professional and commercial services and 7 medical and health care services).
Role	The street provides a mix of convenience food retailing and cafes together with higher order clothing, fabrics and homewares stores that provide for discretionary shopping and a range of medical and professional services that serve a regional catchment.
Catchment	Keppel Street serves local, district and regional catchment areas.
Key Attractors	
Retail Stores	Spotlight is the significant national chain presence in the precinct. The extensive range of food, clothing and homewares stores are comprised of local businesses.
Cafes / Restaurants	Several cafes and restaurants are clustered south of Bentinck Street.
Services	Retail services include embroidery, hairdressing and beauty care, picture framing and video hire (Blockbuster).
Community Amenities	The Council library and art gallery are major attractions for the precinct
Precinct Assessment	
Parking Access	There is extensive off-street parking to service the library, additional off-street parking is provided for the Spotlight store and for the medical services centre at Bentinck Street. This is supplemented by several blocks of on-street parking (Keppel and Bentinck Streets).
Pedestrian Access	The precinct is readily accessible by foot being within approximately 2 minutes walk of the intersection of Bentinck and Keppel Streets.
Major Strengths	The major strengths of the precinct are its diversity and character. It plays a niche role in Bathurst.
Weaknesses	The absence of a small supermarket or convenience store function.
Opportunities for Improvement	Potential for improved shopping and pedestrian access to the existing library car park, which is under utilised at present. This could be linked to the potential for a small supermarket or convenience store.
Possible Threats	Possible relocation of the library.
Significance for Bathurst	Keppel Street has an important niche role in Bathurst. It has developed a number of specialty stores and services that provide recognised alternatives to the national franchise stores in the Core precinct.

Photo 4.11:
Cafe in Keppel Street


bills
2000
SINGLE SERVE

South East Precinct	
Type	Street based commercial and mixed use precinct with freestanding retail and bulky goods attractors.
Location	Russell and Bentinck Streets, south of the Core precinct (refer Figure 4.2).
Activities Structure	An evolving service precinct with a mix of freestanding retail and bulky goods attractors, rural supplies, trade services and a range of medical, hospitality and other services intermixed with existing and former residential properties.
Role	Important supporting services role for the Bathurst CBD.
Catchment	District catchment.
Key Attractors	
Retail Stores	Aldi supermarket, Mitre 10 hardware store.
Cafes / Restaurants	Several cafes and restaurants are located in Bentinck Street south of Russell Street.
Services	Professional services centres provide medical services together with professional and commercial tenancies.
Precinct Assessment	
Parking Access	Off-street parking facilities are provided for the Aldi and Mitre 10 stores together with the hotel and professional services centre. This is supplemented by extensive on-street parking along Russell and Bentinck Streets. Off-street parking is also provided off Russel Street behind the Bathurst Information and Neighbourhood Centre (BINC).
Pedestrian Access	Street based pedestrian access. General absence of weather protection.
Major Strengths	Aldi and Mitre 10 stores, broad diversity of medical and professional services together with trade services and cafes and hospitality.
Weaknesses	The South East precinct is a zone in transition. It accommodates a broad mix of activities with no structural or market based unifying theme.
Opportunities for Improvement	Need for a framework to provide direction for the co-ordinated development and urban design of the precinct.
Possible Threats	No identifiable external threats.
Significance for Bathurst	The South East precinct has attracted new investment and development and provides services to complement the Core precinct. It offers potential for further investment and requires a co-ordinating development framework.

Photo 4.12:
Aldi Supermarket, Russell Street, South East Precinct


ALDI

Durham Street Precinct	
Type	Highway commercial strip
Location	Durham Street north west of Bentinck Street adjacent to the Core precinct.
Activities Structure	Durham Street forms part of the highway bypass system around the Bathurst CBD. It connects the Great Western Highway (links to Sydney) to the Mid Western Highway (links to Blayney and Cowra) and the Mitchell Highway (links to Orange and Dubbo). It is a classic highway strip with four national chain family restaurants, several motels and service stations. New liquor outlets have been developed on the southern side of Durham Street at the George Street intersection and adjacent to the Core precinct. The family restaurants have been developed as independent free standing units primarily accessible by car from the highway.
Role	Highway service role
Catchment	Regional and extra-regional catchment
Key Attractors	
Retail Stores	Limited retail store role confined to the new Dan Murphys and Liquor Land outlets.
Cafes / Restaurants	Five national chain fast food outlets are represented. Four provide cafe amenities as well as take away food services (McDonalds, Hungry Jacks, KFC and Red Rooster). All are accessible from Durham Street.
Community Amenities	Bowls Club
Centre Assessment	
Parking Access	Limited parking on Durham Street. Extensive on-site parking provided for the four national chain restaurants and for the liquor outlets. Off-street parking is provided off Elizabeth Street between the swimming pool and McDonalds.
Pedestrian Access	Limited safe pedestrian access.
Major Strengths	Provides highly visible standardised fast food, auto services and amenities with extended trading hours for residents and travellers.
Weaknesses	Does not provide an effective gateway to the Core and George Street precincts. There is no indication of the amenity and attractions of these precincts from the highway.
Opportunities for Improvement	Opportunities include the potential to:- • improve the gateway function of the highway precinct through urban design together with improvements to pedestrian safety and amenity; • create an integrated visitor information centre that could be integrated with the family restaurant function; • redevelop motel sites for new style accommodation and inner city living opportunities; • reorient the precinct to provide a better connection with the Core precinct with increased activity and investment opportunities.

Possible Threats	There are two possible threats to the current role of the precinct:- • ongoing growth in traffic flows may increase difficulties in accessing the fast food restaurants; • development of edge of town service centres that would have a trade effect on the precinct.
Significance for Bathurst	Durham Street is the main access to the Bathurst CBD and particularly to the Core and George Street precincts. It provides important highway services to residents and travellers. The key challenge is to provide a long term vision for the strip that achieves a higher quality development outcome and better address to the key CBD precincts.

Photo 4.13: Durham Street Precinct

4.11.2 Suburban Centres and Precincts

Westpoint Shopping Centre, Windradyne	
Type	Court style externally faced neighbourhood centre
Location	Corner of Wark Parade and Suttor Street, Windradyne. The existing centre is located south east of Wark Parade.
Activities Structure	The existing centre is an attractively presented two level development. The lower ground floor level is directly accessible from an off-street car park. It comprises an L-shaped court with externally fronted shops that address a common verandah (refer Figure 4.2). The centre is anchored by a small supermarket with a complement of local stores and services. The upper level is connected to an upper ground car park by a pedestrian bridge. It provides medical services. There were no vacancies at the centre at the time of survey (June, 2010).
Role	The centre provides a neighbourhood function providing a limited range of goods for daily and weekly requirements, together with a range of medical services.
Catchment	Several western suburbs of Bathurst including Windradyne, Llanarth and Abercrombie with sections of Robin Hill. Part of the trade catchment may extend to Eglinton at the present time.
Key Attractors	
Retail Stores	The key attractor is the IGA supermarket. Each of the stores fulfils an important supporting role. These comprise the newsagency, pharmacy, bakery and butcher together with the takeaway food store and hairdresser.
Cafes / Restaurants	The limited size of the centre precludes a dedicated cafe / restaurant. The bakery provides a cafe service.
Services	Range of medical services.
Community Amenities	Nearby amenities include a community hall / meeting rooms, West Bathurst Preschool, a church and aged care accommodation.
Parking Access	On site at-grade car parking is provided at two levels to service the development. The lower level provides access to the retailing functions. The upper primarily provides access to the medical functions.
Pedestrian Access	Pedestrian access is afforded to the centre from the car parks and from the local street network.
Major Strengths	The centre is compact, attractively presented and well patronised.
Weaknesses	The weaknesses are an outcome of the limited offer of the current centre (limited range of current stores and services and limited supermarket size)
Opportunities for Improvement	Detailed local area analysis for the Strategy has identified a significant current and future catchment population that can support a larger supermarket and broader range of local stores and services that can be developed without prejudice to the CBD. There is an extensive site that is immediately adjacent to the existing centre that could be developed for a future major extension of the existing centre.

Possible Threats	Given that there are no recommended alternative neighbourhood or higher order retail centres proposed by the Strategy to be developed within or adjacent to the Windradyne area there are no realistic identifiable threats to the long term viability of this centre.
Significance for Bathurst	The Westpoint Shopping Centre has significant development potential as a strong neighbourhood centre. It also has the capacity to provide an important social focus for the growing western suburbs of Bathurst. The Strategy provides recommendations to extend the centre based on a new provision to allow supermarkets up to a mid-size range (up to 2,500 square metres GLA) to locate in suburban Bathurst at designated centres and subject to planning and design requirements (refer Section 7). This extension will allow for a wider range of local retail stores and services together with commercial and professional services.

Figure 4.5: Context Map: Westpoint Shopping Centre, Windradyne

Photo set 4.14: External Photos, Westpoint Shopping Centre, Windradyne

Trinity Heights Shopping Centre, Kelso	
Type	Court style externally faced neighbourhood centre
Location	South east corner of Marsden Lane and Gilmour Street.
Activities Structure	The existing centre is a single level L-shaped structure. A northern extension comprises a free standing single level medical centre. The centre is anchored by a small supermarket with a complement of local stores and services.
Role	The centre provides a neighbourhood function with a limited range of goods for daily and weekly requirements together with a range of medical services. The centre precinct also provides an important community role with a child care centre located immediately to the south of the existing shopping centre.
Catchment	The catchment area is largely confined to the Kelso area, generally within 2 - 3 kilometres of the activity centre.
Key Attractors	
Retail Stores	The centre is anchored by a Foodworks (now IGA) supermarket. The stores and services provide an important complementary local role. These comprise a newsagency, pharmacy, hairdresser, bakery, butcher and take away food store.
Cafes / Restaurants	There are no separately designated cafes / restaurants.
Services	A range of medical services are provided in the centre precinct.
Community Amenities	A child care facility adjoins the shopping centre.
Centre Assessment	
Parking Access	All parking is on-site with road access via Gilmour Street and Marsden Lane (refer Figure 4.6).
Pedestrian Access	The site is well planned in terms of pedestrian access with an L-shaped circuit providing safe pedestrian access to all of the services and facilities (with the exception of the Child Care facility which is separately accessed from Gilmour Street).
Major Strengths	The major strengths are the strategic location of the centre, at an important crossroads, central to the Kelso catchment. It is highly visible and well laid out with an open externally faced plan affording safe parking and pedestrian access.
Weaknesses	The key weakness is the restricted site that has been set aside for the neighbourhood centre allowing limited if any opportunities for centre growth and change. The subject site of the existing centre is less than one hectare. The Bathurst Retail Strategy (1999) recommended a 5 hectare site be set aside to provide for a range of social functions and for growth opportunities. The limited site size is a major constraint to future expansion.
Opportunities for Improvement	Detailed local area analysis for the Strategy has identified ongoing and long term growth potential in the Kelso area that can support a larger supermarket and broader range of local stores and services that could be developed without prejudice to the CBD.

Possible Threats	Given that there are no recommended alternative neighbourhood or higher order retail centres proposed by the Strategy to be developed in the Kelso area there are no realistic identifiable threats to the long term viability of this centre.
Significance for Bathurst	Kelso is an important developing suburb of the Bathurst urban area. The Trinity Heights Neighbourhood Centre has an assured long term future to service this growing area. This Strategy has identified that the local area can support a larger supermarket than is currently provided (up to approximately 1,200 square metres GLA) with a broader range of local stores and services together with selected commercial and professional services. It recommends that planning provision be made to allow for additional development at the local centre site. This provisional requirement should not be transferable to another site (refer Section 7).

Figure 4.6: Context Map: Trinity Heights Shopping Centre, Kelso

Photo set 4.15: Internal and External Views of Trinity Heights Shopping Centre Kelso

4.11.2 Suburban Centres and Precincts (Cont.)

Kelso Centrepoint, Kelso	
Type	Free-standing internal mall development with no active outer facing edges
Location	North side of Boyd Street and Allambie Boulevard
Activities Structure	The centre is an internally faced development focused on a windowless, skylit court. The centre does not present as a recognisable internal mall. The main attractor is a small supermarket. There is a hairdresser, newsagent, bakery, butcher and takeaway food store.
Role	Kelso Centrepoint provides limited goods and services for day to day requirements.
Catchment	The service catchment is confined to the immediate surrounds within approximately one kilometre from the centre.
Key Attractors	
• Retail Stores	The centre is anchored by a Friendly Grocer supermarket. The layout of the centre does not maximise the benefits of existing local stores (as indicated above).
• Cafes / Restaurants	There is no separately designated cafe or restaurant.
• Services	A hairdresser is provided at the centre.
• Community Amenities	A child care centre has been developed adjacent to the Kelso Centrepoint site (refer Figure 4).
Centre Assessment	
Parking Access	On-site parking is provided in an L-shaped format around the centre development. Parking is accessible from Boyd Street and Kebbara Boulevard.
Pedestrian Access	There is a well developed network of local pedestrian access that connects the Kelso Centrepoint site to the local neighbourhood.

Photo set 4.16:
Kelso Centrepoint Shopping Centre Kelso
View left: Internal view of centre
View below: External view of centre

Major Strengths	The key strength is the location of the centre and excellent pedestrian access to the local area.
Weaknesses	The design, layout and environment of the Kelso Centrepoint development is a critical weakness. The centre was identified as being relatively poor in the Bathurst Retail Strategy (1999). The amenity and upkeep of the centre appears to have deteriorated since that time. The centre has some 17 per cent vacancies which indicates underlying structural issues for the centre.
Opportunities for Improvement	There is an opportunity for an appropriately sized convenience centre to serve the immediate local area.
Possible Threats	The centre in its current structure and form is not regarded as viable by the Strategy. The long term threat is in terms of the ongoing decline of the centre and further deterioration in the amenity of the centre.
Significance for Bathurst	Boyd Street serves an important local area of Kelso. The site is well located to provide for convenience services. The Strategy recommends a negotiated process with local stakeholders and members of the local community to achieve a restructuring of the centre and the provision of a new convenience facility with an open style layout that could include additional housing opportunities (refer Section 7).

Figure 4.7: Context Map, Kelso Centrepoint

Stewart Street Precinct, Bathurst	
Type	Highway based commercial precinct
Location	Stewart Street (Mid Western Highway) generally between Rocket and Lambert Streets.
Activities Structure	A diversified highway strip extending over 300 metres. There are essentially two nodes of activities:- • a western node focused at Rocket Street comprising a Shell service station and local shops, a motel facility together with a gym and carpet retailer. On the north side of Stewart street there is an extensive vacant site (formerly a family restaurant); • an eastern node located at Lambert Street comprising the Dudley Hotel and bistro facilities together with a BP service station, Hertz car hire, auto parts retailer and an electrical goods and services retailer.
Role	Stewart Street's principal role is as a commercial highway strip providing commercial services for local resident and travellers. There is a limited convenience service role provided by the newsagency and post office and the convenience stores at the service stations. There is an important travel service role provided by the motel and the two service stations together with the hotel and bistro facility which also provides an important venue for local residents.
Catchment	Stewart Street provides services for both a local catchment and extra-regional catchment (highway bound travellers).
Key Attractors	
• Retail Stores	Limited convenience retail function provided by the newsagency and post office and the convenience stores at the service stations.
• Cafes / Restaurants	The Hotel Dudley and the bistro are important facilities in the area.
Centre Assessment	
Parking Access	On-site parking is available for the hotel and motel and for the immediate needs of the service stations. General parking requirements for the commercial strip are provided on-street.
Pedestrian Access	Both sides of Stewart Street have pedestrian pavements. Safe access is facilitated at the traffic signals at Lambert Street. There is extensive pedestrian access to the surrounding local area.
Major Strengths	The major strength of the precinct is its visibility and high local access to a dense residential population. Stewart Street is also the most logical location to serve a large component of the Robin Hill area that at present does not have a local or neighbourhood centre facility.
Weaknesses	The precinct has no single focus. It has local centre opportunities but does not present as a coherent local centre in any sense.

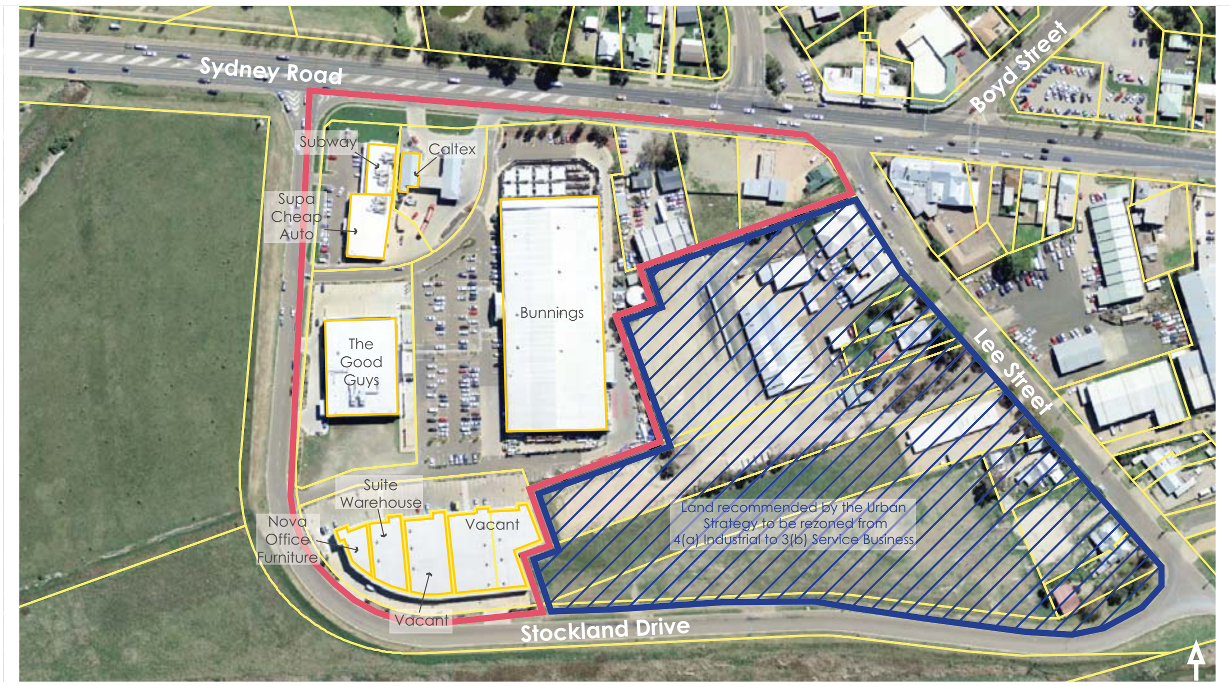
Opportunities for Improvement	Detailed local area analysis for the Strategy has identified a significant catchment population comprising sections of Central Bathurst, West Bathurst and Robin Hill that currently do not have a local or neighbourhood centre. The analysis indicates that Stewart Street has the demand potential to provide a neighbourhood centre function to service these areas subject to the availability and consolidation of a suitable site (refer Section 5). The Strategy has identified an existing significant vacant site (occupied by a former family restaurant). It has found that the site appears to have potential for a small supermarket and cafe (refer Section 7). This could provide an important focus for local and neighbourhood needs.
Possible Threats	A possible threat to the long term amenity and optimal function of the precinct will arise through the failure to agree on a vision for the long term development of the precinct.
Significance for Bathurst	Stewart Street is strategically well placed to meet the needs of an important area of central and suburban Bathurst. The Strategy has identified the opportunity for a new neighbourhood centre and made recommendations for this to be facilitated (refer Section 7).

Figure 4.8: Context Map, Stewart Street Precinct, West Bathurst

4.11.3 Bulky Goods Precincts

Bunnings Precinct, Kelso	
Type	Highway based freestanding building cluster grouped around an open parking court
Location	Sydney Road (Great Western Highway) west of Lee Street
Activities Structure	The precinct is comprised of four freestanding developments: • a 'pad' site comprising a Caltex service station, Subway fast food outlet and Supa Cheap Auto. The site occupies more than half of the limited frontage of the precinct (approximately 153 metres); • a Bunnings hardware store and plant centre. The plant nursery has high exposure to Sydney Road; • the Good Guys, a white goods retailer, is located opposite Bunnings facing a common car park court (refer Figure 4.8); • the southern part of the precinct faces the common parking court and is vacant other than for one tenancy housing an office furniture retailer. Council has approved a DA for Bing Lee in another tenancy although this store has not yet opened.
Role	Regional level bulky goods precinct
Catchment	Regional catchment
Key Attractors	
Retail Stores	Bunnings/The Good Guys
Cafes / Restaurants	Subway fast food outlet
Precinct Assessment	
Parking Access	Sydney Road is a busy highway, particularly in the vicinity of the Bunnings precinct. There is no signalised access from Sydney Road to the site. There is ample on-site parking available to service the precinct.
Pedestrian Access	There is no provision for pedestrian access within the precinct or to link with other areas.
Major Strengths	The Bunnings and Good Guys stores are the major strengths of the precinct.

Figure 4.9: Context Map, Bunnings Bulky Goods Precinct



Weaknesses	There are several key weakneses presented by the precinct: • the site is a narrow, deep site with limited visibility from the highway. This situation has been exacerbated with the dominance of the site by a 'pad' development leaving only a 23 metre corridor of visibility between the Caltex Service Station and the Bunnings to view into the site; • there is no controlled access from the highway; • there is no pedestrian pathway system on the site; • there is no provision for a centrally located precinct cafe and no provision for visible centrally located public amenities; • the disposition of activities severely limits any possible expansion of the precinct. It is noted that the frontage of land facing Sydney Road to Lee Street has been rezoned as 3(b) Service Business. It is also noted that the BRUS (2007) recommended that the remainder of the block that extends to Lee Street and Stockland Drive be rezoned from 4(a) Industrial to 3(b) Service Business. The real difficulty is with the layout of the existing bulky goods activities that creates an extensive inactive edge on the Bunnings development facing the potential development area. Most of the properties envisaged for rezoning are under active use. In summary in the absence of a detailed master plan showing how an integrated bulky goods development could be achieved at the precincts and how sites could be economically consolidated and redeveloped it is difficult to see how the precinct could be realistically consolidated. It is non the less acknowledged that the rezoning may assist this process
Opportunities for Improvement	Possible signalisation of the Sydney Road, Stockland Drive intersection would improve safe access to the precinct.
Possible Threats	The absence of expansion potential at the site, together with the long term development requirements for bulky goods in Bathurst, mean that significant development of a regional level precinct to cater for long term growth is inevitable. There may be consequential effects on the competitiveness of the smaller tenancies.
Significance for Bathurst	The Bunnings precinct provides a highway based location for Bunnings and The Good Guys, together with several other tenancies. However, the site is restricted and does not provide a solution to meet the long term bulky goods requirements of Bathurst. There is no realistic capacity to expand the development or to economically consolidate the subject site.

Kelso Highway Strip	
Type	Highway based bulky goods strip
Location	Sydney Road (Great Western Highway), Kelso at Pat O'Leary Drive
Activities Structure	A single linear strip with high visibility to Sydney Road with a single vehicular access point (opposite Pat O'Leary Drive). A small bulky goods and trades services cluster (less than 3,500 square metres GLA) with the predominant activities focussed on furniture, homewares and floor coverings.
Role	The primary role is display and sales of domestic furniture, homewares and floor coverings.
Catchment	Regional catchment
Key Attractors	
Retail Stores	Lounges Plus and 1825 Interiors
Cafes / Restaurants	None
Services	None
Precinct Assessment	
Parking Access	Extensive parking provision is available along the 100 metre frontage of the development.
Pedestrian Access	There is no provision for pedestrian access along the frontage of the development.
Major Strengths	There are several strengths that the development presents: • all of the stores and tenancies form part of a common development with a single frontage to Sydney Road; • the development overall and each of the tenancies are highly visible from Sydney Road; • common linear parking with a slip entry at the western end and a single centrally placed entry and exit point.
Weaknesses	There are several weaknesses of the development: • the current development has utilised the available site; • the limited scale of the development restricts its attraction; • the development is separately located from the other two bulky goods precincts. This is a common criticism for each of the precincts but its competitive effects would be more significant on the smallest precinct; • there is no pedestrian amenity on the site; • the limited depth of the site has resulted in minimal setbacks from the highway with no capacity to improve the amenity of the frontage.
Opportunities for Improvement	There may be the potential to provide additional bulky goods development to the east of the site, but the limited depth of the sites (generally less than 70 metres) and the need to provide for service loading, together with effective setbacks and store depths will constrain bulky goods opportunities (refer below). It is noted that Council recently exhibited the draft Bathurst Community Access and Cycling Plan (2011) which provides for improved pedestrian and cycle access along Sydney Road.
Possible Threats	The long term development of a regional bulky goods precinct may have consequential effects on the competitiveness of the bulky goods tenancies at the precinct.

Significance for Bathurst	The Kelso highway strip plays a limited role in the provision of bulky goods tenancies and floorspace in Bathurst. There would appear to be potential to provide for further strip development along the largely vacant strip between the Kelso highway strip and the Harvey Norman bulky goods precinct, a distance of approximately 400 metres. The key constraint is the limited depth of the land and the fact that the rear of the vacant strip has a creek and drainage reserve. The development of a future bulky goods precinct must take full account of the needs for major attractors. It appears highly unlikely that major attractors such as the new hardware store under development by Woolworths could be effectively located on this land. It is important that the issue of long term bulky goods development be viewed holistically taking account of the need to accommodate major attractors together with a full complement of supporting tenancies. The land which is largely vacant between the Kelso highway strip and the Harvey Norman precinct needs to be judged from this standpoint. These issues are further examined in the development of the Strategy and the framing of recommendations to address long term bulky goods floorspace and land requirements (refer Section 7).

Figure 4.10: Context Map, Kelso Bulky Goods Precinct

Photos set 4.17: Internal and External Photos, Kelso Bulky Goods Precinct

Harvey Norman Bulky Goods Precinct	
Type	Highway based, freestanding court style development focussed around a centrally located car park.
Location	Great Western Highway, Kelso west of Ashworth Drive
Activities Structure	The precinct has three main activities components: • a freestanding Harvey Norman store located at the corner of the Great Western Highway and Ashworth Drive. It is located proximate to but separate from the main development with its own dedicated parking and access (refer Figure 4.11); • the main development which is an L shaped structure, principally focussed on furniture and furnishings; • a freestanding ‘pad’ site located at the front of the development (outdoor leisure pursuits).
Role	Regional level bulky goods precinct
Catchment	Regional catchment
Key Attractors	
• Retail Stores	Harvey Norman store, Fantastic Furniture, BCF.
• Cafes / Restaurants	None
• Services	None
Precinct Assessment	
Parking Access	There is a principal entry and exit for the main development and a supporting entry with additional access from Ashworth Drive. There is provision for separate vehicle access at the rear of the main development and the Harvey Norman store; extensive provision for parking at the front of the Harvey Norman store and main development.
Pedestrian Access	There is provision for pedestrian access around the main development, but no provision for safe pedestrian access between the Harvey Norman store and the main development.
Major Strengths	The major strengths of the precincts are: • the principal retail attractors which are recognised national traders (Harvey Norman and Fantastic Furniture) and other important regional attractors (including BCF); • the layout of the precinct and presentation and exposure to Great Western Highway.

Photos set 4.18: External Photos of Harvey Norman Bulky Goods Precinct

Weaknesses	Key weaknesses of the precinct are: • there is little functional or visual relationship between the Harvey Norman store and the main development; • the Harvey Norman store has a narrow frontage and poor visual presence to the highway; • there are no amenities or services at the precinct; • there is no capacity to expand on the existing site.
Opportunities for Improvement	There are vacant sites to the west of the precinct and these may have potential for some additional development. However a creek traverses the eastern and northern sections of the adjoining site and this would need to be taken into account. The qualifications addressed in relation to the limitations of the land between the Kelso highway strip and the Harvey Norman bulky goods precinct apply here.
Possible Threats	The same types of issues raised in relation to the Bunnings precinct and the Kelso highway strip also apply here.
Significance for Bathurst	The Harvey Norman bulky goods precinct and the Bunnings precinct are the main bulky goods precincts at present in the Bathurst urban area. Notwithstanding their significance it remains the case that they do not provide an effective site and location to meet the long term floorspace and land requirements for bulky goods over the next 20 years and beyond. This issue is addressed in the Strategy with analysis and recommendations (refer Section 7).

Figure 4.11: Context Map: Harvey Norman Bulky Goods Precinct

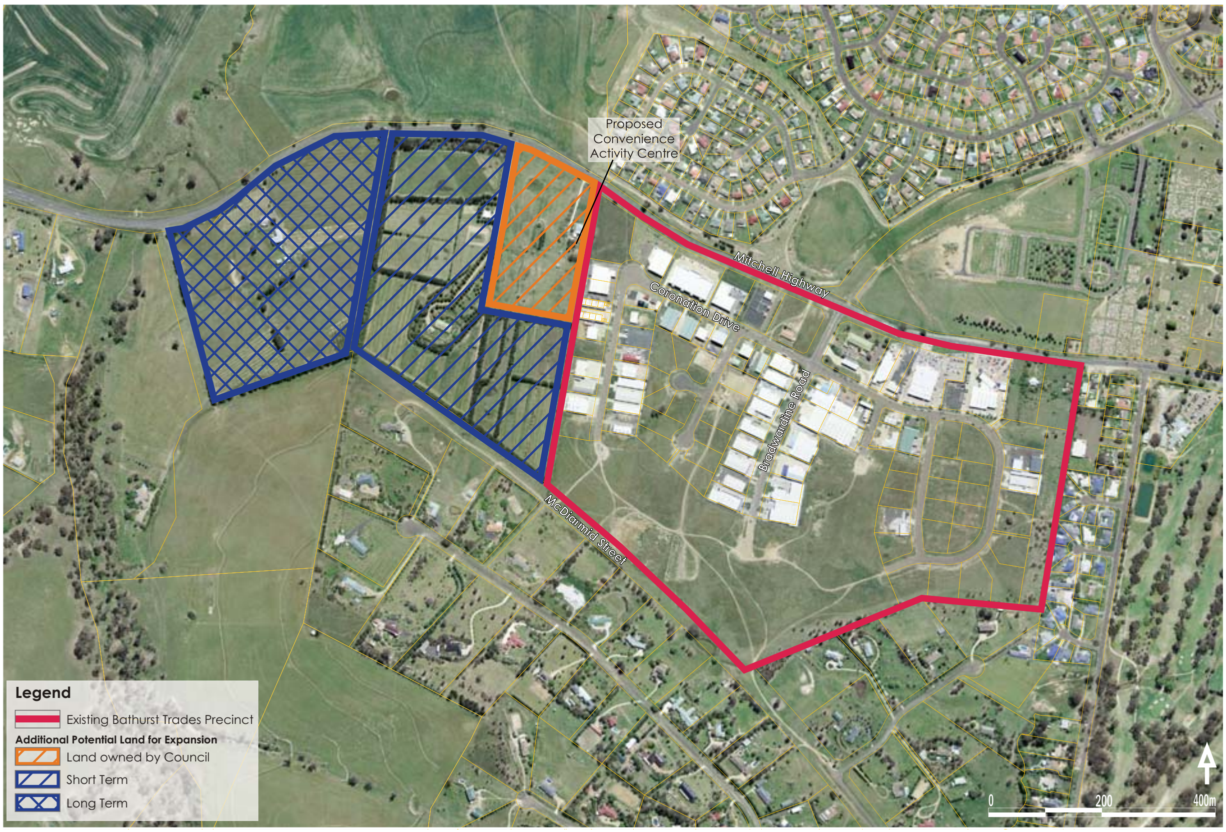
4.11.4 Trades Precinct

Bathurst Trades Precinct	
Type	Planned trades precinct
Location	Bradwardine Road and Mitchell Highway at Robin Hill, approximately five kilometres west of the Bathurst CBD
Role	Regional level trades precinct
Catchment	Regional Catchment
Key Attractors	
• Automotive and caravan sales	Almost all of the city's automotive retailers are located in the precinct (7 of the 9 retailers), namely:- • Holden, • Honda, • Hyundai, • Nissan, • Subaru, • Suzuki, • Toyota Only Ford and Mazda are located outside the precinct. Ford is located at Howick Street near Rankin Street in the Bathurst CBD. The Ford site has been recently purchased and the establishment will likely move out of the CBD. The Mazda dealership is located in William Street in central Bathurst between Keppel and Piper Streets. A caravan sales outlet is located in the precinct
• NSW Government Agency	A district RTA office is located in the precinct: This is an essential service for Bathurst and a key attractor for the precinct
• Building trades supplies/ manufacturers	• Plumbing supplies, • Building supplies, • Paving/tiles supplies, • Window manufacturers, • Prefabricated kitchens
• Engineering	Engineering fabricators
• Storage	Self storage facilities
• Garden design and outdoor furniture	• Architectural mouldings • Garden furniture
• Cafes/Restaurants	A cafe/take away food premises is located in the precinct
• Other Amenities	A gym is located in the precinct

Precinct Assessment	
Vehicular Access	The Bathurst Trades Precinct is a planned development with provision for centralised vehicular access at Bradwardine Road.
Parking Access	Provision has been made for on-site parking at individual tenancies. There is limited provision or capacity for on road parking on internal roads in the precinct.
Pedestrian Access	There is no provision for pedestrian access within the precinct
Major Strengths	• the co-location of the RTA district office and almost all of the city's auto dealerships is an outstanding strength of the precinct. This focus alone provides a new district and regional level attractor for Bathurst; • the growing number of building trades supplies and manufacturers is a key recognised strength of the precinct; • the precinct's internal road layout is exemplary: it provides: - centralised access at Bradwardine Road (minimising unsafe local street ingress and egress movements at the highway), - a central circular avenue, - the street pattern maximises visibility with a minimum number of individual roads. This is ideal for a trades estate or industrial estate and for truck access and movements, - it provides unimpeded extensive visual access to Mitchell Highway. This is ideal for the auto dealerships who have located along the highway strip as they have both the marketing advantage of a significant visual highway presence, and safe vehicular access via Bradwardine Road and Corporation Avenue which effectively provides a double frontage for the dealerships.
Weaknesses	• insufficient attention to pedestrian access and amenity; • limited amenity for visitors (a service centre with convenience store and cafe/restaurant and toilet facilities are required for a large modern precinct such as the Bathurst Trades Precinct); • little apparent attention to landscaping and urban design • roads and buildings are too tight - should have been better provision for landscaping.
Opportunities for Improvement	There are opportunities to improve service amenities and access at the Bathurst Trades Precinct: • Council has purchased the land located immediately to the west of the precinct. Further land (currently used for orchards) to the west of this site offers further potential to expand the precinct. Significantly a planned expansion of the precinct with the westward extension of Corporation Avenue could provide a new entry west of the current precinct. There would be the potential to co-locate a service centre incorporating a convenience store and one or more cafes, together with toilet facilities. This would be an important amenity for the precinct for both visitors and the significant on-site workforce; • there is the potential to signalise the intersection of Bradwardine Road and the Mitchell Highway. This would further improve safe access and egress to the precinct in the longer term if required.

Possible Threats	There are no foreseeable threats to the ongoing and long term success of the Bathurst Trades Precinct.
Significance for Bathurst	The Bathurst Trades Precinct is a remarkable success story for Council. It is a classic example of a successful trades precinct bringing together four critical ingredients: • underlying and long term city and regional demand for a diversity of automotive sales and building trades services; • selection of a well located site with extensive highway visibility and with sufficient capacity to cater for long term growth; • well planned road network and a site layout that maximises visibility for tenants and is well suited for truck access; • the location, design and planning have achieved market response and the precinct has developed as a regional attractor in its own right. The project is a clear demonstration of the economic, access and other management benefits that can be achieved in the planned clustering of activities at well located high capacity sites. The development has achieved a regional automotive sales and building trades precinct, an outcome which would certainly not have occurred if these uses were scattered in various industrial estates across the city. The Bathurst trades precinct provides an excellent example of the benefits of a regionally focussed co-ordinated approach. This is the rationale behind the recommendation for the proposed regional bulky goods precinct at the Sydney Road (South) precinct (DCP site). The Strategy has identified the need for approximately 34,000 square metres GLA of bulky goods floorspace requirements to meet the city's needs over the next 25 years. In relation to bulky goods floorspace the Strategy recommends that future demands be accommodated so far as possible at a single regional site located at Sydney Road east of the City (the proposed intermodal site). There is not sufficient demand to warrant policy support to effectively divide the provision of new sites on both sides of the City. In relation to trades services the Strategy recommends that the existing Bathurst Trades Precinct be further consolidated (as indicated in Figure 4.12) to provide for the long term requirements of the City (refer Section 7.5.10).

Figure 4.12: Context Map: Bathurst Trades Precinct



4.12 Analysis of Vacant Floorspace

An analysis of vacant floorspace by centre and precinct was undertaken for the Strategy. The survey (Bathurst Land Use and Floorspace Inventory) was undertaken in June 2010 and included certain updates for individual properties to March 2011 based on advice from Council. Key findings of the assessment encompassed the following:

- the overall level of vacant floorspace was measured at 6.5 per cent. This is at the upper level of what is considered to be an acceptable range for regional cities (in the range 4.5 - 6.5 per cent);
- vacant floorspace is not evenly distributed across retail and commercial precincts in the Bathurst urban area. As Table 4.7 indicates there are very wide variations in the spatial distribution of vacant floorspace from zero to in excess of 40 per cent;
- the retail and commercial centres and precincts of Bathurst, when ranked in terms of level of vacancy fell into four near equal groups;

    - a group of centres and precincts were observed with less than 2.5 per cent vacant floorspace. These are very low or negligible levels and reflect the strong trading patterns in these precincts, It is noted that Stockland Bathurst and the Westpoint Shopping Centre at Windradyne, together with the Kelso Bulky Goods Precinct (vicinity of Pat O'Leary Drive) had virtually no vacancies at the time of survey. The William Street South Precinct and the South East Precinct, both located immediately to the south of the Core Precinct had approximately 2 per cent vacant floorspace;

    - a set of centres and precincts were in the range 4.6 - 6.5 per cent vacant floorspace. The Bathurst City Centre is the newest edition to the Bathurst CBD having opened in late 2009. The level of vacant floorspace at the time of survey (4.6 per cent) is remarkable given the size of the centre and the numbers of tenancies leased.

      The George Street and Durham Street precincts, together with the "Core Precinct other" (that is the Howick Street and the William Street shopping areas outside the three shopping malls in the Core Precinct), each had between 5 and 6.5 per cent of vacant floorspace. These levels are considered to be within a normal range and entirely manageable. Given the land use and ownership complexity of these city precincts this level of vacant floorspace is reasonable.

    - a set of precincts and a neighbourhood shopping centre were observed to have vacant floorspace levels in the range 6.8 - 13.7 per cent. These levels are above an industry accepted normal range for vacant floorspace. The precincts encompassed the Keppel and Stewart Street precincts with vacant floorspace in the range 6.8 - 8.8 per cent and the Trinity Heights Shopping Centre and Harvey Norman bulky goods precinct with vacant floorspace in the range 10.8 - 13.7 per cent. These vacant floorspace levels, while relatively high are still deemed to be manageable over time in the view of the Strategy.

- a fourth group of centres and precincts have vacancy in the range 17.2 - 46.3 per cent. The group included Kelso Centrepoint, the Bunnings Bulky Goods Precinct, the Bathurst Chase shopping centre and Bathurst Centrepoint Arcade.

- in the view of the Strategy these levels of vacancies are very high and indicate that structural change may be required. In relation to the **Kelso Centrepoint** local centre the Strategy provides recommendations for a facilitated process of engagement with property owners other stakeholders and the local community, and to be co-ordinated by Council; and that subject to this process, redevelopment of the centre to include a new convenience store, public space and the potential for residential development (refer Sections 4.11.2 and 7.2.6).

- the Strategy makes recommendations for a facilitated master planning, re-tenanting and refurbishment process at Bathurst Chase and Bathurst Centrepoint arcade building on the established strength and attraction of the Coles supermarket (refer Sections 4.11.1 and 7).

- in relation to the Bunnings bulky goods precinct the relatively high vacancy level was only recently reached following the loss of the former Beach House Health and Fitness establishment. As indicated in the assessment of the precinct it is the view of the Strategy that a critical weakness of the site is the limited visibility from Sydney Road. The Strategy takes the view that the high vacancy levels are an outcome of structural deficiencies in the site and layout. The Strategy has sought to ensure that the proposed regional bulky goods precinct at the DCP site at Sydney Road (south) has extensive exposure to Sydney Road (refer Section 7).

In summary the surveys and analysis found that the current level of vacant floorspace in Bathurst is at the upper end of an acceptable range for regional cities. A detailed analysis of vacant floorspace levels by centre and precinct indicate very wide variations. The analysis enabled the identification of a set of precincts and a local centre with very high levels of vacant floorspace. Structural change is recommended for three of these.

Photos 4.19: Vacant tenancies in Bathurst Centrepoint Arcade

Table 4.7:

Bathurst Urban Area: Distribution of Vacant Floorspace by Centre / Precinct (2010)

Source: Bathurst Land Use and Floorspace Inventory, Renaissance Planning Pty Ltd, June 2010

Precinct / Activity Centre	% Total Precinct Floorspace	Vacancy Assessment
Bathurst Centrepoint Arcade	46.3	Very High Structural change may be required
Bathurst Chase	22.9	
Bunnings Bulky Goods Precinct	20.9	
Kelso Centrepoint	17.2	
Harvey Norman Bulky Goods Precinct	13.7	Relatively High Resolution over time
Trinity Heights Shopping Centre	10.8	
Keppel Street Precinct	8.8	
Stewart Street Precinct	6.8	
Core Precinct Other*	6.5	Average Within acceptable industry range for regional cities
Durham Street Precinct	5.8	
George Street Precinct	5.1	
Bathurst City Centre	4.6	
South East Precinct	2.2	Very Low - Negligible
William Street South Precinct	1.8	
Kelso Bulky Goods Precinct	0.0	
Stockland Bathurst	0.0	
Westpoint Shopping Centre, Windradyne	0.0	
Bathurst Urban Area (average)	**6.5**	

* Excludes 1,290m^2 vacant floorspace from the former TAFE site.

4.13 Patronage Characteristics of the CBD

An in-centre survey was undertaken by the consultants over the period 15 - 17th July 2010 (on a Thursday, Friday and Saturday morning) in the Bathurst CBD. A total of 498 surveys were conducted at the three principal shopping centres in the CBD (Stockland Bathurst, Bathurst City Centre and Bathurst Chase). A copy of the questionnaire is provided in the appendix (refer Appendix B). The questions surveyed provided information on:

- the residential catchment of the Bathurst CBD;
- primary and supporting reasons for visitation;
- length of stay on the day of visit;
- frequency of visitation;
- modes of travel to the CBD;
- stores, centres and locations visited by patrons on the day of survey;
- purchases made on the internet and at other cities by Bathurst residents;
- age group of respondents.

Survey teams were posted at each of the three main shopping centres in the CBD. The following surveys were undertaken at the respective centres:

- Stockland Bathurst: 198 surveys were undertaken;
- Bathurst City Centre: 160 surveys;
- Bathurst Chase: 140 surveys.

It will be noted that the responses to individual questions varies slightly from question to question.

Stockland Bathurst is the largest shopping centre in Bathurst (18,600 square metres GLA), followed by Bathurst City Centre (11,250 square metres GLA) and Bathurst Chase (7,090 square metres GLA). The surveys were structured to provide statistically representative samples at each centre that could either be analysed either separately or conjointly.

4.13.1 Details of the Bathurst Regional Catchment Area (RCA)

A general introduction and description of the Bathurst RCA was set out in Section 4.3. This section provides detailed analysis of the residential distribution of visitors to the CBD taken from the in centre survey.

The survey recorded the suburbs or localities where visitors normally resided (refer Appendix B). The detailed results of the survey are shown in Table 4.8. These results are for the total sample (494 respondents to this question) without corrections for differential weighting to take account of the varying attractions of each of the centres where the surveys were undertaken. The overall (unweighted) results indicated that:

- approximately 78 per cent of patrons were drawn from the primary catchment that encompassed the Bathurst urban area and surrounding villages;
- a further 11.6 per cent were drawn from the secondary catchment, a rural area surrounding Bathurst within approximately 60 km of the city. Approximately 90 per cent of patrons were drawn from the primary and secondary catchments (termed the main trade area);
- some 5.4 per cent of patrons were drawn from a broad outlying area termed the tertiary catchment. Overall some 96 per cent of patrons were drawn from the primary, secondary and tertiary catchments;
- a further 4.3 per cent of visitors were drawn from locations well beyond the RCA. It will be noted that these were tourists or day visitors to the city. This form of patronage forms a small but notable additional source of inbound trade. It does not form part of identified regular visitation patterns.

These results were checked against the survey results for the individual centres and against the weighted conjoint sample. This analysis is set out in Table 4.9. The purpose of the weightings was to statistically reflect the shopping and visitor population at the three centres surveyed **as a whole**. The method used was to weight the observations for each of the centre samples in proportion to the occupied floorspace at each of the centres as surveyed at June 2010.

As Table 4.9 indicates there are very minor variations (which were not statistically significant) between the unweighted total sample and the weighted conjoint sample. Strictly speaking the weighted conjoint sample is the most accurate statistical result from the survey. The effect of weighting is to marginally expand the spatial distribution of visitors to the Bathurst CBD (compare columns 5 and 6 in Table 4.9); this variation is minor being approximately one percentage point for the main trade area and approximately half of a percentage point for trade drawn beyond the RCA.

More significantly the detailed catchment analysis by centre shows that Bathurst Chase, as it is currently structured, has a significantly more localised catchment than for either Stockland Bathurst or Bathurst City Centre. The results for Bathurst Chase consistently show a reduced catchment in comparison to that observed for Stockland Bathurst and Bathurst City Centre with significantly higher proportion of trips drawn from the primary catchment area and substantially fewer trips drawn from the secondary and tertiary catchment areas and from beyond the RCA.

Table 4.8:
Bathurst Regional Catchment Area (2010)
Detailed Distribution of Survey
Source: Bathurst In-Centre Survey, Renaissance Planning, July, 2010

Suburb / Towns	Frequency	% of Respondents	Accumulated % of Respondents	Weighted Conjoint Sample
Primary Catchment				
Bathurst	187	37.9	37.9	
Kelso	60	12.1	50.0	
West Bathurst	42	8.5	58.5	
South Bathurst	31	6.3	64.8	
Eglinton	15	3.0	67.8	
Raglan	14	2.8	70.6	
Windradyne	14	2.8	73.5	
Abercrombie	9	1.8	75.3	
Perthville	5	1.0	76.3	
Robin Hill	3	0.6	76.9	
Laffing Waters	2	0.4	77.3	
Llanarth	2	0.4	77.7	
Windradyne Heights	2	0.4	78.1	76.3
Secondary Catchment				
Gormans Hill	1	0.2	78.3	
Blayney	12	2.4	80.8	
Oberon	19	3.8	84.6	
Rock Forest	6	1.2	85.8	
Rockley	3	0.6	86.4	
O'Connell	2	0.4	86.8	
Sofala	2	0.4	87.2	
Tarana	2	0.4	87.7	
Yetholme	2	0.4	88.1	
Duramana	1	0.2	88.3	
Limekilns	1	0.2	88.5	
Mount David	1	0.2	88.7	
Neville	1	0.2	88.9	
Peel	1	0.2	89.1	
The Lagoon	1	0.2	89.3	
Triangle Flat	1	0.2	89.5	
Trunkey Creek	1	0.2	89.7	
Turondale	1	0.2	89.9	88.8
Tertiary Catchment				
Walang	1	0.2	90.1	
Wattle Flat	1	0.2	90.3	
Lithgow	7	1.4	91.7	
Orange	6	1.2	92.9	
Portland	3	0.6	93.5	
Cowra	2	0.4	93.9	
Kandos	2	0.4	94.3	
Mudgee	2	0.4	94.7	
Burraga	1	0.2	94.9	
Glen Davis	1	0.2	95.1	
Hill End	1	0.2	95.3	
Wallerawang	1	0.2	95.5	95.0
Beyond Regional Catchment Area				
Linden	1	0.2	95.7	
Emu Plains	1	0.2	96.0	
Blue Mountains	1	0.2	96.2	
Rylstone	1	0.2	96.4	
Penrith	1	0.2	96.6	
Sydney	4	0.8	97.4	
Central Coast	2	0.4	97.8	
Aberdeen	1	0.2	98.0	
Bega	1	0.2	98.2	
Botany	1	0.2	98.4	
Condobolin	1	0.2	98.6	
Cootamundra	1	0.2	98.8	
Gosford	1	0.2	99.0	
Kingswood	1	0.2	99.2	
Londonderry	1	0.2	99.4	
Riverview	1	0.2	99.6	
Tamworth	1	0.2	99.8	
Wollongong	1	0.2	100.0	100.0
Total	494	100.0	na	na

Table 4.9:
Bathurst Regional Catchment Area (2010)
Analysis by CBD Shopping Centre
Source: Bathurst In-Centre Survey, Renaissance Planning, July, 2010

Catchment Area	Centre Surveyed				
	Stockland Bathurst (n=197)	Bathurst City Centre (n=159)	Bathurst Chase (n=138)	Unweighted Total Sample (n=494) refer Table XX	Weighted Conjoint Sample***
	(%)				
Primary	76.6	66.7	93.6	**78.1**	**76.3**
Secondary	11.2	19.5	3.6	**11.7**	**12.5**
Main Trade Area*	**87.8**	**86.2**	**97.2**	**89.8**	**88.8**
Tertiary	6.1	8.8	1.4	**5.8**	**6.2**
Regional Catchment Area**	**93.9**	**95.0**	**98.6**	**95.6**	**95.0**
Beyond the RCA	6.1	5.0	1.4	**4.4**	**5.0**
Total	100.0	100.0	100.0	100.0	100.0

* Includes Primary and Secondary Catchments
** Includes Primary, Secondary and Tertiary Catchments

*** The weighted conjoint sample most closely represents the total shopping population present at the three shopping centres at the time of survey (15-17 July, 2010). The weighting of the samples was in proportion to the occupied floorspace at each of the centres in June 2010. The weightings applied were: Stockland Bathurst: 53.35, Bathurst City Centre: 30.75 and Bathurst Chase: 15.90.

A comparison was made of the measure of the **current visitor catchment** with that observed in the 1998 survey undertaken by Ratio Consultants for the Bathurst Retail Strategy (1999). The comparison showed that in overall terms the form and extent of the Bathurst RCA has not materially changed in the 12 year period between the two surveys. In both cases approximately 95-96 per cent of visitors surveyed were drawn from the RCA and only approximately 4 per cent of visitors were drawn from beyond the RCA. In terms of the comparison between the 1998 surveys undertaken for the Bathurst Retail Strategy and the 2010 surveys, some minor differences were observed in terms of the distributions of trip origins within the RCA but there were no significant variations between the two surveys.

Table 4.10:
Bathurst Regional Catchment Area: Comparative Assessment 1999, 2010
Source: Ratio Consultants, 1999 'Bathurst Retail Strategy and Bathurst In-Centre Survey, Renaissance Planning, July, 2010

Catchment	Survey Year	
	1998	2010*
	% of respondents within catchment	
Primary	83.1	76.3
Secondary	93.3	88.8
Tertiary	96.4	95.0
Persons from beyond Tertiary catchment	3.6	5.0
Total all sources	**100.0**	**100.0**

4.13.2 Primary and Supporting Reasons for Visitation

The in-centre survey asked respondents the *main reason* for visiting the Bathurst CBD and also asked for *other activities* being undertaken. The survey indicated that approximately 71 per cent of respondents cited shopping as the main reason for visiting the CBD. Other purposes for visitation cited as the main reason for visiting the CBD at the day of the survey included:

- personal services (9.6 per cent of patrons);
- work (8.2 per cent of patrons);
- social / recreation (5.3 per cent);
- medical purposes (4.3 per cent);
- other purposes (education or a tourist visit, 1.4 per cent)

The survey also followed up with the question as to “what other activities are you undertaking in the CBD today?”. Multiple responses were permitted. It was found that:

- shopping was the most important supporting reason for visiting the CBD. For those who did not cite shopping as the primary reason (approximately 30 per cent of respondents), some two-thirds had indicated shopping as the leading ‘other activity’ that they were undertaking in the CBD on the day of the survey;
- about half the respondents in this group also indicated social, recreation and leisure activities as being other activities undertaken;
- approximately one-third of the respondents in this group indicated personal services being undertaken

A comparison with the 1998 survey reflects shopping as the dominant activity and the importance of personal business and services, recreation, leisure and medical services. It also reflected the importance of employment in the CBD as a key generator for trips to the Core precinct. There appears to be a shift to higher levels of leisure and social recreation purposes as part of trips to the CBD, as evidenced by the 2010 survey.

Table 4.11:
Main Reason for Visitation to the Bathurst CBD, 2010
Source: Bathurst In-Centre Survey, Renaissance Planning, July 2010

Main Reason for Visitation	Centre Surveyed			
	Stockland Bathurst (n=198)	Bathurst City Centre (n=160)	Bathurst Chase (n=139)	Weighted Conjoint Sample*
	(%)			
Shopping	72.6	73.6	61.1	**71.1**
Personal Services	7.6	11.3	12.9	**9.6**
Work	7.6	8.8	9.4	**8.2**
Social / Recreation	5.1	3.8	9.4	**5.3**
Medical	5.6	1.3	5.8	**4.3**
Visitor / Tourist	0.5	0.6	1.4	**0.7**
Education	1.0	0.6	0.0	**0.7**
Total	100.0	100.0	100.0	100.0

* The weighted conjoint sample most closely represents the total shopping population present at the three shopping centres at the time of survey (15-17 July, 2010). The weighting of the samples was in proportion to the occupied floorspace at each of the centres in June 2010. The weightings applied were: Stockland Bathurst: 53.35, Bathurst City Centre: 30.75 and Bathurst Chase: 15.90.

4.13.3 Length of Stay

The survey asked respondents about the amount of time they were spending in the CBD on the day of survey. The survey found that:

- approximately 23 per cent indicated that they were staying less than one hour;
- about 32 per cent were staying between one and two hours;
- a further 20 per cent were staying between two and three hours;
- the balance (about 25 per cent) were staying for more than three hours.

The March 1998 survey showed a similar order of result for the length of stay patterns of CBD visitors. There appears to be a marginal shift to longer stays with approximately 55 per cent of respondents staying for less that two hours in the 2010 survey (compared to 62 per cent in the 1998 survey) and 45 per cent staying for two hours or longer in the current survey (compared to 38 per cent in the 1998 survey). This appears to reflect a higher level of time spent in the CBD for leisure and related purposes.

Length of stay is also a broad indicator of the role of the centre. Short stays (less than one hour) usually indicate a neighbourhood or convenience role for an activity centre. The weekly shopping role is generally reflected in a one to two hour stay and discretionary and social shopping groups may reflect a shopping trip of more than two hours in duration. The fact that the survey has consistently indicated a broad balance of time spent among visitors reflects the diversity of roles that the CBD plays for shopping in Bathurst (that is it provides services for convenience and weekly shopping trips together with services for more extensive discretionary shopping, together with social and other purposes).

The relatively high proportion of stays for less than one hour at Bathurst Chase (some 33.6 per cent of patrons) is a direct reflection of the near total reliance on the Coles supermarket and the absence of other retail attractors at the centre.

Table 4.12:
Length of Stay by Shopping Centre in the Bathurst CBD, 2010
Source: Bathurst In-Centre Survey, Renaissance Planning, July 2010

Length of Stay	Centre Surveyed			
	Stockland Bathurst (n=198)	Bathurst City Centre (n=160)	Bathurst Chase (n=140)	Weighted Conjoint Sample*
	(%)			
Less than 1 hour	24.7	15.0	33.6	**23.2**
1 - 2 hours	35.9	26.3	29.3	**31.9**
2 - 3 hours	16.2	28.1	16.4	**19.9**
3 - 4 hours	9.1	13.8	7.9	**10.3**
More than 4 hours	14.1	16.9	12.9	**14.8**
Total	100.0	100.0	100.0	100.0

* The weighted conjoint sample most closely represents the total shopping population present at the three shopping centres at the time of survey (15-17 July, 2010). The weighting of the samples was in proportion to the occupied floorspace at each of the centres in June 2010. The weightings applied were: Stockland Bathurst: 53.35, Bathurst City Centre: 30.75 and Bathurst Chase: 15.90.

4.13.4 Frequency of Visitation

The survey asked respondents about their frequency of visitation to the Bathurst CBD. It found that:

- approximately 49 per cent of respondents visited the CBD on a daily basis or several times a week;
- about 37 per cent of respondents visited on a weekly basis;
- the balance of respondents (about 14 per cent) visited the CBD on a fortnightly, monthly or less frequent basis.

The 1998 survey indicated that about 68 per cent of respondents visited the CBD on a daily basis or several times a week and about 20 per cent visited weekly, with about 12 per cent visiting on a fortnightly or less frequent basis.

Frequency of visitation usually reflects the role of the centre. Daily or multi-weekly visits generally reflects a convenience role for the centre. Visitation on a regular weekly basis tends to reflect a district role for the centre and visiting on a less frequent basis, a regional role. The decline in the proportion of daily and multi-weekly trips may reflect a shift in the role of the retail core precinct in particular from a convenience role to a main weekly and discretionary role. The Strategy provides for the significant consolidation and further development of neighbourhood centres in suburban Bathurst and a further relative reduction in the proportion of daily and multi weekly trips could be anticipated over the next decade.

The analysis also indicates a notably higher frequency of daily and multiple trips per week observed at Bathurst Chase. This is a reflection of the current structure of the centre.

Table 4.13:
Frequency of Visitation by Shopping Centre in the Bathurst CBD, 2010
Source: Bathurst In-Centre Survey, Renaissance Planning, July 2010

Visitation Frequency	Centre Surveyed			
	Stockland Bathurst (n=198)	Bathurst City Centre (n=160)	Bathurst Chase (n=139)	Weighted Conjoint Sample*
	(%)			
Daily / Several times a week	48.5	41.2	64.8	**48.8**
Weekly	36.4	41.8	29.5	**36.9**
Fortnightly	4.5	6.9	3.6	**5.1**
Monthly	4.5	6.3	1.4	**4.6**
Less frequently	6.1	3.8	0.7	**4.5**
Total	100.0	100.0	100.0	100.0

* The weighted conjoint sample most closely represents the total shopping population present at the three shopping centres at the time of survey (15-17 July, 2010). The weighting of the samples was in proportion to the occupied floorspace at each of the centres in June 2010. The weightings applied were: Stockland Bathurst: 53.35, Bathurst City Centre: 30.75 and Bathurst Chase: 15.90.

4.13.5 Mode of Travel

The survey provided information on mode of travel to the CBD on the day of survey. It was found that:

- approximately 63 per cent of respondents travelled to the CBD as car drivers;
- a further 26 per cent were car passengers;
- some 6-7 per cent walked;
- the balance (4-5 per cent) came by public transport principally by bus with about 1 per cent of respondents indicating they came by taxi.

The proportion of car drivers in the weighted respondent sample is marginally higher than was observed at the March 1998 survey (61 per cent). However the 1998 survey showed a higher proportion who walked or cycled (some 14 per cent of respondents) and a lower proportion who came as car passengers (some 18 per cent). The balance (7 per cent) principally came by public transport with a small number indicating they came by motorcycle. The 2010 survey was undertaken in mid winter and the records indicate that the weather was cold and wet. This may have influenced the lower proportion of walk trips and the absence of cycle trips at the time of the survey.

Table 4.14:
Mode of Travel by Shopping Centre in the Bathurst CBD, 2010
Source: Bathurst In-Centre Survey, Renaissance Planning, July 2010

Mode of Travel	Centre Surveyed			
	Stockland Bathurst (n=198)	Bathurst City Centre (n=160)	Bathurst Chase (n=139)	Weighted Conjoint Sample*
	(%)			
Car as driver	64.6	65.6	51.1	**62.8**
Car as passenger	24.2	23.8	35.3	**25.8**
Total Car Travel	88.9	89.4	86.4	**88.6**
Walk / cycle	7.1	5.0	8.6	**6.7**
Public transport	4.0	5.6	5.0	**4.7**
Total	100.0	100.0	100.0	100.0

* The weighted conjoint sample most closely represents the total shopping population present at the three shopping centres at the time of survey (15-17 July, 2010). The weighting of the samples was in proportion to the occupied floorspace at each of the centres in June 2010. The weightings applied were: Stockland Bathurst: 53.35, Bathurst City Centre: 30.75 and Bathurst Chase: 15.90.

4.13.6 Stores, Centres and Locations Visited by Patrons

The in-centre survey undertaken in July 2010 identified several defining characteristics of the shopping behavior of patrons to the CBD.

- the first key finding is that most visitors to the CBD undertaking a shopping trip **frequented several stores or services on the one trip:**

  - only 21 per cent of patrons who were surveyed were visiting one store or service only (refer Table 4.16);
  - some 27 per cent were visiting two stores;
  - approximately half of the total sample (50.4 per cent) were visiting three stores or more;

- as part of this pattern, **major stores were influential** for a significant proportion of visitors. Of the top seven destinations indicated by visitors to the Core precinct, five of them were individual stores. These were (refer Table 4.15):

  - the Big W store (frequented by more than 40 per cent of all patrons surveyed in the three centres);
  - the Target store (more than 28 per cent of all patrons);
  - Woolworths, Stockland Bathurst (approximately 25 per cent of all patrons);
  - Woolworths, Bathurst City Centre (approximately 22 per cent of all patrons);
  - Coles supermarket (approximately 19 per cent of all patrons).

- there were **significant levels of shopper interflows between the three centres** (refer Table Set 4.14):

  - the highest level of interaction was between Bathurst City Centre and Stockland Bathurst:
    - * some 55 per cent of patrons to Bathurst City Centre also visited Stockland Bathurst on the day of survey;
    - * approximately 46 per cent of Stockland Bathurst patrons also visited Bathurst City Centre on the day of survey.

  - a significant level of interaction was observed between Bathurst Chase and William Street, and between Bathurst Chase and Stockland Bathurst:

    - * some 34 per cent of patrons to Bathurst Chase also visited shops on William Street on the day of survey;
    - * 22 per cent of patrons to Bathurst Chase also visited Stockland Bathurst on the day of survey;

  - other notable interactions were observed between Stockland Bathurst and Bathurst Chase and between Bathurst Chase and Centrepoint arcade:

    - * approximately 18 per cent of Stockland Bathurst patrons also visited Bathurst Chase on the day of survey;

* some 17 per cent of Bathurst Chase patrons also visited Centrepoint arcade on the day of survey;

- minor levels of interaction extended to William Street and to other parts of the Bathurst CBDE beyond the Core precinct:

  * for the Stockland Bathurst sample some 10 per cent of patrons visited stores or services on William Street and Keppel Street, and between 5-8 per cent of patrons visited the Aldi supermarket and stores and services in Howick and George Streets;
  * for the Bathurst City Centre sample, about 11 per cent of patrons visited Bathurst Chase; between 5-7 per cent visited stores and services on Howick Street and the Aldi supermarket, and less than 5 per cent visited stores and services on William Street or the Keppel or George Street precincts;
  * for the Bathurst Chase sample some 10 per cent visited Keppel Street, approximately 9 per cent visited stores and services on Howick Street or George Street or Bathurst City Centre, and 5 per cent visited the Aldi supermarket.

In summary, the Bathurst in-centre survey provided important information on the shopping behavior of patrons to the three shopping centres surveyed in the Bathurst CBD. It was found that multiple store visitation was the rule rather than the exception for most patrons. Almost 80 per cent of patrons were visiting at least two stores and some 50 per cent were visiting three stores or more.

It was also found that major stores were influential for a significant proportion of visitors. Over 40 per cent of patrons frequented the Big W store on the day of survey, almost 30 per cent the Target store and 20-25 per cent of patrons visited the Coles supermarket or (either or both) the Woolworths supermarkets at Stockland Bathurst or at Bathurst City Centre.

Third, very high levels of interaction were found between Bathurst City Centre and Stockland Bathurst. The two centres were virtually operating as a supercentre with 46-55 per cent of patrons at each centre visiting the other. Significant interactions were observed between Bathurst Chase, Stockland Bathurst, William Street and Centrepoint arcade, and a wider pattern of low level interactions was observed between each of the three centres, William Street, Howick Street and the adjoining precincts.

The findings clearly indicated that most shoppers tend to link stores and services together on the one trip. They also indicated the importance of major stores in underpinning shopping trips to the Bathurst CBD. The findings highlighted the significant success of Bathurst City Centre and the observation that it has become an integral part of the Core precinct with Bathurst City Centre and the pre-eminent Stockland Bathurst virtually operating as a supercentre.

Finally, the findings indicated a wide pattern of relatively low interactions between each of the three centres and the adjacent street system and adjoining precincts. They point the direction for future retail planning and development in the CBD, and the need to improve the offering at Bathurst Chase and facilitate improvements to the connections to the street network and adjoining precincts. These findings informed the objectives and direction for the CBD Strategic Framework for Retail Development that forms part of the recommended Strategy.

Table Set 4.15:
Patterns of Visitation by Shopping Centre in the Bathurst CBD, 2010
Source: Bathurst In-Centre Survey Renaissance Planning, July 2010

Bathurst Chase Sample

Q7. Which shopping areas or centres are you visiting today?	Frequency	% of Respondents (n=140)
Bathurst Chase	*138*	*98.6*
William Street	47	33.6
Stockland Bathurst	31	22.1
Bathurst Centrepoint	24	17.1
Keppel Street	14	10.0
George Street	13	9.3
Bathurst City Centre	12	8.6
Howick Street	12	8.6
Aldi Supermarket	7	5.0
Total Respondents	140	na

Bathurst City Centre Sample

Q7. Which shopping areas or centres are you visiting today?	Frequency	% of Respondents (n=160)
Bathurst City Centre	*157*	*98.1*
Stockland Bathurst	88	55.0
Bathurst Chase	17	10.6
Howick Street	11	6.9
Aldi Supermarket	8	5.0
Keppel Street	7	4.4
William Street	6	3.8
George Street	5	3.1
Total Respondents	160	na

Stockland Bathurst Sample

Q7. Which shopping areas or centres are you visiting today?	Frequency	% of Respondents (n=198)
Stockland Bathurst	*196*	*99.2*
Bathurst City Centre	91	45.8
Bathurst Chase	35	17.5
William Street	21	10.8
Keppel Street	20	10.0
Aldi Supermarket	17	8.3
Howick Street	12	5.8
George Street	12	5.8
Bathurst Centrepoint	5	2.5
Total Respondents	198	na

Table 4.16:
Major Stores and Store Types Visited in the Bathurst CBD: Analysis by Shopping Centre, 2010
Source: Bathurst In-Centre Survey, Renaissance Planning, July 2010

Type of Store / Service	Centre Surveyed			
	Stockland Bathurst (n=198)	Bathurst City Centre (n=160)	Bathurst Chase (n=140)	Weighted Conjoint Sample*
	(% of Respondents)			
Big W	55.6	35.0	20.0	43.6
Target	33.3	28.1	12.9	28.5
Woolworths (Stockland Bathurst)	38.9	11.9	2.1	24.7
Food Court, Café, Restaurant**	22.2	20.0	35.7	23.7
Woolworths (Bathurst City Centre)	7.1	56.9	2.1	21.6
Clothing, Specialty Stores**	21.7	26.3	11.4	21.5
Coles	7.6	3.1	89.3	19.2
Other Specialty**	15.7	20.6	20.7	18.0
Pharmacy, Newsagent, Post Office**	14.1	15.0	27.1	16.5
Banking / Other Services**	5.6	10.6	25.0	10.2
Electrical / Computer Stores**	6.1	11.9	6.4	7.9
Aldi	7.1	6.3	5.0	6.5
Homewares / Household Goods**	4.0	4.4	2.1	3.8
Total	238.9	250.1	259.9	245.7

* The weighted conjoint sample most closely represents the total shopping population present at the three shopping centres at the time of survey (15-17 July, 2010). The weighting of the samples was in proportion to the occupied floorspace at each of the centres in June 2010. The weightings applied were: Stockland Bathurst: 53.35, Bathurst City Centre: 30.75 and Bathurst Chase: 15.90.

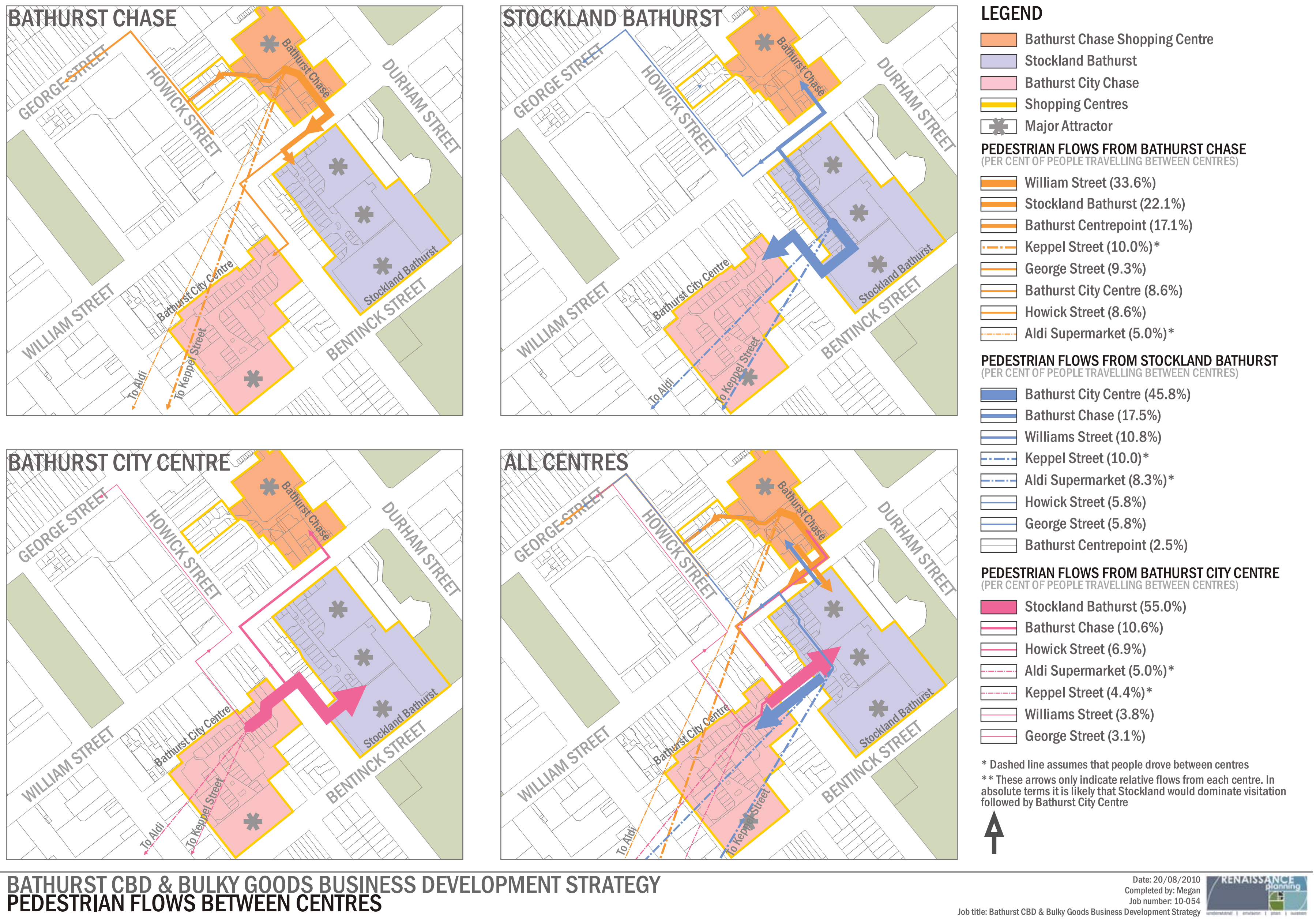
** Does not apply to any particular centre location

Table 4.17:
Number of Stores Visited by Survey Respondents in the Bathurst CBD: Analysis by Shopping Centre, 2010
Source: Bathurst In-Centre Survey, Renaissance Planning, July 2010

Survey Centre	Not Visiting Any Stores	Visiting 1 Store only	Visiting 2 Stores only	Visiting 3 Stores only	Visiting 4 stores or more	Total Sample
	(%)					
Bathurst City Centre (n=160)	5.0	26.9	28.1	18.1	21.9	100.0
Bathurst Chase (n=140)	1.4	25.7	29.3	19.3	24.3	100.0
Stockland Bathurst (n=198)	0.0	16.3	25.3	29.4	29.0	100.0
Weighted Average	1.8	21.0	26.8	24.3	26.1	100.0

* The weighted conjoint sample most closely represents the total shopping population present at the three shopping centres at the time of survey (15-17 July, 2010). The weighting of the samples was in proportion to the occupied floorspace at each of the centres in June 2010. The weightings applied were: Stockland Bathurst: 53.35, Bathurst City Centre: 30.75 and Bathurst Chase: 15.90.

Figure 4.13: Pedestrian Flows between Centres



4.13.7 Age Distribution of Respondents

The survey provided information on the age distribution of respondents. It was found that:

- approximately 11 per cent of respondents were aged under 18 years;
- some 30 per cent were aged 19 - 29 years;
- approximately 16 per cent were aged 30 - 39 years;
- 23 per cent were aged 40 - 59 years; and
- 20 per cent were aged 60 years or over.

Three comparisons were made in relation to the age distributions of the surveyed population. The first was a comparative assessment of the surveyed population with the age structure of the residential population of Bathurst aged over 14 years at the 2006 Census. This distribution revealed the following (refer Table 4.18):

- some 8.8 per cent of residents were aged between 14 and 18 years;
- about 20.2 per cent were aged 19 - 29 years;
- some 16.1 per cent were aged 30 - 39 years;
- 33.4 per cent were aged 40 - 59 years; and
- 21.4 per cent were aged 60 years and over.

The comparison shows a significantly higher representation of persons aged 19-29 years in the surveyed population than in the general residential population. This is a normal outcome of this type of shopping survey as this age group is normally more highly represented in the shopping population. Similarly the survey indicated a significant under representation for persons aged 40-59 years in the shopping population than in the general residential population. This is an expected outcome and reflects the lower levels of participation by this age group in the shopping population, particularly where significant opportunities are available for discretionary shopping trips.

A second comparison was made in relation to age differentials of the surveyed population by shopping centre. It was noted that Stockland Bathurst tended to have a younger shopping population with over 46 per cent of patrons aged under 29 years (compared to 34 per cent for Bathurst City Centre and 35 per cent for Bathurst Chase); the population aged over 40 years at Stockland Bathurst was approximately 37 per cent compared to 52 per cent for Bathurst City Cente and 54 per cent for Bathurst Chase. The younger age bias at Stockland Bathurst appears to be a reflection of the types and concentration of specialty fashion stores.

A third comparison was made in relation to the age groups surveyed at the 1998 survey for the Bathurst Retail Strategy. The comparison with the 1998 survey found a similar pattern to that observed in the 2010 survey namely that the 19-29 year age group was significantly higher in the shopper survey than represented by the distribution in the residential population. Similarly the distribution in the 40-59 year group was under represented in relation to the residential distribution at the time of survey.

In summary, both the 1998 and 2010 in-centre surveys consistently showed a statistically higher representation of respondents aged 19-29 years in the shopper sample and a statistically lower representation of patrons aged 40-59 years. Both surveys were large sample surveys (approximately 500 respondents were interviewed in each survey) and were undertaken at several centres in the CBD by different surveyors some 12 years apart. It is likely that the consistency of the result reflects a differential draw of patrons in particular age groups to shopping centres in the Core precinct of the CBD, and the observation that this appears to be influenced by the makeup of specialty stores in particular centres (for example, the concentration of specialty clothing stores at Stockland Bathurst attracting a younger demographic among shopping patrons).

Table 4.18:
Distribution of Survey Respondents in the Bathurst CBD:
Analysis by Shopping Centre, 2010
Source: Bathurst In-Centre Survey, Renaissance Planning, July 2010

Age	Centre Surveyed				
	Stockland Bathurst (n=196)	Bathurst City Centre (n=160)	Bathurst Chase (n=139)	Weighted Conjoint Sample*	ABS Census Age Group Distribution (14 years + only)
	(%)				
18 years and under	11.2	10.7	8.6	10.6	**8.8**
19 - 29 years	35.2	23.3	28.8	30.5	**20.2**
30 - 39 years	16.8	13.8	18.7	16.2	**16.1**
40 - 59 years	17.3	30.2	28.1	23.0	**33.4**
60 + years	19.4	22.0	15.8	19.6	**21.4**
Total	100.0	100.0	100.0	100.0	100.0

* The weighted conjoint sample most closely represents the total shopping population present at the three shopping centres at the time of survey (15-17 July, 2010). The weighting of the samples was in proportion to the occupied floorspace at each of the centres in June 2010. The weightings applied were: Stockland Bathurst: 53.35, Bathurst City Centre: 30.75 and Bathurst Chase: 15.90.

4.14 Online and Other Escape Expenditure Patterns

The in-centre survey provided information on patterns of online and escape expenditure by Bathurst residents. Respondents were asked whether they had purchased any of the following over the last two years either online or at centres outside Bathurst:

- electrical goods/computers;
- furniture and furnishings;
- clothing and footwear;
- books, CDs and DVDs.

In the analysis process, the total sample was filtered for respondents who came from the Bathurst urban area. The analysis of this sample is shown in Table 4.19. It will be seen that the following proportions of respondents had indicated they had undertaken some online or out of city purchase in the past two years:

- for electrical goods and/or computers: 17 per cent of Bathurst resident respondents;
- for furniture and furnishings: 13 per cent of Bathurst respondents;
- for clothing and footwear: 24 per cent of Bathurst respondents;
- for books, CDs and DVDs: 15 per cent of Bathurst respondents.

The question also provided information on expenditure ranges for the goods surveyed either bought online or outside Bathurst. Analysis of this information indicated the following proportions of retail expenditure by Bathurst residents were made on an annual basis either online or outside Bathurst (refer Table 4.19):

- 16 per cent of expenditures made by Bathurst residents on electrical goods and/or computers;
- 16 per cent of expenditures by Bathurst residents on furniture and furnishings;
- 17 per cent of expenditures by Bathurst residents on clothing and footwear;
- 18 per cent of expenditure by Bathurst residents on books, CDs and DVDs.

Research undertaken on current patterns of online expenditure in Australia (refer Section 3.4) provided the basis to assess the proportions of online expenditure within the overall distribution of online and escape expenditures. The results are shown in Table 4.19:

- for purchases of electrical goods and computers it was found that 8 per cent of expenditures in this commodity group by Bathurst residents were made online on an annual basis over the period 2008-2010, and a similar proportion made as direct purchases at shopping centres and locations at cities outside Bathurst;
- for purchases of furniture and furnishings it was found that 6 per cent of expenditures in this commodity group were made online and 10 per cent made in direct purchases at shopping centres and locations at cities outside Bathurst;
- for purchases of clothing and footwear it was found that 8 per cent of expenditures in this commodity group were made online and 9 per cent were made in direct purchases at shopping centres and locations outside Bathurst;

- for purchases of books, CDs and DVDs it was found that 12 per cent of expenditures in this commodity group were made online and 6 per cent were made in direct purchases at shopping centres and locations outside Bathurst.

Information obtained in the in-centre survey and research into online shopping behaviour patterns in Australia provided the basis to develop broader estimates of expenditure for all of the household and bulky goods categories. These are set out in Table 4.21. It can be seen that:

- the estimated average online expenditure by Bathurst residents for all of household goods is approximately 7.3 per cent. It is also estimated that a similar proportion (7.4 per cent) is spent directly at shopping centres at other cities. The total escape for household goods is thus estimated at approximately 14.7 per cent (of relevant expenditures by Bathurst residents);
- the estimated current average online expenditure by Bathurst residents for all of bulky goods is approximately 5.5 per cent. It is also estimated that 7.7 per cent is spent directly at shopping centres at other cities. The total escape for bulky goods expenditure is thus estimated at 13.1 per cent.

Table 4.19:
Escape and Online Retail Expenditures by Bathurst City Residents, 2010
Source: Bathurst In-Centre Survey, Analysis by Renaissance Planning, February 2011

Major Category	Incidence of Any On-Line Expenditures or Purchases Outside Bathurst	Expenditures Outside Bathurst as a Proportion of Annual Retail Expenditures by Commodity Group (Bathurst Residents)		
		On-Line Annual Expenditures by Commodity Group	Other Escape Expenditures by Commodity Group	Total On-Line and Escape Annual Expenditures by Commodity Group
	% of Respondents from Bathurst Urban Area(n=386)	%		
Electrical goods / computers	17	8	8	16
Furniture / Furnishings	13	6	10	16
Clothing / footwear	24	8	9	17
Books / CDs / DVDs	15	12	6	18

Table 4.20:
Escape and Online Retail Expenditures by Bathurst City Residents, 2010
Analysis by Age Group of Respondents
Source: Bathurst In-Centre Survey, Analysis by Renaissance Planning, February 2011

Age	Sample Type			
	Total Sample Age Distribution (%) (n=494)	Bathurst Urban Area Sample (%) (n=382)	Goods and Services Purchased Beyond Bathurst Sample (%) (n=177)	ABS Census Age Group Distribution (14 years + only)
	(% of Responses)			
18 years and under	10.6	10.0	6.2	8.8
19 - 29 years	30.5	31.7	41.2	20.2
30 - 39 years	16.2	17.0	13.0	16.1
40 - 59 years	23.0	23.0	27.1	33.4
60 + years	19.6	18.3	12.4	21.4
Total	100.0	100.0	100.0	100.0

In summary the in-centre surveys provided an empirical basis to assess online and escape expenditures by Bathurst residents for selected goods. This information has been incorporated into the analysis of retail expenditure patterns and assumptions about future trends in market share to produce forecasts of future potential sales in Bathurst, and floorspace requirements (refer Section 5.2.5 - 5.2.7).

Table 4.21:
Escape and Online Retail Expenditures by Bathurst City Residents, 2010
Expenditure Analysis by Activity Group
Source: Bathurst In-Centre Survey, Analysis by Renaissance Planning, February 2011

Major Category	Expenditure Profiles ($ / person / annum)	Estimated On-Line Escape Expenditure (%)	Total Other Escape Expenditure (%)	Total Spend Outside Bathurst
Household Goods				
Books, CDs, DVDs	387	12	6	18
Homewares (includes of kitchenwares, linen, but excludes electrical goods and computers)	510	8	8	16
Electrical goods and computers (includes cameras and camera accessories, TVs, video and musical equipment, computers, phones & phone equipment) (Part) *	253	8	8	16
Clothing and footwear	1138	8	9	17
Pharmaceutical goods	426	2	3	5
Cosmetics, perfume and toiletries	370	8	12	20
Pets and pet products	90	2	6	8
Newsagents goods / stationery	230	4	1	5
Fashion accessories including watches and jewelery, hats and sunglasses	225	8	8	16
Toys and sporting goods (Part) *	96	6	6	12
Total Household Goods	**3724**	**7.3**	**7.4**	**14.7**
Bulky Goods				
Furniture and furnishings	329	6	10	16
Whitegoods (large home electrical goods including ovens, refridgerators, large screen TVs)	203	7	11	18
Hardware, gardening equipment, plants and outdoor furniture	288	1	4	5
Electrical goods and computers (includes cameras and camera accessories, TVs, video and musical equipment, computers, phones & phone equipment) (Part) *	288	8	8	16
Toy and sporting goods (Part) *	109	8	8	16
Repairs and maintenance	93	3	2	5
Total Bulky Goods	**1310**	**5.5**	**7.7**	**13.1**

* Sold as both household and bulky goods

These assessments directly informed market share and sales modelling for the Strategy (refer Sections 5.2.4 and 5.2.5).

4.15 Patterns of Market Share in the RCA

Analysis prepared for the Strategy provided a current assessment of market share distributions by component catchment area in the RCA. The findings are set out in Table 5.3. This shows the estimated proportions of resident retail expenditures in each of the catchment areas that are bound to shops in Bathurst. It will be noted that:

- in respect of food and groceries expenditure there is little escape expenditure from the primary catchment area (essentially the Bathurst urban area). This is estimated in the range of 5 - 7 per cent. Inbound food and groceries expenditure into Bathurst from the secondary catchment area is estimated in the range 45- 50 per cent and an average of 5 per cent in the tertiary catchment area. Food trade into Bathurst from beyond the tertiary area is estimated in the range of 1 - 2 per cent of sales (generated by tourists, travellers stopping off at Bathurst, and non resident students);

- in respect of household goods, as indicated in the previous section the in-centre surveys and subsequent research and analysis provided the basis to estimate that 14.7 per cent of expenditures were either spent online or bound to centres in cities outside Bathurst. This was rounded up to 15 per cent for the purposes of generating current sales estimates (refer Table 5.3). Thus the current level of retained household goods expenditure at Bathurst was estimated at 85 per cent of locally generated resident expenditures. Household goods trade into Bathurst was estimated at 40 per cent in the secondary catchment area and 10 per cent in the tertiary catchment area. Household goods trade into Bathurst from beyond the tertiary area was estimated at 2 per cent of sales.

- in respect of bulky goods, as indicated in the previous section it was estimated that 13.1 per cent of expenditures were either spent online or bound to centres in cities outside Bathurst. This was rounded up to 15 per cent for the purposes of generating current sales estimates (refer Table 5.3). Therefore, as bulky goods trade into Bathurst was estimated at 35 per cent in the secondary catchment area and 10 per cent in the tertiary catchment area, and trade into Bathurst from the tertiary area was estimated at 4 per cent of sales.

- in respect of retail services it was estimated that only 7 per cent of relevant expenditures by Bathurst residents is escape, either as online expenditures or spent directly at centres in other cities. Personal services trade into Bathurst was estimated at 45 per cent of relevant expenditures by residents in the secondary catchment area and 3 per cent in the tertiary catchment area. Trade into Bathurst from beyond the tertiary area was estimated at 2 per cent of sales.

The effect of current research, survey analysis and modelling resulted in the provision of higher allowances for escape expenditures for household goods and bulky goods than had previously been the case in the 1999 Bathurst Retail Strategy (of the order of 10 percentage points). Further reductions in inbound market shares for Bathurst in the secondary catchment area were also made for household goods and bulky goods (of the order of 15 percentage points). There were no significant changes for escape expenditures for food, groceries and liquor and for retail services in the primary catchment area between the 1999 Bathurst Retail

Strategy and the current Strategy. Similarly there were no significant changes for market share estimates in the tertiary catchment area for any of the major retail categories or for estimates of trade from beyond the tertiary catchment area.

In summary the surveys, research and analysis provided a basis for estimates of market share by component area in the RCA. These were used to generate estimates of current retail sales for the Bathurst urban area.

4.16 Comparative Gap Analysis of Stores in Bathurst and Orange

As part of the assessment of the competitive position of Bathurst and its CBD in relation to other regional cities and particularly Orange, a comparative gap analysis of stores and services was undertaken over the period December 2010 – February 2011. Research was undertaken into the presence or absence of national chain stores and franchises in seven regional cities. The cities researched were:

- Bathurst;
- Albury Wodonga;
- Bendigo;
- Dubbo;
- Orange;
- Tamworth;
- Wagga.

The full results of the research are set out in the Appendix (refer Appendix C). The detailed research showed that in general terms Bathurst is well represented by national chain stores and franchises given its urban and catchment populations.

Of particular relevance to the Strategy was the comparative provision of key stores and franchises in Orange and Bathurst. Given their proximity, the relative distribution of national chain stores and franchises in these two cities has been summarised, in Table 4.22. It will be seen that each city had stores and services not provided in the other:

- Bathurst had some 20 stores and services not provided at Orange. Significant stores at Bathurst not present at Orange included:
  - Target;
  - Spotlight;
  - The Good Guys;
  - other important stores included Williams the Shoeman, Terry White Chemists, EB Games, ABC Centre, Fantastic Furniture and Homemart, Leading Edge and Vodafone and OPSM.

- Orange had some 30 stores and services not provided at Bathurst. Significant stores at Orange not present at Bathurst included:
  - Myer;
  - K Mart;
  - a number of specialty clothing and accessories stores including Pumpkin Patch, Blue Illusion, Esprit, Suzanne Grae, Ed Harry Menswear, Fletcher Jones, Athlete's Foot and Sunglass Hut/Watch Station;
  - Officeworks and several bookstores: Angus & Robertson, BookCity, Collins Booksellers,
  - Camera House;
  - auto supplies and car rentals: AutoBarn, Bob Jane T Mart and Thrifty car rentals;
  - pharmaceutical stores: Amcal and Chemart.

Research and analysis undertaken for the Strategy found that Bathurst was not identified as part of either the Penrith or Orange trade areas (economic analysis undertaken by Hill PDA, February 2010 and by Leyshon, 2005, refer Section 4.11.1). Analysis of the Bathurst residents-only sample from the Bathurst in-centre survey found that the current level of escape expenditure (that is, personal expenditures at cities and shopping centres outside Bathurst, excluding online expenditures) currently averages less than 8 per cent for household goods and bulky goods (refer Table 4.20). Within these broad groups some selected commodity groups have escape expenditures in the range 8-12 per cent. These particular commodity groups included (in descending order of escape expenditure significance):

- cosmetics, perfumes and toiletries;
- white goods (large home electrical goods including ovens, refrigerators and large screen TVs);
- furniture and furnishings;
- clothing and footwear;
- homewares (includes kitchenwares and linen);
- other electrical goods and computers;
- fashion accessories.

Thus the highest level of out-of-town escape expenditures (excluding online expenditures) was in the range 8-12 per cent for particular commodity types as indicated above. The level of escape expenditure bound from the Bathurst urban area to Orange was estimated to be in the range of 4-5 per cent for these particular commodity groups.

Retail and economic analysis undertaken at Orange and Penrith have not identified Bathurst as part of the trade catchment area of either city. The gap analysis found that the most significant difference between Orange and Bathurst in terms of store provision was the Myer store and K Mart at Orange together with a number of specialty clothing and bookstores. The effective outcome is relatively minor with an estimated 4-5 per cent escape expenditure (from the Bathurst urban area to Orange) for relevant commodity groups. It is highly unlikely that Myer which has a store in Orange would also at some future point locate a department store in Bathurst, given its threshold catchment requirements (ideally Myer requires a catchment population of no less than 100,000 persons effective supporting population). However, the K Mart may be a potential store that could be accommodated at Bathurst. Similarly specialty clothing and accessories stores currently not present in Bathurst could be potential stores for the city depending on the type of development and market opportunities.

Significantly, the research and analysis indicated a wide range of stores present in one or more of the other regional cities surveyed and not present in either Bathurst or Orange. As Table 4.24 indicates there are more than 80 stores and services in this category. The clear implication is that many or most of these stores and services could be considered as having potential to locate in Bathurst as part of a future development. For example the gap analysis indicates the a Harris Scarfe store would have potential at Bathurst given that it is not present at either Bathurst or Orange. Similarly there are a number of specialty stores that are not present in either city that could be targeted (refer Table 4.24)

In summary, the gap analysis confirmed some differences in store provision between Orange and Bathurst. In the view of the Strategy these differences are not of critical significance and do not pose a major threat or constraint to the future prosperity and development of regional level retailing in Bathurst. More importantly the gap analysis indicated a far wider diversity of stores and services present in other regional cities and not present in either Bathurst or Orange. These may offer potential in the future long term retail consolidation of the Bathurst CBD and the recommended regional bulky goods precinct.

Table 4.23: Comparative Gap Analysis of National Chain Stores and Franchises in Bathurst and Orange, December 2010 - February 2011

Source: Research and Analysis by Renaissance Planning, December 2010 - February 2011

Limitation of Analysis: This assessment is based on internet research and has not been verified on the ground in cities outside Bathurst

Stores / Services	Bathurst (not Orange)	Orange (not Bathurst)
Department Stores		
Myer		•
Discount Department Stores		
Kmart		•
Target	•	
Supermarkets		
Foodworks	•	
Mini Majors		
Priceline	•	
Clint's Crazy Bargains		•
Go-Lo	•	
Food - Liquor		
Bottle Mart		•
Safeway Liquor	•	
Food - Takeaway		
Muffin Break	•	
Food - Other		
Lenard's		•
Children's Clothing		
Pumpkin Patch		•
Ladies Clothing		
Blue Illusion		•
Esprit		•
Suzanne Grae		•
Men's Clothing		
Ed Harry Menswear		•
Fletcher Jones		•
Footwear		
Williams the Shoemen	•	
Accessories / Leather Goods		
Sunglass Hut		•
Fabric, Crafts and Florists		
Spotlight	•	
Local Fabric and Craft Stores	•	
Chemists, Health and Medical Supplies		
Amcal		•
Chemart		•
Terry White Chemists	•	
Sports and Leisure		
Sportsco	•	
Newspaper, Book and Stationary Retailing		
ABC Centre	•	
Angus & Robertson		•
BookCity		•
Collins Booksellers		•
Officeworks		•
Toys / Games		
EB Games	•	
Jewellery		
Kleins		•
Michael Hill Jewellers	•	
Showcase Jewellers		•
Furniture, Furnishings and Large Format Homewares		
Fantastic Furniture	•	
Homeart	•	
Electrical Goods		
Camera House		•
Crazy Johns		
Good Guys	•	
Auto and Hardware		
AutoBarn		•
Thrifty		•
Banks		
Bendigo Bank		•
Music, Entertainment and Communication Retailing		
Leading Edge	•	
Vodafone	•	
Property and Business Services		
GE Finance and Insurance		•
Optical		
OPSM	•	
Other Retail and Commercial Services		
Kodak Shop		•
Tobacco Station		•
TAB		•

Table 4.24: Comparative Gap Analysis of National Chain Stores and Franchises December 2010 - February 2011: Stores and Services present in other regional cities and not present in either Bathurst or Orange

Source: Research and Analysis by Renaissance Planning, December 2010 - February 2011

Limitation of Analysis: This assessment is based on internet research and has not been verified on the ground in cities outside Bathurst

Stores / Services
Discount Department Stores
Harris Scarfe
Supermarkets
NQR
Mini Majors
The Warehouse
Food - Bread and Cake Retailing
Brumby's
Cafes and Restaurants
Taco Bill
Food - Takeaway
Noodlebox
Pinky's Pizza
Wendy's
Food - Other
Darrell Lea
Nutshack
Boost Juice
Children's Clothing
Cotton on Kids
Ladies Clothing
1626
Jacqui E
Portmans
Sportsgirl
Men's Clothing
Gaz Man
Man To Man
Mensland
Roger David
Mens & Ladies Clothing
Country Road
WestCo
Footwear
Betts & Betts
Speeds
Novo Shoes
Accessories / Leather Goods
Bradmans
Fabric, Crafts and Florists
Lincraft
Chemists, Health and Medical Supplies
Guardian Pharmacy
Giftware and Specialty Homeware Stores
Canterbury Lace
Copperart
Sports and Leisure
Aussie Disposals
Balls N Bumpers
Bicycle Superstore, The
Mountain Designs
Snow Gum
Ray's Outdoors
Rebel Sport
Drummond Golf

Table 4.24 (cont)

Stores / Services
Newspaper, Book and Stationary Retailing
Dymocks
Toys / Games
MindGames
Toyworld
Jewellery
Goldmark Jewellers
Thomas Jewellers
Zamel's Jewellers
Furniture, Furnishings and Large Format Homewares
Adairs
Barbeques Galore
Beacon Lighting
Bev Marks Beds
Captain Snooze
Country Design
Décor Plus
Dollar Curtains and Blinds
Doorsplus
Forty Winks
Freedom
OzDesign Furniture
Howard's Storage World
Electrical Goods
Betta Electrical
Godfrey's
JB HiFi
Tandy
Auto and Hardware
Clark Rubber
Home Hardware
RACV Shop
Strathfield Car Radios
Tyre Power
Travel
Jetset Travel
STA Travel
Escape Travel
Hair, Cosmetics and Body Care
Body Shop
Hairhouse Warehouse
Music, Entertainment and Communication Retailing
VideoEzy
Videoland
Village Cinemas
Property and Business Services
AAMI
Aussie Home Loans
Australia's Pensioners Insurance Agency
QBE Farmgate
Wizard Home Loans
Real Estate
Stockdale & Leggo
Other Retail and Commercial Services
Snap Printing
RSPCA Op Shop

5 retail and office floorspace requirements

retail and office floorspace requirements (2010-2021-2036)

5

5.1 Purpose

The purpose of this section is to present the results of the demand analysis prepared for the Strategy and the assessment of retail and office floorspace requirements for the Bathurst urban area. The analysis and key outcomes are presented as follows:

- Basis of the forecasts,
- Accounting for likely future effects of online sales,
- City-wide net additional floorspace requirements (2010-2021-2036),
- Indicative allocations of floorspace requirements.

5.2 Basis of the Forecasts

The assessment of retail floorspace requirements was generated using a retail expenditure – floorspace model that applied several factors. These were:

- Population projections in the RCA by component catchment area;
- Retail expenditure profiles by residents in the RCA;
- Projected retail demands by residents in the RCA;
- Current and future market shares by component area in the RCA;
- Current and forecast retail sales at Bathurst;
- Current patterns and future requirements for retail turnover per square metre of floorspace;
- Future gross retail floorspace requirements;
- Existing and approved retail floorspace in the Bathurst urban area.

5.2.1 Current and Projected Population (2010-2021-2036)

A key determinant of future retail demand is the projected rate of growth of the resident population in the Bathurst urban area and its RCA. A detailed critical assessment was undertaken of population forecasts prepared for the Bathurst LGA by i.d Consulting, the NSW Department of Planning and by Renaissance Planning. It will be recalled that the assessment found that for the purposes of the floorspace requirements, the NSW Department of Planning would not be used as they projected a lower rate of growth for Bathurst than had been demonstrated by historic, recent and current growth patterns. The id Consulting and Renaissance Planning forecasts were used to indicate:

- The upper level population projections (id. Consulting);
- The middle range population projections (Renaissance Planning).

A summary of the current and forecast populations for Bathurst and its RCA are set out in Table 5.1. At the time of preparation of this analysis the projected ERP for 2010 for the **Bathurst urban area** was in the range 33,650 - 34,170 persons. The preliminary ERP for June 2010, as estimated by the ABS (March 2011 release) is approximately 34,300 persons. This is projected to increase to 37,620 - 39,890 by June 2021 and to 43,700 - 49,440 by June 2036. For the secondary and tertiary catchment areas no forecasts were prepared by id Consulting. The forecasts prepared by Renaissance Planning indicated the following:

- for the secondary catchment area the ERP for June 2010 as projected at December 2010 is approximately 15,670 persons. This is projected to increase to 16,850 persons by June 2021 and to 18,730 persons by June 2036;
- for the tertiary catchment area the ERP for June 2010 as projected as December 2010 is approximately 96,710 persons. This is projected to increase to approximately 102,820 persons by June 2021, and to approximately 111,920 persons by June 2036.

Table 5.1:
Bathurst Regional Catchment Area: Projected Population by Catchment Area
Source: .id Consulting 2010, Renaissance Planning Pty Ltd December 2010

Catchment Area	Estimated Resident Population								
	Source Measure	2010	Projected Population					Projected Change in Population (2010 - 2036)	% Increase in Population (2010 - 2036)
			2016	2021	2026	2031	2036		
Primary	Medium*	33,650	35,820	37,620	39,490	41,630	43,700	10,050	29.9
	High**	34,170	37,120	39,890	42,800	45,750	49,440	15,270	44.7
Secondary	na	15,670	16,270	16,850	17,420	18,080	18,730	3,060	19.5
Tertiary	na	96,710	99,930	102,820	105,700	108,810	111,920	15,210	15.7
Total	Medium*	146,290	152,020	157,290	162,610	168,520	174,350	28,320	19.2
	High**		153,320	159,560	165,920	172,640	180,090	33,540	23.1

* Based on Renaissance Planning projections

** Based on .id Consulting projections

5.2.2 Current and Projected Retail Expenditure Profiles (2010,2021, 2036)

In a market based retail system the amount of retail floorspace that can be sustainably supported is directly dependent on the level of retail expenditure per capita. The ABS undertakes a regular review of Australian expenditure patterns through the Australian Household Expenditure Survey. This provides detailed information on patterns of expenditure by types of households in urban and rural Australia. The most recent survey was undertaken in 2002-03 (refer ABS Catalogue No. 6530.0) This information has been updated by a specialist consultancy Marketinfo using national accounts and social security information. Retail expenditure profiles for Bathurst for 2008-09 were prepared by Marketinfo for the study and updated by Renaissance Planning to June 2010 prices. The resultant profile by major commodity group is shown in Table 5.2.

Long term forecasts of retail expenditures must take into account likely patterns of real growth in retail expenditure. Real growth assumptions by commodity groups were derived for the Strategy by Renaissance Planning based on real growth patterns observed for NSW over the period 2000-2010 together with judgments on current and future industry trends. The resultant real growth assumptions by commodity group are set out in Table 5.2. The assumed rates of real growth for the purposes of the expenditure projections are expressed as percentage growth per annum per capita. The following growth rates were applied (all growth rates are net of inflation):

- for food retail (that is expenditure in food, groceries and liquor purchases): 0.5 per cent per capita per annum;
- for apparel: 1.3 per cent per capita per annum;
- for food catering (meals out and take away food), leisure A, leisure B and retail services (refer footnote to Table 5.2): 1.5 per cent per capita per annum;
- for homewares and bulky goods (refer footnote to Table 5.2): 2.5 per cent per capita per annum.

The application of the real expenditure growth assumptions resulted in the preparation of retail expenditure profiles for 2021 and 2036 at April 2010 constant prices. These are shown in Table 5.2.

Table 5.2:

Bathurst Regional Catchment Area:

Retail Expenditure Profiles by Catchment Area 2010 - 2036

Source: Retail Expenditure Profiles 2008 - 2009, Marketinfo, Queensland

Analysis by Renaissance Planning Pty Ltd, December 2010

Commodity Group	Retail Expenditure Real Change Assumptions	Forecast Annual Retail Expenditures / Capita April 2010 Constant Prices								
		Primary	Secondary	Tertiary	Primary	Secondary	Tertiary	Primary	Secondary	Tertiary
	Real Annual Change (% /annum)	2010			2021			2036		
		($)								
Food Retail[1]	0.5	4,395	4,603	4,621	4,643	4,863	4,882	5,004	5,240	5,261
Food Catering[2]	1.5	1,758	1,675	1,723	2,071	1,973	2,030	2,589	2,467	2,537
Apparel[3]	1.3	1,257	1,149	1,191	1,449	1,324	1,373	1,759	1,608	1,666
Homewares[4]	2.5	1,009	930	974	1,324	1,220	1,278	1,917	1,767	1,851
Bulky Goods (extended)[5]	2.5	1,308	1,229	1,262	1,716	1,613	1,656	2,486	2,335	2,398
Leisure A[6]	1.5	705	632	651	830	744	767	1,038	931	959
Leisure B[7]	1.5	754	753	778	888	887	916	1,110	1,109	1,146
Services[8]	1.5	414	391	409	488	461	482	610	576	602
Total	na	11,600	11,362	11,609	13,409	13,085	13,383	16,513	16,033	16,421

1 Food retail encompasses groceries and fresh food retailing

2 Food catering encompasses fast food and take-away, restaurants, off-license liquor purchases

3 Apparel encompassses clothing and footwear, jewellery and fashion accessories (including watches, hats, sunglasses)

4 Homewares includes kitchenware, linen, electrical equipment (including phones, some whitegoods and TVs)

5 Bulky goods (extended) includes furniture and furnishings, whitegoods, floor coverings, some repair and maintenance services and hardware.

6 The Leisure A group includes items such as books, stationery, photographic equipment, CDs and DVDs, sporting goods.

7 The Leisure B group includes newspapers, cards, magazines, blank computer media and pharmaceutical goods.

8 Services includes hair and beauty services, optical services, video hire, photographic processing services, some repair & maintenance services

5.2.3 Projected Retail Demands in the RCA (2010, 2021, 2036)

The product of the resident population and retail expenditure profiles for designated years is the estimated gross retail expenditure by existing or future residents in the specified year. Table 5.3 shows the estimated current and projected retail expenditures by major commodity group for the primary, secondary and tertiary catchment areas in the RCA. The retail expenditures are shown at April 2010 constant prices. They show consistent real growth over the forecast period that reflects both projected real per capita expenditure growth and population growth for the forecast period.

It will be seen that the estimated retail expenditures of RCA residents is approximately $1.69 billion at April 2010 constant prices. This is projected to increase to $2.1 - $2.13 billion (at April 2010 constant prices) by 2021 and to $2.86 - $2.95 billion by 2036. The analysis and modelling indicate that the level of retail expenditure in the RCA is projected to increase in real terms by approximately 25 per cent over the eleven year period to 2021 and by 72 per cent over the period 2011 - 2036. Approximately one-third of the real cumulative growth in aggregate retail expenditures is attributable to population growth and the balance to projected real growth in consumption.

Table 5.3:
Bathurst Regional Catchment Area:
Estimated Current and Projected Annual Retail Expenditures 2010 - 2021 - 2036
Source: Analysis by Renaissance Planning Pty Ltd, December 2010

Major Commodity Group	Source Measure	Forecast Annual Retail Expenditures at April 2010 Constant Prices* ($,000)											
		Primary			Secondary			Tertiary			Total RCA		
		2010[1]	2021	2036	2010	2021	2036	2010	2021	2036	2010	2021	2036
Food, Groceries and Liquor													
Supermarket goods, fresh food and liquor	Medium*	149,040	174,660	218,650	72,130	81,930	98,150	446,900	501,930	588,790	668,070	758,520	905,590
	High**		185,200	247,370								769,060	934,310
Take away food and dining out	Medium*	59,620	77,900	113,140	26,250	33,250	46,200	166,630	208,680	283,990	252,500	319,830	443,330
	High**		82,610	128,000								324,540	458,190
Total Food, Groceries and Liquor	Medium*	208,650	252,560	331,790	98,380	115,180	144,350	613,530	710,610	872,780	920,570	1,078,350	1,348,920
	High**		267,810	375,370								1,093,600	1,392,500
Household Goods	Medium*	105,780	139,080	204,270	45,540	58,030	81,550	291,060	366,790	504,880	442,380	563,900	790,700
	High**		147,480	231,100								572,300	817,530
Bulky Goods	Medium*	64,880	94,440	158,890	28,000	39,510	63,600	178,570	249,090	392,690	271,450	383,040	615,180
	High**		100,150	179,770								388,750	636,060
Retail Services (part)	Medium*	14,040	18,350	26,640	6,130	7,760	10,790	39,550	49,540	67,410	59,720	75,650	104,840
	High**		19,450	30,140								76,750	108,340
Total Retail Expenditures	Medium*	393,350	504,430	721,590	178,050	220,480	300,290	1,122,710	1,376,030	1,837,760	1,694,120	2,100,940	2,859,640
	High**		534,890	816,380								2,131,400	2,954,430

[1] Mid range of medium and higher projection used for 2010

5.2.4 Current and Future Market Shares in the RCA (2010, 2021, 2036)

Only part of the projected retail demands will be translated to retail sales in the Bathurst urban area. Components of these demands will be spent online or at shopping destinations in towns and cities other than Bathurst.

As indicated earlier in the report, Bathurst draws custom from a region extending up to 120 kilometres from the city (refer Section 4.12.1), termed the RCA. The proportion of resident retail expenditures bound to Bathurst (termed market share) varies by commodity group and by component catchment area (refer Table 5.4). Current patterns of market share within the RCA were set out in Section 4.14.

The analysis required projections to be made on likely future patterns of market share. These are set out in Table 5.4. As the table indicates, the future market share patterns forecast for the purposes of the retail sales projections:

- reflect a judgment by the consultants of **no significant changes** in the **food, groceries and liquor** market share of Bathurst in its primary, secondary and tertiary catchment areas and incidental trade drawn from beyond the tertiary catchment area;

- reflect a judgment by the consultants of **notable and rising levels of escape expenditure for household goods and bulky goods by Bathurst urban area residents** (that is in the primary catchment area). A significant component of this is attributable to the projected growth of online expenditure (this is discussed in Section 5.4);

- the current market shares that Bathurst obtains in the **secondary and tertiary catchment areas** for **household goods and bulky goods** are **not anticipated to fall or rise in the foreseeable future**. The assumption made was that the growth in online expenditure in these areas would simply replace part of the significant existing escape expenditures to destinations other than Bathurst. The future level of trade drawn from beyond the tertiary catchment area was also not anticipated to change in the foreseeable future;

- patterns of market share that Bathurst obtains for **retail services** were **not anticipated to change in the foreseeable future** in areas throughout the RCA, and through incidental trade brought in from beyond the RCA.

Table 5.4:
Bathurst Urban Area;
Patterns of Current and Projected Market Share 2010 - 2021 - 2036
Source: Bathurst In-Centre Survey, Analysis by Renaissance Planning, February 2011

Commodity Group	Bathurst Urban Area Market Share %									Bathurst Urban Area % of Sales Drawn From Beyond the RCA		
	Primary			Secondary			Tertiary					
	2010	2021	2036	2010	2021	2036	2010	2021	2036	2010	2021	2036
Food, Groceries and Liquor												
Supermarket goods, fresh food and liquor	95	95	95	50	50	50	5	5	5	1	1	1
Take away food and dining out	93	93	93	45	45	45	5	5	5	2	2	2
Household Goods	85	80	70	40	40	40	10	10	10	2	2	2
Bulky Goods	85	80	80	35	35	35	10	10	10	4	4	4
Retail Services (part)	93	93	93	45	45	45	3	3	3	2	2	2

5.2.5 Current and Forecast Retail Sales at Bathurst (2010, 2021, 2036)

The product of the gross retail expenditures (Table 5.3) and the estimated current and assumed future market share patterns (Table 5.4) will produce forecasts of retail sales for the Bathurst urban area (Table 5.5). Table 5.5 shows the resultant forecasts of retail sales at April 2010 constant prices by major commodity group and by major geographic source area.

An analysis of the geographical distribution of source areas of trade to Bathurst indicates that the current pattern (2010) discussed in Section 4.3 is not anticipated to materially change over the forecast period, that is:

- the high spatial concentration of source areas for food, groceries and liquor sales is anticipated to continue with approximately 88 per cent of sales in Bathurst likely to be generated by the primary and secondary catchment areas (refer Table 5.5);

- analysis and research for the Strategy has identified projected significant future growth in online expenditures and consequent impacts on escape expenditures from Bathurst in household goods and bulky goods (refer Section 5.4). Notwithstanding this finding, the projected population growth in Bathurst together with real growth in expenditures in these goods will maintain the contribution of the primary catchment as a source area for retail sales in these goods (in the range 62-65 per cent, refer Table 5.5). The relatively wide geographic spread of source areas for household and bulky goods is anticipated to continue with about 23-25 per cent of Bathurst's retail sales in these goods, projected to be drawn from beyond the secondary catchment area;

- the high concentration of source areas for retail services sales at Bathurst is projected to continue with 91 - 92 per cent of sales at Bathurst being drawn from the primary catchment areas.

The projected retail sales for the Bathurst urban area shows notable real growth for the forecast periods:

- for the period 2010-2021 retail sales at Bathurst are forecast to increase from $523 million at April 2010 constant prices to approximately $650 - $678 million by 2021, an increase of 25 - 27 per cent over the period representing a real growth rate in retail sales of approximately 2.2 per cent per annum (net of inflation);

- for the period 2021-2036 retail sales at Bathurst are forecast to increase from $650 - $678 million at April 2010 constant prices to approximately $892 - $973 million by 2036, an increase of 37 - 40 per cent over the period representing a real growth rate in retail sales of 2.3 per cent per annum (net of inflation).

Table 5.5:

Bathurst Urban Area;

Estimated Current and Projected Annual Retail Sales 2010 - 2021 - 2036

Source: Analysis by Renaissance Planning, December 2010

Major Commodity Group	Source Measure	Bathurst Urban Area: Forecast Annual Retail Sales* ($000 at April 2010 Constant Prices)														
		Primary			Secondary			Tertiary			Total from Beyond the RCA			Bathurst Urban Area: Projected Total Sales		
		2010	2021	2036	2010	2021	2036	2010	2021	2036	2010	2021	2036	2010	2021	2036
Food, Groceries and Liquor																
Supermarket goods, fresh food and liquor	Medium*	141,590	165,930	207,720	36,070	40,970	49,080	22,350	25,100	29,440	2,010	2,340	2,890	202,020	234,340	289,130
	High**		175,940	235,000								2,440	3,170		244,450	316,690
Take away food and dining out	Medium*	55,450	72,450	105,220	11,810	14,960	20,790	8,330	10,430	14,200	1,530	2,000	2,860	77,120	99,840	143,070
	High**		76,830	119,040								2,090	3,140		104,310	157,170
Total Food, Groceries and Liquor	Medium*	197,030	238,380	312,940	47,880	55,930	69,870	30,680	35,530	43,640	3,540	4,340	5,750	279,130	334,180	432,200
	High**		252,770	354,040								4,530	6,310		348,760	473,860
Household Goods	Medium*	89,910	111,260	142,990	18,220	23,210	32,620	29,110	36,680	50,490	2,790	3,490	4,610	140,030	174,640	230,710
	High**		117,980	161,770								3,630	5,000		181,500	249,880
Bulky Goods	Medium*	55,150	75,550	127,110	9,800	13,830	22,260	17,860	24,910	39,270	3,430	4,760	7,860	86,240	119,050	196,500
	High**		80,120	143,820								4,950	8,560		123,810	213,910
Retail Services (part)	Medium*	13,060	17,070	24,780	2,760	3,490	4,850	1,190	1,490	2,020	340	450	650	17,350	22,500	32,300
	High**		18,090	28,030								470	710		23,540	35,610
Total Retail Sales	Medium*	355,140	442,260	607,820	78,660	96,460	129,600	78,840	98,610	135,420	10,100	13,040	18,870	522,740	650,370	891,710
	High**		468,960	687,660								13,580	20,580		677,610	973,260

5.2.6 Current Patterns and Future Requirements for Retail Turnover Per Square Metre of Floorspace (2010, 2021, 2036)

Research and analysis for the Strategy provided estimates of current retail sales at Bathurst. The estimates of current retail sales were related to the existing retail floorspace at 2010. Estimates of current retail turnover density were calculated by dividing the estimated current retail sales at 2010 by the existing occupied floorspace for the relevant commodity groups (refer Table 5.6). Retail turnover density (RTD) is the ratio of annual retail turnover to the gross leasable area required to generate the turnover. It is usually measured for a particular commodity group. The estimated current RTDs for Bathurst were as follows for 2010:

- food, groceries and liquor, approximately $8,280 per square metre gross leasable floor area per annum;
- household goods, approximately $3,890 per square metre gross leasable floor area per annum;
- bulky goods, approximately $2,730 per square metre gross leasable floor area per annum;
- selected retail services, approximately $3,010 per square metre gross leasable floor area per annum.

As the discussion in Section 3 indicated the RTD values identified in the assessment of current trading conditions at Bathurst generally represented standard industry levels present in Australian regional cities.

Table 5.6 shows the current RTD values observed at Bathurst in 2010. It also shows projected RTD requirements for 2021 and 2036. These take account of future real growth requirements to maintain store and centre viability.

Table 5.6:
Bathurst Urban Area;
Retail Turnover Density Projected Requirements 2010 - 2021 - 2036
Source: Analysis by Renaissance Planning, December 2010

Major Commodity Group	Retail Turnover Densities (2010 - 2036) based on Renaissance Planning population projections				
	Existing Floorspace (June 2010)	Estimated Retail Sales (2010)	Estimated Current Retail Turnover Densities (2010)	Projected Density Requirements ($ / m^2 GLFA / annum)	
	(m^2 GLA)	($ million)	($ / m^2 GLFA / annum)	2021	2036
Food, groceries and liquor	33,520	277.6	8,282	8,500	9,000
Household goods	35,820	139.3	3,890	4,200	4,500
Bulky goods	31,450	85.8	2,728	3,000	3,500
Selected services*	5,720	17.2	3,014	3,500	4,000
Total	106,510	520.0	4,882	N.E.M*	N.E.M*

* No Estimate Made

5.2.7. Future Gross Retail Floorspace Requirements (2021, 2036)

The future total level of supportable retail floorspace at Bathurst may be calculated by dividing projected retail sales by the required RTD values for major commodity groups for a specified year. Table 5.7 shows the future gross retail floorspace requirements for Bathurst. These were calculated by dividing projected retail sales for Bathurst (Table 5.5) by the projected RTD requirements (Table 5.6).

The gross retail floorspace requirements indicate the future total retail floorspace levels (by major commodity group) that the Bathurst urban area can viably sustain taking account of all of the following contributing factors:

- current and projected trade (market share patterns) of Bathurst within its primary catchment and secondary catchment and broader catchment area termed the Regional Catchment Area (RCA);
- current and projected levels of escape expenditure from Bathurst and other component catchment areas in the RCA, taking account of projected growth in online expenditures;
- projected population growth in Bathurst and its RCA;
- projected real growth in retail expenditures;
- current and projected RTD requirements for major commodity groups.

It can be seen that (refer Table 5.7):

- total retail floorspace requirements for the Bathurst urban area are expected to increase from approximately 123,500 square metres GLA in 2010 to approximately 145,000 - 151,000 square metres GLA by 2021 and to 186,000 - 203,000 square metres GLA by 2036;
- of this quantum the requirement for core retail goods and services floorspace (that is retail floorspace excluding bulky goods) is projected to increase from approximately 83,000 square metres in 2010 to approximately 97,000 - 101,000 square metres by 2021 and 119,000 - 130,000 square metres by 2036;
- bulky goods floorspace requirements are projected to increase from approximately 31,500 square metres in 2010 to 40,000 - 41,000 square metres by 2021 and 56,000 - 61,000 square metres by 2036;
- the projected gross retail floorspace requirements take account of a standard allowance for vacant floorspace. At 2010 the average level of vacant floorspace was approximately 6.6 per cent. [1] This is reflected in Table 4.1. An allowance for 6 per cent vacant floor space was factored into the provision requirements for 2021 and 2036.

---

1 This excludes the former TAFE building in the Bathurst CBD (not considered to be potential retail commercial space)

Table 5.7:
Bathurst Urban Area;
Forecast Gross Retail Floorspace Requirements 2010 - 2021 - 2036
Source: Analysis by Renaissance Planning, December 2010

Major Commodity / Service Group	Existing Supply at 2010	Projected Gross Retail Goods and Services Floorspace Requirements			
		Renaissance Planning*	.id Consulting**	Renaissance Planning*	.id Consulting**
		2021		2036	
	m² GLA				
Food, groceries and liquor	33,520	39,320	41,030	48,020	52,650
Household goods	35,820	41,580	43,210	51,270	55,530
Estimated Total Retail Services	13,970	15,710	16,440	19,740	21,740
Total Core retail goods and services	83,310	96,610	100,680	119,030	129,920
Bulky goods	31,450	39,680	41,270	56,140	61,120
Total Occupied Shopfront and Retail Goods Services Floorspace	114,760	136,290	141,950	175,170	191,040
Estimated Vacant Floorspace Allowance	8,720	8,700	9,060	11,180	12,190
Total Shopfront and Retail Goods and Services	123,480	144,990	151,010	186,350	203,230

* Medium Scenario based on Renaissance Planning population projections
** High Scenario based on .id Consulting population projections

5.2.8 Approved and Seriously Entertained Retail and Bulky Goods Proposals in Bathurst (as at 7 March 2011)

In order to identify net additional retail floorspace requirements for the Strategy, the stock of existing retail floorspace (as at June 2010) should be deducted from the projected total requirements together with approvals for developments that have not yet been constructed and are likely to proceed to development.

Table 5.8 shows an inventory of approved and seriously entertained retail and bulky goods developments in the Bathurst urban area at February 2011. In the view of the Strategy:
- project 1.1 in Table 5.8 will not likely proceed to development;
- in relation to project 1.2 only approximately 580 square metres (a convenience store and a McDonalds restaurant will be developed). It is not likely that the bulky goods component will proceed to development;
- the proposed retail and bulky goods components of project 2.1 have been subsumed in the proposed regional bulky goods precinct recommended by the Strategy;
- the proposed supermarket and retail development at Rankin Street is likely to gain approval and proceed to development, in the view of the Strategy (project 3.1);
- no information is available on project 3.2 and it could not be either included or discounted in a final assessment of net additional retail floorspace requirements.

A first assessment of net additional retail floorspace requirements in provided in Section 5.5. A final assessment of these requirements in relation to the needs of activity centres is set out in Section 7.

Table 5.8:
Bathurst Urban Area;
Approved and Seriously Entertained Retail and Bulky Goods Developments at March 2011
Source: Bathurst Regional Council, December 2010 - March 2011

	Project	Development Approval (DA) Status	Development Prospects	Activity Components by Gross Leasable Area (GLA) m²							
				Supermarkets	Other Retail	Total Core Retail	Bulky Goods	Total Shopfront Floorspace	Offices	Other Activities	Total: All Components
1	Development Approval in Place										
1.1	Proposed Retail Development, Corner Princes, Bentinck and Howick Streets, Bathurst	D.A. granted subject to conditions, December 2007. Effective until December 2012	Proponent has not proceeded to construction approval phase. Unlikely to proceed to development.	1,850	1,160	3,010	-	3,010	-	540[1]	3,550
1.2	Proposed Service Centre and Bulky Goods Development, Lots4 and 5, Pat O'Leary Drive	D.A. granted subject to conditions, April 2010. Construction approval granted for the subdivision works, March 2011. Upon commencement of construction of Phase 1, DA for Phases 1 and 2 remain in perpetuity	Most of Stage 1 appears likely to proceed. Stage 2 (the proposed bulky goods development appears unlikely to gain market support and proceed to development).	-	870[2]	870	16,280[3]	17,150[3]	-	-	17,150
Total: Development Approvals in Place				1,850	2,030	3,880	16,280	20,160	0	540	20,700
2	DCP Approval at Concept Stage*										
2.1	Proposed Freight Terminal, Business Park and Bulky Goods Development, Sydney Road, Kelso/Raglan	Bathurst Regional Development Control Plan (DCP) 2009. Sydney Road Precinct (South). Ministerial Approval granted in December 2009 for the Concept Plan.	Long-term development site, requiring rezoning, development approvals subject to detailed master planning. Site appears to offer excellent potential to meet Bathursts long-term bulky goods needs and optimises its regional role.	-	520	520	11,250	11,770*	-	48,320	60,090
3	Seriously Entertained Development Proposals										
3.1	Proposed Retail Development, 72-78 Rankin Street, Bathurst	Statement of Environmental Effect and associated assessments submitted to Council, December 2010. Assessment and consideration of proposal by Council in progress. Appears likely to achieve conditional DA.	Major tenants appears to have been secured. Prospects of proceeding to development subject to granting of DA, appears high.	1,420[3]	1,060[3]	2,480	-	2,480	-	750[3]	3,230[3]
3.2	Proposed ANZ Bank Redevelopment, Pedrotta's Lane and William Street, Bathurst	Proposed Concept submitted to Council, April 2010		-	950[3]	950[3]	-	950[3]	1,830[3]	-	2,780[3]
Total: Seriously Entertained Development Proposals				1,420	2,010	3,430	0	3,430	1,830	750	6,010
Total: All DA and/or DCP Approved Developments and Seriously Entertained Proposals				3,270	4,560	7,830	27,530	35,360	1,830	49,610	86,800

* The floorspace indicated in this proposed development is Gross Floorspace Area not Gross Leasable Area

[1] Existing building. Future long-term uses uncertain.

[2] Rounded to nearest to 10m². Of the 870m² indicated in Stage 1, 580m² (convenience store and McDonalds) will proceed to construction (as at March 2011)

[3] Rounded to nearest 10m²

5.3 Accounting for Likely Future Effects of Online Sales

It will be recalled (Section 4.13) that the Bathurst in centre survey and research into Australian online retail expenditure patterns provided the basis to assess current levels of escape expenditure from Bathurst, and within this context, estimates of current online expenditure (refer Table 5.9).

The research into online expenditure patterns in Australia indicated an industry wide expectation that online retail expenditure will double between 2009 and 2015 (refer Section 3.4). These projections are based on current prices and include future inflation levels. This order of growth was adopted for the period 2010-2016. A projected real rate of growth (that is, net of inflation) of 8.5 per cent per annum was adopted which will also approximate to a doubling over the period 2010-2016 if inflation is added. Declining future rates of real growth in online expenditure were assumed from 2016.

Table 5.9 shows estimated future online retail expenditures by Bathurst residents that is projected to be lost to stores in Bathurst. Emerging trends identified in the research indicate that it is highly unlikely that retail stores and shopping centres will not take countervailing actions to mitigate against losses to non-store and out-of-city store locations arising from online expenditures. Emerging retail trends cited in Section 3.4 including current research by the Australian Centre for Retail Studies indicated that some retail stores are providing in house online facilities to assist shoppers. It is highly likely that a range of countervailing actions will emerge including an emphasis on the social role of shopping, shops and shopping centres.

On the basis of this view the projections of real growth in online expenditure by Bathurst residents for household goods and bulky goods has been assumed to be substantially higher than general retail expenditure growth for an extended period of time. However, the projection makes the judgment that the rate of growth will decline over time as a number of online and in-store view and purchase options increase (refer Table 5.9). The application of these growth assumptions will result in a four-fold increase in real online expenditures over the forecast period (refer Table 5.9).

The overall outcome of these projections is that online retail expenditures by Bathurst residents are forecast to increase as follows (refer Table 5.9):

- for all household goods, from an average of 7.8 per cent in 2010 to 15 per cent in 2021 to 23 per cent by 2036;
- for all bulky goods, from an average of 6.3 per cent in 2010 to 11.9 per cent in 2021 and 14.2 per cent by 2036.

These projected real changes in the proportion of household goods and bulky goods expenditures bound to non-store locations and to stores in other cities outside Bathurst as a consequence of online purchases, have been incorporated in the projected market shares of Bathurst and consequent future retail sales for Bathurst. The allowances for future escape expenditures by Bathurst residents to locations other than Bathurst take account of the online projections and make a further allowance for personal shopping at centres in towns and cities other than Bathurst. The total escape expenditures by Bathurst residents allowed for in the analysis are as follows:

- for all household goods, an average escape expenditure rate of 15 per cent in 2010 rising to 20 per cent by 2021 and to 30 per cent by 2036 (refer Table 5.9);
- for all bulky goods, an average escape expenditure rate of 15 per cent in 2010 rising to 20 per cent by 2021 and remaining at 20 per cent by 2036.

It is assumed that the differentially higher growth of online retail expenditures by Bathurst residents would result in some reductions in personal shopping at other cities and towns by residents. In relation to the secondary and tertiary catchment areas, it was similarly assumed that the growth in online expenditures by residents in these areas would result in reductions in personal shopping at other centres and towns, and that the competitive position of Bathurst would be retained particularly in the secondary trade catchment area. In the tertiary catchment area, the market shares are relatively minor; it is a niche market and it is assumed that the attractions of the city will be retained sufficient to maintain this level of market share (this includes account of the social significance of Bathurst, significance of the city for events, tourism visits etc.).

In summary, a significant allowance has been made in the assessment of future retail sales and floorspace requirements for Bathurst, taking account of long term substantial real growth in online retail expenditures together with a further allowance for other in person escape expenditures. It is maintained that these provisions are conservative and provide a realistic basis to assess future floorspace requirements.

Table 5.9:
Bathurst: Forecast Growth of Online Retail Expenditures per Capita 2010 - 2036
Source: Analysis by Renaissance Planning Pty Ltd, February 2011

Commodity Group	Forecast On-Line Expenditures / Capita at April 2010 Constant Prices*					
	2010	2016	2021	2026	2031	2036
	($)					
Household Goods	245	406	556	726	905	1,075
Bulky Goods	120	195	268	350	436	518
Total	365	601	823	1,076	1,341	1,593
Commodity Group	**Forecast Total Retail Expenditures Per Capita at April 2010 Constant Prices**					
	2010	2016	2021	2026	2031	2036
	($)					
Household Goods	3,120	3,422	3,697	3,996	4,321	4,674
Bulky Goods	1,913	1,961	2,246	2,840	3,214	3,636
Total	5,033	5,383	5,943	6,837	7,535	8,310
Commodity Group	**Forecast On-Line Expenditures as a Proportion of Total Expenditures**					
	2010	2016	2021	2026	2031	2036
	(%)					
Household Goods	7.8	11.9	15.0	18.2	20.9	23.0
Bulky Goods	6.3	10.0	11.9	12.3	13.6	14.2

5.4 Net Additional Floorspace Requirements (2010-2021-2036)

The assessment of gross retail floorspace requirements for Bathurst was discussed in Section 5.2.7. A first assessment of net additional retail floorspace requirements for the Bathurst urban area was made by deducting the existing stock of occupied floorspace and making allowances for some marginal reductions in vacant floorspace over time.

The first estimate of net additional retail floorspace requirements for the Bathurst urban area, over the period 2010 - 2021 - 2036 are set out in Table 5.10. This assessment does not make allowance for approved or seriously entertained retail and bulky goods proposals that are likely to proceed to development. As the discussion in Section 5.2.8 indicated only the Rankin Street development is likely to proceed to development in the CBD and there is insufficient information to make any judgment in relation to the Pedrottas Lane proposal. Allowance for the Rankin Street project is made in Section 7 in the assessment of floorspace requirements for the period 2010 - 2021 and reviewing needs by centre type.

The broad net additional retail and bulky goods floorspace requirements for the Bathurst urban area are as follows:

- for the period 2010-2021 approximately 22,000 - 27,000 square metres of net additional retail floorspace is required in the Bathurst urban area. This includes approximately 8,000 - 10,000 square metres of additional bulky goods development and some 13,000 - 17,000 square metres of additional core retail goods floorspace (that is, retail goods and services floorspace excluding bulky goods);
- for the period 2021-2036 approximately 39,000 - 49,000 square metres of net additional floorspace is required in the Bathurst urban area. This includes some 16,000 - 20,000 square metres of additional bulky goods development and some 22,000 - 29,000 square metres of additional retail floorspace.

Table 5.10:
Bathurst Urban Area: Forecast Net Additional Retail and Bulky Goods Floorspace Requirements 2010 - 2021 - 2036
Source: Analysis by Renaissance Planning Pty Ltd, February 2011

Major Commodity / Service Group	Projected Net Additional Retail Goods and Services Floorspace Requirements			
	Renaissance Planning	.id Consulting	Renaissance Planning	.id Consulting
	2010 - 2021		2021 - 2036	
	m^2 GLA			
Food, groceries and liquor	5,800	7,510	8,700	11,620
Household goods	5,760	7,390	9,690	12,320
Estimated Total Retail Services	1,740	2,470	4,030	5,300
Total Core retail goods and services	13,300	17,370	22,420	29,240
Bulky goods	8,230	9,820	16,460	19,850
Total Occupied Shopfront and Retail Goods Services Floorspace	21,530	27,190	38,880	49,090
Estimated Vacant Floorspace Allowance	-20	340	2,480	3,130
Total Shopfront and Retail Goods and Services	21,510	27,530	41,360	52,220

In summary the Strategy has identified the need for significant additional core retail and bulky goods floorspace to meet the needs of the Bathurst urban area over the next twenty years and beyond. The identified needs provide the material basis for new neighbourhood centres and consolidations and the ongoing consolidation of the Bathurst CBD together with a new bulky goods precinct. Indicative allocations for these initiatives are provided in Section 7.

5.5 The Demand for Department and Discount Department Store Floorspace

In a regional city, such as Bathurst, the highest order retail function is a department store and a discount department store (examples of a department store include Myer and David Jones, examples of discount department stores include Big W, K Mart and Target). An additional analysis was undertaken of the demand for department and discount department stores in Bathurst for the future period 2010-2021 and 2021-2036. The purpose of the analysis was to further inform strategic planning for the Bathurst CBD and policy development. In particular, the analysis was focussed to identify the timing and likely required scale of future department store and discount department store needs to service Bathurst and its RCA.

The methodology applied for the analysis was developed from the demand assessments undertaken for core retail goods and bulky goods. The demand assessment comprised the following steps:

- the estimated non food retail goods sales for Bathurst was assessed for 2010 from the model developed by Renaissance Planning. This is in the range $225 - $227 million (refer Table 5.10);

- the relevant potential market from which department and discount department store trade is drawn is termed Department Store and Trade Merchandise (DSTM) and is approximately 85 per cent of non food retail goods trade. This is shown as item 2 in Table 5.10 (in the range of $191 - $193 million for 2010);

- the existing discount department stores in Bathurst draw trade from within the potential DSTM pool. The sustainable market share for both the Target and the Big W store is estimated at 20 per cent of the DSTM pool (equating to approximately $38 - $39 million for 2010);

- the existing floorspace of the discount department stores in Bathurst is approximately 12,930 square metres GLA (shown as item 4 in Table 5.10);

- the average retail turnover density (RTD) for existing discount department store floorspace is therefore equal to the sustainable market share divided by the occupied floorspace, which equates to approximately $2,960 turnover per square metre GLA per annum at June 2010 prices;

- allowing for real growth, a future sustainable RTD requirement of $3,500 turnover per square metre GLA per annum at June 2010 constant prices was set for department and discount department stores for Bathurst for 2021;

- the projected non food retail goods sales for Bathurst for 2021 is in the range $294 - $305 million at June 2010 constant prices (refer item 1, Table 5.10 for 2021);

- the projected potential pool of DSTM is in the range $250 - $260 million at June 2010 constant prices (refer item 2, Table 5.10 for 2021);

- allowing for a third discount department store or a department store will have the effect of increasing the sustainable conjoint market share of department and discount departments stores in Bathurst from approximately 20 per cent at present to approximately 25 per cent;

- this equates to sustainable department and discount department store sales in the range of $62 - $65 million for 2021 at June 2010 constant prices;

- applying the future sustainable RTD requirement of $3,500 annual turnover per square metre GLA (item 3, Table 5.11 for 2021), this equates to total department and discount department store floorspace requirements in Bathurst in the range 17,830 - 18,540 square metres GLA by 2021 (shown as item 4, Table 5.10 for 2021);

- assuming the existing discount department stores remain in operation without floorspace change, the net additional floorspace requirements over the period 2010 - 2021 are thus in the range 4,900 - 5,610 square metres GLA of floorspace;

- applying the same analysis routine again for 2036 the net additional floorspace requirements for department and discount department stores to cater for projected demand between 2031 and 2036 is approximately 13,470 square metres GLA.

As the above analysis indicates approximately 4,900 - 5,610 square metres GLA of department and discount department store floorspace is required by growing retail demand in Bathurst by 2021. This level of floorspace is only sufficient to support a small or medium size discount department store (in the range 4,000 - 6,000 square metres GLA). A full sized discount department store is approximately 8,000 square metres GLA and a department store for a regional city is typically of the order of 12,000 square metres GLA.

The analysis shows that in the long term there is significant demand to warrant a department store or an additional full sized discount department store. Over the period 2021 - 2036 demand for additional department store and discount department store floorspace will be growing at the rate of approximately 900 square metres GLA per annum. On this basis a full sized discount department store could be sustained by 2024. Alternatively a department store of approximately 12,000 square metres GLA could be sustained by 2029. It is emphasised that this indicative future timing is based on the sales projections for Bathurst which are regarded as conservative and on the application of future RTDs which allow for further real growth. There is of course nothing to prevent a department or discount department store in excess of 4,000 - 6,000 square metres locating in the Bathurst CBD well before 2021; in the final analysis it remains a market decision.

In summary the analysis indicates the demand for an additional discount department store by 2021 which should be located in the Bathurst CBD. The strategic and policy framework for the recommended Strategy make provision for an additional store development in the first implementation phase of the Strategy (2010 - 2021).

Table 5.11:
Bathurst Urban Area: Assessment of Department and Discount Department Store Floorspace Requirements 2010 - 2021 - 2036
Source: Analysis by Renaissance Planning Pty Ltd, February 2011

Item	2010		2021		2036	
	Renaissance	.id Consulting	Renaissance	.id Consulting	Renaissance	.id Consulting
1. Bathurst Urban Area: Non-food retail goods estimated and projected sales ($ million at April 2010 constant prices)	225.15	227.23	293.69	305.31	427.21	459.24
2. Bathurst Urban Area: Estimated and projected potential Department Store and Trade Merchandise (DSTM) turnover ($ million at April 2010 constant prices)	191.38	193.15	249.64	259.51	363.13	390.35
3. Bathurst Urban Area: Estimated current and projected Department / discount department store Retail Turnover Density (RTD) requirement ($ / m^2 GLFA / annum at 2010 constant prices)	2,960	2,988	3,500	3,500	4,000	4,000
4. Bathurst Urban Area: Estimated and projected Department and Discount Department Store (DDS) floorspace requirements (m^2 GLFA)	12,930	12,930	17,830	18,540	22,700	24,400
5. Net additional Department and Discount Department Store floorspace requirements (m^2 GLFA) (cumulative)	Nil	Nil	4,900	5,610	9,770	11,470

* At June 2010 the total occupied floorspace in department and discount department stores in Bathurst was approximately 12,930m^2

** Market share of Department and Discount Department Store sales (as a proportion of DSTM trade) was estimated at 20% for Bathurst, rising to 25% for 2021 and 2036.

5.6 Demand for Office Floorspace in Bathurst (2010-2021-2036)

The land use and floorspace survey (June 2010) provided current information on the stock of office floorspace in Bathurst. An assessment of demand requirements for office floorspace over the forecast period was undertaken using a provision method of assessment. The steps in the assessment process were as follows:

- the current and projected future effective supporting population of Bathurst was calculated for office floorspace provision. It will be recalled (Section 4.4) that the effective supporting population was defined as the equivalent permanent population that supports the retail trade and services of Bathurst. The basis of calculation is set out in Section 4.4;

- for office services the current effective supporting population for Bathurst is 46,000 people (refer Table 5.11). This is projected to increase to approximately 51,000 - 53,000 by 2021 and to 58,400 - 63,000 by 2031 (refer Table 5.11);

- the current rate of provision of office floorspace in Bathurst is approximately 1.02 square metres per capita which is within the range of office provision in other regional cities recently surveyed (refer Table 4.3);

- a projection of office floorspace requirements was undertaken for Bathurst allowing for marginal growth in the rate of provision consistent with the upper levels of rates observed in other regional cities;

- the resultant growth office floorspace requirements are set out in Table 5.12 .

The analysis indicated that the current stock of occupied office floorspace in Bathurst is approximately 47,600 square metres GLA, (refer Table 5.12). The required stock of office floorspace is projected to increase to 54,000 - 56,000 square metres GLA by 2021 and to 64,000 - 69,000 square metres GLA by 2036. The net additional floorspace requirements for office floorspace are as follows:

- for the period 2010-2021, a net additional requirement of 6,000 - 8,400 square metres GLA of office floorspace;

- for the period 2021-2036, a net additional requirement of 10,500 - 13,400 square metres GLA of office floorspace.

Table 5.12:
Bathurst Urban Area: Forecast Effective Supporting Population for Office Services 2010 - 2021 - 2036
Source: Analysis by Renaissance Planning Pty Ltd, February 2011

Catchment Area	Effective Supporting Population* for Office Floorspace					
	2010		2021		2036	
	Renaissance Planning	.id Consulting	Renaissance Planning	.id Consulting	Renaissance Planning	.id Consulting
Primary	31,290	31,780	34,990	37,100	40,640	45,320
Secondary	5,480	5,480	5,900	5,900	6,560	6,560
Tertiary	9,670	9,670	10,280	10,280	11,190	11,190
Total RCA	46,440	46,930	51,170	53,280	58,390	63,070

* The effective supporting population for office services is based on a combination of the effective supporting population for retail services for the primary catchment and bulky goods for the secondary and tertiary catchments (refer Table 4.4)

Table 5.13:
Bathurst Urban Area: Assessment of Office Floorspace Requirements 2010 - 2021 - 2036
Source: Analysis by Renaissance Planning Pty Ltd, February 2011

Office Floorspace Measure	Existing Supply at 2010	Projected Office Floorspace Requirements			
		Gross Floorspace Requirements		Projected Net Additional Requirements	
		2021	2036	2010 - 2021	2021 - 2036
	m² GLA				
Medium Scenario Requirement*	47,580	53,720	64,230	6,140	10,510
High Scenario Requirement**	47,580	55,940	69,380	8,360	13,440

* Medium Scenario based on Renaissance Planning population projections
** High Scenario based on .id Consulting population projections

5.7 Neighbourhood and Convenience Centre Floorspace Requirements (2010-2021- 2036)

As part of providing a comprehensive analysis of retail floorspace requirements for the Bathurst urban area, assessments were undertaken of the current and future need for neighbourhood and convenience centres in suburban Bathurst. For the purposes of the analysis, a neighbourhood centre was defined as a locally based shopping and services activity centre catering for daily and weekly shopping requirements and anchored by a small supermarket (in the range 500 – 1,200 square metres GLA) or by a medium sized supermarket (in the range 1,201 – 2,000 square metres GLA). A convenience centre was defined as a non-supermarket based shopping and services centre catering for limited daily requirements (refer Glossary).

The assessment of floorspace requirements comprised the following steps:

- a spatial review was undertaken of existing and possible future neighbourhood centres to assess the adequacy of local area catchments;
- a detailed analysis was undertaken of projected local area population growth and projected growth in local catchment areas;
- an assessment was undertaken of floorspace provision requirements for local retail and services needs;
- projections were prepared of future neighbourhood centre floorspace requirements.

5.7.1 Spatial Review

The assessment of local area floorspace requirements commenced with a review of the overall pattern and distribution of existing and proposed neighbourhood centres in the Bathurst urban area. Figure 5.1 shows the spatial pattern of existing neighbourhood centres in Bathurst in relation to the CBD, together with a proposed new neighbourhood centre. It will be noted that:

- Figure 5.1 shows a 2.5 kilometre radius from the CBD (taken as the intersection of William and Howick Street which is the approximate centroid of the principal shopping district).
- the Bathurst Retail Strategy (1999) recommended a 2.5 kilometre exclusion zone around the CBD for supermarket development. The purpose of this was to maintain the integrity of the CBD for current and future shopping developments and to avoid a ribbon pattern of edge-of-CBD developments.
- the inclusion of the 2.5 kilometre radius from the CBD was provided as a context for the assessment of the neighbourhood centre pattern and to see whether it constituted an overly restrictive constraint on neighbourhood centre location and local area coverage;
- Figure 5.1 also shows the current locations of the Westpoint and Trinity Heights neighbourhood centres with indicative 2 kilometre catchments;

- the local centre at Kelso is also shown with an indicative 1 kilometre catchment;

- in addition the analysis has considered provision for a new neighbourhood centre to service the Eglinton local area taking account of the future potential population as envisaged in the recently exhibited Planning Proposal for the expansion of Eglinton (Draft, November 2010). For the purposes of the assessment an indicative location for a future neighbourhood centre was identified on the western side of the intersection of Freemantle Road and Duramana Road.

The analysis showed:

- the existing neighbourhood centres of Westpoint and Trinity Heights together with the proposed future neighbourhood centre at Eglinton have discrete catchment areas applying the 2 kilometre catchments. These catchment areas encompass significant existing and future residential areas. An analysis of the current and future population in these areas was undertaken in the following section to identify future floorspace requirements at each of the three centres;

- the western part of the Kelso local catchment area is also served by the Trinity Heights neighbourhood activity centre. The proximity of the two centres and the effective location of the Trinity Heights centre to cater for future growth provide a first indication that there would not be sufficient population to sustain a neighbourhood function at the Kelso centre.

- the Robin Hill – Mount Panorama area is not effectively served by a neighbourhood centre and the outlying area of Raglan is also not served by existing or future neighbourhood centres. The Strategy recommends additional floorspace to consolidate the existing convenience store at Perthville. It also recommends a convenience hub be developed at the proposed regional bulky goods precinct envisaged for the intermodal site (refer Sections 7.2 - 7.4)

- The urban areas of South Bathurst – Gormans Hill are relatively close to central Bathurst and their service requirements could be provided by facilities in the CBD. These issues are further addressed in Section 5.7.5.

In summary, the initial analysis of activity centre catchments indicated that there was a sound basis to provide detailed population and provision analysis for supermarkets and other local area floorspace requirements to meet the needs of existing and growing suburban populations. The detailed analysis set out is in the following section, also highlighted potential service issues for the Robin Hill – Mount Panorama area, and within this context the issue of a future neighbourhood role for the Stewart Street precinct was examined.

Figure 5.1: Bathurst Urban Area: Initial Catchment Analysis for existing and likely future neighbourhood centres

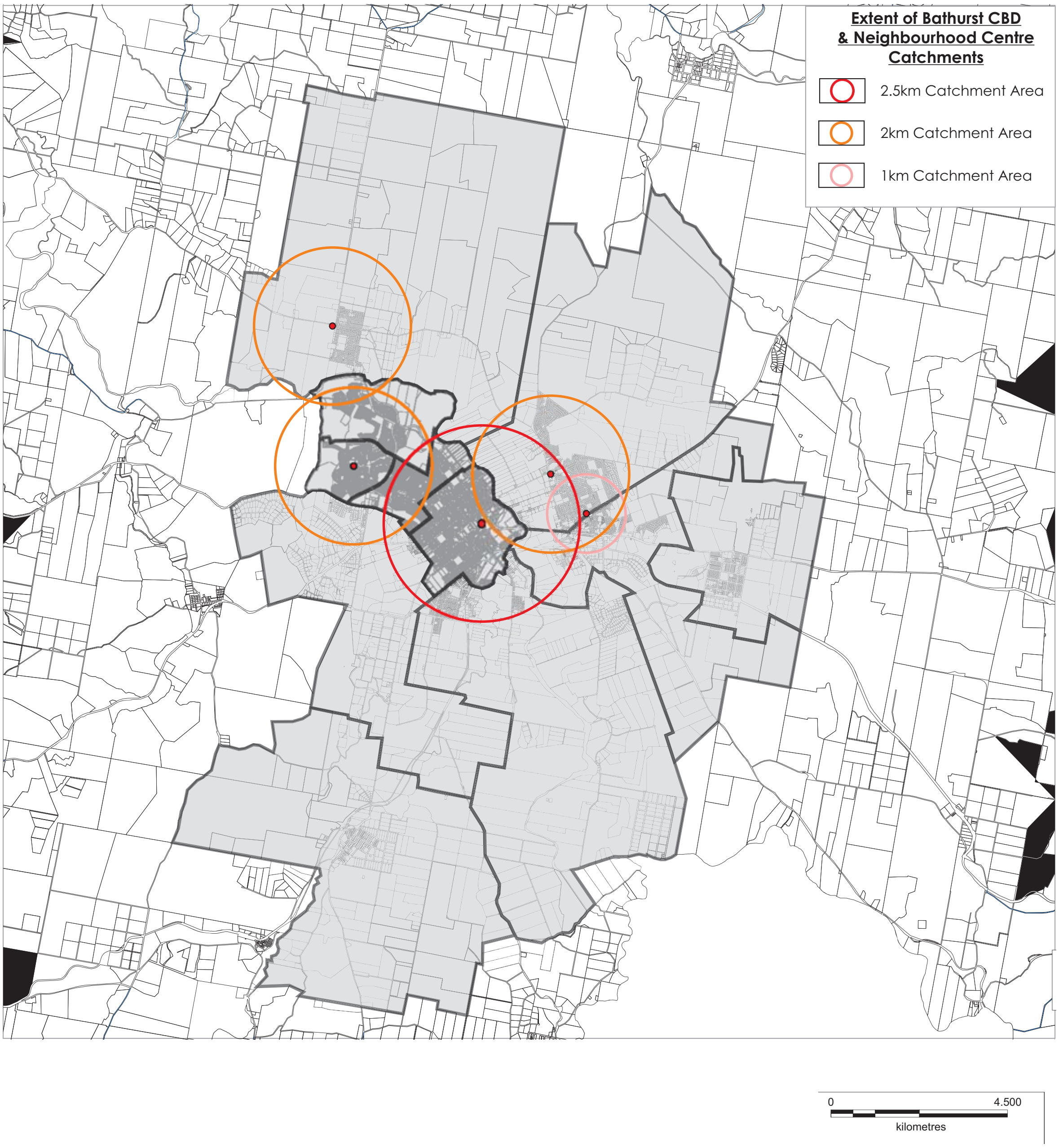
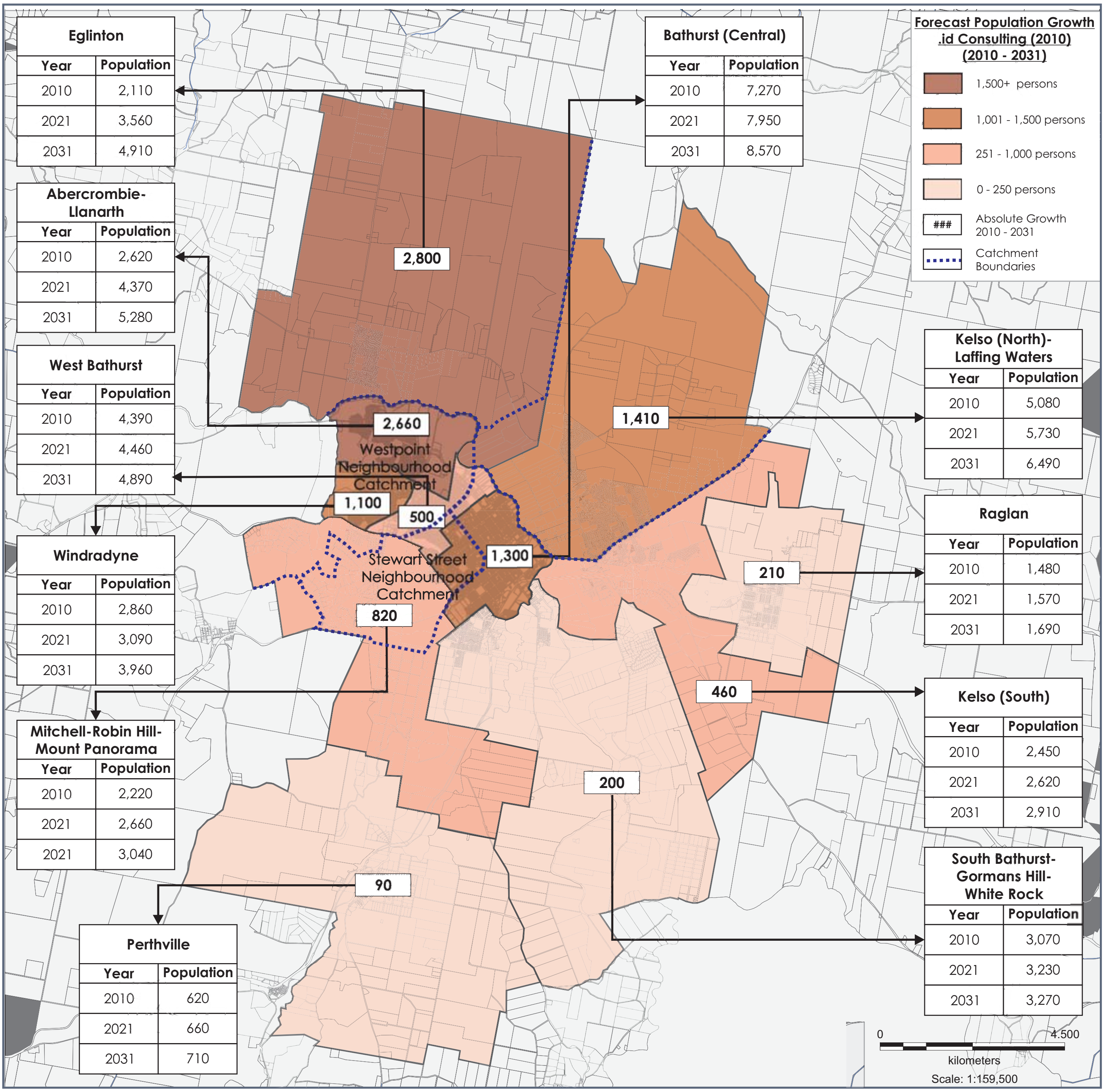


Figure 5.2: Bathurst Urban Area: Forecast Population Growth by Local Area (2010-2031)

Source: .id Consulting (2010). Note: all estimated and forecast populations have been rounded to the nearest 10 units



5.7.2 Detailed Local Area Analysis
the .id Consulting Local Area Forecasts (2010-2021-2031)

The population forecasts prepared for Bathurst Regional Council by .id Consulting in 2010 included local area projections. A summary of these projections is provided in Figure 5.2. This shows the Bathurst local areas with the estimated resident populations (ERPs) for 2010, 2021 and 2036. Figure 5.2 also shows the projected absolute growth for each of the local areas between 2010 and 2031. It will be noted that:

- the map in Figure 5.2 shows the projected population for Eglinton to reach approximately 4,910 people by 2031. The estimated population capacity of the Eglinton local area by Bathurst Regional Council, as facilitated by the current Draft DCP is approximately 3,800 persons. In the detailed analysis this lower Figure was adopted as a limiting population for the purposes of assessing retail floorspace requirements to service the local area;

- most of the population growth is concentrated in the western and northern suburbs of Bathurst and in central Bathurst. Less than 1,000 additional people are forecast for all of the southern suburbs of Bathurst, extending in a east-west arc from Raglan through to Kelso South, South Bathurst – Gormans Hill – White Rock through to Perthville. By contrast, the population growth in the balance of the Bathurst urban area (the western, northern and central suburbs) was projected to exceed 10,000 people in the period 2010 – 2031.

5.7.3 Detailed Local Catchment Analyses

In the next step, the indicative 2 kilometre radial catchments were modified to encompass the local areas used by .id Consulting. The resultant local area catchments are shown in Figure 5.2. It will be noted that:

- the local service catchment for the Westpoint neighbourhood activity centre includes the suburb of Windradyne, West Bathurst (western section), Abercrombie – Llanarth and the western part of Mitchell – Robin Hill – Mount Panorama;

- the local service catchment for a future neighbourhood centre at Eglinton is confined to the Eglinton local area;

- the local service catchment for the current neighbourhood centre at Trinity Heights is confined to the Kelso (north) – Laffing Waters local area;

- the analysis indicated that a significant area not effectively served by neighbourhood centres is the eastern section of the Robin Hill area. The most accessible location to service this area is the existing retail and commercial precinct of Stewart Street (refer Figure 5.3). If a neighbourhood centre function could be provided for Stewart Street, it would serve a local catchment area encompassing parts of central and west Bathurst together with the eastern section of the Robin Hill area (refer Figure 5.3).

Population projections were prepared for each of the above catchment areas using the .id Consulting forecasts. The results are shown in Table 5.13. It will be seen that:

- the most significant local area in terms of its current and projected population is the Westpoint neighbourhood catchment area. The catchment area is estimated to have a current population of 8,350 people (2010) and is forecast to reach 12,600 people by 2031;

- the Trinity Heights neighbourhood catchment area has a current catchment population of 5,080 people and is forecast to reach 6,490 people by 2031;

- the Eglinton neighbourhood catchment area has a current population of 2,010 people and is forecast to reach a capacity population of 3,800 people by 2031;

- the Stewart Street neighbourhood catchment area has a current population of 5,930 people and is forecast to reach 7,150 people by 2031;

- of the remaining local areas their populations are either too small (now and in the future) to warrant a supermarket based neighbourhood centre or they are relatively close to other urban areas and can be effectively serviced by existing centres:

  - the current and projected populations of central Bathurst that would not be serviced by the Stewart Street precinct (if a neighbourhood centre was developed there) are significant in the context of Bathurst. However, the local service needs of these populations can be effectively meet by existing facilities in the CBD. This also applies to the existing and projected populations of south Bathurst – Gormans Hill – White Rock;

  - the local service needs of Kelso south can similarly be meet by the Trinity Heights neighbourhood centre or by existing facilities in the CBD;

  - the current and projected populations of Raglan and Perthville are too small to warrant a supermarket based neighbourhood centre. Their future local service requirements will have to be met by convenience stores that can be co-located with service stations and/or fast food outlets.

The assessment of neighbourhood activity centre floorspace requirements were based on the local area forecasts prepared by .id Consulting. Additional analysis was undertaken in the Macquarie Plains / Kelso area to identify long term neighbourhood activity centre requirements that extend beyond the time horizon for the Strategy (refer Section 7.2.8).

Table 5.14:

Bathurst Urban Area: Forecast Neighbouring Catchment Populations

2010 - 2021 - 2036

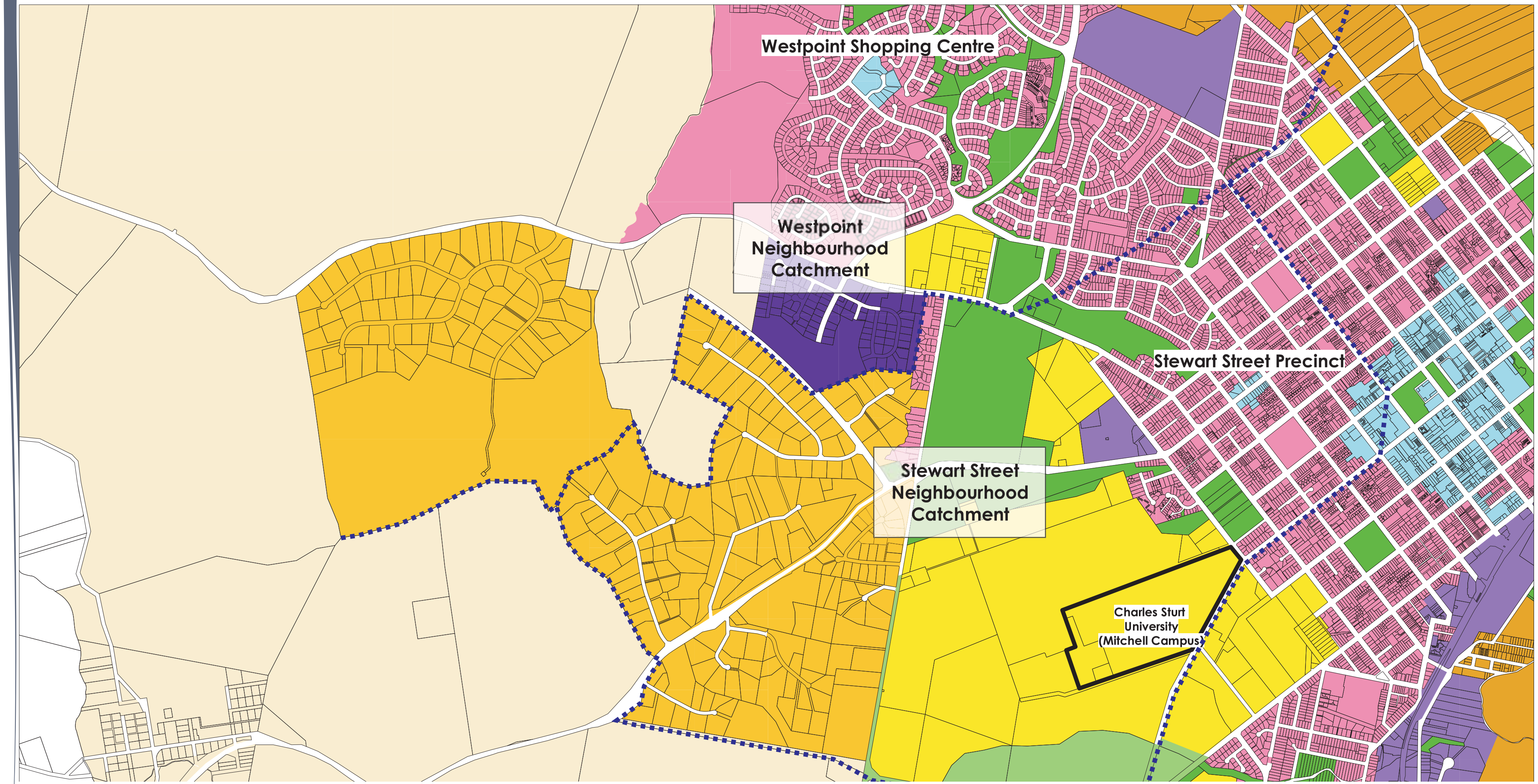
Source: .id Consulting 2010, Population Forecasts for Bathurst required LGA, Catchment Analysis by Renaissance Planning Pty Ltd, February 2011

Local Area	Estimated Resident Population		
	2010	2021	2031
Westpoint Neighbourhood Catchment Area			
Windradyne	2,860	3,090	3,960
West Bathurst (part)	2,200	2,230	2,450
Abercrombie-Llanarth	2,620	4,370	5,280
Mitchell - Robin Hill - Mount Panorama (part)	670	800	910
Total: Westpoint Neighbourhood Centre	**8,350**	**10,490**	**12,600**
Trinity Heights / Kelso Neighbourhood Catchment Area	**5,080**	**5,730**	**6,490**
Eglinton Neighbourhood Catchment Area	**2,110***	**3,000****	**3,800****
Stewart Street Neighbourhood Catchment Area			
Bathurst Central (part)	2,180	2,390	2,570
West Bathurst (part)	2,200	2,230	2,450
Mitchell - Robin Hil l- Mount Panorama (part)	1,550	1,860	2,130
Total: Stewart Street Neighbourhood Catchment Area	**5,930**	**6,480**	**7,150**
Raglan	1,480	1,570	1,690
Kelso (South)	2,450	2,620	2,910
Bathurst Central (South East) (part)	5,090	5,570	6,000
South Bathurst - Gormans Hill - White Rock	3,070	3,230	3,270
Perthville	620	660	710
Total: Bathurst Urban Area	**34,180**	**39,350**	**44,620**

* .id Consulting estimate for Eglinton at 2010.

** Projections for Eglinton have been downwardly revised by Renaissance Planning (2011) to fall within residential capacity of DCP (established 18 November 2010)

Figure 5.3: Stewart Street potential Neighbourhood Activity Centre: Local Catchment Area



5.7.4 Rates of Floorspace Provision Requirements for Neighbourhood and Convenience Centres (2010-2021-2031)

The assessment of neighbourhood and convenience centre floorspace requirements for suburban Bathurst required an analysis of rates of floorspace provision for these types of centres. In relation to neighbourhood activity centres:

- recommended rates of floorspace provision for the neighbourhood centres are set out in Table 5.14. These were determined through an analysis of current per capita expenditure levels for food, groceries and other locally consumed goods and services and the application of sustainable RTDs to ensure viable trading. The analysis was also based on the setting of an appropriate market share for neighbourhood trade that still provides for the major component of market share to be provided by the Bathurst CBD. The determination of approximately 0.2 square metres GLA of supermarket floorspace per capita to meet neighbourhood needs for local supermarkets allows for a 30 per cent market share for the neighbourhood supermarket within the local catchment area;

- the recommended provision rates are 0.35 square metres GLA per capita for retail floorspace of which 0.2 is for supermarket requirements and the balance for other food and other retail stores and services;

- a further 0.15 square metres GLA per capita is recommended to accommodate local commercial services (for example, local legal or accounting services) and local medical and community services;

- a total of 0.50 square metres GLA per capita is recommended for retail, commercial, medical and community services floorspace provision in neighbourhood centres.

The recommended rate of provision for convenience centres was developed on the basis that modern convenience stores will achieve a maximum 12-15 per cent market share of relevant goods in their local service areas. On this basis, a provision rate of 0.1 square metres GLA per capita for convenience stores was recommended. The Strategy does not make any quantitative assessment for other floorspace in these types of centres, though it does recommend the co-location of convenience stores with service stations and/or fast food outlets in suitable highway based locations.

Table 5.15:
Bathurst Urban Area: Recommended Rates of Neighbourhood Centre Floorspace Provision 2010 - 2036
Source: Analysis by Renaissance Planning Pty Ltd, March 2011

Store/Service Type	Recommended Floorspace Rate of Provision	
	Small Neighbourhood Centres	Large Neighbourhood Centres
	Floorspace (m^2/capita)	
Supermarket	0.20	0.20
Other food stores	0.10	0.10
Other retail stores and services	0.05	0.15
TOTAL: Retail	**0.35**	**0.45**
Commercial services	0.05	0.10
Medical services and community	0.10	0.15
TOTAL: Community services and community	**0.15**	**0.25**
TOTAL: Neighbourhood floorspace	**0.50**	**0.70**

5.7.5 Floorspace Requirements for Neighbourhood and Convenience Centres in Suburban Bathurst (2010-2021-2031)

The application of the recommended rates of floorspace provision for neighbourhood and convenience centres to the current and projected populations in the identified catchment areas, resulted in the assessment of future floorspace requirements. The findings for neighbourhood centres are set out in Table 5.15:

- the Westpoint neighbourhood activity centre has a current floorspace requirement (2010) for a 1,670 square metres GLA supermarket together with 1,250 square metres of other retail floorspace and a further 1,250 square metres of non-retail floorspace. The needs are projected to increase to 2,000 square metres of supermarket floorspace by 2021 with the need for a further 2,620 square metres of other retail floorspace and 2,620 square metres of non-retail floorspace or a total of 7,240 square metres of activity centre floorspace by 2021. By 2031 the total requirement increases to 9,340 square metres GLA;

- the Trinity Heights neighbourhood activity centre has current total floorspace requirements of 2,540 square metres GLA including the need for a 1,020 square metres supermarket. The long term requirements (by 2031) include the need for a 1,200 square metres GLA supermarket, a further 1,030 square metres of other retail floorspace and 1,030 square metres of non-retail floorspace with a total activity centre floorspace requirement of 3,260 square metres GLA by 2031;

- a recommended neighbourhood activity centre at Eglinton could support a 420 square metres GLA supermarket at present, rising to 600 square metres GLA by 2021 and 840 square metres by 2036. The long term floorspace requirements (by 2036) are approximately 2,100 square metres GLA of retail and non-retail floorspace;

- a potential neighbourhood activity centre at Stewart Street could at present (2010) support a 1,190 square metres GLA supermarket rising to 1,200 square metres GLA by 2021. Potential demand for a larger supermarket would increase beyong this time period but the supermarket has been capped at 1,200 square metres given likely site limitations. A total of 890 square metres GLA of other retail activities could at present be supported rising to 1,120 square metres GLA by 2031. At present, a neighbourhood activity centre at Stewart Street could support 890 square metres GLA of non-retail (commercial, medical services and community floorspace). The demand for this increases to approximately 1,120 square metres GLA by 2036. The total neighbourhood activity centre floorspace required at Stewart Street is approximately 2,970 square metres GLA rising to approximately 3,440 square metres GLA by 2031-2036.

The analysis also provided an assessment of convenience store requirements for Kelso, Raglan and Perthville. As indicated in Section 7.2.6, the existing Kelso local centre is not considered to be sustainable in the foreseeable future. The Strategy recommends that in the event that the site is redeveloped consideration be given for alternative uses including medium density housing and the provision of a convenience store. The required floorspace for a convenience store / newsagency and a deli / cafe / takeaway food store at Kelso local centre is approximately 500 square metres (refer Section 7.4.1)

The floorspace requirements for a local / convenience centre at the proposed Bathurst Retail Hub to service the proposed regional bulky goods precinct and significant on-site employment at the intermodal site, and to service the needs of the Raglan community are approximately 1,100 square metres GLA (refer Section 7.4.1).

Similarly floorspace requirements for a convenience centre at the proposed ancillary service centre to be co-located at the Bathurst Trades Centre is approximately 850 square metres GLA (refer Section 7.4.1). The convenience store requirements for Perthville are approximately 100 square metres GLA (refer Section 7.4.1).

In summary, within the wider context of identified retail, bulky goods and office floorspace requirements for Bathurst, assessments were undertaken of neighbourhood and convenience floorspace requirements for suburban Bathurst. These provided the demand basis for the development and policy recommendations for neighbourhood and convenience centres set out in the following section.

Table 5.16:

Bathurst Urban Area: Forecast Floorspace Requirements of Neighbourhood Activity Centres 2010 - 2021 - 2036

Source: Analysis by Renaissance Planning Pty Ltd, March 2011

Neighbourhood Activity Centres	Total Neighbourhood Activity Centre Floorspace Requirements (GLA, m²)[1]			
	2010	2021	2031	2036
Westpoint				
Supermarket	1,670	2,000	2,500	2,500[2]
Other Retail	1,250	2,620	3,150	3,420
Total Retail	2,920	4,620	5,650	5,920
Non Retail	1,250	2,620	3,150	3,420
Total Floorspace Required	*4,170*	*7,240*	*8,800*	*9,340*
Trinity Heights / Kelso Neighbourhood Catchment Area				
Supermarket	1,020	1,150	1,200[3]	1,200[3]
Other Retail	760	860	970	1,030
Total Retail	1,780	2,010	2,170	2,230
Non Retail	760	860	970	1,030
Total Floorspace Required	*2,540*	*2,870*	*3,140*	*3,260*
Eglinton				
Supermarket	420	600	760	840[4]
Other Retail	320	450	570	630
Total Retail	740	1,050	1,330	1,470
Non Retail	320	450	570	630
Total Floorspace Required	*1,060*	*1,500*	*1,900*	*2,100*
Stewart Street				
Supermarket	1,190	1,200	1,200	1,200
Other Retail	890	970	1,070	1,120
Total Retail	2,080	2,170	2,270	2,320
Non Retail	890	970	1,070	1,120
Total Floorspace Required	*2,970*	*3,140*	*3,340*	*3,440*
Total Neighbourhood Activity Centres				
Supermarket	4,300	4,950	5,660	5,740
Other Retail	3,220	4,900	5,760	6,200
Total Retail	7,520	9,850	11,420	11,940
Non Retail	3,220	4,900	5,760	6,200
Total Floorspace Required	*10,740*	*14,750*	*17,180*	*18,140*

Footnotes

[1] All current and forecast requirements have been rounded to the nearest 10m²

[2] Westpoint can support supermarket floorspace of 2,500m² GLA at 2031. This is capped at 2,500m² GLA after 2031 (could support approximately 2.750m² GLA by 2036).

[3] Trinity Heights could support supermarket floorspace of 1,230m² GLA at 2031 (and 1,270m² GLA at 2036) but has been capped at 1,200m² GLA for statutory purposes and the likelihood of limited available land.

[4] The forecast supermarket floorspace requirement for Eglinton is 840m² GLA at 2036. The Strategy recommendation will allow a maximum permissable floorspace for a supermarket of 1,200m² GLA.

[5] Stewart Street could support forecast supermarket floorspace requirements of 1,300m² GLA by 2021, 1,430m² GLA by 2031 and 1,500m² GLA by 2036. These have been capped at 1,200m² for statutory purposes and the likelihood of limited available land.

6 vision development

vision development

6

Community and stakeholder workshops were undertaken as part of the Bathurst CBD and Bulky Goods Business Development Strategy to inform and guide the future of retailing in the city. These workshops consisted of two four hour facilitated workshops held in Bathurst on Monday 9 August 2010. Approximately forty stakeholders participated in the workshops. The stakeholders were representative of Bathurst's retail 'whole system' being the network of people and organisations that influence or may be influenced by the future development of retail in Bathurst.

The participants in each workshop addressed the following issues and questions:

- **Exploration of the present situation**
  - What are the good and not so good things about retail in Bathurst today?
  - What are the present external trends and issues affecting retail in Bathurst and which will have the most influence on the future?
  - What hard questions should the retail strategy address?

- **Designing the future**
  - What are the future directions for retail growth and development?
  - What values or principles should guide future decisions?

- **The vision or point of differentiation.**
  - The vision states what retail in Bathurst should offer in the future.
  - The vision provides a way to differentiate retail in Bathurst from its competitors.

The outputs from both workshops were captured in an unedited outputs report and a summary of the unedited outputs follows. The words used closely reflect those of the workshop participants. They state what is important to the community and how retail in Bathurst should develop in the future.

The Present Situation

Internal influences: good things and not so good things about retail in Bathurst today.

There are good things about retail in Bathurst today and not so good things. Future development would build on the 'good things'. The 'not so good things' would be done differently or not at all.

Good things

- The CBD is strong with diversity and choice. There are no competing shopping Malls in suburbs and local neighborhood centres work to complement the CBD.

- There is a good mix of cultural and social facilities within the CBD. Examples include the library and art gallery. These facilities provide another reason to visit the city centre.

- The atmosphere of the central business district is enhanced by the heritage buildings and streetscapes,

- Specialist precincts like Keppel Street are developing and becoming popular.

It is easy to walk between shops in the central business district. It is compact in design and the walking distances between shops are not great.

Not so good things

- Traffic and congestion in the CBD
- Empty shops and an oversupply of shops
- Landscaping around the bulky goods areas and urban design in streetscapes
- The availability of public transport and alternative transport options to get around
- The pedestrian environment particularly in the areas of physical access and road safety

External trends and issues most likely to affect future retail in Bathurst

Bathurst retail is presently affected by external trends and issues that will influence and shape future retail activity. From the stakeholder's perspective these are the key outside influences:

- The strategic advantage provided by Bathurst's ample supply of water. This will facilitate development and can be used to green spaces in the City, towns and suburbs.

- Potential changes in population. As Sydney out grows itself more people are likely to come and settle in the regions and this will expand the retail market. Also demographic shifts like the ageing population will increase the number of people moving into town to access services. The recent arrival of migrants with different cultures will create demand for different products and services.

- The growing role Bathurst plays as a regional centre for education. Education is a key industry and keeps the age profile of the city relatively young. Students are an important retail market segment and facilities should be developed to service the needs of this market.

- Increased access to online shopping. This trend competes with smaller retailers. However it may be an opportunity for local businesses to sell regional products to a wider market.

- The low carbon economy and climate change. This will influence a range of considerations like, transport costs and choices, building design, housing density and the need for shade in public places.

- The increasing desire for good local food and a café culture. Urban design will need to encourage socialization through on street dining and café precincts.

Future Directions

These are the key directions as identified by the stakeholders that the future retail strategy should follow:

- Maintain the diversity of retail across the hierarchy - the central business district, neighborhood centres and bulky goods areas. Encourage local retail offerings and the growth of specialty precincts.
- Make the most of the City's unchangeable assets – the central hub, wide streets, heritage buildings and streetscapes. This is central to the atmosphere and identity of Bathurst.
- Continue to grow the city as an education centre and make the retail offerings attractive to the student market.
- Provide equity of access for all people into and around buildings and streets across the city. This includes alternative transport options.
- Meet and exploit the opportunities of on line shopping to sell Bathurst and its products to the world.
- Manage the anticipated population growth and demographic shifts.
- Protect heritage as growth occurs. Allow Bathurst to go 'up' as opposed to going 'out' through set back higher rise developments to accommodate people wanting to live closer to services and facilities.
- Improve traffic flows and pedestrian safety in retail areas and move away from the heavy reliance on car transport.
- Promote Bathurst as a place to visit and shop. This includes upgrading the entrances to the city to create a sense of arrival and make shopping areas attractive.
- Use Bathurst's ample supply of water to accommodate more development and increase the use of landscaping for shade and visual appeal in retail precincts and public places.

Community Vision

The community wants future retail in Bathurst to have the following characteristics:

Choice and Diversity

Relaxed and Invigorating

The heartbeat of our country life and living

Choice and Diversity

Retail in Bathurst offers choice and diversity in the mix of locally owned specialty shops and national chains of the central business district and in the neighborhood convenience centres and bulky goods outlets.

The community buy local and locally, supporting our own retailers and neighborhood stores. This helps keep the overall retail offering balanced, responsive to needs, interesting and engaging.

Others from around the Region come to Bathurst for this 'local' experience and to access recognised national chains. Here retail is diverse and offers choice. The shopping experience also includes sampling local produce and the hospitality offered by the cafes and restaurants of our 'Country City'.

Relaxed and Invigorating

Retail and cultural activities take place against the backdrop of beautiful and elegant heritage buildings and streetscapes. This part of our identity creates the special atmosphere of our City. People enjoy being together outside in pavement cafes, under the leafy canopies of the Town Square or in the specially created spaces of the neighborhood precincts.

Parking and getting around the CBD is easy. The city loop bus, walking and cycling tracks connect our neighborhoods and bulky goods area with the CBD.

The CBD is linked and well connected in all ways. Pedestrians come first so walking between the different themed precincts is safe and accessible. The City is also digitally connected with broad, high powered communication pathways. This makes it easy for people to do business in and out of Bathurst.

Our bulky goods areas on the outskirts do not dominate the sense of arrival people have to our City. The trees, landscapes and links between each outlet have softened the look and feel of these precincts that also have places where people can meet and be together.

The social experience of retail is both relaxed and invigorating offering a full range of activities that are convenient, interesting and engaging.

The heartbeat of our country life and living

Our central business district is our 'heart' and its 'beat' comes from a shopping experience supported by cultural, recreational and learning activities.

People live centrally in apartments built behind our gracious heritage buildings and streetscapes. This gives the best mix of the past and the present. Sophisticated city living with country charm is what makes Bathurst so appealing and attractive.

Similarly every small convenience centre provides not just daily retail needs but also a 'heartbeat' to the neighborhoods they serve. These centers all have places where people can gather and meet.

Our pride and passion for living in Bathurst is underpinned by the gracious City Centre with its business, cultural, educational and social activities, the landscaped bulky goods precincts and the vibrant neighborhood centers.

Principles to guide future choices

In future choices about retail in Bathurst the stakeholders seek that Council be guided by the following principles:

- Safety and access for all
- Enhancing lifestyle and livability
- Respecting our heritage and unique identity
- Planning for today with tomorrow in mind
- Supporting and growing local diversity

7 building the strategy

7 building the strategy

In this section the Bathurst CBD and Bulky Goods Business Development Strategy is presented bringing together key findings from the analysis and research. The principal components of the Strategy encompass the following:

- strategic directions to guide the Strategy;
- a recommended activity centre hierarchy;
- indicative floorspace requirements for activity centres;
- supporting policies for implementation;
- a CBD strategic framework for retail development;
- recommendations for monitoring and review;
- impact assessment framework.

7.1 Strategic Directions

The recommended policy framework comprises a set of principles that set out the underlying objectives, directions and rationale for the Strategy. These have been drawn from evolving state policy, from the strategic framework prepared for Bathurst, the BRUS (2007) and the key policy document which has guided Bathurst's retail development over the last decade, the Bathurst Retail Strategy (1999).

The principal policies recommended for the Bathurst CBD and Bulky Goods Business Development Strategy encompass the following:

- regional service role of Bathurst;
- a network of activity centres and precincts;
- planning for growth and change;
- a market based system;
- a community of defined sustainable neighbourhoods;
- activity diversity, amenity and economic viability;
- net community benefit.

Principle 1. Maximise Bathurst's regional retail and service role

Bathurst's prosperity and long-term sustainability is strongly related to its role as a regional services city. The Strategy seeks to maintain and strengthen the city's regional retail and service role through:

- the maintenance and consolidation of the regional retail attractions and amenities of the Bathurst CBD;
- providing a framework to facilitate a diversity of business investment and development in the CBD;
- the development of a regional bulky goods precinct to accommodate future facility and floorspace requirements for the next twenty years and beyond;
- ensuring that neighbourhood activity centre developments do not prejudice the pre-eminence and regional role of the CBD.

Significance for the Strategy

Maximising the regional role of Bathurst is the pre-eminent consideration to optimise its future potential within a sustainable framework. It has broader application to general economic development and the maximisation of its regional service role that extends well beyond retailing to encompass education, research and health services, legal services and justice, commercial and professional services, government administration, entertainment, hospitality and tourism, manufacturing, transport and logistics.

For retailing the need to maximise Bathurst's regional role and attraction was well recognised by the Bathurst Retail Strategy (1999). The 1999 Strategy resolutely opposed the development of any retail centre that had a sub-regional or regional role in suburban Bathurst and provided a physical framework for the further regional consolidation of the Bathurst CBD. It argued that where the (urban) population of regional cities was less than 100,000 people then as a general rule they could not support regional level retail shopping centres within their suburbs without prejudicing the regional retail roles of the established CBD, and particularly the prosperity, amenity and future investment opportunities for the CBD. This observation was well recognised by Council and cited in the BRUS (2007), as presented in Section 2.5 in this report.

In retailing the role of an activity centre is defined by the role of its leading retail attractors. For regional cities such as Bathurst regional retail attractors are department stores and discount department stores, full line supermarkets (that is national chain supermarkets generally in excess of 3,000 square metres GLA) and specialist discount supermarkets such as the Aldi store. Thus in practical terms a commitment to maintain and consolidate the regional core retailing role of Bathurst in the CBD (that is in relation to retail goods and services excluding bulky goods) means a commitment to ensure that these types of stores will only be permitted in the CBD and that new developments that required these stores as their anchors would also only be allowed within the CBD.

This was the policy set out in the Bathurst Retail Strategy (1999). It is the policy recommendation in this Strategy and there remains a consistency and continuity in this approach.

The policy of maintaining and facilitating a strong regional retailing role in the CBD of Bathurst has resulted in significant new retail investment in the CBD. In the decade since the Bathurst Retail Strategy (1999) the former William Street car park site has been redeveloped, a project that arose directly from the recommendations of the 1999 Strategy. It has resulted in the Bathurst City Centre development which, as research undertaken for the Strategy has confirmed, has strongly reinforced the Core precinct and the retail attraction and amenity of the CBD. The restrictions on supermarket size have served Bathurst well and ensured that the Aldi store located in the CBD. This Strategy recognises that the improvement of suburban activity centres is an important priority for Bathurst and that this will require a modification of the supermarket floorspace restriction. However, this is advanced in a way that will not impact on the regional retailing role of the CBD (refer Section 7.4.4).

Other cities have maintained a strong regional retail role for their CBDs. Orange is a good example of a city where its core regional retail functions are concentrated in its CBD and it has a strong, well integrated and attractive regional level retail district in its CBD. At Dubbo a regional level suburban shopping centre was permitted at Orana Mall and at Tamworth Shopping World in Tamworth. Both cities have witnessed a drawn out conflict with the owners of these respective centres seeking to further consolidate and expand these centres. In some cases, as at Coffs Harbour and Gladstone and Rockhampton in Queensland, the level of surburban retail development has reached the point where the pre-eminent regional retail role is no longer held by the CBD. In this context it is instructive to ask the question - where are there recent examples of comparable levels of retail investment that have occurred in the Bathurst CBD in other regional cities, particularly in cities that have regional level shopping centres in their suburbs?

The maximisation of Bathurst's regional level retail role should also be reflected through bulky goods policy. The demand for future bulky goods development presents a unique opportunity for the city to further maximise its regional role. To achieve optimal regional benefits the City needs to facilitate an integrated regional level highway based bulky goods precinct with high visibility and safe access and with clear long term development capacity. This is further advanced in Section 7.2.

Principle 2. A network of activity centres and precincts

Retail, commercial and community developments should where feasible be undertaken within a planned framework of existing and future activity centres and precincts to ensure:

- the provision of regional level retail goods and services at the CBD as part of a broader regional provision of commercial, professional and other services to meet the broad range of discretionary needs of Bathurst and its regional catchment area (RCA);
- the provision of regional level of bulky goods stores and services at defined precincts in Bathurst;
- the provision of local retail and service stores and facilities at defined neighbourhood activity centres planned to meet a daily and weekly shopping requirements;
- the provision of convenience stores to meet a range of daily requirements for outlying and smaller communities in the Bathurst Regional Council local government area.

Significance for the Strategy

A fundamental basis for modern urban and regional planning is the widely accepted principle that retail, commercial and community developments should, where feasible, be planned within the framework of a hierarchy of activity centres and precincts. This was reaffirmed in the recent Draft Centres Policy prepared by the NSW Department of Planning (April 2009). The Draft Centres Policy indicated that a strong activity centre based framework achieves other benefits such as contributing to a more compact city, providing a more effective structure to facilitate public transport opportunities and providing opportunities for healthier cities by facilitating opportunities for walking and cycling, together with providing opportunities to create a stronger sense of community and sense of place (refer Section 2.7.1 in this report).

The Strategy recommends that all retail and bulky goods development with the exclusion of service centre and convenience store development be located in designated centres or precincts. As a practical example of this policy an envisaged Woolworths hardware store development should only be supported within a designated planned bulky goods precinct, rather than a freestanding superstore with no relationship to any other bulky goods or retail activities or any existing or planned centre.

Principle 3. Planning for growth and change

It is important that the land use system in the network of activity centres and precincts be capable of adjusting to changes in patterns of demand and social needs which will occur over time. The application of this principle will be reflected through:

- provision of sufficient land to allow for the long-term development of activity centres;
- provision of a flexible statutory management system;
- application of forecasting and the identification of long-term needs and priorities by Council and relevant state agencies;
- an overall framework for the long-term development of Bathurst that takes full account of the need for a balance of land uses and sustainable social, economic and environmental outcomes.

Significance for the Strategy

Bathurst is a growing regional city. Long term population and economic growth have been reflected in residential, industrial and commercial land use development in Bathurst. This is a long term process which is likely to continue for the foreseeable future. Both the BRUS (2007) and this Strategy have identified the need for significant additional development to meet future requirements. This Strategy has identified the need for significant growth and structural change in the Bathurst retail commercial system with provision for future growth:

- in the Bathurst CBD. A framework for the future retail development of the CBD is provided in Sections 7.6 (also refer Figure 7.2);

- in the neighbourhood activity centres of Bathurst. The recommended hierarchy and floorspace requirements for the consolidation of the existing centres of Westpoint, Trinity Heights and Stewart Street are set out in Sections 7.2 - 7.4, 7.5.4, 7.5.6 - 7.5.8 and requirements for a new neighbourhood activity centre at Eglinton are also outlined in these sections;

- a policy framework and guidelines for convenience stores to meet the needs of local populations at Kelso, Raglan, Perthville and West Bathurst are set out in Sections 7.5.5;

- a policy framework and guidelines are also provided for a new major bulky goods precinct to progressively meet the long term requirements for Bathurst (refer Sections 7.2.7, 7.3 and 7.4);

The recommended approach in the Strategy of providing a proactive framework for growth and structural change is entirely consistent with the draft state policy framework. A key principle of the Draft Centres Policy (NSW Department of Planning, April 2009) is that there should be sufficient flexibility in the retail commercial system to allow existing centres to grow and change and new centres to form.

Principle 4. A Market Based System

The draft state policy clearly recognises that retail and other land uses have evolved and will continue to develop in a market system. A key recommendation of the Draft Centres Policy (op.cit.) is that "market determines need for development, planning regulates location and scale". As the draft policy indicates, planning can play a key role through:

- *"setting out the broad spatial pattern of growth to help provide certainty for public and private investment;*
- *ensuring the supply of available floorspace accommodates market demand in a way that balances economic, social and environmental objectives;*
- *restricting development that imposes a net cost on society or is poorly designed"*.

Significance for the Strategy

The Strategy recognises the significance of the recommended policy. The underlying rationale of the draft state policy is that the market is best placed to determine the need for retail and commercial development. Analysis prepared for the Strategy has identified future floorspace and land requirements for retail development. **These requirements have been identified and outlined in the Strategy to assist and facilitate long term planning and development in Bathurst to ensure the coordinated development of land and resources, and to maximise economic, environmental and community benefits.**

It is clearly recognised that the identification of floorspace requirements for the purposes of the Strategy is indicative only and intended to assist in the strategic planning process for Bathurst. The assessment of floorspace requirements, cannot and does not replace the market system that ultimately determines sustainable floorspace requirements; though it does seek to understand the order of requirements that are likely for Bathurst taking account of market-based requirements for viable and economically sustainable floorspace.

It is also recognised that existing development approvals cannot be used to restrict other developments from the viewpoint of competition alone (that is, in the absence of broader planning, environmental and community benefit considerations).

Principle 5. A Network of Defined Sustainable Neighbourhood Centres

The Strategy seeks to ensure equitable access for most daily and weekly food and service requirements within Bathurst's existing and future neighbourhoods. These needs are being addressed through an evolving network of locally based neighbourhood centres.

Significance for the Strategy

The BRUS (2007) provides a physical land use framework for the organisation and development of the Bathurst urban area as a system of identifiable local areas. The Strategy recognises the importance and the growing significance of neighbourhood centres as focal points for the local areas. The intent of the Strategy is to ensure that the neighbourhood centres provide for local shopping needs of residents and also form important social foci for local areas providing limited community, medical and professional services. Where possible, these neighbourhood centres should have extensive pedestrian and cycle way linkages to established and growing residential areas and to provide a sense of place for the local areas.

Principle 6. Activity Diversity, Amenity and Economic Viability

The Strategy seeks to achieve a diverse, dynamic, amenable and economically viable activity centre system that meets current and projected needs for regional, district and local shopping requirements.

Significance for the Strategy

The Strategy provides for a hierarchy of activity centres and precincts to meet the current and future needs of the city and its RCA. The hierarchy is structured and planned to develop to meet the diversity of current and projected needs for the foreseeable future. Within this context, the Strategy seeks to maximise opportunities for diversity, dynamic change and to ensure viability at each level in the hierarchy (refer Section 6.2).

Principle 7. Net Community Benefit

The Strategy provides for a net community benefit test to evaluate significant retail and commercial development proposals where a rezoning is required. Consistent with the Draft Centres Policy (op.cit.) it should be used to assess the merits of rezoning in the following circumstances:

- *"proposals to develop within an existing centre where the current zoning does not permit the use;*
- *proposals to develop outside an existing centre where the current zoning does not permit the use;*
- *proposals to create a new centre."*

Significance for the Strategy

The intent of the principle is to provide a transparent assessment framework to assist in the evaluation of major retail and commercial initiatives in Bathurst that will require rezoning, and to ensure that the assessment methodology and underlying rationale is consistent with draft state policy.

7.2 Recommended Hierarchy

This section sets out the recommended activity centre hierarchy for the Bathurst Regional Council local government area. Each activity centre is presented in terms of:

- designation under the Bathurst CBD and Bulky Goods Development Strategy;
- designation under the Draft Retail Centres Policy;
- its designated role;
- catchment type and population (current and projected);
- defining retail elements;
- supporting stores and services;
- recommended policies;
- priority initiatives.

7.2.1 Recommended Hierarchy: Bathurst CBD

Bathurst CBD and Bulky Goods Development Strategy Designation	Regional city CBD
Draft Centres Policy Designation	Major Centre
Designated Role	The regional shopping and services centre for Bathurst and its regional catchment area (RCA). The centre provides for the full range of daily, weekly and discretionary shopping requirements together with all of the supporting professional and commercial services required in a modern regional centre.
Catchment Type and Population	Regional catchment extending north to Mudgee, east to Lithgow, southwest to Cowra, Population of Bathurst LGA: Preliminary ERP (2010): 39,920 ERP projected (2021): 43,460 - 45,410 ERP projected (2036): 50,470 - 55,250 Effective supporting population 2010: 44,380 2021: 47,870 - 49,870 2036: 53,530 - 58,430
Defining Retail Elements	• Regional shopping centre, • Department store, discount department store, major supermarket
Supporting Stores and Services	• National chain specialty stores and services • Diversity of local stores and services • Extensive network of commercial and professional services
Recommended Floorspace Requirements	• Core retail floorspace requirements (2010-2021) • Discount department store 5,500 square metres GLA (mid range estimate) • Other retail floorspace requirements 5,500 square metres GLA • Office floorspace requirements (mid range estimate) 3,550 square metres GLA
Recommended Policies	• Maintain the retail primacy of the Bathurst CBD • Facilitate new regional level retail development in the Bathurst CBD • Maintain the focal regional retail role of the Core precinct within the Bathurst CBD • Facilitate improved pedestrian linkages within the core precinct and to adjoining precincts

Priority Initiatives	Retention of the retail primacy of the Bathurst CBD through the maintenance of a floorspace restriction for individual stores in excess of 2,500 square metres GLA at the Westpoint neighbourhood activity centre and in excess of 1,200 square metres GLA at other designated neighbourhood activity centres. This is to ensure that discount department and department stores and large supermarkets can only be provided in the Bathurst CBD for the foreseeable future. The Strategy recommends support for the following projects to consolidate the Core precinct: • proposed Revitalisation Program for Bathurst Chase (lower ground level entry area at William Street) and Centrepoint Arcade (refer Section 7.5); • proposed office and retail redevelopment of the ANZ property at Pedrottas Lane; • the recommended City Heart project to provide a town square and opportunities for unique attractions for Bathurst that could include a farmers' market, University of the Third Age and community/arts precinct in the south west quadrant (area including the former TAFE building and adjacent sites fronting Howick Street, refer Section 7.5 and Figure 7.3). The Strategy recommends support for the following projects to optimise the long term regional retail potential of the Bathurst CBD: • visioning and master planning project for Council to co-ordinate and facilitate a new major retail/mixed use development of the George Street car park. The potential development area could also include the current Ford site at Howick Street (refer Section 7.5). The project could potentially accommodate a new discount department store and/or new major homewares stores and other stores and services that will complement the strengths and attractions of George Street (refer Section 7.5 and Figure 7.3). The Strategy recommends support for the following projects to strengthen the retail offering in precincts adjacent to the Core: • proposed supermarket development at Rankin Street, • potential redevelopment project that could include joint use of part of the library car park with opportunities to link to Keppel Street. The project could provide a small supermarket/convenience store to complement the existing retail offering at Keppel Street (refer Section 7.5 and Figure 7.3), The Strategy recommends the following project to improve pedestrian safety and connectivity in the CBD: • facilitation of a slow speed street network encompassing the principal shopping and commercial streets (refer Section 7.5 and Figure 7.3). The Strategy recommends the following project to improve the amenity and diversity of activities in the Durham Street precinct: • planning and facilitation of a boulevard and gateways project for Durham Street; • consultation, visioning and feasibility opportunities project for a significant interface area at Durham Street (refer Section 7.5).

7.2.2 Recommended Hierarchy: Westpoint Neighbourhood Activity Centre

Bathurst CBD and Bulky Goods Development Strategy Designation	Large neighbourhood centre
Draft Centres Policy Designation	Neighbourhood centre
Designated Role	Comprehensive neighbourhood centre providing for all daily and most weekly purchases. The centre provides a range of supporting medical and community services.
Catchment Type and Population	Extensive neighbourhood catchment comprising several western suburbs of Bathurst/Windradyne, the western section of West Bathurst, Abercrombie-Llanarth, and the western section of the Mitchell-Robin Hill-Mount Panorama area. Current ERP 2010: 8,350 Projected ERP 2021: 10,490 Projected ERP 2031: 12,600
Defining Retail Elements	• Medium sized supermarket (in the range 1,201-2,500 square metres GLA, refer Glossary). Note 2,500 square metres will be required by 2031 with 2,000 square metres required by 2021(refer Table 5.16) • Small hardware store (in the range 300-500 square metres GLA)
Supporting Stores and Services	• Newsagency, • Pharmacy • Bakery/hot bread shop • Delicatessen/café • Family restaurant/café • Fresh food/health food outlets • Hairdresser/beautician • Commercial services could include ATMs, real estate agents, tax agents, accountants and solicitors • Medical services • Multi-purpose community shopfront library/council enquiries and rates/resource centre • Infant health centre At capacity development the total floorspace requirements for retail stores and services is approximately 5,920 square metres GLA. The total retail floorspace requirements for retail stores and services as indicated above (that is in addition to the supermarket and hardware store) is approximately 2,920 square metres GLA. At capacity development the total area of non-retail floorspace requirements to provide the commercial and medical services and community services (examples of possible activities above) is approximately 3,420 square metres GLA

Recommended Floorspace Requirements	Current activity centre floorspace: 1,380 square metres GLA (2010, refer Table 4.1) Total floorspace requirements 2021: • 3,570 square metres (retail) • 1,570 square metres (non-retail) • 5,140 square metres (total) Total floorspace requirements 2036: • 4,550 square metres (retail) • 2,050 square metres (non-retail) • 6,600 square metres (total)
Recommended Policies	• Support the planned consolidation of the existing Westpoint neighbourhood activity centre to a large neighbourhood centre, anchored by a medium sized supermarket, as defined in the Strategy (refer Glossary). • Do not allow any neighbourhood, local or convenience stores at any other locations in the defined catchment area of the centre, (refer Figure 7.2) in the absence of a comprehensive policy review by Council. • Ensure that the consolidated activity centre is (essentially) street based or externally faced, provides a village square or court and conveys a sense of place and character that meets the needs and aspirations of the local community.
Priority Initiatives	• Facilitation of the planned consolidation of the existing Westpoint neighbourhood activity centre through a master planning-DCP process encompassing the proponent, Council, stakeholders and the local community. • Within this context, preparation of a master plan that achieves the strategic planning and urban design objectives of the Strategy, the requirements of Council and the needs and aspirations of stakeholders and the local community. • The master plan should provide for identified long term needs through to 2036. • The master plan should address the issues of architecture, provision of shade and shelter, landscape design, car parking layout and access, and the provision of attractive active pedestrian focal spaces. It should also address pedestrian and cycle access to the existing and new centre and provision for linkages to the surrounding neighbourhood area. • Formal statement of the key elements and requirements of the master plan within a DCP for the Westpoint neighbourhood activity centre precinct. • Amendment of the Bathurst Regional DCP to allow a medium sized supermarket as defined in the Strategy to be developed and operate in the Westpoint neighbourhood activity centre precinct.

7.2.3 Recommended Hierarchy: Trinity Heights Shopping Centre

Bathurst CBD and Bulky Goods Development Strategy Designation	Small neighbourhood activity centre
Draft Centres Policy Designation	Neighbourhood centre
Designated Role	Neighbourhood activity centre providing for most daily and a range of weekly purchase requirements. The centre provides supporting medical and community services.
Catchment Type and Population	Essentially services the Trinity Heights/Kelso neighbourhood area: Current ERP 2010: 5,080 Projected ERP 2021: 5,730 Projected ERP 2031: 6,490
Defining Retail Elements	• Small sized supermarket (in the range 500-1,200 square metres GLA, refer Glossary) • Small hardware store (in the range 300-500 square metres GLA)
Supporting Stores and Services	Selected stores and services within the indicative list provided for Westpoint neighbourhood activity centre (refer Section 7.2.2), consistent with the reduced scale of retail, commercial and community floorspace requirements at the Trinity Heights neighbourhood activity centre.
Recommended Floorspace Requirements	Current activity centre floorspace: 2,230 square metres GLA (2010, refer Table 4.1) Total floorspace requirements 2021: • 2,010 square metres (retail) • 860 square metres (non-retail) • 2,870 square metres (total) Total floorspace requirements 2036: • 2,230 square metres (retail) • 1,030 square metres (non-retail) • 3,260 square metres (total)

Recommended Policies	• Support the planned consolidation of the existing Trinity Heights neighbourhood activity centre as a small neighbourhood centre to be anchored by a small sized supermarket as defined in the Strategy (refer Glossary). • Do not allow any neighbourhood, local or convenience stores at any other locations in the defined catchment area of the centre (refer Figure 7.2), with the exception of the recommended restructuring of the existing Kelso Centrepoint local centre. No further development of local stores or services in the defined catchment area should be allowed in the absence of a detailed and comprehensive policy review by Council. • Ensure that the consolidated centre is street based or externally faced, provides a village square or court and conveys a sense of place and character that meets the needs and aspirations of the local community. • Ensure that the consolidated centre does not extend north of Marsden Lane or west of Gilmour Street. It will be noted that a separate analysis has been undertaken to provide neighbourhood activity centre requirements to service the long term population capacity of the (currently unzoned land at) Macquarie Plains / Kelso area (refer Section 7.2.8)
Priority Initiatives	• Amendment of the Bathurst Regional DCP to allow a small sized supermarket as defined in the Strategy to be developed and operate in the Trinity Heights neighbourhood activity centre. • Facilitation of the planned consolidation of the existing Trinity Heights neighbourhood activity centre through a master planning-DCP process following the principles, process and desired outcomes as generally indicated for the Westpoint activity centre (refer Section 7.2.2). The plan should provide a long-term framework to meet the identified retail, commercial and community floorspace requirements through to 2036.

7.2.4 Recommended Hierarchy: Stewart Street Neighbourhood Activity Centre

Bathurst CBD and Bulky Goods Development Strategy Designation	Small neighbourhood activity centre and commercial precinct
Draft Centres Policy Designation	Neighbourhood centre
Designated Role	Neighbourhood activity centre providing for most daily and a range of weekly purchase requirements. It is intended that the centre will support medical and community services. It will also continue to accommodate highway based activities (that could encompass service station/s, trade services and sales, automotive sales, family restaurants/fast food outlets, and hotel/motel accommodation).
Catchment Type and Population	The catchment extends over several suburbs in central and south western Bathurst. The areas that form part of the identified neighbourhood catchment encompass Bathurst central (south western part), West Bathurst (eastern part), and the south eastern section of the Mitchell-Robin Hill-Mount Panorama area (refer Figure 5.3). Current ERP 2010: 5,930 Projected ERP 2021: 6,480 Projected ERP 2031: 7,150
Defining Retail Elements	• Small sized supermarket (in the range 500-1,200 square metres GLA, refer Glossary). • Small hardware store (in the range 300-500 square metres GLA).
Supporting Stores and Services	Selected stores and services within the indicative list provided for Westpoint neighbourhood activity centre (refer Section 7.2.2), consistent with the reduced scale of retail and community floorspace requirements at the Stewart Street neighbourhood activity centre.
Recommended Floorspace Requirements	The existing floorspace is dominated by the highway commercial strip role of the precinct. At 2010, the existing floorspace was (refer Table 4.1): • 820 square metres (retail) • 110 square metres (office services) • 2,890 square metres (other activities or vacant) • 3,820 square metres (total) Total activity centre floorspace requirements, 2021: • 2,170 square metres (retail) • 970 square metres (non-retail) • 3,140 square metres (total) Total activity centre floorspace requirements, 2036: • 2,320 square metres (retail) • 1,120 square metres (non-retail) • 3,440 square metres (total)

Recommended Policies	• Support the planned development of a small neighbourhood centre as part of the existing Stewart Street precinct. Ensure that the activity centre will be anchored by a small sized supermarket as defined by the Strategy (refer Glossary). • Do not allow any neighbourhood, local or convenience stores at any other locations in the defined catchment area of the centre, (refer Figure 5.3 and 7.2) with the exception of the existing convenience centre at Mitre Street in West Bathurst. No further development of local stores or services in the local catchment area should be allowed in the absence of a detailed and comprehensive review by Council. • Ensure that the recommended neighbourhood activity centre is street based or externally faced and provides an attractive, safe and amenable external space as a focal point for the activity centre. • Ensure that the neighbourhood activity centre conveys a sense of place and character and is well integrated and consistent with existing scale and built form of the Stewart Street precinct.
Priority Initiatives	• Amendment of the Bathurst Regional DCP to allow a small sized supermarket as defined in the Strategy to be developed and operate in the Stewart Street precinct. • Facilitation of the planned development of a supermarket based neighbourhood activity centre within the Stewart Street precinct through a master planning-DCP process following the principles and process recommended for the Westpoint activity centre (refer Section 7.2.2). • Joint investigation (Stewart Street stakeholders and Council with reference to the RTA) of opportunity sites and master plan options to accommodate the recommended small neighbourhood activity centre function.

7.2.5 Recommended Hierarchy: Eglinton Neighbourhood Activity Centre

Bathurst CBD and Bulky Goods Development Strategy Designation	Small neighbourhood activity centre
Draft Centres Policy Designation	Neighbourhood centre
Designated Role	Neighbourhood activity centre providing for most daily and a range of weekly purchase requirements. It is intended that the centre will support medical and community services.
Catchment Type and Population	The intended service catchment area is the existing and planned Eglinton residential area as set out in the Planning Proposal (as exhibited November 2010). Current ERP 2010: 2,110 Projected ERP 2021: 3,000 Projected ERP 2036: 3,800
Defining Retail Elements	Small supermarket (in the range 500-1,200 square metres GLA, refer Glossary).
Supporting Stores and Services	Selected stores and services within the indicative list provided for the Westpoint neighbourhood activity centre (refer Section 7.2.2), consistent with the reduced scale of retail, commercial and community floorspace requirements at the Eglinton neighbourhood activity centre.

Recommended Floorspace Requirements	There is an existing convenience store, located at Park Street, Eglinton (approximately 90 square metres GLA, refer Table 4.1). The recommended floorspace requirements are for a planned neighbourhood activity centre to be developed at a site recommended by the Strategy. Total floorspace requirements 2021: • 1,050 square metres (retail) • 450 square metres (non-retail) • 1,500 square metres (total) Total floorspace requirements 2036: • 1,470 square metres (retail) • 630 square metres (non-retail) • 2,100 square metres (total)
Recommended Minimum Site Requirements	• As a new activity centre recommended for a greenfields site there are opportunities to ensure that the proposed neighbourhood activity centre site is of sufficient size to readily meet its long term requirements. • It is recommended that the minimum floorspace requirement that the centre should be planned for is 2,100 square metres GLA to meet projected growth for the Eglinton residential area as indicated in the current draft Planning Proposal (as exhibited November 2010), and provide the neighbourhood service requirements over the period 2010-2036. The equivalent Gross Floor Area (GFA) requirement is approximately 2,330 square metres; and the equivalent Gross Building Area (GBA) is approximately 2,590 square metres. • The minimum site requirement allowing for onsite landscaping and carparking together with the building development and service requirements is no less than 3 times the Gross Building Area. Thus the minimum site required is approximately 7,770 square metres, say 8,000 square metres. • It is recommended that the minimum site required to meet the small neighbourhood retail and other service requirements as indicated above is 8,000 square metres, clear of road, drainage and any other reservations. • The reservation of the site of this size is only sufficient to meet basic floorspace and associated landscape and urban space requirements. The recommended neighbourhood activity centre at Eglinton provides excellent opportunities for the co-location of recreation and community facilities and (depending on demand) future retirement facilities. In these circumstances a substantially larger precinct should be allocated at the subject location and the planned neighbourhood activity centre to optimise opportunities for the centre to serve as a social and community focus for Eglinton.

7.2.5 *Recommended Hierarchy: Eglinton Neighbourhood Activity Centre (cont)*

Recommended Policies	• The recommendation of the Strategy is that a new site be reserved for a planned Eglinton neighbourhood activity centre to be located on the north-west or south-west corner of Duramana Road and Freemantle Road-Wellington Street to provide the local shopping and service requirements of the current and future population of Eglinton. • A sufficient sized site should be required for the recommended neighbourhood activity centre and ancillary activities (as indicated above). • Planning for the neighbourhood activity centre should consider its integration with future recreation and community facilities and potential for co-location with retirement facilities (subject to future demand). • Do not allow any neighbourhood, local or convenience stores at any other locations in the defined catchment area of the centre (refer Figure 7.2), in the absence of a comprehensive policy review by Council. • Ensure that the new activity centre is street based or externally faced, provides a village square or court and conveys a sense of place and character that meets the needs and aspirations of the local community. • Ensure that the new activity centre maximises its social and community role, and the potential for a diversity of activities within the context of future requirements and growth at Eglinton.

Priority Initiatives	• Facilitation of the planned development of a neighbourhood activity centre at Eglinton through a master planning process encompassing the proponent, Council, stakeholders and the local community. • Within this context preparation of a master plan that achieves the strategic planning and urban design objectives of the Strategy, the requirements of Council and the needs and aspirations of stakeholders and the local community. • The master plan should provide for the identified long term needs through to 2036. • In the event that Council identifies additional areas for future residential development that had the effect of increasing the long term residential capacity of Eglinton then this should immediately trigger a review of the floorspace and land requirements for the recommended neighbourhood activity centre at Eglinton. • The master plan should address the issues of architecture, provision of shade and shelter, landscape design, car park layout and access and the provision of attractive active pedestrian focal spaces. • A precinct plan should be developed indicating priority and long term pedestrian and cycle way planning and showing how the new activity centre will be integrated into this network. • Formal statement of the key elements and requirements of the master plan within Planning Proposal for the Eglinton neighbourhood activity centre precinct. • Amendment of the Bathurst Regional DCP to allow a small sized supermarket as defined in the Strategy to be developed and operate in the Eglinton neighbourhood activity centre precinct.

7.2.6 Recommended Hierarchy: Kelso Convenience Centre

Bathurst CBD and Bulky Goods Development Strategy Designation	Convenience centre
Draft Centres Policy Designation	No designation
Designated Role	Provision for daily requirements. The centre also provides a bottle shop and a child care centre.
Catchment Type and Population	Localised immediate catchment within approximately 800 metres of the existing Kelso Centrepoint shopping centre. Current ERP 2010: 2,670 Projected ERP 2021: 2,540 Projected ERP 2031: 2,410
Defining Retail Elements	Modern, multipurpose convenience store
Supporting Stores and Services	Existing store and community service located at the north-eastern edge of the Kelso Centrepoint shopping centre (bottle shop at Boyd Street and child care centre at Kabbera Boulevard).
Recommended Floorspace Requirements	• Approximately 300 square metres is required for a modern multipurpose convenience store to meet the current and future needs of the local population. • A further 200 square metres may be required for a café/fast food outlet subject to the outcome of a master planning process to be undertaken with stakeholders and the local community.
Recommended Minimum Site Requirements	• A site of approximately 1,200 square metres is required to accommodate the recommended convenience store and ancillary parking and landscaping requirements. • These site requirements will be increased at the ratio of approximately 3 to 1 if other retail commercial facilities are added.
Recommended Policies	• Support the redevelopment of the Kelso Centrepoint shopping centre to a convenience store, local urban space and residential development. • Ensure that the new convenience store and urban focal space is externally faced and located adjacent to the existing bottle shop and child care centre.

Priority Initiatives	• Amendment of the Bathurst Regional DCP to restrict allowable retail development at the Kelso subject site to a maximum store size of 300 square metres. • Facilitation of a joint master plan for the local precinct encompassing existing shopping centre and property stakeholders, the local community and Council. • Resolution of a master plan for the precinct with the support of stakeholders, the local community and Council that provides a new framework for the sustainable development and operation of the precinct. The master plan could provide: - a modern multipurpose convenience store with extensive visibility, - potential for a café/fast food outlet, - an urban focal space linking the convenience store, bottle shop and child care centre, - other community or health facilities as may be identified, - opportunities for different types of residential living and accommodation, - ancillary open space and car parking requirements. • Drafting of an amendment to facilitate the rezoning of the subject land of the precinct to enable new development in accord with the resolved master plan.

7.2.7 Recommended Hierarchy: Sydney Road Precinct (Intermodal Site)

Bathurst CBD and Bulky Goods Development Strategy Designation	Regional bulky goods precinct
Draft Centres Policy Designation	Specialised centre
Designated Role	The primary regional bulky goods and transport precinct for Bathurst and its region. The precinct will provide for the full range of bulky goods shopping requirements. It will also provide convenience stores and services for the significant visitor and working population.
Catchment Type and Population	Regional catchment extending north to Mudgee, east to Lithgow and southwest to Cowra. Population of Bathurst LGA: ERP 2010: 39,280 ERP projected (2021): 43,460 - 45,410 ERP projected (2036): 50,470 – 55,250 Effective supporting population: 2010: 43,970 2021: 46,280 – 48,090 2036: 52,710 – 57,300
Defining Retail Elements	• Integrated regional level bulky goods shopping precinct • Regional level national chain bulky goods stores (in excess of 6,000 – 8,000 square metres GLA per tenancy)
Supporting Stores and Services	• National chain bulky goods stores (in the range of 1,000 – 3,500 square metres GLA per tenancy) • Convenience store/newsagency • Pharmacy • Cafes/fast food outlets • ATMs • Public amenities • Service station

Recommended Floorspace Requirements	Current Concept Plan approvals allow for "highway uses" totaling 11,250 square metres GLA and a service station of 520 square metres GLA. For the purposes of the Strategy, this has been interpreted as permitting bulky goods development (the "highway uses") and a convenience store/ cafes (the 520 square metres of floor area for the service station). Total floorspace requirements: 2021: • 8,230 – 9,820 square metres (bulky goods) • 820 – 980 square metres (supporting retail stores and services) • 9,050 – 10,800 square metres (total) Total floorspace requirements: 2036: • 24,690 – 29,670 square metres (bulky goods) • 1,240 – 1,480 square metres (supporting retail stores and services) • 25,930 – 31,150 square metres (total) It is important to note that the indicative requirements for bulky goods floorspace are based on market demand based assessments (that is, projections of future retail expenditures, application of an allowance for future losses to escape expenditure and online purchases, and an analysis of turnover requirements for bulky goods floorspace). The needs of individual tenants will certainly result in the projections to 2021 being exceeded (the requirements for the Woolworths "Masters" lifestyle and hardware store together with the needs for a new major Harvey Norman store would alone exceed 14,000 square metres GLA. For these reasons, for purposes of long term planning the long term bulky goods and related retail floorspace requirements identified for the precinct (31,150 square metres) represent the minimum requirement for site planning.

Recommended Minimum Site Requirements	It is intended that the Sydney Road DCP site will serve as the regional bulky goods precinct for Bathurst catering for the long term requirements of the city and its RCA. Allowing for a contingency of 10 per cent, the site will need to accommodate bulky goods and associated retail floorspace of 34,270 square metres GLA. This amounts to approximately 42,310 square metres Gross Building Area (GBA). The minimum site requirements to accommodate this development allowing for car parking, service vehicle access, landscaping, pedestrian pathways and open space areas is equal to approximately 3 times the Gross Building Area, or approximately 12.7 hectares. The site should provide an extensive frontage to Sydney Road allowing for the road and development setbacks as required by the DCP. It should provide controlled access at a single central point as generally indicated in the revised Concept Plan (refer Figure 2.4 in this report). The development should provide a central linear landscaped car park, running parallel to Sydney Road with a themed landscape reserve on the south side of Sydney Road. The car park should extend east and west from the central entry area. The bulky goods stores should front the linear car park and be linked by a common pedestrian walkway with verandah coverage. The cafes and limited provision of retail stores to service the development and workers in the adjoining intermodal complex should be located central to the development and the pedestrian walkway system. The frontage for the bulky goods site should be no less than 400 metres and optimally in the order of 600 metres. The average depth of the site should be no less than 200 metres and should be sufficient to accommodate the major stores and attendant deliveries and servicing requirements.

	Cafes and fast food restaurants to be provided in the development should be integrated as part of the shopfront edge for the bulky goods stores. The cafes and fast food restaurants should be located in the centre of the development with provision for a pedestrian space and outlook and form a central unit with the limited retail stores and services. The cafes and fast food restaurants should not be located as free standing pads on the highway edge as has been the case in previous developments.
Recommended Policies	It is recommended that a site of approximately 12.7 hectares be reserved to provide a bulky goods precinct to accommodate the long term needs of Bathurst and its RCA over the next 20 years and beyond. The site should form part of the Sydney Road DCP Concept Plan site. It should meet the frontage and depth requirements as generally indicated (above) and should meet the needs of identified major future tenants. Do not support any further bulky goods store development on currently non-zoned land in free standing locations elsewhere in the Bathurst Regional Council local government area, in the absence of a comprehensive policy review by Council. Support the development of an integrated fully master planned regional bulky goods precinct with provision of supporting retail stores and services to meet the needs of visitors and workers in the adjoining intermodal complex, on the basis of principles set out above. Provide for pedestrian and cycle access from the Raglan residential area to the retail and service focal area for the precinct, consistent with principles set out in the approved Concept Plan and the proposed modified plan (refer Figures 2.3 and 2.4 in this report).
Priority Initiatives	In principle agreement (Council, the NSW State Government and relevant agencies and the proponent) for refinements/revisions to the Concept Plan to allow the co-development of an integrated regional level bulky goods precinct as part of the Sydney Road DCP development. Policy and planning support by Council for the development of the integrated regional level bulky goods precinct. Completion of the master planning process to provide for the integrated regional level bulky goods precinct. Preparation of LEP and DCP amendments as required to facilitate the development.

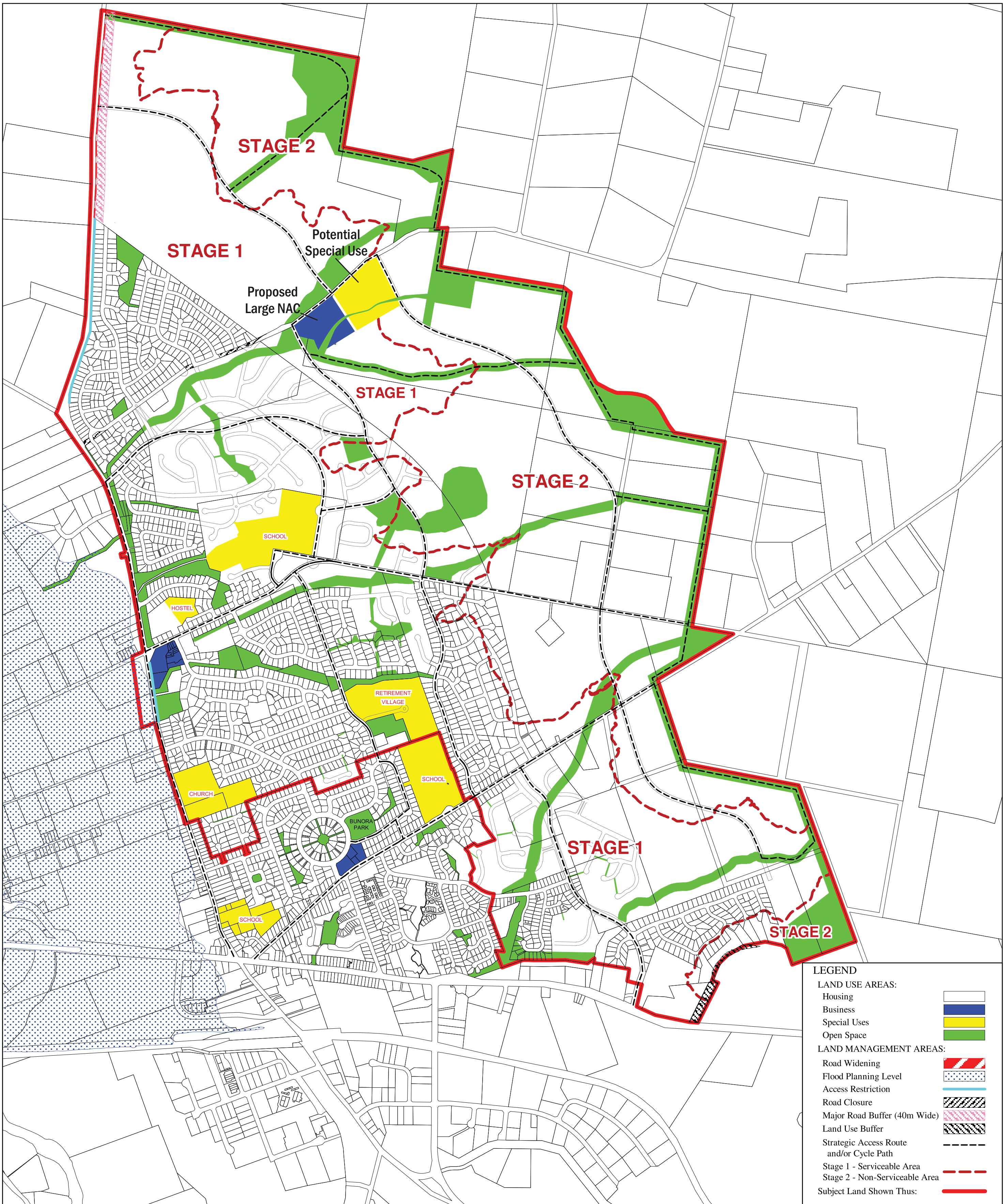
7.2.8 Recommended Hierarchy: Macquarie Plains / Kelso Future Activity Centre

Bathurst CBD and Bulky Goods Development Strategy Designation	Future Large Neighbourhood Activity Centre
Draft Centres Policy Designation	Neighbourhood Centre
Designated Role	Future comprehensive neighbourhood centre providing for all daily and most weekly purchases. The centre is intended to provide a range of supporting medical and community services.
Catchment Type and Population	The proposed future large neighbourhood activity centre is intended to serve an extensive area identified by the BRUS (2007) in the Macquarie Plains / Kelso area. The area has a future residential capacity of approximately 485 hectares and is intended to accommodate approximately 10,000 people (refer Section 2.3).
Defining Retail Elements	• Medium sized supermarket (in the range 1,201 - 2,500 square metres GLA, refer Glossary); • small hardware store (in the range of 300 - 500 square metres GLA)
Supporting Stores and Services	• Newsagency, • Pharmacy • Bakery/hot bread shop • Delicatessen/café • Family restaurant/café • Fresh food/health food outlets • Hairdresser/beautician • Commercial services could include ATMs, real estate agents, tax agents, accountants and solicitors • Medical services • Multi-purpose community shopfront library/council enquiries and rates/resource centre • Infant health centre At capacity development the additional floorspace requirements for supporting retail stores and services (that is in addition to a supermarket of approximately 2,500 square metres GLA and a small hardware store of approximately 500 square metres GLA) is approximately 1,500 square metres GLA. The floorspace requirements for supporting non-retail services (examples provided above) at capacity development is approximately 2,500 square metres GLA.
Recommended Floorspace Requirements	At capacity development the proposed large neighbourhood activity centre will require approximately 7,000 square metres GLA or retail and non-retail floorspace comprised of 4,500 square metres of retail floorspace and 2,500 square metres of non-retail floorspace. Further details are set out above.

Recommended Minimum Site Requirements	• It is recommended that a 5 hectare site be set aside for the future neighbourhood activity centre; • approximately 2.6 hectares are required to meet the needs of the activity centre as set out on the previous page; • the balance (approximately 1.4 hectares) should be set aside and form part of a consolidated future site to provide for co-located activities (including potential community, recreational or education activities and possible activity centre open space.
Recommended Policies	• It is recommended that the preferred location for the future large neighbourhood activity centre be at the junction of future primary and secondary roads that provide maximum access to the development area; • The future neighbourhood activity centre should also be linked to the district open space system and to the future network of pedestrian pathways and cycleways; • A recommended indicative location for the future neighbourhood activity centre is set out in Figure 7.1. The figure shows the indicative location together with possible road and access linkages.
Priority Initiatives	• It is recommended that structure planning for the Macquarie Plains / Kelso area incorporate the recommended location principles, site requirements and indicative location as set out in Figure 7.1.

Figure 7.1: Macquarie Plains / Kelso Area: Indicative Location for Proposed Large Neighbourhood Activity Centre

Souce: Bathurst Regional Development Control Plan 2009 (Map No. 5 - Kelso)



ADOPTION DATE:

AMENDMENTS

No.	DATE.	DESCRIPTION.

LOCALITY: KELSO, LAFFING WATERS

ENVIRONMENTAL PLANNING AND ASSESSMENT ACT, 1979

BATHURST REGIONAL LOCAL GOVERNMENT AREA.

SCALE: 1:25,000

CERTIFIED IN ACCORDANCE WITH THE ENVIRONMENTAL PLANNING AND ASSESSMENT ACT 1979 AND REGULATIONS

GENERAL MANAGER. DATE:

G:\Planning Data\DCP_2009\Kelso.WOR

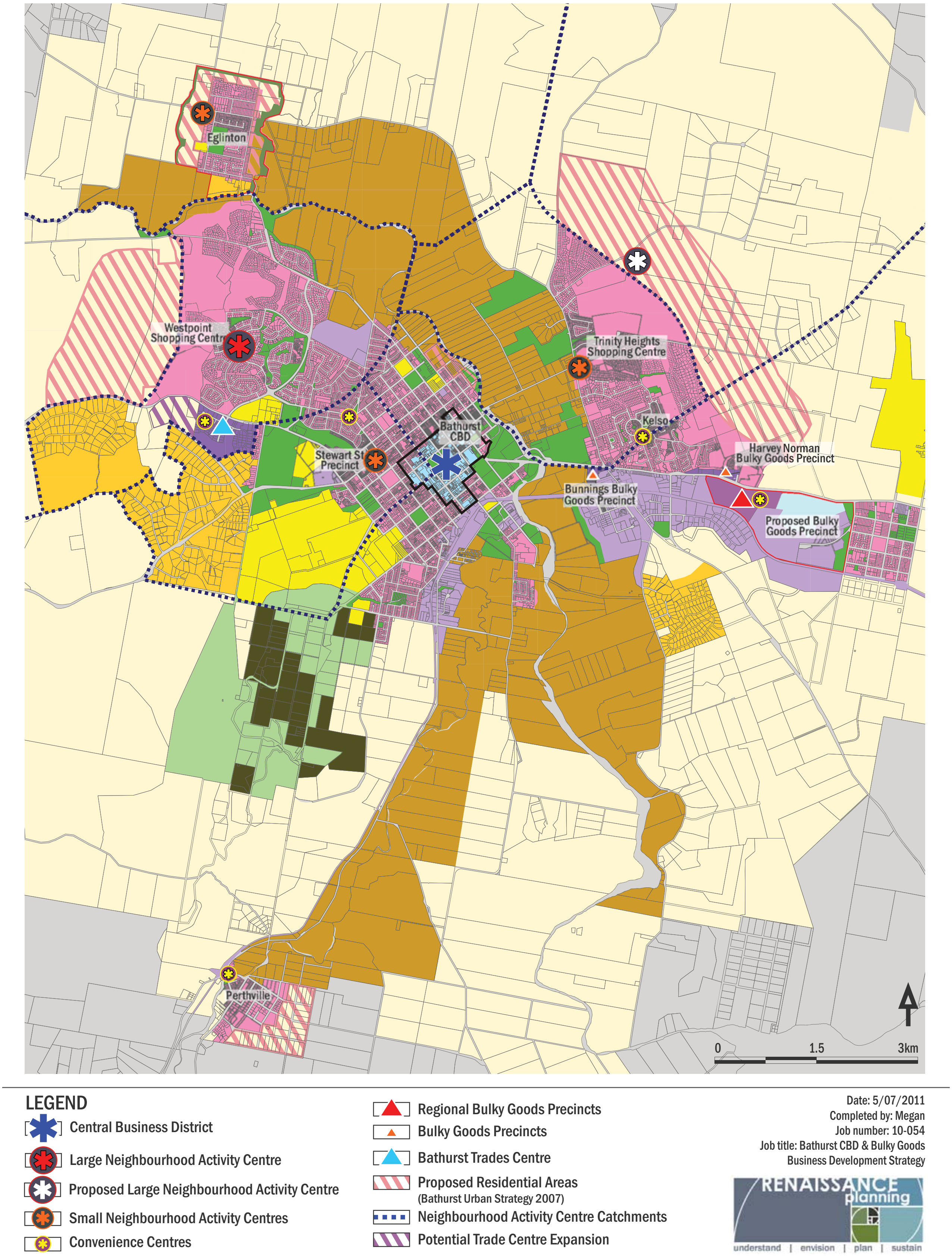
7.3 Recommended Retail Hierarchy Framework Plan (2010 - 2021 and beyond)

The Strategy has set out a recommended activity centre hierarchy providing a structured system of existing and future activity centres and precincts to deliver a diversity of regional, district and local services to meet the needs of the Bathurst community and its RCA (refer Section 7.2).

The Strategy has provided a Framework Plan to spatially define the existing, emerging and likely future activity centre hierarchy for the Bathurst urban area. Figure 7.2 shows the recommended Recommended Retail Hierarchy Framework Plan that **relates the recommended activity centre hierarchy to the current and future structure of the Bathurst urban area.** The Plan shows:

- the centrally located Bathurst CBD which is the only designated regional level activity centre (for core retail goods and services) in the Bathurst Regional LGA;
- a network of neighbourhood activity centres and their associated catchment areas. These encompass:
    - the large neighbourhood activity centre of Westpoint;
    - the existing Trinity Heights neighbourhood activity centre;
    - the Stewart Street neighbourhood activity centre;
    - the proposed Eglinton neighbourhood activity centre.
- a supporting network of convenience centres and stores. These encompass:
    - the proposed Bathurst Retail Hub to provide ancillary convenience services and amenities for visitors and workers at the recommended bulky goods regional precinct (Sydney Road, South, DCP site) and the adjoining planned intermodal development;
    - the proposed Bathurst Trades Centre: Ancillary Service Centre to provide ancillary convenience services and amenities for visitors and workers at the Bathurst Trades Precinct;
    - the proposed convenience centre at Kelso to form part of a revitalised precinct focus as part of a community consultation and master planning process;
    - the existing convenience centre at Mitre Street, West Bathurst;
    - the existing convenience centre and proposed new convenience store at Perthville.
- the recommended regional level bulky goods precinct proposed to be developed at the Sydney Road (South) DCP site (and to include the co-located Bathurst Retail Hub);
- a network of supporting bulky goods precincts encompassing:
    - the Bunnings precinct, Sydney Road, Kelso;
    - the Kelso bulky goods precinct, Sydney Road vicinity of Pat O'Leary Drive;
    - the Harvey Norman bulky goods precinct, Sydney Road vicinity of Ashworth Drive.

Figure 7.2: Recommended Retail Hierarchy



7.4 Recommended Indicative Floorspace Requirements (2010 - 2021 - 2036)

7.4.1 Indicative Requirements by Centre and Precinct

The purpose of this section is to bring together the identified floorspace requirements necessary to implement the Strategy. These requirements have been reconciled against the forecast floorspace needs for the city as a whole over the periods 2010 - 2021 and 2021 - 2036.

The identified floorspace requirements and links to recommended initiatives for particular centres and precincts are set out in the table below.

Centre Precinct	Identified Net Additional Retail Floorspace Requirements m² GLA	Links to Centre and Precinct Initiatives recommended by the Strategy
Indicative Allocations of Core Retail Floorspace (excluding bulky goods)		
Bathurst CBD	**11,000**	Allows for: • proposed development at Rankin Street currently under consideration by Council; • proposed development at Pedrottas Lane; • potential development of a medium sized discount department store (approximately 5,500 square metres GLA), and approximately 3,500 square metres of supporting specialty stores; • a small supermarket (approximately 500 square metres) at Keppel Street
Large Neighbourhood Activity Centre:		
Westpoint	**4,930**	Allows for: • significant new development to consolidate the Westpoint neighbourhood activity centre; • provision for a 2,500 square metre supermarket; • approximately 15 additional stores and 2,000 (net additional) square metres of retail floorspace

Centre Precinct	Identified Net Additional Retail Floorspace Requirements m² GLA	Links to Centre and Precinct Initiatives recommended by the Strategy

Indicative Allocations of Core Retail Floorspace (excluding bulky goods)

Small Neighbourhood Activity Centres		
Trinity Heights	870	Allows for: • expansion of the existing supermarket to 1,200 square metres GLA; • approximately 400 square metres of additional retail development.
Eglinton	1,470	Allows for: • development of a 1,200 square metre supermarket; • 630 square metres of supporting specialty retail stores and services.
Stewart Street	2,320	Allows for: • development of 1,200 square metre supermarket; • 1,100 square metres of supporting specialty retail stores and services.
Total: Small Neighbourhood Activity Centres		
	4,660	

Convenience Stores and Centres		
Bathurst Retail Hub (ancillary services and amenities for the recommended Regional Bulky Goods Precinct)	1,100	Allows for: • convenience store/newsagency (300 square metres), cafes/take away food stores (400 square metres), pharmacy (250 square metres) and health food/deli store (150 square metres).
Bathurst Trades Centre: ancillary service centre	850	Allows for: • convenience store/newsagency (300 square metres), cafe/take away food store (300 square metres), pharmacy (250 square metres)

(cont. over)

Centre Precinct	Identified Net Additional Retail Floorspace Requirements m² GLA	Links to Centre and Precinct Initiatives recommended by the Strategy
Indicative Allocations of Core Retail Floorspace (excluding bulky goods)		
Convenience Stores and Centres (cont)		
Convenience Centre, Kelso	500	Allows for: • convenience store/newsagency (300 square metres) and a deli/cafe/take away food store (200 square metres).
Convenience Store, Perthville	100	Allows for: • convenience store/sub newsagency (100 square metres).
Total Convenience Stores and Centres		
	2,230*	
Total Allocated Core Retail Floorspace (excluding bulky goods)		
	22,820	

* Proposed convenience centre at Kelso will replace existing retail floorspace (contraction of existing floorspace by 490 square metres))

Indicative Allocation of Bulky Goods Floorspace

Regional Bulky Goods Precinct, Sydney Road (Intermodal Site)	34,270	Allows for: • all of the identified bulky goods floorspace needs assessed through to 2036 to be developed at the DCP site; • demand based modelling indicates net additional requirements of 8,200 - 9,800 square metres of net additional bulky goods floorspace in the period 2010 - 2021, but identified major tenancy requirements are likely to exceed 14,000 square metres in the short term (refer Sections 5.4 and 7.2.7)
Total Allocated Bulky Goods Floorspace		
	34,270	

* The Strategy recommends a reduction in retail floorspace at the Kelso local centre as a consequence of master planning and redevelopment (from 820 square metres at present to 500 square metres as proposed.

7.4.2 *Reconciliation of the Indicative Floorspace Needs by Centre and Precinct to the Overall Assessed Requirements for the Bathurst Urban Area*

In relation to **core retail floorspace**, it will be recalled that:

- the assessed retail floorspace requirements for the Bathurst urban area were (refer Section 5.4) :
  - in the range **13,300 - 17,370** square metres GLA for the period **2010 - 2021**;
  - in the range **22,420 - 29,240** square metres GLA for the period **2021 - 2036.**

- as the table opposite indicates the total identified core retail floorspace that is required to implement centre and precinct initiatives recommended by the Strategy is **22,820** square metres GLA;

- the above forecast floorspace demand requirements clearly indicate that the total indicative allocation of 22,820 square metres could not be met until after 2021. Analysis of projected take up requirements indicate that the indicative allocation would be totally warranted by the demand forecasts by 2023 - 2027 (depending on which demand scenario is realised), or by approximately 2025 as a mid range estimate. This assumes that all of the identified floorspace requirements could indeed be implemented. It is highly likely that some of the identified requirements (for example at Trinity Heights and at Stewart Street) may not be fully implementable because of site constraints).

The recommendation of the Strategy is that the indicative allocations should be adopted as a reference for the implementation of activity centre and precinct policy. The position of the Strategy is that they indicate the emphasis and direction for the future growth and development of the Bathurst retail centre hierarchy over the next ten years and beyond to best meet the needs of the current and future Bathurst community. On a fully utilised basis these allocations will meet the core retail floorspace needs of Bathurst to approximately 2025.

In the period from approximately 2025 to 2036, the demand assessments undertaken for the Strategy indicate that even if all of the indicative allocations are implemented, a further 13,140 - 24,030 square metres GLA will remain as future unused demand requirements.

In relation to **bulky goods floorspace,** the recommendation of the Strategy is that all of the identified future bulky goods floorspace demands (that is for the entire period 2010 - 2036) should be allocated to the recommended regional bulky goods precinct proposed to be developed at the Sydney Road (South) DCP site. The rationale for this recommendation is to provide the maximum degree of clarity and support for the regional bulky goods precinct. It is a high strategic priority for Bathurst in the immediate future. As indicated in Section 7.2.7, a minimum of 34,270 square metres GLA should be allowed for to meet future needs, and very significant floorspace quanta are likely to be realised in the short term due to the particular requirements of major national tenants.

7.5 Supporting Policies for Implementation

The purpose of this section is to bring together a number of detailed supporting policies which will need to be considered and implemented in order to give effect to the Strategy. These encompass the following areas:

- application of the indicative floorspace requirements;
- regional centre development;
- definition of the Bathurst CBD;
- supermarket policy and store size limitations outside the CBD;
- criteria for convenience store development;
- retail development master planning;
- community services provision;
- principles for neighbourhood activity centre development;
- accommodating Bathurst's bulky goods needs;
- accommodating long term trades activities.

7.5.1 Application of the Indicative Floorspace Requirements

The indicative retail, bulky goods and office floorspace requirements for the Bathurst urban area to meet the future needs of the city and its RCA over the period 2010 – 2021 and 2021 – 2036 were assessed to inform the Strategy (refer Section 5).

Indicative allocations of likely floorspace requirements by centre type were also made to inform the Strategy and provide the material basis for the policy recommendations, including:

- recommended further development and consolidation of the regional retail role of the CBD;
- recommended consolidation and development of neighbourhood activity centres;
- recommended development of an integrated regional level bulky goods precinct.
- Consistent with the direction of draft State policy, it is recommended that the identified floorspace requirements as set out in the Strategy be considered as advisory and that they are only intended to provide an indication of the likely order of floorspace and (where relevant) land requirements. It is recommended that the identified floorspace requirements not be placed in a statutory form.

7.5.2. Regional Centre Development

It is recommended that regional level core retail (that is, non bulky goods) development only be permitted in the Bathurst CBD as defined in Section 7.3.3. For the purposes of the Strategy a regional level core retail development is defined as a regional level store (that is, a department store, a discount department store, or a large supermarket in excess of 2,500 square metres GLA), or a shopping centre anchored by one or more regional level stores.
It is recommended that Council only give effect to varying this policy subject to an informed comprehensive policy review of the Strategy.

The intended effect of this policy recommendation is to remove the risk of a future sub regional centre development being located in suburban Bathurst or in exurban Bathurst for the foreseeable future (over the next 20 years and beyond) and to provide as much development and investment certainty as possible for future major developments in the Bathurst CBD.

7.5.3. Definition of the Bathurst CBD

For the purposes of the Strategy and its implementation it is recommended that the Bathurst CBD be defined as the land generally bounded as shown in Figures 4.1 and 4.2 of the Strategy. The defined area of the Bathurst CBD is based on the 3a General Business Zone, but has been regularised and includes areas that are currently zoned Residential 2a Zone.

The purpose of drawing a broader boundary for the Bathurst CBD, that extends beyond the 3a General Business Zone, is to ensure that future retail and other commercial developments are placed in a broader environmental framework and fully consider amenity impacts on adjacent land use. It is not intended or inferred that the defined CBD is a precursor to extend the 3a General Business Zone.

7.5.4. Supermarket and Policy and Store Size Limitations Outside the CBD

The current policy which is based on recommendations from the Bathurst Retail Strategy (1999) has a floorspace restriction of 700 square metres for single tenancies in non-bulky goods developments outside the CBD. It is recommended that the current policy be amended as follows:

Definition of types of supermarkets;
It is recommended that three classes of supermarkets be defined for the purposes of the Strategy. These are:

- Small supermarkets: these are facilities intended to provide daily food and other convenience requirements together with limited weekly requirements. The recommended maximum permissible floor area for these facilities is 1,200 square metres GLA.

- Medium sized supermarkets: these are facilities intended to provide a comprehensive daily food and other convenience requirements together with a range of weekly food, grocery and other convenience requirements, together with packaged liquor. The recommended maximum permissible floor area for these facilities is 2,500 square metres GLA.

- Full sized supermarkets: these are facilities intended to provide a comprehensive range of groceries, fresh food products and limited household items and stationery together with packaged liquor. There is no recommended maximum floorspace for these facilities but they will be generally in excess of 3,000 square metres GLA. Depending on demand conditions and site availability, store areas of the order of 3,600 – 4,200 square metres can be anticipated in modern shopping developments in regional cities.

Application of the Recommended Types of Supermarkets in the Bathurst Activity Centre Hierarchy

It is recommended that the classified types of supermarkets be permitted to locate as follows:

Type of Centre as Recommended in the Strategy	Identified Existing and Proposed Centres	Recommended Allowable Supermarket Type
Bathurst CBD	Bathurst CBD	• No restriction on supermarket types or sizes; • the only location in the Bathurst regional local government area where full sized supermarkets as defined by the Strategy are recommended to be permitted to locate and operate.
Large neighbourhood activity centre	Westpoint Neighbourhood Activity Centre	A medium sized supermarket as defined by the Strategy should be permitted to locate and operate at the Westpoint Activity Centre precinct, subject to other relevant conditions being met for development (refer Section 7.2.2).
Small neighbourhood activity centres	• Trinity Heights Neighbourhood Activity Centre • Stewart Street Neighbourhood Activity Centre • Eglinton Neighbourhood Activity Centre	Small sized supermarket as defined by the Strategy should be permitted to locate and operate at each of the identified existing or designated small neighbourhood activity centres as set out on this Table, subject to other relevant conditions being met for development (refer Sections 7.2.3 - 7.2.5).
Regional Bulky Goods Precinct	Sydney Road Intermodal Site	No supermarket as defined in the Strategy is recommended to be permitted to locate in the development as a permissible ancillary retail store or service (refer Section 7.2.7).

7.5.5 Criteria for Convenience Store Development

Definition of Convenience Store:

A convenience store is defined for the purposes of the Strategy as a building with a gross leasable floor area (GLA) of no more than 300 square metres used to sell food, drinks and other convenience goods. It may also be used to hire convenience goods.

Recommended Permitted Locations for Convenience Stores

The following locations are recommended where convenience stores as defined above should be permitted:

Type of Centre as Recommended in the Strategy	Identified Location/Centre	Planning Context
Bathurst Retail Hub (ancillary services and amenities for the recommended Regional Bulky Goods Precinct)	Sydney Road Intermodal site	• A convenience store (as defined by the Strategy) is proposed to form part of an ancillary retail hub to service the regional bulky goods precinct and adjoining intermodal precinct; • the proposed retail hub would have several stores and services (refer to Sections 7.2.7 and 7.4.1 for examples of associated retail activities); • the proposed hub could provide an effective convenience service centre role for the nearby residential neighbourhood of Raglan.
Bathurst Trades Centre: ancillary services centre	Co-location with proposed extension to Bathurst Trades Centre, Mitchell Highway	• A convenience store (as defined by the Strategy) is proposed to form part of an ancillary services centre to service the Bathurst Trades Centre; • a highway service centre comprising a service station, cafe/take away food store and supporting stores (refer Section 7.4.1).
Convenience Centre	Mitre Street West Bathurst	Existing shops and cafe that service a local area in West Bathurst
	Boyd Street and Allambie Boulevard Kelso	Convenience store as part of a redevelopment to replace the existing Centrepoint shopping centre (refer Section 7.2.6)
	Vicinity, Vale Road and Bridge Street Perthville	Opportunity for a new convenience store within the existing village centre precinct
	Sydney Road, south side, vicinity of Pat O'Leary Drive, Kelso	Development approval for a fast food family restaurant and convenience store/service station

Recommended Criteria for New Convenience Store Development

No additional locations have been identified for new convenience stores. It is recommended that applications for new convenience stores be required to address the following criteria:

(a) Highway based convenience stores:

- Location on a main road leading into Bathurst.
- If a designated RTA road the proposed development must meet visibility, access and egress conditions and setback requirements to meet the requirements of the Authority in conjunction with Council.
- Co-location with a service station would be desirable.

(b) Convenience stores to service special needs:

It is recommended that Council makes provision for the potential development for convenience stores as an ancillary service to provide accessible convenience goods and services in new or expanded developments in the Bathurst urban area.
Examples of uses where the co-location of a convenience store could be considered include:

- Hospitals,
- Retirement villages,
- Universities, TAFE colleges or small schools,
- Major industrial areas,
- New tourist developments including hotel developments.

7.5.6 Retail Development Master Planning

It is recommended that in circumstances where a new activity centre or precinct is to be developed that Council should require the preparation of a Precinct Master Plan. Council may also require the identified principal elements of the Precinct Master Plan to be formally stated in a DCP for the precinct.

The Precinct Master Plan should address the following:

Context plan for the precinct showing:

- Location of the proposed development within the precinct;
- Cross sections and sections showing the relative scale of the proposed development in the precinct;
- Pedestrian spaces and pathways linking the proposed development to other areas of the precinct;
- Vehicular access and egress to the development within the wider context of existing and future precinct traffic circulation;
- Access to public transport, relevant to the type and scale of the proposal;
- Relationship of the proposed development to heritage and urban design streetscapes or elements as may be relevant;
- Landscape and urban design concepts showing the proposed development within its precinct setting.

Overall layout of the proposed development showing:

- Proposed major stores and supporting specialty stores and services;
- Other activities proposed for the development;
- Internal and external pedestrian space;
- Elevations and sections showing the intended scale of the developments and relationship to the street and/or external pedestrian spaces;
- Provision for verandah protection;
- Transparency of shopfront ground floor elevations;
- Vehicular access and egress to car parking;
- Pedestrian access from the principal car park areas to the shopping area;
- Layout of onsite car parking;
- Urban design details for major pedestrian spaces/forecourt areas;
- Provision for seating and public amenity;
- Provision for external edge lighting (including under verandah lighting).

7.5.7 Community Services Provision

Bathurst Regional Council has recently completed the Bathurst Social and Community Plan (2011-2016). The Plan has undertaken research and consultation to identify the needs of a broad range of groups including children, young people, women and older people, people with a disability, indigenous people, people with a diverse linguistic background and other groups.

It is framed to deliver positive outcomes for the future of the Bathurst community through the provision of:

- *"A range of good quality and accessible transport options;*
- *Adequate health care for the community including preventative health education;*
- *Social inclusion opportunities for the more vulnerable members of the community;*
- *Adequate housing for all ages and needs;*
- *Good educational and training opportunities;*
- *Opportunities to promote and educate the community regarding sustainability;*
- *Support and encouragement to continue to develop our economy; and*
- *Opportunities to value, celebrate and support our future generations."*

(Social and Community Plan, Bathurst Regional Council website)

The ongoing development of existing and future neighbourhood activity centres will provide opportunities for the co-location of community and recreation centres at these centres. It is recommended that Council give consideration to the potential for the co-location of future social and recreation facilities where opportunities arise.

7.5.8 Principles for Neighbourhood Activity Centre Development

The Strategy recommends a (new) small neighbourhood activity centre at Eglinton and the significant consolidation of the existing neighbourhood activity centre at Westpoint. It also recommends the development of a small supermarket and associated retailing at the Stewart Street precinct to provide a small neighbourhood activity centre function at the precinct. The Strategy further recommends a convenience centre to be co-located with the recommended bulky goods regional precinct at the Sydney Road South (DCP) site, and a new convenience store as part of a proposed master planning and redevelopment of the Centrepoint shopping centre.

In summary the Strategy provides opportunities for significant change and new development at the neighbourhood and local level. In order to fully utilise potential opportunities and maximise social, economic and environmental benefits a set of planning and design principles has been put forward to guide neighbourhood activity centre development.

Planning and Design Principle	Recommended Planning and Design Initiatives
Place Setting and Urban Design Context Optimise the physical and built form setting to create a sense of place	This will be achieved through: • application of compact, consistent built form that clearly defines the neighbourhood centre; • street based and/or externally faced shopfront - verandah environments; • creation of pedestrian focal spaces and places that the plan is directed toward.
Defined Retail Core Provide a framework for an evolving, viable and active retail core precinct at the heart of the neighbourhood activity centre	This will be achieved through: • tightly knit externally faced shop activities that address a common pedestrian realm; • strategic placement of the anchor and supporting stores to optimise pedestrian flows; • visual connection to a parking street or court; • clearly defined village core or heart space through a pedestrian focal space visually connected to the retail core.
Diversity of Supporting Services Optimise the potential at the neighbourhood activity centre for a range of retail, commercial and community services that best reflect current and evolving needs	This will be achieved through: • provision for a broad mix of retail stores and services and commercial and community services relevant to the neighbourhood scale (refer to indicative stores and services for the Westpoint neighbourhood activity centre, Section 7.2.2); • design of a clearly defined supporting services precinct/area that is a logical extension of the retail core; • provision of a consistent shopfront - verandah environment linking the retail core and supporting services precinct and maximising opportunities for pedestrian access and visitation.
Social Role of the Neighbourhood Centre Provide an environment that will best enable the local and district community to relate to the neighbourhood activity centre as their central social place	This will be achieved through: • provision and opportunities for local groups to meet at the neighbourhood centre; • opportunities for informal social interaction at the neighbourhood centre - the opportunities will be provided through public spaces and multipurpose facilities that bring the community together; • optimise opportunities to co-locate sporting and recreation facilities at the neighbourhood centre; • optimise opportunities to co-locate shared community - education facilities at/adjoining the neighbourhood activity centre.
Neighbourhood Access Ensure safe and amenable access from the neighbourhood centre to the residential precincts in the local catchment	This will be achieved through: • linking the neighbourhood centre to the existing and planned open space network via pedestrian pathways and cycleways; • ensuring that where key pedestrian/cycle routes cross main roads there is provision for safe access; • ensuring that the neighbourhood pedestrian/ cycle network links all existing and future schools, retirement villages and other recognised social facilities to the neighbourhood activity centre.

7.5.9 Accommodating Bathurst's Bulky Goods Needs

Providing a Long Term Strategic View for Bulky Goods Provision

The Strategy has assessed the long term floorspace and land requirements to accommodate the city's bulky goods needs, taking full account of its current and future regional role and making significant provision for the impacts of online retailing on future floorspace demand.

The Strategy has identified a preferred site for a future bulky goods precinct that could accommodate all of the city's requirements for the foreseeable future (to 2036 and beyond). The floorspace and site requirements, together with ancillary retail stores and services recommended for the site are set out in Section 7.2.7. **The Strategy provides a clear strategic view of the city's bulky goods needs over the next 20 years and beyond, and the required land use - development solution to best maximise regional benefits to the city**

Limitations of Bulky Goods Development to date in Bathurst

In the decade following the Bathurst Retail Strategy (1999) there has been significant bulky goods development in Bathurst. This has enabled major national operators to locate in Bathurst and strengthen the offering and assist in the reduction of escape expenditures. However, the sites that have been developed have been sub-optimal with either limited access and visibility from the highway and/or with limited future development capability taking account of the site and servicing requirements of new major entrants. **A consolidated well planned regional level bulky goods precinct at Bathurst will leverage maximum regional attraction, catchment and market share beyond the level that could be generated through scattered developments throughout the city.** It is this objective which underlies the recommended development for a regional level bulky goods precinct at the Sydney Road Intermodal site.

Needs of New Major Entrants

The effective planning and development of a regional level bulky goods precinct in Bathurst necessarily requires detailed site planning sufficient to meet all of the siting, access, servicing and visibility requirements of the major stores. Currently there are two major retail groups that are likely to require new major bulky goods store facilities in Bathurst: the Harvey Norman group and Woolworths that are seeking to find a site for their new lifestyle bulky goods store (Masters). It is recommended that Council coordinate a facilitated process of engagement with these two companies to ensure:

- that their current and ultimate siting needs can be fully met at the Sydney Road Intermodal site;
- that the land price for the required sites reasonably reflects the location and current state of development of the land and makes allowance for the additional value that these major entrants will add to the bulky goods precinct.

That being said it is recommended that Council not consider any application for rezoning to facilitate a freestanding development by any individual operator at other locations in urban or exurban Bathurst. This type of process is not a strategic process at all but ad hoc development which will not permit an optimal economic outcome for the Bathurst community.

7.5.10 Accommodating Long Term Trades Activities

As part of the Strategy a review was undertaken of the Bathurst Trades Precinct (refer Section 4.11.4). It was noted that the precinct located at Bradwardine Raod and Mitchell Highway in the suburb of Robin Hill has been a remarkable success for Council. It has accommodated trades activities demands and has developed as the City's leading precinct for automotive sales and building trades services.;

A review was required to be undertaken as to the suitability of the precinct for bulky goods activities. The view of the Strategy is that in order to maximise regional benefits to the City the bulky goods demands should be accommodated at one comprehensively planned precinct of high amenity with a full provision of supporting services and amenities. There is not sufficient demand to divide these future bulky goods requirements and locate them at different areas of the City. The Strategy has observed that the market has opted for an eastern corridor extending along Sydney Road east of the Macquarie River as a preferred location for bulky goods. The preferred and recommended site for a regional bulky goods precinct is consistent with this corridor approach.

On the basis of this reasoning the Strategy recommends that the Bathurst trades precinct, and any extensions of the precinct, be planned, maintained and consolidated for the diversity of trades activities required by Bathurst and its RCA. The remaining capacity of the precinct (approximately 12 hectares as advised by Council), together with the additional site purchased by Council should be focussed on these activities. Regional strategic benefit for Bathurst will be maximised by consolidating all of the city's bulky goods demands in a fully planned regional precinct, east of the city on the DCP site.

It is recommended that Council amend its Urban and Rural Strategies so that land northeast of the future McDiarmid Streeet be earmarked for future Service Business use rather than Rural Residential use, and facilitate the expansion of the Bathurst Trades Precinct (refer Figure 4.12).

7.6 CBD Strategic Framework for Retail Development

The Strategy has identified the indicative retail, bulky goods and office floorspace requirements for Bathurst over the next 25 years. Within this context it has identified retail floorspace and development opportunities for the Bathurst CBD, taking account of long term requirements and the need to consolidate and maximise the district's regional role. These requirements have been linked to identified site opportunities in a considered strategic view of the CBD: a draft Retail Development Framework.

The draft Retail Development Framework is comprised of a set of planning principles and possible design approaches to achieve these principles. It also comprises recommended planning and design initiatives to implement these principles. The planning and design approach is brought together in the draft CBD Strategic Framework for Retail Development (refer Figure 7.3).

7.6.1 Recommended Planning and Design Principles

Planning and Design Principle	Recommended Planning and Design Initiatives
Attraction and Amenity of the Core Precinct Maximise and strengthen the regional attraction of the Core precinct	This will be achieved through: • Improving pedestrian-space connectivity: - Activation of Pedrottas Lane. - Improve pedestrian safety levels at existing mid-block crossings (flashing lights at existing crossings at Howick Street, east and west of William Street). - Establish pedestrian crossings at current locations at William Street, north and south of Howick Street (installation of zebra crossings and flashing lights). • Revitalisation Program for Bathurst Chase (lower ground level entry area at William Street) and Centrepoint arcade. Opportunities for: - Tenancy strategy to complement the Coles supermarket (potential for a fresh food market theme); - Co-ordinating role by Council. • Under-verandah lighting program: Joint Council – Property Owners initiative; • Town square and community centre in the south-west quadrant (refer to City Heart).

Planning and Design Principle	Recommended Planning and Design Initiatives
Opportunities for New Major Retail Investment Optimise opportunities for new major retail investment to address the long term needs for the CBD	This will be achieved through: • Vision, master planning and DCP process for the George Street car park and surrounds. The most significant opportunity site in the CBD. Opportunities for: - Department/discount department store. - Homewares centre – build on the existing strengths of George Street. - Themed specialty shopping. Possible incorporation of DFO theme (Direct Factory Outlets in a themed centre). - On-site structure car parking: application of the approach which has worked well in Bathurst. - Mixed use, including residential hotel on upper levels (refer to Heritage Values). - Encourage arcade linkage to George Street as part of the development. • Vision, master planning and DCP process for the library car park site at Keppel Street. Opportunities for: - Small supermarket/convenience store to complement existing stores and services in Keppel Street. - Possible development of a public space with active shopfront edges to interface with the library – art gallery and provide a focal area for the Keppel Street precinct. - Undercover or structure car parking. Improved pedestrian access to the car park. - More effective utilisation of the car park by Keppel Street visitors.
City Heart Provide a unique space and meeting place for Bathurst that complements its unique structure and character	This will be achieved through: • Vision, master planning and DCP process for the south-west quadrant of the Core precinct to develop a town square and community focus (area encompasses the former TAFE building, the Australian Fossil and Mineral Museum and the former Bathurst Public School buildings and site). Investigate opportunities for: - Creation of a unique external-internal public space to create an iconic central place for Bathurst and complete the four quadrants of the Core precinct. - Opportunity to add new regional attractions to the Bathurst CBD including a farmers' market, university of the third age and community centre;- Improved east-west linkages to William and George Streets.

Planning and Design Principle	Recommended Planning and Design Initiatives
Linkages to Connecting Precincts Optimise linkages between the Core, George Street and William Street South precincts	This will be achieved through: • Signalisation at George/Howick Streets; • Signalisation at George/Russell Streets; • Pedestrian crossings (zebra crossings and flashing lights) at mid-block locations across George Street (between Howick and Durham and Howick and Russell Streets); • Extension of under-verandah lighting along George Street (joint Council Property Owner initiative). • Consideration of a slow speed street network (40 km per hour maximum) in the heart of the CBD and the principal shopping and commercial streets. These encompass: - George Street (Durham Street south to Russell Street); - William Street (Durham Street south to Russell Street); - Howick Street (George Street east to Bentinck Street); - Russell Street (George Street east to Bentinck Street); - Keppel Street (William Street south to Seymour Street).
Gateway Opportunities Optimise opportunities to provide an attractive gateway and entry to the Core and George Street precincts from Durham Street	This will be achieved through: • Vision, master planning and DCP process for Durham Street. Framework to facilitate: - Hospitality and residential development opportunities; - Boulevarding of Durham Street; - Urban design for gateways at William, George Streets and Bentinck Streets; - Improved safe pedestrian access to William and George Streets.
Heritage Values Protect, maintain and enhance the unique character and heritage values of the Bathurst CBD	This will be achieved through: • Ensuring that new development maintains and protects existing streetscapes of recognised heritage value; • Ensuring that where new development is required at the street front, that the built form scale and massing respect and complement the established pattern; • Ensuring so far as practicable that new development is set back from the historic street front and that upper levels do not obscure or compromise the visual integrity of established streetscapes of heritage value.

7.6.2 Recommended CBD Retail Development Framework

The recommended CBD Framework Plan is set out in Figure 7.3. It provides a strategic framework for the co-ordinated retail development and consolidation of the Bathurst CBD. The proposed Framework provides the spatial context in which a range of projects and design initiatives could be co-ordinated to achieve the planning and design principles set out in Section 7.6.1.

The key elements of the recommended CBD Retail Development Framework encompass the following:

- recognition of the regional significance of the key retail elements that define the Core Precinct: Stockland Plaza, Bathurst City Centre and Bathurst Chase. Within this context recognition of the internal and external pedestrian network system that links these centres;

- identified developments to further consolidate and improve the Core Precinct. These encompass:
  - recommended Revitalisation Program for Bathurst Chase (lower level at William Street entry area) and Centrepoint Arcade;
  - proposed redevelopment of the ANZ site at Pedrottas Lane to provide an active linkage to William Street;
  - revitalisation of the former TAFE buildings and master plan for a new city square precinct. The recommended City Heart project could encompass a town square, new public space - internal regional retailing attractions such as a farmers' market, opportunities for a University of the Third Age and a community arts centre/precinct.

- identified potential sites to accommodate new major regional developments. The recommended site encompasses the George Street car park and the adjoining former Ford site located on Howick Street. The two sites represent the largest single opportunity available in the CBD. The Strategy has recommended a master planning and consultation process to identify an optimal retail/mixed use outcome for the site and precinct that should encompass new linkages to George Street;

- identified projects to improve retail diversity and attraction at precincts adjacent to the Core. These encompass:
  - the proposed Rankin Street supermarket development;
  - potential for a shared use and development of the library car park with links through to Keppel Street to provide retail attractions not currently available at the street to strengthen the retail offer.

- a recommended project for the master planning of Durham Street to provide a boulevard and urban design gateway entries to the Core and George Street precincts;

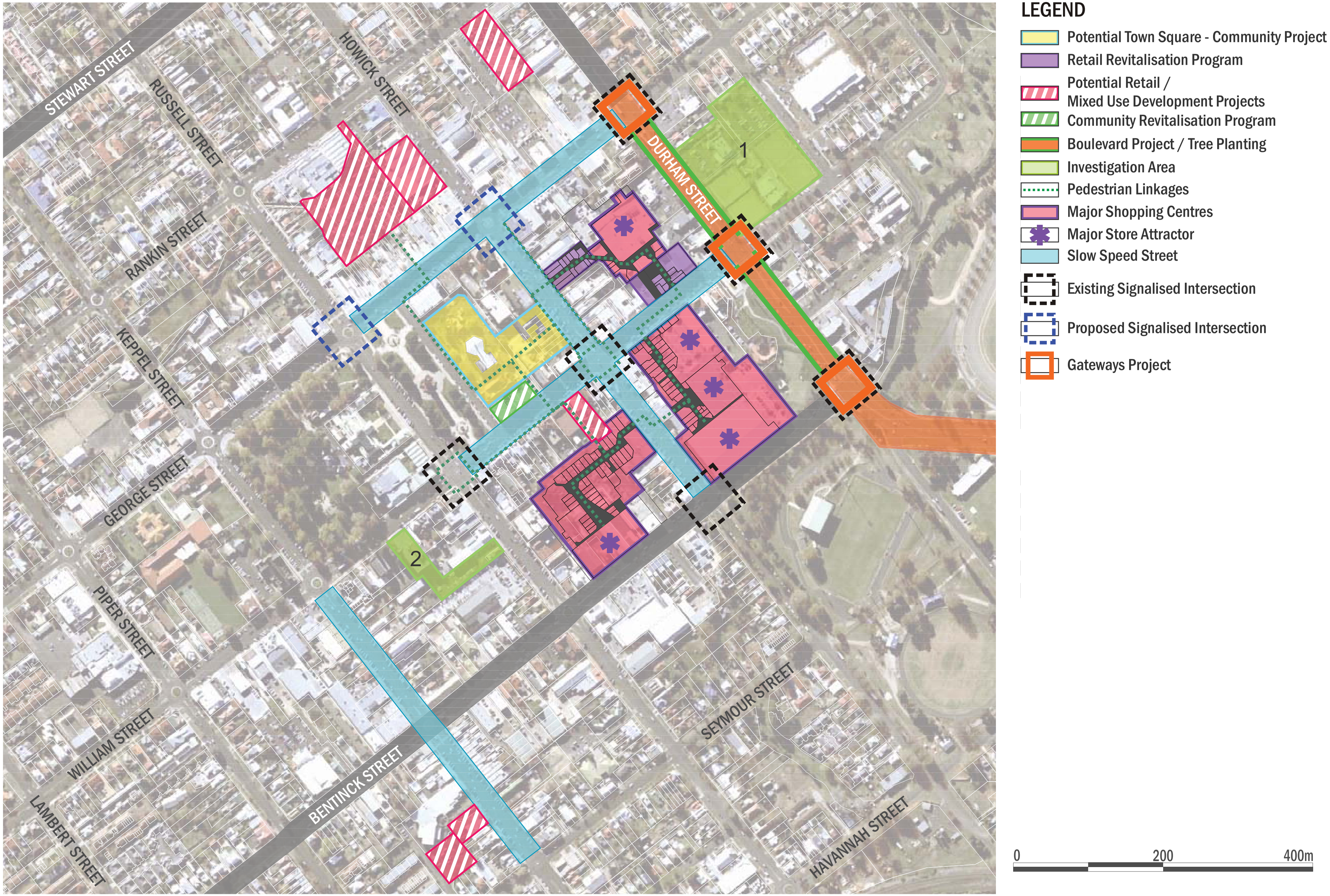
- recommended traffic calming and road safety measures to improve pedestrian access and safety in the Bathurst CBD and assist in the extension of regional level retailing. Potential projects include:
  - traffic signalisation at George and Howick Streets and George and Russell Streets;

- establishment of a network of slow speed streets (40 kph maximum speed) in the principal shopping and commercial streets. These encompass George Street (Durham to Russell Street), William Street (Durham to Russell Street) and Howick Street (George to Bentinck Street). A section of Keppel Street has also been recommended (William to Seymour Street).

The recommended CBD Retail Development Framework has identiifed two investigation areas for master planning and feasibility assessments and subject to these outcomes facilitation of new development. The investigation areas are:-

- an area at Durham Street, extending south to William Street and north to Elizabeth Street (refer Figure 7.3, Area 1). The area may have potential for a future mixed use precinct that could include hospitality and medium density residential development;
- an area that encompasses the State Government offices and adjoining carpark (refer Figure 7.3, Area 2). The area may have potential for a future joint Council and State Government administration centre together with improved parking facilities, cafes and retail services.

Figure 7.3: Bathurst CBD Retail Development Framework



BATHURST CBD & BULKY GOODS BUSINESS DEVELOPMENT STRATEGY
BATHURST CBD RETAIL DEVELOPMENT FRAMEWORK

Date: 31/03/2011
Completed by: Megan
Job number: 10-054
Job title: Bathurst CBD & Bulky Goods Business Development Strategy

RENAISSANCE planning
understand | envision | plan | sustain

7.7 Impact Assessment Framework

It is recommended that where rezonings are necessary to facilitate activity centre development or where new significant developments are planned for activity centres that Council give consideration for the application of an impact assessment framework. The following table sets out a proposed Impact Assessment Framework with various measures of net community benefit to assist in the planning and resolution of the proposal to ensure that net community benefits are optimised to best ensure sustainable and long term benefits for the Bathurst community.

Assessment Criterion	Significance	Issues to be Addressed
Net Community Benefit	In New South Wales, the concept used in the assessment of retail development proposals is net community benefit. There is no formally agreed definition or measure of the concept, but it is taken to designate a considered overview of a range of factors relevant to the development, role and operation of a development proposal. It refers to an overall judgment of factors relevant to the development taking account of state and local policies and drawing a conclusion as to whether or not on balance, the proposal is in the public interest – that is whether it will contribute to a net community benefit for existing and future communities.	• The applicant for the proposed development should demonstrate how the proposed development is consistent with state and local policies. • The applicant should also demonstrate through a thorough assessment of criteria that the proposed development will on balance produce a clear net community benefit for existing and future communities. • The assessment criteria to be addressed by the applicant encompasses: - Strategic location; - Accessibility; - Opportunity for choice; - Places for people and urban design; - Economic viability; - Environmental sustainability; - Amenity and safety.
Strategic Location	The activity centre hierarchy and supporting objectives and policies are directed to the consolidation and development of a robust, dynamic and sustainable network of centres and precincts to meet the current and future needs of Bathurst and its RCA. The geographic pattern of existing and future centres, their roles and catchment areas, constitute a fundamental consideration in the assessment of future development proposals.	• Contribution of the proposal to the consolidation of the CBD and existing or designated future major, local or convenience centres. • Consistency of the proposal to the existing or future designated role of the subject activity centre. • Extent to which the proposal supports state and local policy, including the Bathurst CBD and Bulky Goods Business Development Strategy (2010).
Accessibility	Bathurst's evolving activity centre hierarchy is intended to ensure that existing and future communities shall have equitable levels of access for convenience and weekly family requirements. It is important that the planning of activity centres and the requirements for development proposals be considered within an integrated accessibility environment that takes account of pedestrian and cycle access together with public transport access in addition to vehicular access.	• The extent to which the proposal contributes to improved pedestrian and cycle access to the subject centre or precinct. • The extent to which the proposal contributes to improved access, amenity or safety for travel to the centre by public transport. • The extent to which the proposal can be effectively and safely accommodated to ensure vehicular access for visitors, employees and deliveries.

Assessment Criterion	Significance	Issues to be Addressed
Opportunity for Choice	The evolving activity centre hierarchy is intended to provide a network of centre and precincts to meet a diversity of existing and future needs. These include not only the full range of discretionary and convenience retail goods and services but also encompass commercial and professional services, leisure, entertainment, hospitality and recreation services, community and health services and special residential accommodation in addition to medium density residential where opportunities are available.	• The extent to which the proposal broadens retail and commercial choices and opportunities for residents, consistent with the existing and designated activity centres framework. • The extent to which the proposal contributes to the wider diversity of activities in the subject activity centre or precinct. • The extent to which the proposal specifically contributes to community, health and professional services in the subject activity centre or precincts.
Places for People	The centres and precincts which make up the City's activity centre hierarchy are intended to be developed as central places to serve local and district communities (and regional communities in the CBD and the regional centre). In this context, it is important that they are designed to include spaces and places for gathering and social engagement. It is also important that urban design recognise the unique place-defining character or centre and precincts.	• The extent to which the proposal improves the attraction, spaces, services, amenity and environment of the subject centre for people of all ages, that is, the social role and focus of the centre. • The extent to which the proposal contributes to street-based or externally pedestrian environments. • The extent to which the proposal contributes to the development of gathering places and spaces in the subject centre or precinct. • The extent to which the proposal makes a contribution to improving the urban design, landscape and architecture of the subject centre or precinct, consistent with its setting and character. • The extent to which the proposal contributes to improved safety and amenity of the subject centre or precinct.

Assessment Criterion	Significance	Issues to be Addressed
Economic Viability	In order to ensure a sustainable activity centre system, it is important that each part of the network is economically viable for the foreseeable future. Centres at all levels need to respond to the range of demand requirements for goods and services and ensure stable and adequate returns to tenants and property owners.	• The contribution of the proposed development to the long-term trade and viability of the subject centre, consistent with its current or designated future role. • Contribution of the proposed development to the generation of a diversity of employment opportunities during the construction and operational phases of the development. • The extent to which the proposed development could cause planning blight through vacancies and disinvestment in the subject centre or in other relevant impact centres. Measures being undertaken in the design, layout, tenanting and staging of the proposed development to mitigate against this potential outcome. • The extent to which the proposed development may cause significant losses in services in the subject centre or in other relevant impact centres; and the extent to which this may in turn diminish the intended roles of the subject centre and other impact centres.
Environmental Sustainability	It is important that in new developments and for refurbishments of existing centres that each development seeks to minimise its carbon footprint through its design and construction. It is also important that new and existing developments seek to optimise water capture for on-site use and landscaping.	• Contribution of the proposal to the use of renewable energy sources and the design, layout and construction of the development to minimise its carbon footprint. • Utilisation of solar design and orientation to effect an energy efficient development that minimises off-site energy requirements. • Use of water sensitive urban design (WSUD) practices in the design, layout and construction of the development
Amenity and Safety	A long-standing concern of planning is that new developments should have regard to ensuring the highest amenity and safety outcomes for the proposed development itself, the subject centre and to other neighbouring properties where relevant.	• Extent to which the proposed development ensures safety for visitors and workers through its design and layout, its approach to the public realm, and pedestrian spaces and access routes. • The extent to which the proposed development demonstrably minimises negative amenity impacts on the subject centre and on the general surrounds.

7.8 Monitoring and Review

It is recommended that Council undertake a review of the Bathurst CBD and Bulky Goods Development Strategy in 2013 after the results of the 2011 Census are released to monitor the population and demand forecasts prepared for the Strategy.

It is further recommended that Council undertake comprehensive reviews of the Bathurst CBD and Bulky Goods Development Strategy at five yearly intervals after 2013 to review the effectiveness of the recommendations at that time and revise policies and initiatives as may be required.

Appendix A:
Floorspace Classification

ACTIVITIES CLASSIFICATION

Source: Based on Ratio Consultant's retail classification system & ABS *ANZSIC*, Australian Cat. No. 1292.0.55.002, 2006.

Renaissance Code	Revised ABS Description	ANZSIC (2006)			Guide page ref.
		Subdivision	Group	Class	
A	FOOD, GROCERIES AND LIQUOR STORES				
A.1	National chain supermarkets	41	411	4110	248
A.2	Discount supermarkets	41	411	4110	248
A.3	Other supermarkets	41	411	4110	248
A.4	Convenience stores	41	411	4110	248
A.5	Bakery product manufacturing (non-factory based)	11	117	1174	116
A.6	Fresh meat, fish and poultry retailing	41	412	4121	248
A.7	Fruit and vegetable retailing	41	412	4122	248
A.8	Liquor retailing	41	412	4123	248
A.9	Other specialised food retailing	41	412	4129	248
A.10	Cafes and restaurants	45	451	4511	264
A.11	Takeaway food services	45	451	4512	264
A.12	Catering services	45	451	4513	365
B	DEPARTMENT AND GENERAL STORES				
B.1	Department stores	42	426	4260	257
B.2	Discount department store	N/A	N/A	N/A	N/A
B.3	Mini major	N/A	N/A	N/A	N/A
C	CLOTHING, FOOTWEAR AND FABRIC STORES				
C.1	Manchester and other textile goods retailing	42	421	4214	251
C.2	Clothing retailing	42	425	4251	256
C.3	Footwear retailing	42	425	4252	256
C.4	Other retailing (personal accessories etc.)	42	425	4259	257
D	OTHER HOUSEHOLD A STORES (generally < 350 sqm)				
D.1	Houseware retailing	42	421	4213	250
D.2	Computer and computer peripheral retailing	42	422	4222	252
D.3	Sport and camping equipment retailing	42	424	4241	254
D.4	Entertainment media retailing [CDs, DVDs, records]	42	424	4242	254
D.5	Toy and game retailing	42	424	4243	255
D.6	Newspaper and book retailing	42	424	4244	255
D.7	Watch and jewellery retailing	42	425	4253	256
D.8	Pharmaceutical, cosmetic and toiletry retailing	42	427	4271	258
D.9	Stationery goods retailing	42	427	4272	258
D.10	Antique and used goods retailing	42	427	4273	259
D.11	Flower retailing	42	427	4274	259
D.12	Other store-based retailing N.E.C.	42	427	4279	259
E	OTHER HOUSEHOLD B STORES (generally > 350 sqm)				
E.1	Furniture retailing	42	421	4211	250
E.2	Floor coverings retailing	42	421	4212	250
E.3	Houseware retailing	42	421	4213	250
E.4	Electrical, electronic and gas appliance retailing	42	422	4221	251
E.5	Other electrical and electronic goods retailing	42	422	4229	253
E.6	Hardware and building supplies retailing	42	423	4231	253
E.7	Garden supplies retailing	42	423	4232	253
E.8	Toy and game retailing	42	424	4243	255
E.9	Marine equipment retailing	42	424	4245	255
E.10	Stationery goods retailing	42	427	4272	258
E.11	Sport and camping equipment retailing	42	427	4272	258
F	RETAIL SERVICES				
F.1	Banking (retail outlets)	62	622	6221	297
F.2	Building society operation	62	622	6222	297
F.3	Credit union operation	62	622	6223	297
F.4	Other retail banking n.e.c.	62	623	6230	
F.5	Life insurance	63	631	6310	300
F.6	Health insurance	63	632	6321	300
F.7	General insurance	63	632	6322	300
F.8	Superannuation funds	63	633	6330	301
F.9	Auxiliary insurance services	64	642	6420	303
F.10	Passenger car rental and hiring	66	661	6611	305
F.11	Other motor vehicle and transport equipment rental and hiring	66	661	6619	305
F.12	Video and other electronic media rental and hiring	66	663	6632	306
F.13	Other goods and equipment rental and hiring n.e.c	66	663	6639	307
F.14	Professional photographic services	69	699	6991	318
F.15	Travel agency and tour arrangement services	72	722	7220	323
F.16	Packaging services	73	732	7320	327
F.17	Lottery operation	92	920	9202	360
F.18	Other gambling activities	92	920	9209	360
F.19	Hairdressing and beauty services	95	951	9511	367
F.20	Funeral services	95	952	9520	367
F.21	Laundry and dry-cleaning services	95	953	9531	368
F.22	Photographic film processing	95	953	9532	368
F.23	Other personal services N.E.C.	95	953	9539	369
F.24	Diet and weight reduction centre operation	95	951	9512	367

G	TRADE SERVICES				
G.1	Building construction	30			209
G.2	Heavy and civil engineering construction	31			211
G.3	Construction services	32			213
G.4	Plumbing services	32	323	3231	215
G.5	Electrical services	32	323	3232	215
G.6	Air conditioning and heating services	32	323	3233	216
G.7	Fire and security alarm installation services	32	323	3234	216
G.8	Other construction services N.E.C.	32	329	3299	219
G.9	Other warehousing and storage services	53	530	5309	280
G.10	Farm animal and bloodstock leasing	66	662	6620	306
H	REPAIR SERVICES				
H.1	Domestic appliance repair and maintenance	94	942	9421	363
H.2	Electronic (except Domestic Appliance) and precision equipment repair	94	942	9422	364
H.3	Other machinery and equipment repair and maintenance	94	942	9429	365
H.4	Clothing and footwear repair	94	942	9491	
J	PROPERTY AND BUSINESS SERVICES (generally < 500 sqm)				
J.1	Newspaper, periodical, book and directory publishing	54	541		282
J.2	Broadcasting (except Internet)	56			288
J.3	Internet publishing and broadcasting	57	570	5700	290
J.4	Telecommunications services	58	580		291
J.5	Internet service providers, web search portals and data processing services	59			293
J.6	Financial services	64	641	6419	302
J.7	Heavy machinery and scaffolding rental and hiring	66	663	6631	306
J.8	Real estate services	67	672	6720	309
J.9	Scientific research services	69	691	6910	312
J.10	Architectural services	69	692	6921	312
J.11	Surveying and mapping services	69	692	6922	313
J.12	Engineering design and engineering consulting services	69	692	6923	313
J.13	Other specialised design services	69	692	6924	314
J.14	Scientific testing and analysis services	69	692	6925	315
J.15	Legal services	69	693	6931	315
J.16	Accounting services	69	693	6932	316
J.17	Advertising services	69	694	6940	316
J.18	Market research and statistical services	69	695	6950	316
J.19	Management advice and related consulting services	69	696	6962	317
J.20	Computer system design and related services	70	700	7000	320
J.21	Employment services	72	721		322
J.22	Other administrative services	72	729		323
J.23	Building cleaning, pest control and other support services	73	731		326
J.24	Civic, professional and other interest group services	95	955		370
J.25	Printing and printing support services	16	161		136
K	COMMERCIAL OFFICES (generally > 1,000 sqm)				
K.1	Financial services	64	641	6419	302
K.2	Scientific research services	69	691	6910	312
K.3	Architectural services	69	692	6921	312
K.4	Surveying and mapping services	69	692	6922	313
K.5	Engineering design and engineering consulting services	69	692	6923	313
K.6	Scientific testing and analysis services	69	692	6925	315
K.7	Legal services	69	693	6931	315
K.8	Accounting services	69	693	6932	316
K.9	Corporate head office management services	69	696	6961	317
K.10	Veterinary services	69	697	6970	318
K.11	Employment services	72	721		322
K.12	Banking Services (administration)				
K.13	Other administrative services	72	729		323
K.14	Central government administration	75	751	7510	330
K.15	State government administration	75	752	7520	330
K.16	Local government administration	75	753	7530	331
K.17	Justice	75	754	7540	331

Renaissance Code	Revised ABS Description	ANZSIC (2006)			Guide page ref.
		Subdivision	Group	Class	
L	EDUCATION, SPORTS AND COMMUNITY DEVELOPMENT SERVICES				
L.1	Emergency, public order and safety services	77	771		334
L.2	Preschool education	80	801	8010	338
L.3	Primary education	80	802	8021	338
L.4	Secondary education	80	802	8023	338
L.5	Combined primary and secondary education	80	802	8023	339
L.6	Special school education	80	802	8024	339
L.7	Technical and vocational education and training	81	810	8101	340
L.8	Higher education	81	810	8102	340
L.9	Sports and physical recreation instruction	82	821	8211	341
L.10	Arts education	82	821	8212	341
L.11	Adult, community and other education N.E.C.	82	821	8219	342
L.12	Aged care residential services	86	860	8601	349
L.13	Other social assistance services	87	870	8790	
L.14	Child care services	87	871	8710	350
L.15	Creative and performing arts activities	90	900		354
L.16	Sports and physical recreation activities	91	911		356
L.17	Religious services	95	954	9540	370
L.18	Community halls (Church, RSL, Men's Sheds)				
L.19	Tourist information centres	89	892	8921	
L.20	Parks and gardens operation				
M	ENTERTAINMENT, RECREATION AND ACCOMODATION				
M.1	Accommodation	44	440	4400	263
M.2	Pubs, taverns and bars	45	452	4520	265
M.3	Clubs (hospitality)	45	453	4530	265
M.4	Motion picture exhibition	55	551	5513	286
M.5	Libraries and archives	60	601	6010	295
M.6	Museum operation	89	891	8910	352
M.7	Zoological and botanical gardens operation	89	892	8921	352
M.8	Nature reserves and conservation parks operation	89	892	8922	352
M.9	Horse and dog racing activities	91	912		358
M.10	Amusement and other recreational activities N.E.C.	91	913	9139	359
M.11	Brothel keeping and prostitution services	95	953	9534	369
N	MEDICAL AND HEALTH CARE SERVICES				
N.1	Hospitals	84	840		344
N.2	General practice medical services	85	851	8511	345
N.3	Specialist medical services	85	851	8512	345
N.4	Pathology and diagnostic imaging services	85	852	8520	346
N.5	Dental services	85	853	8531	346
N.6	Optometry and optical dispensing	85	853	8532	347
N.7	Physiotherapy services	85	853	8533	347
N.8	Chiropractic and osteopathic services	85	853	8534	347
N.9	Other Allied Health services	85	853	8539	347
N.10	Ambulance services	85	859	8591	348
N.11	Other health care services n.e.c.	86	863	8639	348
P	TRAFFIC AND TRANSPORT SERVICES				
P.1	Road freight transport	46	461	4610	268
P.2	Taxi and other road transport	46	462	4623	269
P.3	Road passenger transport	46	462		268
P.4	Rail freight transport	47	471	4710	270
P.5	Rail passenger transport	47	472	4720	270
P.6	Air and space transport	49	490	4900	273
P.7	Scenic and sightseeing transport	50	501	5010	274
P.8	Other transport n.e.c.	50	502	5029	274
P.9	Postal services	51	510	5101	276
P.10	Courier pick-up and delivery services	51	510	5102	276
P.11	Airport operations and other air transport support services	52	522	5220	278
P.12	Parking services	95	953	9533	369
P.13	Bicycleway				
P.14	Local street / lane				
P.15	Distributor road				
P.16	Arterial road				
P.17	Freeway / Highway				
Q	MOTOR VEHICLE AND UTILITIES RETAILING AND SERVICES				
Q.1	Motor vehicle dismantling and used parts wholesaling	35	350	3505	
Q.2	Car retailing	39	391	3911	245
Q.3	Motor cycle retailing	39	391	3912	245
Q.4	Trailer and other motor vehicle retailing	39	391	3913	245
Q.5	Motor vehicle parts retailing	39	392	3921	245
Q.6	Tyre retailing	39	392	3922	246
Q.7	Fuel retailing	40	400	4000	247
Q.8	Automotive electrical services	94	941	9411	362
Q.9	Automotive body, paint and interior repair (incl car wash)	94	941	9412	362
Q.10	Other automotive repair and maintenance	94	941	9419	362
T	INFRASTRUCTURE AND UTILITIES				
T.1	Electricity supply	26			201
T.2	Gas supply	27	270	2700	203
T.3	Water supply, sewerage and drainage services	28	281		204
T.4	Waste collection, treatment and disposal services	29			205
U	WHOLESALING (including TRADE / BUILDING SUPPLIES)				
U.1	Basic material wholesaling	33			221
U.2	Machinery and equipment wholesaling	34			227
U.3	Motor vehicle and motor vehicle parts wholesaling	35			232
U.4	Grocery, liquor and tobacco product wholesaling	36			234
U.5	Other goods wholesaling	37			238
U.6	Commission-based wholesaling	38	380	3800	243

W	MANUFACTURING				
W.1	Food product manufacturing	11			112
W.2	Beverage and tobacco product manufacturing	12			120
W.3	Textile, leather, clothing and footwear manufacturing	13			123
W.4	Wood product manufacturing	14			130
W.5	Pulp, paper and converter paper product manufacturing	15			133
W.7	Petroleum and coal product manaufacturing	17			138
W.8	Basic chemical and chemical product manufacturing	18			140
W.9	Polymer producter and rubber product manufacturing	19			149
W.10	Non-metallic mineral product manufacturing	20			154
W.11	Primary metal and metal product manufacturing	21			160
W.12	Fabricated metal product manufacturing	22			167
W.13	Transport equipment manufacturing	23			175
W.14	Machinery and equipment manufacturing	24			181
W.15	Furniture manufacturing	25	251		195
W.16	Other manufacturing	25	259		197
W.17	Non-metallic mineral mining and quarrying	09			102
W.18	Exploration and other mining support services	10			105
X	PARKS AND OPEN SPACE				
X.1	Public park				
X.2	Open space n.e.c				
X.3	Recreation reserve				
X.4	National park				
X.5	Town square				
X.6	Pedestrian walk / space				
X.7	Water retention area				
X.8	Forestry reserves				
S	SPECIALISED RETAIL ACTIVITIES				
S.1	Antique retailing				
S.2	Used / recycled goods				
S.3	Opportunity shops				
S.4	Agricultural supplies and services				
S.5	Medical supplies				
S.6	Galleries and other cultural activities				
R	RESIDENTIAL				
R.1	Standard density				
R.2	Medium density single dwelling (detached)				
R.3	Townhouses				
R.4	Apartments				
R.5	Special residential accommodation (retirement home)				
GVT	Government n.e.c.				
LGA	Local government administration	75	753	7530	331
CP	Parking services	95	953	9533	369
V	VACANT				
VR	VACANT RESIDENTIAL			VR	
VL	VACANT LAND			VL	
VS	VACANT SHOP			VS	
DW	DWELLING			DW*	
UN	UNKNOWN			UN*	

Appendix B:
In-Centre Survey Form

Bathurst Central Business District
In-Centre Visitor Survey

15 - 17 July, 2010

Renaissance Planning Pty Ltd, for Bathurst Regional Council

Good morning/good afternoon, we are undertaking a survey for the Bathurst City Council. May I ask you a few questions?

1. What suburb or town do you live in?

☐ Bathurst ☐ South Bathurst ☐ West Bathurst ☐ Kelso ☐ Windradyne ☐ Windradyne Heights

☐ Eglington ☐ Perthville ☐ Raglan ☐ Abercrombie ☐ Blayney ☐ Oberon

Other (please indicate below)

....

2. How did you travel to the CBD/Bathurst today?

☐ car as driver ☐ car as passenger ☐ bus ☐ taxi ☐ bicycle ☐ walk ☐ other

3. What is your intended length of stay in the Bathurst CBD?

☐ less than 1 hour ☐ 1-2 hours ☐ 2-3 hours ☐ 3-4 hours ☐ more than 4 hours

4. On average, how frequently do you visit the Bathurst CBD for any purpose?

☐ daily/ several times a week ☐ weekly ☐ fortnightly ☐ monthly ☐ less frequently

5. What is the main reason you are in the CBD today? Tick one box only

☐ shopping ☐ personal services (hairdresser banking, dry cleaning) ☐ education ☐ work ☐ medical/ dental/ professional services ☐ social/ recreation/ leisure ☐ visiting/ tourism

Other (please specify)

....

6. What other activities are you undertaking in the CBD today? (may tick more than one box)

☐ shopping
☐ personal services (hairdresser banking, dry cleaning)
☐ education
☐ work
☐ medical/ dental/ professional services
☐ social/ recreation/ leisure
☐ visiting/ tourism

Other (please specify)

....

7. Which shopping areas or centres are you visiting today? (may tick more than one box)

☐ Stockland Bathurst (includes Big W, Target)
☐ Bathurst City Centre (includes new Woolworths supermarket)
☐ Bathurst Chase (includes Coles supermarket)
☐ Bathurst Centrepoint (arcade from Howick Street to Coles)
☐ William Street
☐ Howick Street
☐ George Street
☐ Keppel Street
☐ Aldi Supermarket

8. Which stores/services are you visiting today? (may tick more than one box)

☐ Big W
☐ Target
☐ Woolworths/ Stocklands
☐ Woolworths/ Bathurst City Centre
☐ Coles
☐ Aldi
☐ pharmacy. newsagency, post office
☐ food court, cafe, restaurants
☐ homewares/ household goods
☐ clothing specialty stores
☐ electrical/ computer stores
☐ other specialty stores
☐ banking/ other services

9. Over the past two years have you purchased any of the following goods on the internet or at centres outside of Bathurst?

Yes ☐ No ☐ (if yes please answer below)

Type of Goods	Approximate Value				
	Less than $100	$100 - $200	$200 - $500	$500 - $1,000	Greater than $1,000
Electrical Goods/computers					
Furniture/furnishings					
Clothing/footwear					
Books/CDs/DVDs					

10. To what age group do you belong?

☐ under 18 yrs
☐ 19-29 yrs
☐ 30-39 yrs
☐ 40-59 yrs
☐ 60 + yrs

THANK YOU FOR YOUR CO-OPERATION

Appendix C:
Gap Analysis

Bathurst CBD & Bulky Goods Business Development Strategy

Desktop Analysis by Renaissance Planning (December, 2010)

Note: This gap analysis is subject to a web check only

Stores / Services	Bathurst	Orange	Dubbo	Tamworth	Albury / Wodonga	Wagga	Bendigo
Department Stores							
Myer		•	•		•	•	•
Discount Department Stores							
Kmart		•		•	•	•	•
Target	•		•	•	•	•	•
Big W	•	•	•	•	•	•	•
Harris Scarfe			•				
Supermarkets							
Aldi	•	•			•		
Bi-Lo				•	•		•
Coles	•	•	•	•	•	•	•
Foodworks	•					•	
IGA	•	•	•	•	•	•	•
NQR							•
Woolworths	•	•	•	•	•	•	•
Mini Majors							
Priceline	•		•	•	•	•	•
Clint's Crazy Bargains		•	•		•	•	
Go-Lo	•				•	•	
Reject Shop	•	•	•	•	•	•	•
The Warehouse			•	•	•	•	
Best and Less	•	•	•	•		•	•
Food - Bread and Cake Retailing							
Baker's Delight	•	•	•	•	•	•	•
Brumby's				•		•	
Cafes and Restaurants							
Gloria Jean's	•	•	•	•	•	•	•
La Porchetta's					•	•	•
Taco Bill					•		
Food - Liquor							
Bottle Mart		•	•	•	•	•	•
Cellarbrations	•	•	•		•		
Liquorland	•	•	•	•	•	•	•
Safeway Liquor	•			•	•	•	•
Food - Takeaway							
Domino's Pizza	•	•	•	•	•	•	•
Hungry Jacks	•	•	•	•	•	•	•
KFC	•	•	•	•	•	•	•
McDonald's	•	•	•	•	•	•	•
Pizza Hut	•	•	•	•	•	•	•
Red Rooster	•	•	•	•	•	•	•
Subway	•	•	•	•	•	•	•
Donut King	•	•	•	•	•	•	•
Wendy's			•	•	•	•	•
Muffin Break	•		•	•	•		•
Food - Other							
Darrell Lea					•	•	
Nutshack					•		•
Boost Juice			•	•	•		
Lenard's		•	•	•		•	•
Children's Clothing							
Pumpkin Patch		•	•	•	•	•	•
Cotton on Kids							•

Stores / Services	Bathurst	Orange	Dubbo	Tamworth	Albury / Wodonga	Wagga	Bendigo
Ladies Clothing							
1626			•	•	•	•	•
Blue Illusion		•			•		•
Bras N Things	•	•	•	•	•	•	•
Crossroads	•	•		•		•	•
Esprit		•			•	•	•
Ice Accessories					•		
Jacqui E							•
Katies	•	•	•	•	•	•	
Miller's Fashion Club	•	•		•	•	•	•
Noni B	•	•	•	•	•	•	•
Portmans					•	•	•
Rockmans	•	•	•	•	•	•	•
Sportsgirl					•	•	•
Supre	•	•	•	•	•	•	
Sussan	•	•	•	•	•	•	•
Suzanne Grae		•	•	•	•	•	•
Men's Clothing							
Ed Harry Menswear		•	•		•	•	•
Fletcher Jones		•			•	•	•
Gaz Man							•
Lowes Menswear	•	•	•	•	•	•	•
Man To Man					•		
Mensland					•		
Roger David					•	•	•
Mens & Ladies Clothing							
Country Road							•
Jay Jays	•	•	•	•	•	•	•
Jeans West	•	•	•	•	•	•	•
Just Jeans	•	•	•	•	•	•	•
Rivers	•	•	•	•	•	•	•
WestCo					•		
Cotton On	•	•	•	•	•	•	•
Colorado	•	•	•	•	•	•	•
Footwear							
Betts & Betts						•	
Payless Shoes	•	•	•	•	•	•	•
Speeds			•				
Williams the Shoemen	•		•	•	•	•	•
Athlete's Foot	•	•	•	•	•	•	•
Novo Shoes							•
Accessories / Leather Goods							
Bradmans					•		
Kays Bags						•	
Strandbags	•	•	•	•	•	•	•
Sunglass Hut		•			•	•	
Fabric, Crafts and Florists							
Interflora							
Lincraft					•		
Lombard							
Spotlight	•		•	•	•	•	•
Local Fabric and Craft Stores	•						
Chemists, Health and Medical Supplies							
Amcal		•		•	•		•
Chemart		•			•		
Guardian Pharmacy						•	•
Terry White Chemists	•				•		•
Giftware and Specialty Homeware Stores							
Canterbury Lace					•		•
Copperart			•	•		•	

Stores / Services	Bathurst	Orange	Dubbo	Tamworth	Albury / Wodonga	Wagga	Bendigo
Sports and Leisure							
Aussie Disposals					•	•	•
Balls N Bumpers					•		•
Bicycle Superstore, The					•		
Mountain Designs					•		
Snow Gum				•	•		•
Sportsco	•		•		•		•
Sportspower	•	•			•		•
Ray's Outdoors					•		•
Rebel Sport					•	•	•
Drummond Golf					•		•
Newspaper, Book and Stationary Retailing							
ABC Centre	•						
Angus & Robertson		•		•	•	•	
BookCity		•				•	
Collins Booksellers		•			•	•	•
Dymocks					•		•
Officeworks		•	•		•	•	•
Cartridge World	•	•	•	•	•	•	•
Toys / Games							
MindGames					•		
Toyworld			•				•
EB Games	•		•	•	•	•	•
Jewellery							
Goldmark Jewellers				•	•	•	•
Kleins		•	•		•	•	•
Michael Hill Jewellers	•		•	•	•	•	•
Prouds Jewellers	•	•	•	•	•	•	•
Showcase Jewellers		•		•	•	•	•
Thomas Jewellers					•	•	•
Furniture, Furnishings and Large Format Homewares							
Adairs				•	•	•	•
Barbeques Galore			•	•	•	•	•
Beacon Lighting					•		
Bev Marks Beds					•		
Captain Snooze			•		•	•	•
Carpetchoice	•	•	•	•	•	•	•
Carpet Court	•	•	•	•		•	•
Country Design				•			•
Décor Plus						•	
Dollar Curtains and Blinds					•	•	•
Doorsplus			•		•		
Fantastic Furniture	•		•	•	•	•	
Forty Winks				•	•	•	•
Freedom			•		•	•	
Harvey Norman	•	•	•	•	•	•	
Homeart	•		•	•	•	•	
House	•	•		•	•	•	•
OzDesign Furniture					•		
Tradelink Showroom (bathroom, kitchen, laundry)	•	•	•	•	•	•	•
Howard's Storage World					•	•	
Electrical Goods							
Betta Electrical					•	•	
Camera House		•			•	•	•
Crazy Johns							•
Dick Smith	•	•	•	•	•	•	•
Godfrey's				•	•	•	•
Good Guys	•		•	•	•	•	•
JB HiFi					•		•
Radio Rentals	•	•	•	•	•	•	•
Retravision	•	•					•
Tandy						•	
Warehouse Sales					•		•

Stores / Services	Bathurst	Orange	Dubbo	Tamworth	Albury / Wodonga	Wagga	Bendigo
Auto and Hardware							
AutoBarn		•	•		•	•	•
Beaurepaires for Tyres	•	•	•	•	•	•	•
Bob Jane T Mart	•	•	•	•	•	•	•
Bridgestone Tyre Centre	•	•	•	•	•	•	•
Bunnings	•	•	•	•	•	•	•
Clark Rubber			•				•
GoodYear Auto Service Centre	•	•	•	•	•	•	•
Mitre 10	•	•	•	•	•	•	•
Repco	•	•	•	•	•	•	•
Strathfield Car Radios					•	•	
Supercheap Auto	•	•			•	•	
Tyre Power			•		•	•	•
UltraTune	•	•	•	•	•	•	•
Avis	•	•	•	•	•	•	•
Thrifty		•	•	•	•	•	•
Travel							
FlightCentre	•	•	•	•	•	•	•
Harvey World Travel	•	•	•	•	•	•	•
Jetset Travel				•			•
Travel World	•	•		•			
Escape Travel				•	•	•	•
Hair, Cosmetics and Body Care							
Body Shop							•
Just Cuts	•	•	•	•	•	•	•
Price Attack	•	•		•	•	•	•
Hairhouse Warehouse					•		•
Banks							
ANZ	•	•	•	•	•	•	•
Banksia Financial Group					•		•
Bendigo Bank		•	•	•	•	•	•
Commonwealth Bank	•	•	•	•	•	•	•
National Australia Bank	•	•	•	•	•	•	•
St George	•	•	•	•	•	•	
Westpac	•	•	•	•	•	•	•
Music, Entertainment and Communication Retailing							
Leading Edge	•				•	•	
Sanity	•	•	•	•	•	•	•
VideoEzy			•	•	•	•	•
Blockbuster Video	•	•	•	•	•	•	
Optus World	•	•	•	•	•	•	•
Vodafone	•				•	•	•
Fone Zone	•	•		•	•	•	•
Telstra Shop	•	•	•	•	•	•	•
Village Cinemas					•		•
Property and Business Services							
AAMI					•	•	•
Aussie Home Loans			•		•		•
Australia's Pensioners Insurance Agency					•	•	•
GE Finance and Insurance		•	•	•	•	•	•
GIO	•	•		•	•	•	
HBA							
H&R Block Accountants	•	•	•	•	•	•	•
Medicare	•	•	•	•	•	•	•
Mortgage Choice	•	•			•		
QBE Farmgate			•	•	•	•	•
Wizard Home Loans						•	

Stores / Services	Bathurst	Orange	Dubbo	Tamworth	Albury / Wodonga	Wagga	Bendigo
Real Estate							
Elders	•	•	•	•	•	•	•
First National R/E	•	•		•	•	•	•
Hocking Stuart							
LJ Hooker R/E	•	•	•	•	•	•	
Landmark	•	•	•	•	•	•	•
Ray White R/E	•	•	•	•	•	•	•
Stockdale & Leggo					•		
Optical							
OPSM	•		•	•	•	•	
Other Retail and Commercial Services							
Kodak Shop		•		•		•	
Snap Printing					•	•	
RSPCA Op Shop							•
Salvation Army Thrift Shop	•	•	•	•	•	•	•
Australian Red Cross Op Shop	•	•	•	•	•	•	•
St Vincent's de Paul Op Shop	•	•	•	•	•	•	•
Tobacco Station		•	•				
TAB		•	•	•	•	•	•
Australia Post	•	•	•	•	•	•	•
AGL/Elgas Energy Shop	•	•	•				•
Centrelink	•	•	•	•	•	•	•