The centre has a low profile built form with the key focal point being the IGA supermarket and service station contributing to a mostly car focussed Activity Centre. This is reflected in the area of at-grade car parking which separates the supermarket from Howe Street. This separation also accommodates a wide grass verge with some vegetation provided.

The most notable aspect of this centre is the relatively unformed and ad-hoc nature of development within it, principally the unformed or unconnected nature of some of the roads and the presence of vacant lots within the centre.

Transport and Access

Howe Street connects to the Western Freeway and the Ballarat urban area to the south. To the north Howe Street connects to local destinations. A turning lane on Howe Street provides access from the north to the car parking area associated with the IGA which is accessed from Creek Street. Loading facilities associated with the IGA are also provided from Creek Street.

Miners Rest is served by one bus service (route 17), which connects it to Wendouree Railway Station and Stockland Wendouree. There are no existing cycle paths.

Existing Strengths and Weaknesses

The following section draws on some of the key findings from previous studies in addition to the comments raised during focus group sessions and through observation during site visits.

Strengths

- The centre has a defined and captive local market.
- Convenient access via road and good level of visibility to passing trade.
- Opportunities to expand the centre.
- Attractive broader environmental and rural setting.

Weaknesses

- Limited retail and service offer.
- Lack of community facilities or services.
- Lack of a community focal point, meeting space or greeting area.

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ballarat activity centres strategy

miners rest IGA

legend

study area

Project Ref:	10.514
Dwg No.:	UDD-014
Scale:	1:6000@A4
Date:	18.02.11
Revision:	B

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3.16 Proposed Centres

It is recognised that new Activity Centres are proposed for the Ballarat West Growth Area. The 1,675ha Ballarat West Growth Area will cater for primarily residential growth and provide services and infrastructure for new communities. The Growth Area comprises greenfield land to the west of Alfredton, Delacombe and Sebastopol. The Growth Area will provide around 18,000 new houses at full development which will accommodate a population of over 40,000 people.

The Ballarat West Growth Area Plan (2009) indicated that the likely floorspace required for centres within the Growth Area could be as follows:

Table 26 - Ballarat West Growth Area Planned Activity Centres (2009)

Location	Centre Type	Indicative Net Additional Retail Floorspace by 2030 (sqm)
Delacombe	Neighbourhood Centre	15,000
Alfredton	Neighbourhood Centre	6,500
Alfredton (Cuthberts Road)	Still to be determined	Up to 3,700
Delacombe North (x 2)	Local Centre	1,000 – 1,500
Sebastopol West	Local Centre	Up to 1,000

Source: Ballarat West Growth Area Plan (2009)

The 2009 Plan was superseded by the Alfredton West Precinct Structure Plan and the Ballarat West Precinct Structure Plan. Both of the revised documents provide more detail about the activity centre hierarchy in the Ballarat West Growth Area. The revised Plans refer to the Delacombe Centre as 'Glenelg Highway' and Alfredton West as 'Lucas'.

The proposed Glenelg Highway Activity Centre will be the largest Activity Centre in the Growth Area. The Centre will provide for local employment, business and retail activity and community facilities.

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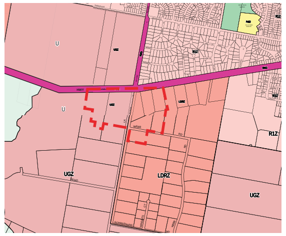
ballarat activity centres strategy

glenelg highway (proposed)

legend

study area



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3.17 Other Retail Clusters – Out of Centre

Hill PDA's survey of the City of Ballarat identified a number of additional retail stores and clusters. In many cases these clusters were not substantial enough to constitute an Activity Centre or a centre to be considered by this Strategy. In addition there are various other commercial uses scattered throughout the City that are often located in inappropriate zones or locations and which are often protected by existing use rights.

For the purposes of completeness we have recorded these clusters as follows:

- Harold Street, Wendouree located on the western side of Harold Street between Stamford Street in the north and Adela Street in the south. The centre provides a strip of smaller, single storey shop fronts including take-away food stores, the Harold Street Convenience Store and Newsagent, a pizza parlour, laundry, beauty salon, hairdresser, locksmiths and hobbies store.
- Southern side of College Street at the junction with Browns Parade. The cluster predominately provides non-retail uses including a catering company, special learning centre and professional offices.
- Sturt Street adjacent to the junction of Kallioota Street, Alfredton. This local centre comprises a small parade of shops including a liquor store, laundry, convenience store, pizza restaurant, take away food store and hairdresser.
- Corner of Howitt Street and Lydiard Street North, Ballarat. This location includes a general store and a hairdresser.
- Corner of Simpson Street and Walker Street, Ballarat. This location includes a hairdresser, south rural water and accounting firms.
- Humffray Street North, Brown Hill. This location includes general stores, hairdressers, Laundromat, post office and take away food.
- Corner of Kline Street and Wesley Circuit, Ballarat. This location includes a Laundromat, Beautician, milk bar, hairdresser and take away food.
- York Street, Ballarat. This location includes a general store.
- Corner of Joseph Street and Clayton Street. This location includes a general store.
- Corner of Humffray Street South and Elsworth Street West, Mount Pleasant. This location includes a book shop and a fitness/health studio.
- Corner of Cobden Street and Barkly Street, Ballarat. This location includes a hairdresser, furniture shop and vacant shops.
- Hill Street, Ballarat. This location includes youth services, employment services, training centre, industry and an indoor stadium.
- Skipton Street, Ballarat. This location includes a bakery, graphic design studio, optometrist, builders, newsagent, automotive, Tradelink and a cycling centre.
- Corner of Morgan Street and Midland Highway, Ballarat. This location includes a bottle shop, pub and a general store.
- Corner of Midland Highway and Prince Street, Ballarat. This location includes an industrial cluster.

- Corner of Lylia Avenue and Dallas Avenue, Ballarat. This location includes a kindergarten.
- North of Vickers Street, Ballarat. This location includes Automotive and a Tattoo parlour.
- Latrobe Street, Ballarat. This location includes office supplies, butcher, engineering, industrial and vacant lots.
- Pleasant Street South, Ballarat. This location includes gas and plumbing services, butcher, pub, bottle shop and take away food.
- Corner of Drummond Street North and Macarthur Street, Ballart. This location includes furniture/fabric, lawyer, beauty, home loans, café, interior design and a petrol station.
- Corner of Dowling Street and Norman Street, Ballarat. This location includes Thrifty car rental and a petrol station.
- Grandview Grove, Ballarat. This location includes café, take away food, restaurant, hairdresser, aquarium and vacant lots.
- Corner of Carpenter Street and Theobold Street, Ballarat. This location includes take away food, hairdresser, grocery store and vacant lots.
- Violet Grove, Wendouree West. This location includes aged care, take away food, vacant lots, budget groceries, the Uniting Care office and a Uniting Care op shop.
- St Cedars Grove, Lake Gardens. This location includes the Yellow Pages office, audio, bakery and vacant lots.
- Main Road, Ballarat. This location includes restaurants, a pharmacy, takeaway food stores, a bakery and service station.
- Golden Point Centre. This location includes an arts and craft shop, hairdresser and Laundromat.
- Corner of Stirling Drive and Gilles Street North, Ballarat. This location includes a childcare centre.

4. Existing Demand for Retail Floorspace

The following Chapter identifies the sources of retail expenditure generated within the City of Ballarat's trade areas in order to estimate the existing level of demand for retail floorspace within the City today. The Chapter then cross references this information with the results of the Strategy's floorspace surveys to better understand whether the City of Ballarat is currently over or undersupplied by any category of retail floorspace. This Chapter establishes a foundation for Part B of this Strategy that forecasts the growth in demand for retail floorspace in the City over time. These forecasts in turn will assist in better understanding how, and to what extent, the City's Activity Centres will need to grow and expand.

4.1 Sources of Retail Expenditure

Residents within the City of Ballarat

In order to inform this Strategy, telephone surveys, shopper surveys and business surveys were undertaken by Hill PDA. These are discussed in detail in Appendix 2 of this Strategy however the key findings of relevance to identifying sources of expenditure include:

- 90% of telephone survey participants undertook the majority of their shopping trips at centres within the City of Ballarat, with 99% shopping for food and groceries within the City.
- When asked where participants usually shop for non-food items (e.g. clothing, books, toys) 92% of telephone survey participants still shopped within the City, although clothing had the lowest capture rate out of all non-food retail store types (likely due to the draw of Melbourne CBD).
- 94% of face-to-face survey participants undertook the majority of their shopping within the City of Ballarat, with the most popular destination being Ballarat CBD (28%). By comparison, 45% of participants indicated that they did travel to centres outside of the City, of which 87% travelled to either Melbourne or Geelong.

On this basis, for the purposes of expenditure modelling it is assumed that centres within the City of Ballarat will capture the majority of retail expenditure from residents within the local government boundary. However, it is recognised that the proximity and strength of centres outside of the City will also result in retail expenditure escaping the local government area. The level of escape expenditure will be influenced by:

- Geelong is 85km south-east of Ballarat CBD along the Midland Highway (A300). It contains a number of national retailers which are not found within Ballarat. These include the likes of: Country Road, Sportscraft, Sunglass Hut, Esprit Kids, Glue, Saba, Diana Ferrari, Mossimo, Toys R Us, Betta Electrical and Australian Geographic. Notwithstanding this, we note that the Myer Ballarat department store carries a number of these national brands such as Country Road, Sportscraft and Esprit Kids. Combining its retail, recreation, tourism and entertainment attractions, it is likely that Geelong will be a considerable draw for residents located to the south of the City of Ballarat and consequently their retail expenditure.
- Bendigo is 115km north-east from Ballarat CBD along the Midland Highway and contains a similar range of retailers as the City of Ballarat. It is therefore unlikely that much expenditure is being lost from the City of Ballarat to Bendigo.

- Melbourne CBD is around 1.5 hours east of Ballarat CBD and is accessible via the Western Highway. Melbourne contains a significantly greater range of retail goods, services, entertainment and tourism attractions compared to Ballarat CBD. The telephone and face-to-face shopper surveys from across the City of Ballarat indicated that around 52% of participants travel to destinations outside of the City of Ballarat for occasional or event shopping, with 42% visiting Melbourne or Geelong to do so. This is particularly evident for the likes of clothing. This combined with the relatively manageable drive times from Ballarat to Melbourne and its larger centres (e.g. Highpoint Shopping Centre and Chadstone), would result in considerable escape expenditure leaving the City of Ballarat for Melbourne.

Residents Outside of the City of Ballarat

The City of Ballarat is recognised as the capital of Western Victoria. As such, its recognised that Activity Centres within the City of Ballarat will also have the capacity to draw on retail expenditure from rural residential areas and smaller towns outside of the City's boundaries, particularly the local government areas located to the north and east. The retail offer in smaller towns outside of the City of Ballarat includes:

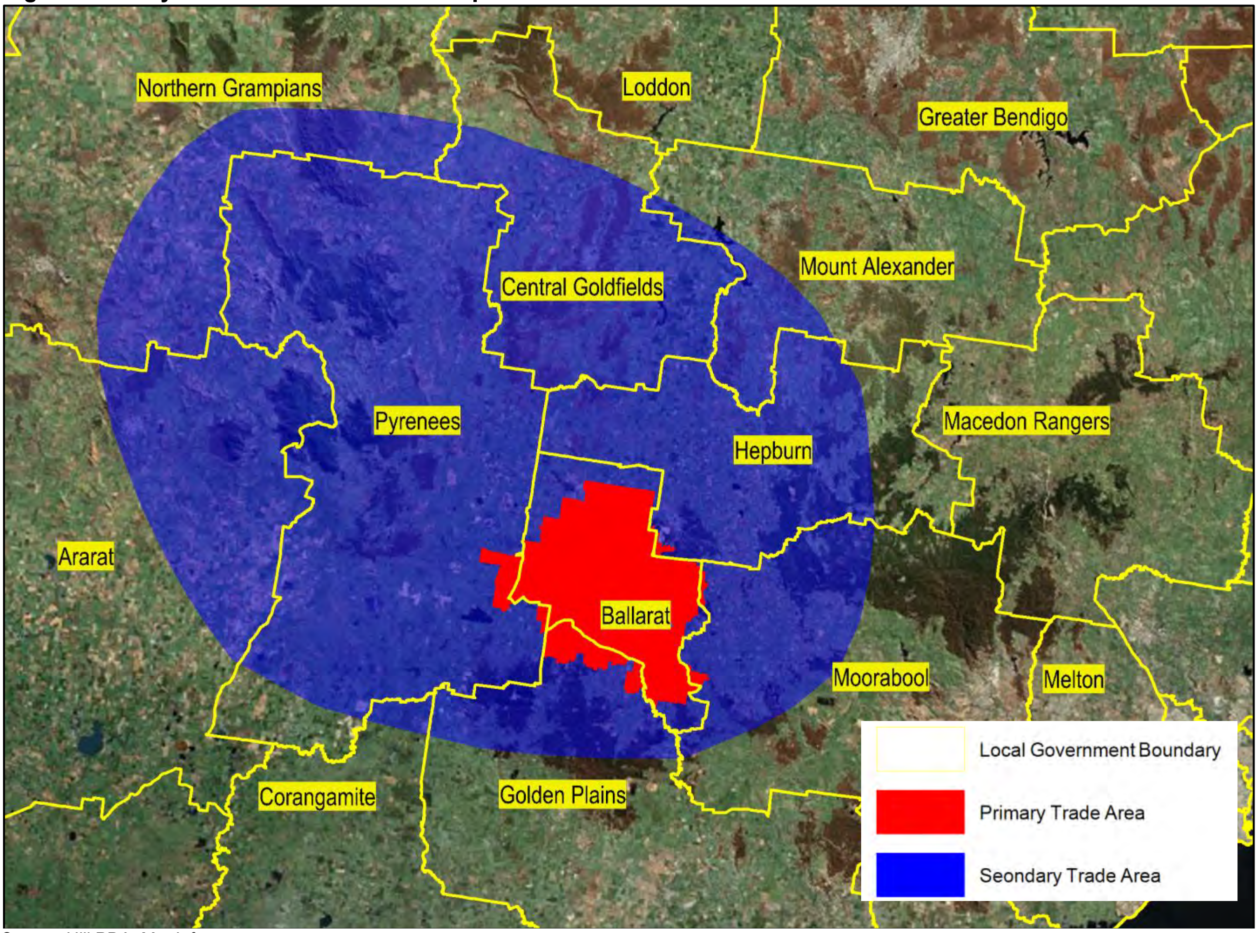
- Supa IGA Beaufort
- IGA Clunes
- Coles Daylesford
- IGA Avoca
- Foodwise Skipton
- IGA Ballan
- Foodworks Creswick
- Safeway, Coles, ALDI and IGA Maryborough

It is likely that these supermarkets are meeting the everyday food and grocery needs of their local residents. However, given their limited offer in other retail commodities, lack of department and discount department stores, and their relatively short drive times to Ballarat, it is likely that the City captures a proportion of the clothing, specialty non-food, department store and bulky goods expenditure generated in these localities. However, the City will not capture all of this non-food related expenditure as it is likely surrounding and larger centres like Bendigo, Horsham, Geelong and Melbourne will still capture a large proportion of this retail spend.

The City of Ballarat is also likely to capture a small proportion of grocery, take-away food, restaurant and personal services expenditure from residents in these locations based on the concept of dual shopping trips (i.e. when in Ballarat to visit bulky goods stores, a shopper may also visit the bank, do some grocery shopping and have lunch in a local café).

The primary (residents within the City of Ballarat) and secondary (residents outside of the City of Ballarat) sources of retail expenditure directed towards the City of Ballarat are depicted in the following map.

Figure 9 - City of Ballarat Sources of Expenditure



Source: Hill PDA, MapInfo

Tourism Expenditure

In addition to household expenditure, it is recognised that retail centres within the City of Ballarat will capture some expenditure from tourists. In 2009/2010 Tourism Research Australia (TRA) estimated that there were 453,000 domestic overnight visitors to the City of Ballarat who stayed 907,000 nights. In addition, there were 15,000 international visitors who stayed 181,000 nights.

The main source of data used to estimate tourism expenditure is the National Visitor Survey and the International Visitor Survey. The most recent data published for the City of Ballarat is contained within the Regional Tourism Profile for the 2009/2010 period (published by the TRA in January 2011).

For 2009/2010 the TRA estimated visitors to the City of Ballarat stayed around 1.1m nights with $162m of tourism expenditure generated from overnight visitors during 2009/2010. Furthermore, there were 1.4m domestic 'day trippers' to the City of Ballarat in 2009/2010 who spent approximately $122m in the local economy.

However, not all of this tourism expenditure is directed towards retail facilities and accordingly the TRA indicates the following breakdown of domestic visitor tourism spend.

Table 27 - City of Ballarat Domestic Visitor Expenditure by Category ($m2009)

Visitor Type	Accommodation	Food & Drink	Transport Fares & Packages	Fuel	Shopping	Entertainment	Other	Total Expenditure
Expenditure ($)								
Domestic Day	-	38	2	33	39	6	2	122
Domestic Overnight	39	37	3	23	20	6	3	132
Total	**39**	**75**	**5**	**56**	**59**	**12**	**5**	**254**
Expenditure (%)								
Domestic Day	-	32%	2%	28%	33%	5%	2%	100%
Domestic Overnight	30%	28%	2%	18%	15%	5%	2%	100%
Total	**15%**	**29%**	**2%**	**22%**	**23%**	**5%**	**2%**	**100%***

Source: City of Ballarat Regional Tourism Profile 2009/2010, TRA (January 2011) * May not total 100% due to rounding

Food and drink, shopping and entertainment make up 52% of tourist expenditure. However, given strong population growth predicted for the City, it is recognised the main driver of demand for retail floorspace will remain with new residents both within the City and in neighbouring towns and regions. Furthermore, the long-term trend for tourism in the City of Ballarat is unclear and this will distort assumptions made with regard to how much expenditure Activity Centres in the City could capture. As a result, the tourism industry is recognised as a contributor to demand for retail floorspace within the City, but has not been added to total expenditure.

4.2 Household Expenditure Captured from within Ballarat

To inform expenditure modelling within this Strategy, the Victoria in Future (2008) population projections from MacroPlan's June 2010 report were adopted for the City of Ballarat. This indicates that the population of the City in 2010 was around 96,000 persons.

Household expenditure is dependent not only upon population size, but household size and the socio-demographic characteristics of those households. Most notably there is a strong correlation between expenditure, household type and household income levels.

For the purposes of this Strategy, household expenditure was sourced from:

- The ABS Household Expenditure Survey 2003-04 which provides household expenditure by broad commodity type by household income quintile; and
- MarketInfo 2009 which is generated by combining and updating data from the 2006 Census and the ABS Household Expenditure Survey (HES).

MarketInfo combines the data from the Census, HES and other sources to derive total HES by commodity type. This data, which was validated using taxation and national accounts figures, quantifies around 14% more expenditure than the ABS HES Survey. The ABS Retail Survey 1998-99 (Cat No. 8624.0) provides a cross tabulation of store type (defined by ANZIC), by commodity type. Multiplying the percentages in the cross tabulation by total dollars spent generates household expenditure by retail store type.

Based on the above mentioned assumptions total household expenditure from residents in the City was around $1,231.4m in 2010. A breakdown of this expenditure by retail store type is provided in the following table.

Table 28 - City of Ballarat Household Expenditure in 2010 ($m2009)

Retail Store Type	$m
Supermarket & Grocery Stores	388.0
Specialty Food Stores	117.3
Fast-Food Stores	58.9
Restaurants, Hotels and Clubs*	69.3
Department Stores	113.3
Speciality Clothing Stores**	69.1
Bulky Goods Stores	193.3
Other Personal & Household Goods Retailing	193.6
Selected Personal Services***	28.7
Total	**1,231.4**

Source: Source: Hill PDA (2010), ABS Household Expenditure Survey 1998 -1999 and MarketInfo 2009. * Only expenditure relating to food and drink on premises and excludes other sources of revenue such as accommodation, gaming & gambling. ** examples include Myer, David Jones, Kmart, Target, and Big W. *** Includes hair and beauty, photo processing, clothing alterations, laundry cleaning, optical dispensing and video hiring. N.B May not total due to rounding.

It is recognised that not all expenditure will be captured by Activity Centres within the City. Some expenditure will escape the City to other centres (e.g. Melbourne, tourist destinations outside the City etc.). For the purpose of expenditure modelling, the following capture rates have been assumed for Activity Centres within the City of Ballarat.

Table 29 - Assumed Capture Rates for the City of Ballarat

Retail Store Type	Capture Rate
Supermarket & Grocery Stores	95%
Specialty Food Stores	80%
Fast-Food Stores	80%
Restaurants, Hotels and Clubs	80%
Department Stores*	80%
Speciality Clothing Stores	70%
Bulky Goods Stores	80%
Other Personal & Household Goods Retailing	80%
Selected Personal Services	90%

Source: Hill PDA (2010)

Capture rates vary for different types of goods depending upon the degree of homogeneity of the retail goods in question and the frequency of purchase required. The above assumptions have been based on the results of the telephone and face to face shopper surveys which indicated:

- Residents undertake the majority of their shopping within the City of Ballarat, but still make occasional shopping trips to destinations outside of the City;
- Over 90% of participants undertook food and grocery shopping within the City;
- Up to 90% of spend on personal services (e.g. hairdressers, dry cleaning, video/dvd hire) remained within the City;
- 45% of participants indicated that they did travel to centres outside of the City of Ballarat to shop, of which 87% travelled to either Melbourne or Geelong; and
- Participants mainly left the City to shop for clothing.

Hill PDA's assumptions are broadly in line with previous work undertaken by Council. The Ballarat Commercial Development Strategy (2009) assumed that the primary trade area had a capture rate of 95% of food/grocery/liquor expenditure, 85% of total household goods expenditure (including clothing, footwear and fabric stores and other household goods), and 83% of bulky goods expenditure (including electrical goods, hardware stores, furniture and furnishings stores).

By applying the assumed captures rates to expenditure generated, the proportion of spend which is captured by Activity Centres within the City from its residents can be deduced. This is shown in the following table.

Table 30 - Capture of Household Expenditure in 2010 ($m2009)

Retail Store Type	$m
Supermarket & Grocery Stores	368.6
Specialty Food Stores	93.9
Fast-Food Stores	47.1
Restaurants, Hotels and Clubs*	55.4
Department Stores	90.6
Speciality Clothing Stores	48.4
Bulky Goods Stores	154.6
Other Personal & Household Goods Retailing	154.9
Selected Personal Services**	25.8
Total	**1,039.2**

Source: Source: Hill PDA (2010), ABS Household Expenditure Survey 1998 -1999 and MarketInfo 2009. * Only expenditure relating to food and drink on premises and excludes other sources of revenue such as accommodation, gaming & gambling. ** Includes hair and beauty, photo processing, clothing alterations, laundry cleaning, optical dispensing and video hiring. N.B May not total due to rounding

The table above indicates that overall the City of Ballarat retains approximately 84% of resident expenditure. This equated to some $1,039.2m of expenditure as of 2010.

4.3 Household Expenditure Captured from Outside Ballarat

To assess the amount of expenditure Activity Centres within the City could draw from residents in neighbouring regional areas, the Victoria in Future Population Projections (2008)[15] have been adopted. The population of surrounding local government areas which falls within the secondary catchment of the City of Ballarat is shown in the table below.

Table 31 - Resident Population Captured by the City Ballarat (2010)

Local Government Area	2010
Ararat	8,854
Central Goldfields	10,260
Corangamite	871
Golden Plains	9,315
Hepburn	14,080
Moorabool	14,014
Mount Alexander	5,598
Pyrenees	6,343
Total	**69,334**

Source: Victoria in Future (2008) Second Release (September 2009)

[15] These projections were published in September 2009 by the Department for Planning and Community Development and cover the 2006 to 2056 period. LGA level population projections are provided over the 2006 to 2026 period, with projections beyond 2026 provided only for the state of Victoria, metropolitan Melbourne and regional Victoria.

As with expenditure captured from residents within the City, for the purpose of calculating expenditure from outside the City, household expenditure was sourced from the ABS Household Expenditure Survey 2003-04 and MarketInfo 2009. Furthermore real growth of 1.3% per annum has been adopted.

Based on these assumptions, expenditure generated by households within the catchment of the City of Ballarat but which lie outside the local government boundary was around $889m in 2010.

Table 32 - Household Expenditure from outside the City in 2010 ($m2009)

Retail Store Type	$m
Supermarket & Grocery Stores	288.9
Specialty Food Stores	87.3
Fast-Food Stores	40.2
Restaurants, Hotels and Clubs*	46.5
Department Stores	80.0
Speciality Clothing Stores	46.8
Bulky Goods Stores	139.6
Other Personal & Household Goods Retailing	139.6
Selected Personal Services**	20.0
Total	**888.9**

Source: Source: Hill PDA (2010), ABS Household Expenditure Survey 1998 -1999 and MarketInfo 2009
* Only expenditure relating to food and drink on premises and excludes other sources of revenue such as accommodation, gaming & gambling.
** Includes hair and beauty, photo processing, clothing alterations, laundry cleaning, optical dispensing and video hiring
N.B May not total due to rounding

For areas outside of the City of Ballarat capture rate assumptions are based on:

- The drive times between residents and Activity Centres, including not only those centres within the City of Ballarat, but centres such as Geelong, Horsham and Bendigo;
- The retail offer of smaller centres that form part of this catchment; and
- The shopper survey results.

For the purposes of expenditure modelling, the following capture rates have been assumed.

Table 33 - Capture Rates for Households outside the City

Local Government Area	'Core' Shopping[1]	Comparative Goods[2]	Bulky Goods[3]
Ararat	5%	50%	50%
Central Goldfields	20%	50%	60%
Corangamite	15%	50%	60%
Golden Plains	40%	50%	60%
Hepburn	20%	50%	50%
Moorabool	10%	30%	30%
Mount Alexander	10%	50%	50%
Pyrenees	40%	50%	60%

1 - Comprises 'supermarket & grocery stores', 'speciality food stores', 'fast-food stores', 'restaurant, hotels and clubs', 'selected personal services', 40% of 'other personal & household goods retailing'.
2 - Comprises 'department stores', 'clothing stores' and 60% 'other personal & household goods retailing'.
3 - Comprises 'bulky goods stores'.
Source: Hill PDA (2010)

The Ballarat Commercial Development Strategy (2009) assumed the City of Ballarat captured 30% of food, grocery and liquor expenditure, 56% of total household goods expenditure, and 40% of bulky goods expenditure. This is broadly in line with the assumed captures rates by Hill PDA.

By multiplying capture rates by total expenditure generated, the proportion of expenditure which is captured by Activity Centres within the City of Ballarat from residents in outlying areas is shown in the table below.

Table 34 - Capture of Household Expenditure from outside the City in 2010 ($m2009)

Retail Store Type	$m
Supermarket & Grocery Stores	57.0
Specialty Food Stores	17.2
Fast-Food Stores	7.9
Restaurants, Hotels and Clubs*	9.1
Department Stores	36.6
Speciality Clothing Stores	21.3
Bulky Goods Stores	68.9
Other Personal & Household Goods Retailing	49.4
Selected Personal Services**	3.9
Total	**271.2**

Source: Hill PDA (2010)

The results indicate that in 2010 the City of Ballarat captured around $271.2m of retail expenditure from households located outside of the City.

4.4 Total Household Expenditure Captured

The table below shows there was around $1,310.4m of retail turnover available to Activity Centres and retail stores in the City of Ballarat as of 2010.

Table 35 - Total Turnover Available to the City of Ballarat in 2010 ($m2009)

Retail Store Type	Source of Expenditure ($m)		Total Captured ($m)
	Households within the City	Households outside the City	
Supermarket & Grocery Stores	368.6	57.0	425.6
Specialty Food Stores	93.9	17.2	111.1
Fast-Food Stores	47.1	7.9	55
Restaurants, Hotels and Clubs*	55.4	9.1	64.5
Department Stores	90.6	36.6	127.2
Specialty Clothing Stores	48.4	21.3	69.7
Bulky Goods Stores	154.6	68.9	223.5
Other Personal & Household Goods	154.9	49.4	204.3
Selected Personal Services**	25.8	3.9	29.7
Total	**1,039.2**	**271.2**	**1,310.4**

Source: Hill PDA (2010), ABS Household Expenditure Survey 1998 -1999 and MarketInfo 2009. * Only expenditure relating to food and drink on premises and excludes other sources of revenue such as accommodation, gaming & gambling. ** Includes hair and beauty, photo processing, clothing alterations, laundry cleaning, optical dispensing and video hiring. N.B May not total due to rounding

4.5 Retail Floorspace Demand

Demand for retail floorspace has been calculated by applying target turnover rates on a per square metre basis to expenditure captured. The table below provides assumed target turnover levels (or industry benchmarks) by retail store type at 2010[16].

Table 36 - Benchmark Turnover Rates in 2010 ($/sqm GLA)

Retail Store Type	$/sqm
Supermarket & Grocery Stores	10,065
Specialty Food Stores	7,549
Fast-Food Stores	7,549
Restaurants, Hotels and Clubs*	4,529
Department Stores	3,523
Specialty Clothing Stores	5,033
Bulky Goods Stores	3,523
Other Personal & Household Goods Retailing	4,529
Selected Personal Services**	3,221
Weighted Average	**5,381**

Sources: ABS Retail Survey 1998-99 (escalated to 2007 dollars), JHD Retail Averages, Hill PDA and various consultancy studies.
Allowance for growth in real turnover per square metre of 0.65% per annum.

Based on Hill PDA's modelling, Activity Centres within the City of Ballarat required around 243,500sqm of retail floorspace at 2010. Of this, around 42,300sqm is attributed to supermarket and grocery stores, 14,700sqm to specialty food stores and so on.

Table 37 - Demand for Floorspace in the City of Ballarat in 2010 (sqm NLA)

Retail Store Type	Floorspace Demand (sqm)
Supermarket & Grocery Stores	42,285
Specialty Food Stores	14,717
Fast-Food Stores	7,286
Restaurants, Hotels and Clubs	14,242
Department Stores	36,106
Speciality Clothing Stores	13,849
Bulky Goods Stores	63,440
Other Personal & Household Goods Retailing	45,109
Selected Personal Services	9,221
Total	**243,524**

Source: Hill PDA (2010)

By comparison, it is noted that the *Ballarat Commercial Development Strategy* showed the City of Ballarat required approximately 287,820sqm of retail floorspace ('food, groceries and liquor', 'household goods' and 'bulky goods') as of 2011. This was based on $1,581.8m of total retail sales in the City in 2010. Whilst Hill PDA's estimate of demand for retail floorspace is less than that in the *Ballarat Commercial Development Strategy*, this is largely due the addition of a tertiary trade area in the Commercial Development Strategy, as well as slightly lower assumed capture rates.

[16] Note that the table above assumes that real turnover per square metre will increase at a rate of around 0.65% per annum. This is in line with historic trends. Expenditure per capita has increased at around 1.3% to 1.4% above CPI every year since 1986. Around half of this increase has translated into an increase in retail floorspace per capita (from 1.8sqm in the 1980s to around 2.1-2.2sqm today). The balance of the increase in expenditure has translated into a real increase in turnover per square metre rates.

4.6 Demand versus Supply

In 2010 the City of Ballarat has almost 348,600sqm of retail floorspace located in the 13 Activity Centres that are the subject of this Strategy. Expenditure modelling indicates the City demands around 246,255sqm of floorspace, indicating the City is currently oversupplied of retail floorspace. However, the results differ for each retail store type, with fast food stores currently being undersupplied as shown in the table below.

Table 38 - Demand verses Supply at 2010 (sqm NLA)

Retail Store Type	Supply	Demand	Demand v. Supply
Supermarket, Grocery and Convenience Stores	44,358	42,285	2,073
Specialty Food Stores	17,878	14,717	3,161
Fast-Food Stores	5,141	7,286	-2,145
Restaurants, Hotels and Clubs	26,492	14,242	12,250
Department and Discount Department Stores	37,726	36,106	1,620
Clothing	22,462	13,849	8,613
Bulky Goods Stores	74,699	63,440	11,259
Other Personal & Household Goods Retailing	99,304	45,109	54,195
Selected Personal Services	20,523	9,221	11,302
Total	**348,583**	**246,255**	**102,328**

Source: Hill PDA (2010) Note: Red denotes undersupply of retail floorspace.

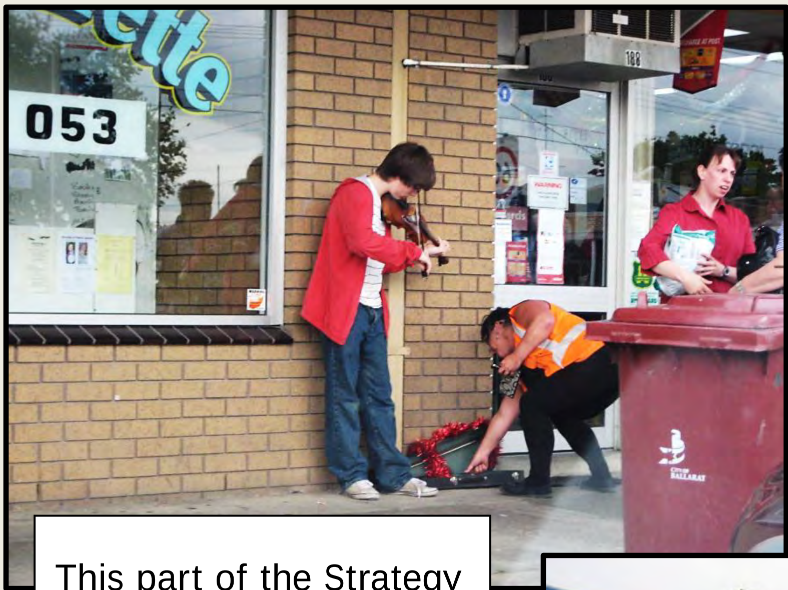
However, the above results should be read with caution given there are various Local Activity Centres which supply retail floorspace within the City, but which are not the subject of this Strategy.

Furthermore, it should be recognised that whilst the analysis of existing centres in Chapter 3 indicated the City had a low overall vacancy rate (which would tend to indicate strong demand and good centre performance), consultation with local stakeholders revealed that there was in fact a high turnover of tenants and businesses (especially in Ballarat CBD).

Notwithstanding these limitations, the results do show those retail uses that are significantly oversupplied and those retail uses that may approach equilibrium or undersupply in the future.

Part B

Ballarat Looking Forward



This part of the Strategy builds on the information provided in Part A to forecast growth and change in Ballarat up to 2030. Part B seeks to better understand demand for floorspace in Ballarat's centres over time and recommends a revised hierarchy of centres in line with the opportunities and constraints of each centre.

5. TRENDS INFLUENCING BALLARAT'S CENTRES

There are a number of local, regional and global trends that are, and will in the future influence Ballarat's Activity Centres including their size, mix of uses, location, vitality and economic viability. This Chapter provides a summary of these key trends as context for the Strategy and its recommendations. A more detailed analysis of relevant trends is provided in Appendix 3.

5.1 The Economy

Comparative to other western Countries, Australia's economy has fared relatively well during the recent global economic crisis largely as a result of the minerals and energy boom. Despite the relative strength of the Australian economy, challenges still relate however to consumer and business confidence in addition to lifestyle factors such as housing affordability and grocery prices. In turn these factors have a considerable influence on the City of Ballarat's economy and in turn its activity centres with particular respect to investment and development decisions.

In accordance with Australia wide trends and Ballarat's role as a Regional Centre in Western Victoria, some of the key industries forecast to grow in the City include retail, health and community services, education and medical uses. Each of these uses influence demand for space in the City of Ballart's Activity Centres. Despite ongoing industry rationalisation, manufacturing is anticipated to remain a key industry in the City of Ballarat.

5.2 The New Economy

The New Economy is a term used to describe a knowledge and idea-based economy. The New Economy is characterised by technological innovation, e-commerce, digital transformation, higher education, skills and open trade. It differs from the previous economy where the key driver of economic growth was the mechanisation of the production process.

Looking forward, the City of Ballarat proposes to capitalise on the growth of the New Economy to become Australia's premier high tech and knowledge based regional economy[17]. To achieve this objective the City will need to foster innovation and adaptation, education and training through a range of mechanisms including the growth of existing tertiary education intuitions. The City of Ballarat's Activity Centres will also need to provide attractive environments for its 'knowledge workers' including good quality office space, a choice of restaurant and café destinations, a range of entertainment facilities and an attractive night time economy.

5.3 Retail Trends and Drivers

Over the past three decades significant changes have occurred in the retail industry such as the introduction of new technologies, the ageing of the population, increased female participation in the workplace and changing consumer preferences. These changes are placing greater pressure on many of the existing activity centres in City of Ballarat to either adapt or lose market share.

[17] City of Ballarat Economic Strategy 2010 -2014, May 2010

As a result of changing lifestyle trends and retail formats, shoppers are increasingly spending more on entertainment, technology and leisure related goods rather than traditional grocery and clothing offers. Shoppers are also seeking a broader range of activities and Activity Centres that provide both retail and entertainment options including eating out, wine bars, cinemas and video game parlours.

Accordingly some of the key retail trends influencing the City of Ballarat include:

- The growing importance of convenience retailing including not only geographic proximity to home but the convenience of one stop shopping at convenient hours resulting in the extension of operating hours;
- The development of larger (i.e. 4,000sqm+) supermarkets to include a wider range of food and non-food items in addition to the emergence of smaller discount supermarkets (800 -1,500sqm) such as Aldi and Maxi Food. Increasingly supermarkets are becoming the core or anchor for successful modern activity centres;
- The development of out-of-town centres which are often characterised by bulky goods retailing and other activities that require larger floor areas and lower rent structures than those found in traditional centres;
- The growing number of specialty store chains and franchises and the importance of their location close to major anchors in centres;
- The growing size and diversification of major centres and their expansion to include entertainment, accommodation (hotel/serviced apartments) and lifestyle focus including eat streets and street theatre (busker and public performances);
- Changing shifts in trade including the expansion of Principal and Major Activity Centres (such as Ballart CBD and Wendouree) taking trade away from some neighbourhood and local centres; the emergence of more convenience centres on major roads which are taking trade away from the traditional neighbourhood centres based around public transport nodes; the growing predominance of bulky goods retailers on the fringe of large shopping centres and in industrial areas which are taking trade in bulky goods away from the traditional retail centres; and the declining market share of older style centres typically located at train stations; and
- The growing popularity of internet shopping which presently accounts for approximately 5% of total retail sales.

5.4 Commercial Trends and Drivers

In accordance with traditional models, Ballarat CBD (comprising some 170,600sqm of commercial floorspace) is the main location within the City of Ballarat for commercial and professional businesses. This floorspace supports the function of the City as a whole in addition to the broader regional catchment. The following trends have been identified as having potential to influence the future demand for, and location of, commercial office space across all of Ballarat's Activity Centres as follows:

- The growth of the new economy and ongoing deindustrialisation is expected to strengthen demand for commercial floorspace especially in key locations, close to tertiary education and transport links;
- The slower than predicted rate of conversion to homeworking, resulting in over 80%[18] of Australians still working in business premises rather than home offices;

[18] ABS Locations of Work Survey 2005

- The emergence of business parks and changes in business composition and technology, over the last decade and a half resulting in a significant shift in the location of office-based activities outside of traditional Activity Centres thereby creating potential competition with existing centres for office tenants;
- Rising fuel prices and the introduction of mandatory energy efficiency disclosure for large commercial buildings (>2,000sqm) by the Federal Government in the second half of 2010. This will lead to sustainability becoming an increasingly important driver of price and demand[19]; and
- An increase in the number of working hours per household and a greater proportion of dual earning households is a trend that means less time for family responsibilities. Accordingly work places that enable workers to conveniently combine paid work, leisure and family responsibilities are becoming increasingly attractive. i.e. locations that offer improved access to high quality retail shops and services, a wide range of health, legal, child care, banking and government related outlets, as well as consumer outlets.

5.5 Tourism Trends in Ballarat

Tourism is an important industry within the City of Ballarat given the legacy of gold mining and the historical importance of the events at the Eureka Stockade. In keeping with broader Australian trends however, the tourism sector in the City of Ballarat has experienced a decline in recent years. The development of robust Tourism and Investment Attraction Strategies would help to negate this trend by developing strategies to reinvigorate interest and further investment. Once in the City of Ballarat, good quality and vibrant Activity Centres will encourage longer stays and increase spend to the benefit of the local economy.

5.6 Residential Trends and Drivers

Demand for housing within the City of Ballarat is anticipated to experience significant growth over the Strategy period given the City's strong and diverse economy as well as the relative affordability of housing in many of its suburbs compared to metropolitan Melbourne. This attraction will be enhanced by improved access via fast rail link to and from Melbourne. Demand for housing will also be influenced by an ageing population and declining household sizes thereby increasing demand for a range of dwelling sizes and types including retirement and aged care housing.

A growing resident population will in turn enhance demand for retail and business services over the next 20 years within Activity Centres of the City. Furthermore, an ageing resident population will drive demand for smaller dwellings and give potential to higher density residential development, townhouse dwellings and seniors living in proximity to services and facilities. This growth in demand is forecast and discussed further in the following Chapters of Part B.

[19] The Jones Lang LaSalle 2009 global survey on Corporate Real Estate and sustainability indicates that an increasing number of corporate executives consider sustainability to be a critical business issue.

6. FUTURE DEMAND FOR RETAIL FLOORSPACE

The following Chapter builds on the findings of Chapter 4, Part A to forecast the growth in demand for retail floorspace in the City of Ballarat over the Strategy period. The results of this Chapter will assist in informing the future hierarchy of Activity Centres within the City of Ballarat and the extent to which they will need to grow to accommodate demand.

6.1 Sources of Retail Expenditure

As discussed in Chapter 4 there are two main sources of retail expenditure available to Activity Centres in the City of Ballarat. These sources are from:

- **Residents within the City of Ballarat –** it was found that 92% of participants in Hill PDA's shopper surveys undertook the majority of their shopping within the City of Ballarat's Activity Centres. However, 45% of participants indicated that they also travel to other centres outside of the City to undertake a proportion of their shopping, mainly for the likes of clothing, and mostly to Geelong and Melbourne CBD. For the purposes of expenditure modelling it has been assumed that centres within the City of Ballarat will capture the majority of retail expenditure from residents within the local government boundary.
- **Residents located outside but within close proximity of the City of Ballarat –** Activity Centres within the City of Ballarat will also continue to draw on retail expenditure from rural residential areas and smaller towns outside of the City's boundaries. Given the high level of accessibility to Ballarat, the limited retail offer within the surrounding localities, as well as a lack of department and discount department stores, it is likely that the City captures a proportion of their clothing, specialty non-food, department store and bulky goods expenditure. The City is also likely to capture a small proportion of grocery, take-away food, restaurant and personal services expenditure from residents in these locations based on the concept of dual shopping trips (i.e. when in Ballarat to visit bulky goods stores, a shopper may also visit the bank, do some grocery shopping and have lunch in a local café).

No allowance has been made for retail expenditure generated by tourists to the City of Ballarat. However, as noted in Chapter 4, whilst not a key source of expenditure, tourism spend will contribute to demand for retail floorspace.

6.2 Household Expenditure from within the City of Ballarat

Population Growth and Future Demographics

A 2010 demographic study for the City of Ballarat by MacroPlan analysed a range of population forecasts ranging from low to high growth scenarios. The forecasts provide an overview of the sensitivity of the City to different scenarios of change and reflect uncertainties such as current and future economic influences and market risk, as well as the growth of Western Melbourne.

To inform this Strategy we have adopted the Victoria in Future (2008) projections as amended by the MacroPlan Report prepared for Council. The projections estimate that as of 2010 the resident population of the City of Ballarat was approximately 96,000 persons with forecasts to increase to almost 127,000 persons by 2030.

Table 39 - City of Ballarat Population Projections (2010 to 2030)

Year	Population	Growth Rate**	Population Increase (cumulative from 2010)
2010	96,000*	-	-
2015	103,249	1.5%	7,249
2020	111,119	1.5%	15,119
2025	118,784	1.3%	22,784
2030	126,978	1.3%	30,978

* 2010 population derived by applying the actual growth rate for the City of Ballarat between 2006 and 2010 (2.1% per annum) to the VIF population estimate at 2006. ** In 5 year intervals.
Source: Victoria in Future (2008) and Demographic & Residential Assessment Stage 1 Report, MacroPlan (June 2010)

Much of the forecast increase in the population of the City of Ballarat to 2030 is attributable to the Ballarat West Growth Area. MacroPlan[20] indicate that this area will accommodate 2,806 persons by 2020 and 15,729 persons by 2030. On this basis, the Ballarat West Growth Area will account for approximately 39% of the population increase in the City of Ballarat to 2020 and 51% of the increase to 2030.

The demographic change which occurs within the City of Ballarat to 2030 will be important to the level of retail expenditure which will be available and the way in which this is spent. However forecast expenditure is based on household spend rather than individual spend. As a result, the modelling takes account of forecast future household numbers which reflects recent trends in changing household sizes. The trend across regional Victoria trend is for an increase in the number of lone family households and childless couples (as noted in Appendix 3).

Household Expenditure

In addition to population growth, expenditure will increase due to real growth in retail spend per capita as a result of increasing affluence and consumerism. Since 1986 real growth in expenditure per person across Australia has increased at around 1.3% to 1.4% per annum. For the purpose of this Strategy, real growth of 1.3% per annum has been adopted.

As identified in Part A of this Strategy, households within the City of Ballarat generated approximately $1,231.5m in expenditure in 2010. This is forecast to increase to $2,108.7m in 2030, representing an increase of $877.2m over the Strategy period as shown in the table below.

Table 40 - Growth of Household Expenditure Generated within the City to 2030 ($m2009)

Retail Store Type	2010	2015	2020	2025	2030
Supermarket & Grocery Stores	388.0	445.1	511.0	582.7	664.4
Specialty Food Stores	117.3	134.6	154.6	176.2	201.0
Fast-Food Stores	58.9	67.5	77.5	88.4	100.8
Restaurants, Hotels and Clubs*	69.3	79.5	91.2	104.0	118.6
Department Stores	113.3	129.9	149.2	170.1	194.0
Speciality Clothing Stores	69.1	79.3	91.0	103.8	118.3
Bulky Goods Stores	193.3	221.8	254.6	290.3	331.0
Other Personal & Household Goods Retailing	193.6	222.1	255.0	290.7	331.5
Selected Personal Services**	28.7	32.9	37.8	43.1	49.1
Total	**1,231.5**	**1,412.7**	**1,621.9**	**1,849.3**	**2,108.7**

Source: Source: Hill PDA (2010), ABS Household Expenditure Survey 1998 -1999 and MarketInfo 2009. * Only expenditure relating to food and drink on premises and excludes other sources of revenue such as accommodation, gaming & gambling. ** Includes hair and beauty, photo processing, clothing alterations, laundry cleaning, optical dispensing and video hiring. N.B May not total due to rounding

[20] Economic Assessment for Ballarat West Growth Area (November 2010), MacroPlan

It is important to note that not all of this expenditure will be captured by Activity Centres within the City of Ballarat, and in accordance with the survey results some expenditure will continue to escape to centres such as Geelong, Melbourne CBD and close to the place of work of residents.

By applying the same capture rates discussed in Chapter 4 for residents of the City to the expenditure generated, the proportion of expenditure which is captured by centres within the City of Ballarat can be calculated.

Table 41 - Capture of Household Expenditure from the City of Ballarat to 2030 ($m2009)

Retail Store Type	Capture Rate	2010	2015	2020	2025	2030	Growth 2010-30
Supermarket & Grocery Stores	95%	368.6	422.8	485.4	553.5	631.2	262.6
Specialty Food Stores	80%	93.9	107.7	123.6	141.0	160.8	66.9
Fast-Food Stores	80%	47.1	54.0	62.0	70.7	80.7	33.6
Restaurants, Hotels and Clubs*	80%	55.4	63.6	73.0	83.2	94.9	39.5
Department Stores	80%	90.6	103.9	119.3	136.1	155.2	64.6
Speciality Clothing Stores	70%	48.4	55.5	63.7	72.6	82.8	34.4
Bulky Goods Stores	80%	154.6	177.4	203.7	232.2	264.8	110.2
Other Personal & Household Goods	80%	154.9	177.7	204.0	232.6	265.2	110.3
Selected Personal Services**	90%	25.8	29.6	34.0	38.8	44.2	18.4
Total		**1039.3**	**1192.2**	**1,368.7**	**1,560.7**	**1,779.8**	**740.5**

Source: Hill PDA (2010), ABS Household Expenditure Survey 1998 -1999 and MarketInfo 2009. * Only expenditure relating to food and drink on premises and excludes other sources of revenue such as accommodation, gaming & gambling. ** Includes hair and beauty, photo processing, clothing alterations, laundry cleaning, optical dispensing and video hiring. N.B May not total due to rounding.

The table above indicates that in 2010 the City of Ballarat retained approximately 84% or $1,039.3m of resident expenditure, increasing to $1,779.8m by 2030. The addition of this household expenditure, to expenditure captured from outside the City, will determine the total retail turnover available to Activity Centres in the City of Ballarat.

6.3 Household Expenditure from outside the City of Ballarat

For those areas outside of the City but from which retail expenditure is likely to be drawn, the Victoria in Future (VIF) population projections (2008)[21] have been adopted. Given the VIF projections only go through to 2026, Regional Victoria projections have been adopted for the periods beyond 2026. These projections are provided in the following table.

Table 42 - Population Projections (2010 to 2030)

Local Government Area	Population Forecast						Growth
	2009	2010	2015	2020	2025	2030	2009-2030
Ararat	8,822	8,854	8,951	9,035	9,119	9,480	3.4%
Central Goldfields	10,237	10,260	10,395	10,581	10,728	11,161	4.1%
Corangamite	868	871	879	884	892	928	3.2%
Golden Plains	9,116	9,315	10,233	11,116	12,010	12,652	15.7%
Hepburn	13,935	14,080	14,764	15,449	16,161	16,920	9.3%
Moorabool	13,810	14,014	15,004	16,047	17,139	18,014	12.7%
Mount Alexander	5,519	5,598	5,974	6,362	6,762	7,102	8.2%
Pyrenees	6,278	6,343	6,629	6,883	7,134	7,456	8.5%
Total STA	**68,585**	**69,335**	**72,829**	**76,357**	**79,945**	**83,713**	**9.3%**

Source: Victoria in Future (2008) Second Release (September 2009), Department for Planning and Community Development

[21] These projections were published in September 2009 by the Department for Planning and Community Development and cover the 2006 to 2056 period. LGA level population projections are provided over the 2006 to 2026 period, with projections beyond 2026 provided only for the state of Victoria, metropolitan Melbourne and regional Victoria.

Given that the wider catchment of retail facilities within the City of Ballarat contains part of, but not all of, neighbouring local government areas, for the purposes of modelling we have made an assumption about the proportion of each local government area that falls within the wider catchment.

Based on assumed population projections total household expenditure by retail store type is forecast in the table below.

Table 43 - Household Expenditure from Outside of the City to 2030 ($m2009)

Retail Store Type	2010	2015	2020	2025	2030	Growth 2010-30
Supermarket & Grocery Stores	288.9	323.8	362.1	404.8	452.2	163.3
Specialty Food Stores	87.3	97.8	109.4	122.4	136.7	49.4
Fast-Food Stores	40.2	45.2	50.5	56.6	63.2	23.0
Restaurants, Hotels and Clubs*	46.5	52.2	58.4	65.3	73.0	26.5
Department Stores	80.0	89.8	100.4	112.5	125.6	45.6
Speciality Clothing Stores	46.8	52.5	58.7	65.8	73.5	26.7
Bulky Goods Stores	139.6	156.8	175.3	196.5	219.5	79.9
Other Personal & Household Goods Retailing	139.6	156.5	175.1	195.9	218.8	79.2
Selected Personal Services**	20.0	22.4	25.0	28.0	31.3	11.3
Total	**888.9**	**997.0**	**1,114.9**	**1,247.8**	**1,393.8**	**504.9**

Source: Source: Hill PDA (2010), ABS Household Expenditure Survey 1998 -1999 and MarketInfo 2009
* Only expenditure relating to food and drink on premises and excludes other sources of revenue such as accommodation, gaming & gambling.
** Includes hair and beauty, photo processing, clothing alterations, laundry cleaning, optical dispensing and video hiring
N.B May not total due to rounding

By applying the assumed capture rates in Chapter 4 (Table 29) of this Strategy, retail spend captured by Activity Centres from residents outside of the City can be estimated.

Table 44 - Capture of Household Expenditure from Outside of the City to 2010-2030 ($m2009)

Retail Store Type	2010	2015	2020	2025	2030	Growth 2010-30
Supermarket & Grocery Stores	57.0	64.3	72.4	81.2	90.8	33.8
Specialty Food Stores	17.2	19.4	21.8	24.5	27.4	10.2
Fast-Food Stores	7.9	8.9	10.1	11.3	12.7	4.8
Restaurants, Hotels and Clubs*	9.1	10.3	11.6	13.0	14.5	5.4
Department Stores	36.6	40.9	45.8	51.1	57.1	20.5
Speciality Clothing Stores	21.3	23.9	26.7	29.8	33.3	12
Bulky Goods Stores	68.9	77.2	86.4	96.5	107.7	38.8
Other Personal & Household Goods Retailing	49.4	55.4	62.0	69.3	77.4	28
Selected Personal Services**	3.9	4.4	5.0	5.6	6.2	2.3
Total	**271.3**	**304.7**	**341.8**	**382.3**	**427.1**	**155.8**

Source: Hill PDA (2010)

The results indicate the City captures around $271.3m of retail expenditure in 2010 from households outside the local government boundary, increasing to $427.1m by 2030.

6.4 Total Expenditure Captured

The table below shows there is around $1,310.6m of retail turnover available to Activity Centres and retail stores in the City of Ballarat in 2010, increasing to $2,206.9m in 2030.

Table 45 - Total Turnover Available to the City of Ballarat to 2030 ($m2009)

Retail Store Type	2010	2015	2020	2025	2030	Growth 2010-30
Supermarket & Grocery Stores	425.6	487.1	557.8	634.7	722	296.4
Specialty Food Stores	111.1	127.1	145.4	165.5	188.2	77.1
Fast-Food Stores	55	62.9	72.1	82	93.4	38.4
Restaurants, Hotels and Clubs*	64.5	73.9	84.6	96.2	109.4	44.9
Department Stores	127.2	144.8	165.1	187.2	212.3	85.1
Speciality Clothing Stores	69.7	79.4	90.4	102.4	116.1	46.4
Bulky Goods Stores	223.5	254.6	290.1	328.7	372.5	149
Other Personal & Household Goods Retailing	204.3	233.1	266	301.9	342.6	138.3
Selected Personal Services**	29.7	34	39	44.4	50.4	20.7
Total	**1,310.6**	**1,496.9**	**1,710.5**	**1,943.0**	**2,206.9**	**896.3**

Source: Hill PDA (2010), ABS Household Expenditure Survey 1998 -1999 and MarketInfo 2009. * Only expenditure relating to food and drink on premises and excludes other sources of revenue such as accommodation, gaming & gambling. ** Includes hair and beauty, photo processing, clothing alterations, laundry cleaning, optical dispensing and video hiring. N.B May not total due to rounding

6.5 Growth in Demand for Retail Floorspace

Demand for retail floorspace is calculated by applying target turnover rates to expenditure captured. The table below provides assumed target turnover levels (or industry benchmarks) by retail store type to 2030[22]. Note this includes an allowance for the growth in real turnover of around 0.65% per annum.

Table 46 - Benchmark Turnover Rates ($/sqm GLA)

Retail Store Type	2010	2015	2020	2025	2030
Supermarket & Grocery Stores	10,065	10,396	10,739	11,092	11,457
Specialty Food Stores	7,549	7,797	8,054	8,319	8,593
Fast-Food Stores	7,549	7,797	8,054	8,319	8,593
Restaurants, Hotels and Clubs*	4,529	4,678	4,832	4,992	5,156
Department Stores	3,523	3,639	3,759	3,882	4,010
Speciality Clothing Stores	5,033	5,198	5,369	5,546	5,729
Bulky Goods Stores	3,523	3,639	3,759	3,882	4,010
Other Personal & Household Goods Retailing	4,529	4,678	4,832	4,992	5,156
Selected Personal Services**	3,221	3,327	3,436	3,550	3,666
Weighted Average	**5,381**	**5,558**	**5,741**	**5,930**	**6,125**

Sources: ABS Retail Survey 1998-99 (escalated to 2007 dollars), JHD Retail Averages, Hill PDA and various consultancy studies. Allowance for growth in real turnover per square metre of 0.65% per annum.

[22] Note that the table above assumes that real turnover per square metre will increase at a rate of around 0.65% per annum. This is in line with historic trends. Expenditure per capita has increased at around 1.3% to 1.4% above CPI every year since 1986. Around half of this increase has translated into an increase in retail floorspace per capita (from 1.8sqm in the 1980s to around 2.1sqm today). The balance of the increase in expenditure has translated into a real increase in turnover per square metre rates.

Based on Hill PDA's modelling, the following table indicates Activity Centres within the City of Ballarat demanded around 246,255sqm of retail floorspace in 2010, increasing to 363,303sqm in 2030. This is equivalent to growth of 117,048sqm or a 47.5% net change over the period. The majority of this is due to strong population growth forecast for the Ballarat West Growth Area's around Alfredton, Delacombe and Sebastopol.

Table 47 - Growth in Demand for Retail Floorspace to 2030 (sqm NLA)

Retail Store Type	2010	2015	2020	2025	2030	Growth 2010-30
Supermarket & Grocery Stores	42,285	46,855	51,942	57,221	63,018	20,733
Specialty Food Stores	14,717	16,301	18,053	19,894	21,902	7,185
Fast-Food Stores	7,286	8,067	8,952	9,857	10,869	3,583
Restaurants, Hotels and Clubs	14,242	15,797	17,508	19,271	21,218	6,976
Department Stores	36,106	39,791	43,921	48,223	52,943	16,837
Speciality Clothing Stores	13,849	15,275	16,837	18,464	20,265	6,416
Bulky Goods Stores	63,440	69,964	77,175	84,673	92,893	29,453
Other Personal & Household Goods Retailing	45,109	49,829	55,050	60,477	66,447	21,338
Selected Personal Services	9,221	10,219	11,350	12,507	13,748	4,527
Total	**246,255**	**272,098**	**300,788**	**330,587**	**363,303**	**117,048**

Source: Hill PDA (2010)

To put this quantum of growth into overall perspective:

- An additional 117,000sqm of retail floorspace is equivalent to around 3 new Stockland Wendouree's;
- An additional 20,700sqm of supermarket and grocery floorspace is equivalent to 4 to 5 large supermarkets of around 4,000sqm to 4,500sqm;
- An additional 16,800sqm of department store floorspace is equivalent to 2 new discount department stores (e.g. Kmart, Big W, and Target); and
- An additional 27,800sqm of floorspace in clothing and other personal and household goods is equivalent to around 250 to 300 additional specialty stores.

The recommended distribution of this growth by centre is further discussed in Part C of this Strategy.`

6.6 Supply verses Demand

In 2010 the City of Ballarat had almost 348,600sqm of retail floorspace. Expenditure modelling within this Strategy indicates the City demands around 246,255sqm of retail floorspace in 2010, increasing to 363,303sqm in 2030. The table below compares existing supply to demand for retail floorspace in the City of Ballarat to 2030.

Table 48 - Demand Versus Supply for Retail Floorspace to 2030 (sqm NLA)

Retail Store Type	Floorspace Supply	Demand v. Supply				
		2010	2015	2020	2025	2030
Supermarket, Grocery and Convenience Stores	44,358	2,073	-2,497	-7,584	-12,863	-18,660
Specialty Food Stores	17,878	3,161	1,577	-175	-2,016	-4,024
Fast-Food Stores	5,141	-2,145	-2,926	-3,811	-4,716	-5,728
Restaurants, Hotels and Clubs	26,492	12,250	10,695	8,984	7,221	5,274
Department and Discount Department Stores	37,726	1,620	-2,065	-6,195	-10,497	-15,217
Clothing	22,462	8,613	7,187	5,625	3,998	2,197
Bulky Goods Stores	74,699	11,259	4,735	-2,476	-9,974	-18,194
Other Personal & Household Goods Retailing	99,304	54,195	49,475	44,254	38,827	32,857
Selected Personal Services	20,523	11,302	10,304	9,173	8,016	6,775
Total	**348,583**	**102,328**	**76,485**	**47,795**	**17,996**	**-14,720**

Source: Hill PDA (2010) Note: Red denotes undersupply of retail floorspace.

The results indicate that the initial oversupply of floorspace in 2010 decreases to 2030, at which time there will be an overall undersupply of around 14,700sqm of retail floorspace. However, this is not distributed evenly across all retail store types. There is an immediate undersupply of fast-food store floorspace within the City, with supermarkets and department stores reaching full absorption in the medium term (2015 to 2020).

It is recognised that some of this undersupply, particularly for supermarkets and specialty stores, will be filled by planned Activity Centres in the Ballarat West Growth Area's such as Glenelg Highway (approximately 23,000sqm of retail before 2030 including a supermarket), Lucas (approximately 5,000sqm by 2030) and other small centres.

Furthermore, new developments in the pipeline will also meet demand for retail floorspace over time. For example, the approved Project Oxygen hardware store will largely meet growth in bulky goods floorspace to 2030.

7. Future Demand for Commercial and Social Floorspace

The following Chapter provides an estimate of demand for commercial and social floorspace across the City of Ballarat to 2030. The estimates have been prepared to complement the retail floorspace estimates discussed in Chapter 6 and to better understand the competing demand for floorspace in Ballarat's Activity Centres over the Strategy period. This analysis will also help to inform what future scale and role Ballarat's Activity Centres will need to achieve in order to meet the projected needs of the community and regional economy.

7.1 Methodology

To forecast demand for commercial and social floorspace, for consistency and clarity we have used the employment forecasts that underpin Council's Economic Strategy 2010-2014 (as outlined Appendix 1). Using the general categories provided in the Economic Strategy we have defined commercial jobs as those relating to communication services; finance and insurance; property and business services; government administration and defence. Whilst industries such as manufacturing also generate ancillary commercial jobs, and thereby demand for office space, the majority of this demand and thereby supply, will be located within industrial areas and is not therefore likely to influence the role of Ballarat's Activity Centres.

We have defined jobs relating to social floorspace – otherwise referred to as special uses - as those in education; health and community; cultural and recreational services. Many of these uses relate to floorspace within or adjacent to Ballarat's centres (such as the St John of God and Ballarat Base Hospitals and the University of Ballarat) however in the case of the latter, floorspace can also be provided outside of centres (i.e. at Mount Helen).

In order to undertake the forecasting an economic model was prepared that:

1. Extrapolated Council's employment forecasts from 2006 to 2030 to align with the timescales of the Strategy and calculated benchmark years of 2010 and 2020 to align with the retail forecasts discussed in Chapter 6;
2. Translated Council's employment forecasts into floorspace requirements utilising appropriate employment yields; and
3. Converted the commercial and social floorspace requirements into site area using appropriate floorspace ratios (FSRs).

7.2 Demand for Commercial Floorspace and Land 2010 – 2030

Applying the methodology referred to above, it was found that the City of Ballarat is likely to experience a net increase of 4,178 commercial jobs between 2010 and 2030. As shown in the following table, across all commercial industries there is forecast growth. The greatest actual growth is however forecast for the property and business service sector. The growth of this industry is a common trend across Australia, with notable growth in the property industry also likely in the City of Ballarat on account of its planned residential release area and the associated dwelling growth.

In percentage terms, the most significant increase is forecast for the communication industry. This is likely to be a result of the investment stimulus created by communication clusters such as the University of Ballarat Technology Park in Mount Helen which has IBM as a core tenant.

Table 49 - Forecast Growth in Commercial Office Jobs to 2030

Commercial Jobs	2010	2020	2030	Net Change 2010-2030
Communication Services	1,515	2,036	2,761	1,246
Finance and Insurance	1,193	1,241	1,303	110
Property and Business Services	3,175	3,946	4,946	1,771
Government Administration and Defence	2,629	3,112	3,680	1,051
Total	**8,512**	**10,335**	**12,690**	**4,178**

Source: Based on SGS employment forecasts May 2010 and extrapolated by Hill PDA 2011

To translate the above forecasts into demand for floorspace, we have cross multiplied jobs with benchmark employment yields (e.g. 1 job per 32sqm for communication services) by industry. These densities have been based on our industry experience and survey analysis undertaken for Regional Cities of a similar character to the City of Ballarat.

As a result, by 2030 there will be demand for over 400,800sqm of commercial office space within the City of Ballarat as shown in the table below.

Table 50 - Commercial Floorspace Demand by Industry to 2030 (sqm)

Commercial Jobs	Floorspace Yields	2010	2020	2030
Communication Services	32	48,480	65,152	88,352
Finance and Insurance	28	33,404	34,748	36,484
Property and Business Services	32	101,600	126,272	158,272
Government Administration and Defence	32	84,128	99,584	117,760
Total		**267,612**	**325,756**	**400,868**

Source: Based on SGS employment forecasts May 2010, adjusted by Hill PDA 2011

In line with the employment projections, the greatest actual increase in demand for floorspace (+56,672sqm or 42.5% of all additional commercial floorspace demand) will stem from growth within the property and business service industry. Furthermore the greatest proportional increase within industry over this same period will relate to communication services (+39,872sqm or an 82% increase from 2010).

Table 51 - Net Change in Commercial Floorspace Demand by Industry to 2030 (sqm)

Industry Category	2010 -2020	2020-2030	Net Change 2010-2030
Communication Services	16,672	23,200	39,872
Finance and Insurance	1,344	1,736	3,080
Property and Business Services	24,672	32,000	56,672
Government Administration and Defence	15,456	18,176	33,632
Total	**58,144**	**75,112**	**133,256**

Source: Based on SGS employment forecasts May 2010 and extrapolated by Hill PDA 2011

Hill PDA's 2010 floorspace survey indicated the City had around 170,600sqm of commercial office supply, however this only included shopfront commercial supply of those Activity Centres that are the subject of this Strategy. It did not include standalone commercial buildings outside of Activity Centres (e.g. University of Ballarat Technology Park) or shop top commercial office. This is largely because shop top commercial office is often difficult to assess given access constraints to these premises and the difficulty in determining either the exact use (e.g. commercial versus residential) or type of commercial premises.

To translate the forecast growth in demand in commercial office space into land area, we have cross multiplied the floorspace estimates by land use densities (as shown in column two of the following table). It is important to note that whilst a Floor Space Ratio (FSR) of 1:1 is commonly applied for commercial office space, we have taken a more conservative approach applying an FSR of 0.8:1 to account for policy objectives to promote Ballarat CBD as the main commercial centre in the City and its potential density restrictions on account of its heritage character.

The results indicate that by 2030, there will be demand for an additional 9.1ha of land to accommodate the forecast increase in commercial office space in the City of Ballarat. This represents a 47% increase from estimated demand in 2010. The greatest actual increase will once again relate to property and business services given that it is the largest growth industry in relation to job generation and is generally accommodated in buildings with a density similar to other commercial categories shown above.

Table 52 - Net Increase in Commercial Land Demand by Industry to 2030 (ha)

Industry Category	Prevailing FSR	2010 -2020	2020-2030	Net Change 2010-2030
Communication Services	0.4	0.7	0.9	1.6
Finance and Insurance	0.8	0.1	0.1	0.2
Property and Business Services	0.8	2.0	2.6	4.6
Government Administration and Defence	0.8	1.2	1.5	2.7
Total		**4.0**	**5.1**	**9.1**

Source: Based on SGS employment forecasts May 2010 and extrapolated by Hill PDA 2011

In the case that the majority or all of the 1.6ha of additional land required to service the growth in communication services is accommodated in business centres such as Mt Helen, some 7.5ha of additional land will still be required within Ballarat's Activity Centres to accommodate forecast commercial growth.

7.3 Demand for Social Floorspace and Land 2010 - 2030

Applying the same methodology for social or special uses as commercial, we have found that the City of Ballarat is forecast to experience a net increase of 9,726 jobs for this category between 2006 and 2030.

As shown in the table below, across all of the special use categories there is forecast growth with the most significant actual growth forecast in the health and community services sector. The scale of this growth is underpinned by a number of demographic trends (including the ageing of the population) in addition the growing scale of Ballarat's resident population resulting in a significant increase in demand for health and community related services. The scale of the growth in this sector is also a strong reflection of the regional role played by the City of Ballarat in the provision of services and the presence of major health facilities such as the Ballarat Base Hospital.

Table 53 - Forecast Growth in Special Use Jobs to 2030

Industry Category	2010	2020	2030	Net Change 2010-2030
Education	4,426	5,290	6,385	1,959
Health and Community Services	6,954	9,256	12,266	5,312
Cultural and Recreational Services	1,206	1,718	2,446	1,240
Total	**12,586**	**16,264**	**21,097**	**8,511**

Source: Based on SGS employment forecasts May 2010 and extrapolated by Hill PDA 2011

The number of jobs within the cultural and recreational services is forecast to double between 2010 and 2030 (+1,240 jobs representing a 103% increase). This is once again reflective of Ballarat's significant forecast population growth yet it also aligns with the changing lifestyle habits of Australians (as discussed in Appendix 3 - Trends) who are increasingly seeking culturally diverse forms of entertainment and more active opportunities for recreation.

Applying benchmark employment yields (e.g. 1 job per 30sqm for health and community services) to the forecast growth in demand for jobs it was found that by 2030, there will be demand for just over 787,000sqm of floorspace relating to special uses within the City of Ballarat.

Table 54 - Special Use Floorspace Demand by Industry to 2030 (sqm)

Industry Category	Floorspace Yields	2010	2020	2030
Education	35	154,910	185,150	223,475
Health and Community Services	30	208,620	277,680	367,980
Cultural and Recreational Services	80	96,480	137,440	195,680
Total		**460,010**	**600,270**	**787,135**

Source: Based on SGS employment forecasts May 2010, adjusted by Hill PDA 2011

By 2030 demand for floorspace relating to special uses would increase by a notable +327,000sqm between 2010 and 2030 representing 71% growth. In line with the employment projections, the greatest actual increase in demand for floorspace (+159,360sqm or 49% of all additional demand) will result from growth within health and community services. Furthermore the greatest proportional increase within industry over the same period will relate to cultural and recreational services (+99,200sqm or a 103% increase from 2010).

Table 55 - Net Change in Special Use Floorspace Demand by Industry to 2030 (sqm)

Industry Category	2010 -2020	2020-2030	2010-2030
Education	30,240	38,325	68,565
Health and Community Services	69,060	90,300	159,360
Cultural and Recreational Services	40,960	58,240	99,200
Total	**140,260**	**186,865**	**327,125**

Source: Based on SGS employment forecasts May 2010 and extrapolated by Hill PDA 2011

To translate the forecast growth in demand for special uses into land area, we have cross multiplied the floorspace by standard land use densities for each category (as shown in column two of the following table).

By 2030, there will be a net increase in demand for approximately 21.5ha of land across the City of Ballarat to support the growth in demand for Special Uses. The net increase in demand for land is significantly greater for special uses than commercial in part as a result of the greater forecast net increase in jobs in these categories and in part as a result of their lower prevailing development densities.

Table 56 - Net Increase in Special Use Land Demand by Industry to 2030 (ha)

Industry Category	Prevailing FSR	2010 -2020	2020-2030	2010-2030
Education	0.5	1.5	1.9	3.4
Health and Community Services	0.7	4.8	6.3	11.1
Cultural and Recreational Services	0.7	2.9	4.1	7.0
Total		**9.2**	**12.3**	**21.5**

Source: Based on SGS employment forecasts May 2010 and extrapolated by Hill PDA 2011

It is important to note that whilst the provision of social / special use floorspace should be encouraged within Ballarat's Activity Centres to ensure a true mix of uses in each centre to meet the needs of the community, the actual quantum of land required for these uses over the Strategy period is so great that this may not be achievable. Rather a balance will need to be provided between the provision of education, health and cultural floorspace within centres and its location in appropriate areas adjacent to, or complementary to, existing centres.

Part C

The Strategy

This part of the Strategy translates the key findings of Parts A and B into visions and recommendations for Ballarat's Activity Centres. The recommendations are communicated as planning principles, strategies and design objectives for each centre. Part C also provides a prospective hierarchy of Activity Centres and a framework by which to assess future Activity Centre development.

8. STRATEGY VISION AND PRINCIPLES

This Chapter provides a vision for Activity Centres in the City of Ballarat. It also provides guiding principles for the planning and development of Activity Centres in the municipality, and indicative future floorspace requirements for each centre. The purpose of this Strategy is to provide clear direction for the future planning and development of Activity Centres in the City of Ballarat over the next 30 years. It therefore replaces previous strategies and policies prepared by the City of Ballarat.

The Vision and Principles established in this Chapter are based on State planning policies, principles derived from the Ballarat Council Plan 2009 to 2013, and from the Ballarat Interim Activity Centres Strategy. Floorspace requirements are based on the demand forecasts discussed in Part B of this Strategy. A revised and prospective future Activity Centres Hierarchy is also identified, which details the planned future role and characteristic of each Activity Centre.

Based on the analysis provided in this Strategy and discussions with key stakeholders during its preparation, the following vision for the City of Ballarat's Activity Centres has been prepared.

A strong and diverse network of Activity Centres that provide vibrant, sustainable and accessible shopping, employment, entertainment, social and community focal points throughout the City, which meet the needs of the existing and future population of the City of Ballarat, the broader region and visitors to Ballarat.

A network of centres that reinforce the primacy of the Ballarat Central Business District and which have the potential to accommodate future growth in retail, employment, entertainment, social and community services and facilities as a consequence of future population growth, changing socio-economic characteristics, and changing retail and economic trends.

Flexibility for centres to change over time to accommodate the changing needs of their communities, with the opportunity for local communities and business groups to be involved in determining the distinctive identity which evolves for each centre.

8.1 Principles

A number of principles have been developed to guide the planning and development of Activity Centres in Ballarat and to provide clear guidelines for future decision making. These principles are elaborated upon in this section of the Strategy and are carried through to the more detailed recommendations for each centre provided in Part D of the Strategy.

It is important to note that this Activity Centres Strategy moves away from a purely retail and commercial focus and moves towards a more holistic vision of Activity Centres as focal points for the community and as important elements in making urban areas more sustainable.

The following principles are grouped into broad themes.

8.2 Overarching Principles

Define and Reinforce a Hierarchy of Activity Centres in the City of Ballarat

Principle 1. *Define an appropriate hierarchy for Activity Centres in the City of Ballarat which define the roles and function of different types of centres and the associated requirements to service the full range of needs of the community of Ballarat and the wider region.*

Principle 2. *Provide clear directions to guide the future planning and development of different types of Activity Centres within the municipality into the future.*

Discussion

These principles seek to ensure that there is a clear definition of the role of each centre in the Activity Centres Hierarchy. This is required to provide Council and other decision makers with clear strategic direction by which to assess requests to rezone land, applications for planning permits, and make infrastructure investment decisions in Activity Centres. Whilst floorspace requirements may change over time, what is of primary importance in driving decisions is the relationship between Activity Centres within the hierarchy, which should be maintained as identified. The Activity Centres Strategy should be instrumental in identifying the existing and future role and function of each centre, whilst ensuring flexibility is maintained to enable individual centres to adapt to meet the needs of their local communities.

Primacy of the Ballarat CBD

Principle 3. *Retain and enhance the role of the Ballarat Central Business District (CBD) as the pre-eminent Activity Centres within Ballarat and the wider region, and as the centre which provides higher order retail, commercial, entertainment, service, community, cultural and related activities for the whole of Ballarat and its wider region.*

Principle 4. *Ensure that retail development in other Activity Centres within the City of Ballarat, particularly Major Activity Centres and the designated Bulk Goods Centre, support the role of the Ballarat CBD as the pre-eminent Activity Centre within Ballarat and the wider region.*

Principle 5. *Provide a network of Smaller Neighbourhood and Local Centres, to support the Ballarat CBD and Major Activity Centres, and which will provide for the daily and weekly shopping and social needs of the communities they serve.*

Discussion

Ballarat CBD should continue to function as the pre-eminent retail centre for Ballarat and the Western Region of Victoria, and as the location for major office development serving the municipality and wider region. This is in addition to its lead role in terms of higher order entertainment, community and cultural activities.

Ballarat CBD provides the highest level of accessibility by public transport in the municipality and the region, and represents the greatest concentration of investment in public infrastructure. The protection and enhancement of the role of the CBD is a key element of this Strategy. This is particularly the case when considering proposals for the expansion of retail and other uses within existing and planned Major Activity Centres and other competing centres in

Ballarat. This principle requires the active management and 'promotion' of the CBD to ensure it continues to provide a solid 'base' for social, community and economic activity within the City of Ballarat.

Activity Centres as Diverse and Conveniently Located Focal Points for the Community

Principle 6. *Encourage a network of Activity Centres throughout the municipality which are highly accessible, mixed use and diverse focal points and social meeting places for the communities they serve.*

Principle 7. *Broaden the range of uses and activities in existing Activity Centres that are currently predominately 'shopping centres', to include a wider range of retail, office, entertainment and community services, and which are open over longer hours into the evening and on weekends, commensurate with the role of the centre in the hierarchy and the needs of the surrounding population.*

Principle 8. *Ensure that any new centres which are developed include a diverse range of uses and activities, consistent with the above principles, and are not developed as 'retail only' centres.*

Discussion

Government authorities (such as the City of Ballarat) can contribute to the growth of strong Activity Centres by making appropriate decisions regarding the location of public facilities. When additional facilities and services are located in Activity Centres, the provision of public transport services becomes more viable and people using centres can make one trip to meet several needs at one destination. More people, including those without cars, also have access to centres.

Significant new education and health facilities – including secondary schools, libraries and hospitals – that attract users from large geographic areas, as well as other community and administrative facilities should be located in or on the edge of Principal or Major Activity Centres (such as Ballarat CBD, Wendouree or Glenelg Highway) with good public transport provision. Such clustering of activities will make better use of resources and make the most of public infrastructure and transport services. These education and health facilities should be located at centres that are within the service catchment of the facility, and in a type of centre appropriate to the intensity of service, measured by trip generation, and to the primary functions of the facility (for example, research and development, user services).

Sports and entertainment facilities generate a significant number of trips. They should also be located within or at the edge of Activity Centres where possible. Large facilities of metropolitan, State or national significance may be considered for out-of-centre locations, but they should be at locations that are highly accessible to their catchment of users, particularly by public transport.

New small-scale education, health and other community facilities that meet local needs – including maternal and child health centres, kindergartens, local branch libraries and primary schools – will be encouraged to locate in or next to Neighbourhood Activity Centres (such as Sebastopol, Midvale and Sebastopol South). These are important local community uses. Their location should create effective links with related activities, reduce the need to make multiple trips, and encourage walking, cycling and the use of local public transport services.

Consolidate Retail and Commercial Activities in Existing and Planned Activity Centres

Principle 9. *Encourage new retail and office development (other than local daily convenience shops) to locate in existing or planned Activity Centres, including bulky goods retailing.*

Discussion

This principle seeks to encourage new retail and office uses, in particular, to locate within existing and planned Activity Centres. Considerable public investment in infrastructure, services and facilities is directed towards Activity Centres. Policies of planning and other government agencies focus much government spending, improvements in public transport, and priorities for medium and higher density housing, towards Activity Centres. The aim of these efforts is to make Activity Centres attractive, convenient and accessible focal points of community life and activity.

The location of retail and office uses outside designated Activity Centres has the potential to undermine the role and function of Centres, and the policy efforts and investment decisions of both the government and the private sector.

Discourage Out of Centre Retail and Commercial Development

Principle 10. *Discourage new retail and office development (including bulky good retailing) from locating out of existing or planned Activity Centres.*

Principle 11. *Discourage bulky goods retail from occurring on industrial zoned land.*

Principle 12. *Only consider new retail and office development (including bulky goods retailing) outside of existing or planned Activity Centres in the following circumstances:*

- Where an economic assessment clearly identifies a need for additional retail and / or office development in the area;
- Where there is no opportunity to accommodate the development within, or if not within, adjacent to an existing or planned Activity Centres;
- Where the new centre meets Activity Centre principles in terms of: accessibility by public transport; walking and cycling; the mix and diversity of uses proposed; and its role as a community focal point;
- Where an economic assessment identifies that the development will not adversely impact on the role and function of other Activity Centres; and
- Where there is a clear net community benefit.

Discussion

New retail and commercial development remote from existing Activity Centres has the potential to compete with and potentially weaken the role and function of existing Activity Centres. Considerable public and private investment in a wide range of services and facilities, including public transport and the like, focuses on existing Activity Centres. Planning decisions that have the potential to weaken established Activity Centres can have a substantial community dis-benefit.

Proposals for development or expansion of activities remote from existing Activity Centres will be discouraged by giving preference to locations in, or on the border of, existing and planned Activity Centres. Out-of-centre proposals will only be considered where it can be substantially demonstrated that the proposed use or development will deliver a net benefit to the community and will not have an adverse impact on existing Activity Centres.

It is acknowledged that it can be problematic accommodating large format bulky goods retail development within existing centres. Strong policy support is given to the location of such uses within the Ballarat CBD and other Major Activity Centres in Ballarat. However where this is not possible the Strategy supports a clustering of such uses in a single designated area, rather than in dispersed locations across the City. An area has been identified for bulky goods retail uses in the vicinity of Learmonth Road and Gilles Street, including the existing Homemaker Centre on Gilles Street and the area on Learmonth Road rezoned by Ministerial Amendment to accommodate a homemaker development. The Glenelg Highway centre also presents opportunities for Bulky Goods retail.

Orderly and Economically Sound Development of Planned New Activity Centres

Principle 13. *Identify locations for new Activity Centres that will be required to service residential growth areas in Ballarat and to provide staging plans to allow for the orderly planning and development of those centres over time.*

Discussion

It is important to the vitality of the City of Ballarat's existing Activity Centres, that the proposed centres identified by this Strategy are carefully planned, staged and developed in order to provide for the communities of Ballarat's residential growth areas. The timing of developing these centres (particularly Glenelg Highway which is identified as a future Major Activity Centre) must ensure that no detrimental impact is experienced by existing centres as a result of floorspace being provided before population growth can support it. The development of these centres must also be carefully managed to ensure that community services and facilities are provided in line with the needs of residents.

To this end the two new centres in the Ballarat West Growth Area have been identified as developing over time into their prospective place in the future hierarchy. In this regard the proposed centre at Glenelg Highway is anticipated to commence as a Large Neighbourhood Activity Centre, whilst Lucas is identified as developing over time from a Neighbourhood Activity Centre to a Large Neighbourhood Activity Centre, particularly as other employment generating uses such as offices develop in the centre. The planning for proposed centres in the new Growth Area has been undertaken through the Precinct Structure Plan process.

Adequate Opportunity to Expand Activity Centres to Accommodate Future Needs

Principle 14. *Ensure adequate zoned land is available in or adjacent to existing and planned Activity Centres to accommodate the expansion and development of Activity Centres (retail, commercial and social floorspace) having regarding to changes in population and lifestyle characteristics, and trends in retail and community service provision.*

Discussion

Ensuring that there is an appropriate amount of land available within each centre to accommodate anticipated growth is important to ensure that development within a centre is not constrained and that flexibility exists for a centre to grow and develop over time. When assessing future floorspace needs, accommodating additional height and better utilisation of ground level car parking areas etc., are relevant planning considerations. The boundaries established for Activity Centres in Ballarat also need to be broad enough to accommodate community and recreational uses, as well as medium and higher density housing.

Activity Centre boundaries identified in this Strategy are intended as a starting point only, for review and refinement as part of more detailed future structure planning that will identify those that can accommodate further growth.

Net additional indicative floorspace by 2030 for each centre in Ballarat is detailed in Table 57.

Economically Viable Centres, Enhanced Choice and Competition

Principle 15. *Support a diversity of retail uses and activities within Activity Centres to enhance consumer choice as well as the economic strength of centres.*

Principle 16. *Ensure sufficient flexibility exists to accommodate emerging trends in retailing within existing and planned Activity Centres where appropriate and where there is a net benefit to the community.*

Discussion

Centres with strong retail anchors and a good variety of modern and contemporary retail and service businesses, will attract a wide range of shoppers and visitors over weekdays and weekends. Strong and diverse centres within the City of Ballarat will help to minimise the level of escape expenditure from the municipality, and the need for residents to travel to more distant centres outside of the City to access services.

To achieve a more diverse mix of uses, support should be given to the establishment and expansion of anchor tenants, such as appropriately sized supermarkets, particularly in smaller centres. This will enhance the attraction of the centre to local residents as well as to visitors. Any such expansion should be subject however to analysis (please refer to Chapter 11).

It is important to recognise that retail and related uses are in a constant state of change and evolution. The recent trend towards large format retailing and bulky goods retailing is one example. What might occur in the future is as yet unknown. Whether it be towards bigger and larger premises that rely on economies of scale and which service an increasingly large population catchment, or it be a return to smaller more closely spaced centres due to desire for environmental sustainability and a return to more local community values, is yet to be determined. What is important is that the planning policy framework is sufficiently flexible to accommodate these changes, where they result in an improved outcome for the community

Busy, Vibrant and Active Centres with Individual Identities

Principle 17. *Develop vibrant Activity Centres with clear individual identities through branding and marketing initiatives.*

Discussion

A primary aim of this Strategy is to develop a network of Activity Centres which, through careful planning, marketing, branding and management, become the focus for vibrant community life.

This principle seeks to provide the opportunity for centres to develop their own character and identity, which reflects the needs and aspirations of their users. This identity can positively influence the branding and marketing of centres, assist in attracting new investment, and in developing notions of 'community' and 'sense of place'. A vision for the character and identity of a centre should be developed by working closely with stakeholders, local businesses and community groups, through the preparation of a structure plan or a community plan.

Investment, Employment and Business Growth

Principle 18. *To attract additional investment in Activity Centres, work with local business networks and stakeholders to enhance the appeal of investing and developing in the City of Ballarat and assist in the generation of additional employment opportunities through the application of planning policy and the use of non-statutory measures.*

Discussion

As the population of the City of Ballarat grows so too will the demand for local jobs and for services. To support this need, it will be necessary to attract and facilitate additional investment in Ballarat's Activity Centres. It will also be necessary to enable the growth and expansion of existing businesses through suitable land use zones and development controls. Facilitating the development of new businesses and the expansion of existing businesses within Activity Centres will be important in ensuring their long term viability.

To create an environment conducive to investment, there should be clear and consistent planning policy and direction from Council. Furthermore the economic implications of prospective planning policies (such as the viability of development within centres at designated densities and building heights) should be tested with the development community and business owners to ensure that planning controls are reasonable and conducive to growth. The undertaking of targeted Investment Attraction Strategies at a centre based level should also be considered to ensure that the best outcome can be achieved for Ballarat's Activity Centres.

Furthermore, the City of Ballarat should proactively engage with businesses and seek to streamline the development approvals process by coordinating Council departments and approaches to development with key stakeholders in Ballarat's designated Activity Centres. The appointment of a Place Manager to assist with this coordination is an approach that this Strategy recommends. In addition, as part of the implementation of any structure plan for the larger centres, consideration should be given to the removal of third party appeal rights for developments within the Activity Centres which are in keeping with the relevant structure plan.

Safe and Convenient Movement for Pedestrians and Cyclists

Principle 19. *Ensure the design and layout of centres considers pedestrian scale and movement.*

Discussion

Within Activity Centres it is important that all planning and development decisions, particularly those related to built form and traffic management, acknowledge and support the movement of pedestrians.

Traditionally planning decisions relating to retail development have centred around car and truck movements, car parking and loading. This principle seeks to ensure that pedestrian and cycle movements, pedestrian amenity, and also public transport provision, receive priority in the planning and development of centres.

Housing Mix and Accessibility

Principle 20. *Support increased residential densities in and around Activity Centres.*

Discussion

This policy supports existing State and local planning policies that strongly encourage the provision of medium and higher density housing both within and around Activity Centres.

Delivering more residential development in and around Activity Centres increases their vibrancy and viability through increased day and night activity, as more people live within their respective catchment.

Environmental Sustainability

Principle 21. *Establish a pattern and distribution of Activity Centres throughout the urban area of Ballarat and the wider municipality that enhances the sustainability of the Ballarat urban area. This is to be achieved by:*

- Clustering a wide mix of diverse uses in Activity Centres to promote multi-use trips and to provide alternatives to car travel by encouraging public transport use / walking / cycling; and
- Ensuring that buildings and public spaces within Activity Centres incorporate best practice sustainability measures in terms of the design, construction and ongoing operation of buildings and spaces.

Discussion

Given the long term nature of this Strategy, it is vital that Activity Centres are planned and developed in light of global environmental issues such as climate change, greenhouse gas emissions, peak oil, conservation of water and other resources, waste minimisation and recycling etc. This requires decision making in relation to broad strategic projects, and also at the permit application stage, to place an emphasis on the incorporation of best practice environmentally sustainable design initiatives into the planning, construction and ongoing operation of all aspects of Activity Centres. This principle applies especially to Council buildings and works, as local government can provide leadership in this regard.

Planning, despite overarching objectives regarding sustainability, in many ways has contributed to the current situation where urban development in Australian cities is relatively unsustainable. This is largely due to the emphasis traditional land use planning has placed on the provision of car parking and car access, and the separation of land uses. This has led to the establishment of largely single purpose retail centres, surrounded by extensive areas of ground level car parking, which are often disconnected from their residential surrounds and lacking in the provision of public transport.

Concentration and integration between a mix of residential, employment, retail, service and community uses within a centre, not only promotes dual shopping trips, better pedestrian connectivity and reduces car dependency, but also encourages overall sustainability and viability of centres. This type of centre minimises the number of private vehicle trips, encourages walking between major anchors and increases the feasibility of public infrastructure investment, including public transport.

8.3 Process Principles

Economic and Net Community Benefit Assessments

Principle 22. *Require a Net Community Benefit Assessment to be prepared by the proponent and submitted with any request to rezone land or any planning permit application for a retail use or development over 1000sqm.*

Discussion

This principle is intended to ensure that no planning decision is made on any significant retail and commercial development in the municipality, without a full assessment being undertaken of the net community benefit of the proposal. The process involving a Net Community Benefit Assessment is outlined in Chapter 11 of this report.

9. The Activity Centres Hierarchy

This Chapter builds on the principles and vision to identify a future hierarchy for Activity Centres in the City of Ballarat. The revised hierarchy has been prepared in light of the floorspace audit undertaken by Hill PDA, community and stakeholder consultation and economic floorspace demand modelling.

More specifically, the proposed future centre hierarchy and boundaries have had regard to:

- State and Local policy planning policy frameworks regarding Activity Centres and sustainable development;
- Council's objectives as outlined in the Council Plan 2009-2013;
- Forecast net additional floorspace requirements;
- Anticipated population growth, the scale and location of growth areas;
- Trends in retailing, commercial and residential markets; and
- Broader aims of planning and economic development within the City of Ballarat.

The results of analysing this data combined with our experience in centre planning have culminated in the recommendations of this Chapter.

9.1 Definitions of Activity Centres

An Activity Centres hierarchy establishes the order (with respect to scale and function) of one centre compared to another. For the purposes of this Activity Centres Strategy, the definitions shown within Table 57 have been adopted to establish a suitable hierarchy for the City of Ballarat looking forward. These definitions and the floorspace estimates which accompany them are intended to provide a clear framework for the hierarchy of centres and to allow this Strategy to be easily used within both an economic and a planning context. As such, wherever possible the definitions reflect those contained in State Planning Policy.

The definitions adopted for this Strategy are as follows.

Principal Activity Centres (PACs)

A Principal Activity Centre may include the following elements:

- serve a very large catchment covering several suburbs and local government areas;
- a focus for community activity, services and investment;
- a location for priority government investment and support;
- a mix of activities that generate high numbers of trips, including business, retail, services and entertainment;
- be generally well served by multiple public transport routes; and
- have the potential to grow and support intensive housing developments without conflicting with surrounding land uses.

Principal Activity Centres tend to incorporate the following types of uses:

Department stores, discount department stores, mini-majors, multiple supermarkets, bulky goods retailing, regional offices, major recreational facilities, major entertainment facilities such as theatres and cinemas, wide range of small businesses, personal services, boutique retailing, professional and other commercial services, restaurants and cafes, libraries, government offices, including courts and other major community infrastructure, health services, religious and educational facilities.

<u>Major Activity Centres (MACs)</u>

Major Activity Centres are defined by the following functions and attributes:

- they have similar characteristics to Principal Activity Centres but serve smaller catchment areas;
- they have scope to accommodate ongoing investment and change in retail, office, service and residential markets;
- they encourage more mixed-use development in appropriately located centres;
- they are easily accessible by multiple means of public transport; and
- they encourage continued broadening of the range of uses.

These centres can be defined by the following uses:

Discount department stores, more than a single supermarket, mini majors, larger office uses, wide range of small businesses, personal services, professional and other commercial services, cafes and entertainment facilities, library and local government offices, health and community services, religious and educational facilities.

<u>Large Neighbourhood Activity Centres (LNACs)</u>

Large Neighbourhood Activity Centres may include the following elements:

- a range of small businesses and shops;
- at least one full line supermarket and some public transport access;
- generally between 10,000sqm and 20,000 square metres of retail and commercial floor space;
- accessibility via walking and / or cycling;
- accessibility by local bus services, and public transport links to one or more PACs or MACs;
- have a role as important community focal points, and are close to community services (schools, libraries, etc) and other facilities that benefit from good public transport
- contribute to the goal of encouraging walking, cycling and local public transport use, particularly where they are part of a network of centres;
- higher-density housing will be encouraged in and around LNACs;
- these centres can improve access to local services and accommodate the changing housing needs of local residents who do not want to break their links with their local community.

These centres can be defined by the following uses:

One or more supermarket, wide range of small businesses, personal services, professional and other commercial services, cafes, library and local government offices, health recreation and community services, religious and educational facilities such as primary schools, medical centres, maternal health centres and multipurpose community facilities.

Neighbourhood Activity Centres (NACs)

Neighbourhood Activity Centres may include the following elements:

- centres dominated by small businesses and shops;
- they offer some local food shopping convenience services;
- generally less than 10,000 square metres of retail floor space;
- accessible by walking and cycling;
- accessibility by local bus services, and public transport links to one or more PACs or MACs;
- have a role as important community focal points, ideally close to community services (schools, libraries, etc.) and other facilities that benefit from good public transport;
- medium-density housing will be encouraged in and around NACs;
- these centres can improve access to local services and accommodate the changing housing needs of those who do not want to break their links with their local community.

These centres can be defined by the following uses:

Single supermarket, range of small businesses, personal services, commercial services, cafes, health recreation and community services such as medical centres, maternal health centres and multipurpose community facilities.

Bulky Goods Centre

An area to the west of the Wendouree Major Activity Centre is identified as a bulky goods centre (Wendouree Bulky Goods Retail Centre). This area has been identified as a separate centre in recognition of the different types of activity and movement generated by a precinct that specifically accommodates 'bulky goods' or large format retail stores.

The Ballarat West Precinct Structure Plan includes a bulky goods centre, as part of the Glenelg Highway Major Activity Centre. In accordance with the Precinct Structure Plan, this centre will primarily serve the population of the Ballarat West Growth Area and will be staged in line with demand growth in the Growth Area.

The Strategy supports these centres being further developed to become a major bulky goods retailing destination in the City of Ballarat and wider region. However it is important to carefully monitor and manage the types of retail uses which locate in these centres, to ensure that they do not detrimentally impact on the role and function of the Ballarat CBD. Large format retail uses to be encouraged within these centres should be in keeping with State Policy definitions.

9.2 Activity Centres Hierarchy and Indicative Floorspace

This Section of the Strategy provides a summary of existing and emerging Activity Centres in the City of Ballarat and indicative net additional floorspace[23] for each centre to 2030. The indicative net additional floorspace has been based on the economic modelling presented in Part B of the Strategy. The modelling suggests the need for a net increase in floorspace in Activity Centres throughout the municipality as follows:

1. +327,000sqm of social floorspace;
2. +117,000sqm of retail floorspace; and
3. +133,000sqm of commercial floorspace.

Based on the principles outlined earlier in this Strategy floorspace demand has been distributed throughout the municipality on the basis of the following assumptions:

- 3.5% of all future retail demand will be located outside of the centres defined in the Activity Centres Hierarchy (representing approximately 4,000sqm);
- 25% of all future demand for commercial office space will be located outside of centres in locations such as employment lands where it will play an ancillary role to industrial uses and special uses (such as the hospitals) or where it will complement existing business park clusters such as IBM (representing approximately 33,000sqm); and
- Close to 60% of all floorspace relating to special uses will be located outside of centres in schools, TAFE campuses, hospitals, medical centres etc. (representing over 187,500sqm).

The following assumptions have been made in relation to specific centres:

- That Ballarat CBD will continue to be the focal point for a range of higher order uses and activities in the municipality and wider region. This role will continue to be supported through appropriate structure planning and economic development policies. As a consequence over 50% of all estimated demand for future commercial floorspace, close to 15% of retail floorspace and 47% of new special uses floorspace (i.e. arts, education and health) has been allocated to Ballarat CBD;
- That the proposed Glenelg Highway Major Activity Centre will aim to accommodate 15% of commercial floorspace demand, 2% of special uses floorspace and 20% of retail floorspace by 2030; and
- Wendouree Major Activity Centre will aim to accommodate 16% of anticipated retail floorspace, 10% of commercial floorspace and 25% of special use floorspace.

Floorspace allocation to lower order centres is outlined in Table 57. Floorspace has been allocated commensurate to the role of each centre in the Activity Centres hierarchy.

It is important to note that in accordance with the Strategy project brief, all indications regarding net additional floorspace are aspirational and have been based upon demand modelling. They have not had regard to environmental, traffic and transport considerations affecting individual centres. Such factors will need to be considered at the more detailed design and development stage of each Activity Centres.

[23] It is important to note that these guides are aspirational and do not represent a cap

Furthermore all discussions regarding net additional floorspace are indicative only, and span the period from 2010 to 2030. Implementation and phasing of floorspace should remain subject to appropriate assessment and review at the detailed structure planning and planning permit application stages, so that net community benefit can be identified and addressed (please refer to Chapter 11 for further details of NCBA).

The following table provides a summary of the existing and prospective Activity Centre Hierarchy for the City of Ballarat in addition to indicative floorspace.

Table 57 - Proposed Future Centre Hierarchy and Growth for the City of Ballarat to 2030

Centre	Previous Hierarchy	New Hierarchy	Current Zone	Future Zone	Indicative Net Additional Floorspace to 2030 (sqm NLA)				
					Retail *	Commercial **	Special Use***	Total	Centre Characteristics
Ballarat CBD	Principal Activity Centre	Principal Activity Centre	B1Z, R1Z, PUZ	ACZ	16,500	55,000	66,000	137,500	Department stores, discount department stores, regional and sub regional office functions, peripheral sales, convenience retailing, supermarkets and a wide range of other retail, commercial, entertainment and tourism functions.
Wendouree	Major Activity Centre	Major Activity Centre	B1Z, R1Z, MUZ	B1Z, R1Z	18,500	10,000	35,000	63,500	Discount department stores, supermarkets, neighbourhood convenience, major community infrastructure.****
Glenelg Highway	Proposed	Major Activity Centre over time - commences as a LNAC	UGZ	UGZ	23,000	15,000	3,000	41,000	Act as the main shopping precinct for Ballarat West and have a civic function (including library, community centre and early years hub). Accommodate two full-line supermarkets, discount department stores, specialty shops and services. Retail floorspace made up of 29,500sqm retail core and 20,000sqm restricted retail/bulky goods by 2050. Allow residential uses and encourage the introduction of office/ home developments around the periphery of the centre. Provision of floorspace will be staged in line with demand growth in the Ballarat West Growth Area catchment.*****
Sebastopol (formerly Sebastopol North)	Large Neighbourhood Activity Centre	Large Neighbourhood Activity Centre	BIZ, MUZ, R1Z	B1Z, R1Z	2,000	5,000	17,000	24,000	Supermarkets, specialty shops, major community and social infrastructure, office functions. ******
Midvale	Neighbourhood	Large Neighbourhood Activity Centre	B1Z. R1Z	B1Z	1,000	2,500	5,000	8,500	
Lucas	Proposed	Large Neighbourhood Activity Centre over time - commences as a NAC	-	-	5,000	2,500	2,000	9,500	
Buninyong	Neighbourhood	Large Neighbourhood Activity Centre	B1Z, MUZ	B1Z, MUZ	1,000	2,000	2,000	5,000	
Sebastopol South (formerly Sebastopol)	Neighbourhood	Neighbourhood Activity Centre	B1Z, MUZ	B1Z, SUZ, MUZ	1,000	1500	4,000	6,500	
Redan (formerly Maxi Food)	Local Activity Centre	Neighbourhood Activity Centre	B1Z, MUZ	B1Z	700	1,500	2,000	4,200	Small cluster of primarily food based retail activities. Can include a supermarket specialty shops, community facilities and personal services. Opportunities for small business.
Alfredton East (formerly Alfredton Aldi)	Local Activity Centre	Neighbourhood Activity Centre	B1Z	B1Z	500	1,500	500	2,500	
Northway	Local Activity Centre	Neighbourhood Activity Centre	B1Z	B1Z	200	750	500	1,450	
Miners Rest	Local Activity Centre	Neighbourhood Activity Centre	MUZ	B1Z	200	-	500	700	
Pleasant Park	Local Activity Centre	Neighbourhood Activity Centre	B1Z	B1Z	400	750	500	1650	
Carngham Road	Proposed	Neighbourhood Activity Centre	UGZ	UGZ	3,000	1,500	1,500	6,000	Medium sized neighbourhood activity centre providing for a supermarket, specialty shops and services and opportunities for some offices. Substantial community infrastructure, including multi purpose community centre, early years hub and town park.
Wendouree Bulky Goods Retail Centre	Part of Wendouree MAC	Bulky Goods Retail Centre			40,000	-	-	40,000	Concentration of bulky goods retail.
Total					**113,000**	**99,500**	**139,500**	**352,000**	

Table Footnotes:

* Note: Retail net additional floorspace based on a proportional share of forecast demand for retail floorspace over the study period (+117,000sqm) yet subtracting the approved 40,000sqm retail development. Accordingly resulting demand of approximately 72,000sqm has been distributed.

**Note: Commercial net additional floorspace based on a proportional share of forecast demand for commercial office space (+99,000sqm) and excludes accommodation and food category

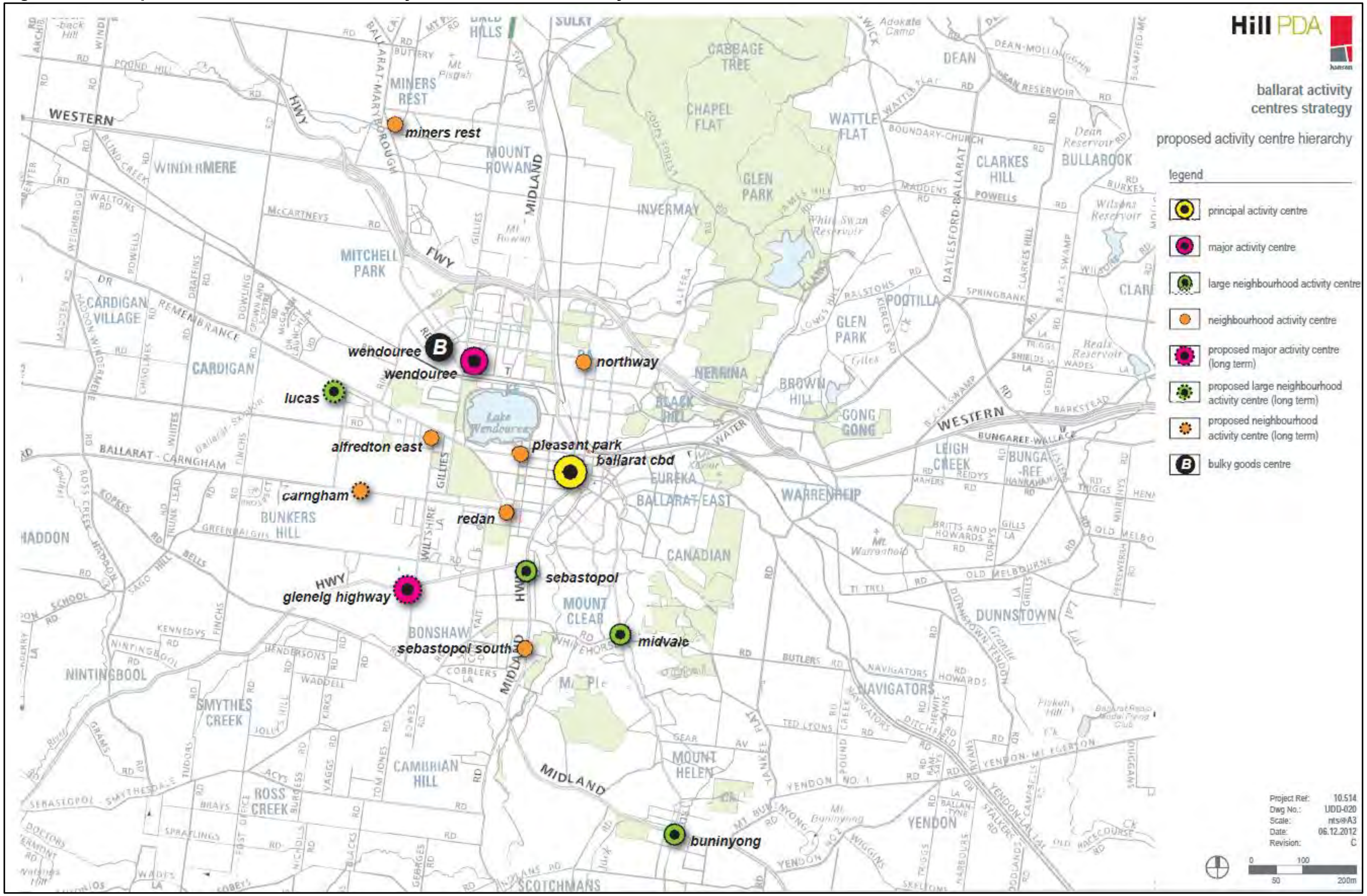
***Note: Special Use category net additional floorspace (education, health and arts) based on a proportional share of forecast demand for special use floorspace (+327,000sqm)

****Note: : No growth nominated in parts of Howitt Street not designated as part of the Wendouree Centre will now be considered out of centre and may accommodate part of the 3.5% of floorspace nominated for these areas

*****Note: Floorspace as of 2030 not 2050 as per Structure Plan

******Note: Floorspace target in relation to Lucas does not include that approved as part of Stage 1 of the Lucas Town Centre (PLP/2011/769).

Figure 10 - Proposed Future Centre Hierarchy for the Ballarat Activity Centres



9.3 Changes to the Classification of Existing Activity Centres

It is important to note that two of the centres identified in the *Ballarat Interim Activity Centres Strategy* have had their place within the new hierarchy reassessed in order to reflect their roles and compositions. These centres are discussed further below.

<u>Wendouree and Howitt Street</u>

Within the existing Activity Centre framework (documented in Part A of this Strategy) established through the *Interim Activity Centres Strategy*, Stockland Wendouree is identified as a stand-alone Activity Centre. This area also includes a large area of land to the west which accommodates existing and approved bulky goods development to the immediate west of the centre. Howitt Street, from Gillies Street North to the Sunraysia Highway is also identified a separate Activity Centre.

This Strategy proposes a reassessment of the extent and role of these centres to better reflect existing functions and preferred future roles. The proposed reconfiguration of these areas (from a policy perspective) are identified in Figure 11 which shows the existing identified centre boundaries and the changes proposed under this Strategy. These matters are discussed in more detail in the following section.

<u>Wendouree Bulky Goods Centre</u>

Bulky goods retailing requires a different built form to traditional retail, particularly in relation to the emphasis placed on vehicular access associated with larger products that may be purchased in these stores. This Strategy seeks to recognise the different urban form that this is likely to entail.

While the preference is for all retail uses to be accommodated within designated Activity Centres as a first priority, where this is not possible, the Strategy has sought to ensure that these uses can be provided in a single cluster. As there is an existing homemaker centre on the western edge of Gillies Street North and a large area which has been rezoned by Ministerial Amendment to accommodate further bulky goods uses, this is considered an appropriate location for such a cluster.

This bulky goods centre has been separated from the Wendouree Major Activity Centre as different policy will apply to each of these areas. The bulky goods centre does not reflect, nor can it be guided by, State and local planning policy on Activity Centres, which seeks to achieve a mix of uses and place a priority on pedestrian movement. Instead, development in this area should be guided by the Interim Design Guidelines on Large Format Retail Premises.

While the precinct boundary shown seeks to include existing and proposed development (and largely reflects the existing Business 4 Zoning), the boundary should not be considered binding. Additional land currently zoned Industrial 1 adjoining this precinct could be considered for expansion in the future should any proposal demonstrate demand and that there will be a net community benefit from the expansion of this precinct.

Wendouree Major Activity Centre

The Wendouree Major Activity Centre, as defined in this Strategy represents an amalgamation of the existing Wendouree Centre, with part of the Howitt Street Activity Centre and land between. This will assist in consolidating the focus of the Wendouree Major Activity Centre closer to the intersection of Gilles Street north and Howitt Street.

It will also assist in retaining the eastern part of this area for lower intensity industrial and business uses, and other uses that do not generate high levels of pedestrian movement. This new centre will essentially have two 'anchors' in the existing Stockland Centre and the existing, relatively vibrant strip of retail premises accessed via the service lane off Howitt Street.

The expansion of the land area encompassed by this new Activity Centre boundary reflects the range of land uses that should be accommodated within a Major Activity Centre, including community facilities, such as the Wendouree Performing Arts Centre, and opportunities for higher density housing.

The centre has been defined with a boundary that includes many opportunities for change and renewal, including the existing larger format and semi industrial uses to the west of the retail strip centre on Howitt Street. Particular attention should be paid in any structure planning process to urban renewal opportunities in this part of the centre.

The inclusion of Stockland Wendouree offers opportunities to further integrate and improve pedestrian connections and amenity between the eastern edge of the complex and Howitt Street.

Howitt Street, Wendouree

The remaining area of the previously identified Howitt Street Activity Centre, between Forrest Street and Creswick Road (Midland Highway), is proposed to be removed from the Activity Centre hierarchy. This portion of Howitt Street accommodates primarily semi-industrial uses, with a clustering of medical facilities in proximity to Forest Street.

Existing land uses and the physical extent of this area are not characteristic of an Activity Centre under current policy. There is little scope within the area to intensify land uses in a way which improves pedestrian access and encourages a reduction in car use and intensification of residential uses.

Given its existing uses, Howitt Street will remain an important economic and urban service corridor. This role is strongly supported by the Strategy, despite the removal of this area form the Activity Centre hierarchy. From a policy perspective it is important that the uses that occur within this corridor do not compromise the development of either Wendouree Major Activity Centre (to the immediate west), or Ballarat CBD to the south-east.

As such there needs to be clear policy direction that the corridor is not appropriate for uses such as shops (including restricted retail) which would be better located in the defined Activity Centres. Its current zone will remain to ensure that existing uses are not impeded upon as a result of the changes in the Activity Centre boundary.

As the land is zoned Mixed Use and in order to avoid inappropriate restrictions on potential alterations to existing businesses, careful consideration should be given to the uses which will be supported given it is not appropriate to specify maximum leasable floor areas within the schedule to this zone. This area is identified in Figure 11 as the Howitt Street Future Investigation Area 1.

The Strategy has also identified a number of existing uses on Howitt Street to the east of Creswick Road (the Midland Highway) through to Doveton Street North which have the potential to transition in use over time to support current uses in the locality. Whilst this area has not been identified in either this Strategy or in the *Interim Activity Centre Strategy* as part of an Activity Centre, the future uses in this area will need careful consideration to ensure that development supports rather than compromises the function and long term sustainability of commercial activity within the existing activity centre. As such, the area has been identified as the Howitt Street Future Investigation Area 2 in Figure 11 to identify the need for further detailed work to determine the best long term use for the land in this area.

Figure 11 - Wendouree and Howitt Street Activity Centre Reclassification

Ballarat Marketplace

The *Interim Activity Centres Strategy* identified Ballarat Marketplace as a separate Activity Centre. This Strategy has found however that the mix of uses and cluster of bulky goods does not constitute a separate 'Activity Centre'. This area plays a peripheral role to retailing in Ballarat CBD. Whilst the main tenants are Bunnings, Officeworks and an Aldi supermarket, the remainder of the centre comprises either semi-industrial or remnant residential uses. There is little supporting retail, service or office development.

Given the existing land use and tenant type, the relatively isolated position of the centre (particularly for pedestrian access) and its proximity to the Ballarat CBD, this Strategy considers Ballarat Marketplace as being a peripheral part of the Ballarat CBD. However, it is recommended that the City of Ballarat further investigates the role and function of this part of the City either through a highest and best use assessment or similar study. Given Part B of this Strategy recognised significant retail and service provision (i.e. supply) within the periphery areas of the Ballarat CBD to which Ballarat Marketplace is part, this Strategy also recommends further investigation of the role and function of these periphery areas.

It is noted that there are some areas which were not identified in the Interim Activity Centre Strategy which would be logical to also include in any future assessment of this land. These have been identified by the dashed line in Figure 12 below.

Figure 12 - Ballarat Marketplace Area for Further Investigation

9.4 Existing Activity Centres to be Renamed

In Part A of the Strategy, the names and boundaries used in the *Interim Activity Centres Strategy* and other Council documents were adopted for consistency. However, further to the detailed assessment undertaken for this Strategy, and feedback from the community consultation programme, it was identified that a number of existing centres would benefit from being renamed.

The reasons for this are twofold. Firstly, in many cases the current names of centres do not reflect the roles the centres play in the Activity Centres hierarchy. Secondly, some of the centres have been named after anchor tenants. This is not considered appropriate moving forward given anchor tenants can change, and diversity of activities and uses are encouraged in centres.

Without prejudicing opportunities for the renaming of centres by the local community and stakeholders in the future, suggested new names of affected centres are as follows:

- Sebastopol – previously known as Sebastopol North;
- Sebastopol South – previously known as Sebastopol;
- Alfredton East – previously known as Alfredton Aldi; and
- Redan – previously Maxi Foods.

These 'suggested' names have been used in the Activity Centres Hierarchy and Action Plans in Part D of this Strategy.

9.5 New Activity Centres in Growth Areas

An assessment of the future role and function of Activity Centres within the City of Ballarat has been undertaken with an understanding and view of the role new Activity Centres may perform in Ballarat in the future. Three new centres have been identified as required in the municipality over the next 20 – 40 years within the Ballarat West Growth Area.

These centres will be supported by a network of smaller Local Activity Centres as specified in the Precinct Structure Plans. Additional comments are provided below.

Lucas

Lucas is identified as one of the new centres to be developed. It will initially be developed as a Neighbourhood Activity Centres, but has the potential to evolve into a Large Neighbourhood Activity Centre over time.

The centre will develop around a single primary retail anchor, with potential for a second anchor over time. The centre will also include a community hub and neighbourhood park, along with additional retail, medium density residential and employment opportunities. This composition is in keeping with the Activity Centres principles identified in this Strategy.

It should be noted that a Precinct Structure Plan has been adopted for Alfredton West which includes the Lucas Activity Centre and it is now part of the Ballarat Planning Scheme. Furthermore the Lucas Urban Design Framework was adopted in October 2011.

Glenelg Highway and Carngham Road Activity Centres

The Glenelg Highway Major Activity Centre is a proposed Large Neighbourhood Centre that will develop into a Major Activity Centre over time, staged in line with demand growth in the Ballarat West Growth Area Catchment. The Centre will act as the main shopping precinct for Ballarat West and have a civic function (including library, community centre and early years hub). The Centre will allow residential uses and encourage the introduction of office / home developments around the periphery of the Centre.

The Carngham Road Neighbourhood Activity Centre will provide for a mix of retail and services with opportunities for some offices. It will provide substantial community infrastructure, including multi-purpose community centre, early years hub and Town Park.

Both the Glenelg Highway Major Activity Centre and Carngham Road Neighbourhood Activity Centre should be developed in accordance with the Ballarat West Precinct Structure Plan.

9.6 Activity Centre Action Plans

The Action Plans which can be found on the following pages can be used by Council independent of this Strategy, as stand-alone brochures. These brochures outline opportunities for improvement (with a primary focus on the physical realm of the centres), and the preferred future role for the centres.

The brochures also identify key actions for each centre (also found in the Implementation Plan at Section 10.8). It is important to note that Action Plans have not been prepared for the centres in the 'Neighbourhood' category which are of a smaller scale with fewer propensities towards change. These include Pleasant Park, Northway and Miners Rest. Given the low level of change anticipated for these centres (at least within the short - medium term) a dedicated Action Plan was not considered a necessary step in the implementation of this Strategy.

BALLARAT CBD

FUTURE ROLE: PRINCIPAL ACTIVITY CENTRE

future role

The Ballarat Central Business District (CBD) will continue to serve as the Principal Activity Centre (PAC) within the City of Ballarat. It will develop over time as the primary commercial centre for Western Victoria, while expanding and diversifying the retail offer available. The Centre will continue to build on the synergies with the educational opportunities and the heritage assets which contribute to the Centre's character. The PAC will remain the key focus area for office and commercial development in the City.

The amount of people living within the PAC's trade area will increase substantially over time which will generate increased activity within the Centre across a longer range of hours. There will be redevelopment of significant parcels of land within the PAC increasing the floorspace available and revitalising tired areas of the Centre. The pedestrian environment within the Centre will be improved and movement between different parts of the Centre will become easier.

implementation

The rezoning of the Ballarat CBD to an Activity Centre Zone would allow Council to most easily implement the recommendations of the CBD Strategy which has been prepared to guide the future development of this PAC. If required, any changes to the CBD Activity Centre boundary will be resolved as part of this process.

public realm improvements

As per the recommendations of the CBD Strategy. As the CBD contains a number of sub precincts all key public realm improvements cannot be encapsulated within this section of the Activity Centres Strategy.
For further details please refer to the Ballarat CBD Strategy.

private realm improvements

As per the recommendations of the CBD Strategy. As the CBD contains a number of sub precincts all key private realm improvements cannot be encapsulated within this section of the Activity Centres Strategy.
For further details please refer to the Ballarat CBD Strategy.

key actions

As the CBD contains a number of sub precincts all key actions cannot be encapsulated within this section of the Activity Centres Strategy.
For further details please refer to the Ballarat CBD Strategy.

future floorspace

The future floorspace (sqm NLA) for the Ballarat CBD to 2030 includes an indicative net additional:

	2015	2020	2025	2030	Total
Retail	1,500	3,000	6,000	6,000	16,500
Commercial	8,000	12,000	15,000	20,000	55,000
Special Use	6,000	12,000	20,000	28,000	66,000
Total Floorspace	15,500	27,000	41,000	54,000	137,500

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FUTURE ROLE: MAJOR ACTIVITY CENTRE

future role

The Wendouree Major Activity Centre (MAC) will see some significant changes moving forward. The existing Stockland Shopping Centre will continue to develop and play a large role in activity within the Centre. However, the extent of the MAC will be broadened to incorporate the western portion of Howitt Street to develop greater synergies and improved connections between these two activity nodes. The area will build upon existing medium density development to increase the amount of residents living close to the Centre. Connections to the railway station will improve as the western end of Howitt Street is developed to a greater intensity as befits the MAC status of the Centre. Pedestrian movement and amenity throughout the Centre will also improve over time.

implementation

The zoning within the Centre is generally considered appropriate. While there are some areas in the Centre where it is considered change may be appropriate, it is recommended that, given the status of the Centre as a MAC, the preparation of a structure plan to guide future development and the final boundary and zoning changes should be undertaken. Some rezoning of land is recommended for consideration in the shorter term, being the mixed use zoned areas within the amended Activity Centre boundary which should be rezoned to Business 1. This Strategy adjusts the boundary of the Centre to include land within the Howitt Street corridor to the west of Forest Street extending to Gillies Street. The Centre now includes a large residential area between Stockland and Ballarat Grammar, noting that this land is suggested for retention in the Residential 1 Zone.

public realm improvements

- Establish wide, safe and well lit footpaths lined with canopy trees between key destinations including Wendouree Station, Howitt Street, Gillies Street, Stockland Shopping Centre, Wendouree Homemaker Centre, Woolworths (Howitt Street).
- Establish high quality pedestrian/bicycle links between Gillies Street and Learmonth Street (adjoining Bunnings).
- Develop a high quality pedestrian/bicycle link between Gillies Street and Park Street (south of Stockland Shopping Centre), extend Cromwell Street to the west.
- Establish a vehicle accessway to the rear of properties in Howitt Street and abutting the railway line to provide rear servicing and access to rear car parking areas.

private realm improvements

- Consolidate residential development south and east of the Stockland Shopping Centre with high quality medium density housing.
- Work with the management of Stockland to ensure any future expansion improves the Centre's visual presentation to Norman Street and Gillies Street North.
- Encourage Stockland Shopping Centre and abutting development along Park Street to develop a continuous and efficient street connection with Howitt Street.
- Encourage Stockland Shopping Centre to establish high quality landscaping, pedestrian connections and bicycle parking throughout the precinct and surface car parks.
- Encourage the redevelopment of properties along the southern side of Howitt Street to create a continuous retail and active street edge with car parking at the side or rear of properties.
- Encourage the renewal of blank walls at the Queen Elizabeth Centre aged accommodation interfacing the Stockland Shopping Centre car park through improved surface treatments and additional openings.
- Encourage the consolidation of lots and limited vehicle crossovers to improve continuous and safe pedestrian paths along the street edge of the Southern side of Howitt Street.
- Redevelop the south-eastern and south-western corners of the Howitt Street and Gillies Street intersection with high quality buildings that mark the street corners.

key actions

- Undertake a structure planning process for the Major Activity Centre. This plan could consider the following:
  - The appropriate final boundary for this Activity Centre;
  - The preferred name for the amalgamated centre and rebranding, should a change be supported;
  - Connections for pedestrians across Howitt Street and to Stockland Wendouree;
  - Access to public toilets and seating within the centre, as well as additional lighting and disabled access points;
  - The intensification of retail and commercial development to the west of the Howitt Street service lane, including repairing the street edge;
  - Better integrate land uses (for example: the aged care accommodation); and
  - Medium density housing opportunities.
- Work with Stockland to improve public realm interfaces and amenity around the Stockland Shopping Centre and pursue improved pedestrian and vehicular linkages from the Stockland Shopping Centre to Howitt Street and to the Wendouree bulky goods precinct. This should include greater activation of the eastern elevation of the Centre.
- Begin tree planting in the Howitt Street median and footpath and improvements to pedestrian pavement surfaces.

future floorspace

The future floorspace (sqm NLA) for Wendouree to 2030 includes an indicative net additional:

	2015	2020	2025	2030	Total
Retail	6,500	6,500	3,000	2,500	18,500
Commercial	1,500	3,000	3,000	2,500	10,000
Special Use	5,500	7,000	9,000	13,500	35,000
Total Floorspace	13,500	16,500	15,000	18,500	63,500

action plan

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ballarat activity centres strategy
wendouree activity centre action plan

legend
- activity centre boundary
- encourage high quality medium density housing
- stockland redevelopment to address main street frontages
- establish defined pedestrian and vehicle through link
- incorporate canopy planting, safe pedestrian/ cycling links between street and entries in car parks
- establish continuous active retail edge
- encourage lot consolidation and removal of crossovers
- bulky goods retail centre
- encourage car parking consolidation to rear of lots
- establish accessway to service rear carparks
- seek improvements to blank wall presentation
- provide safe, well lit footpaths with shade trees
- establish through block pedestrian/ cycling links
- provide pedestrian/ cycling crossing
- development to demarcate intersection

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SEBASTOPOL

FUTURE ROLE: LARGE NEIGHBOURHOOD ACTIVITY CENTRE

future role

Sebastopol (formerly known as Sebastopol North), like Midvale will develop over time to become a Large Neighbourhood Activity Centre, increasing the level of retail and service offer, commercial floorspace and community facilities. The area will also continue to develop medium density housing around the Centre to provide immediate access to these facilities to a greater number of residents. Sebastopol is one of the centres expected to experience relatively substantial growth. This is partly related to the growing catchment but also the locational context and large lots available for redevelopment. The existing retail offering will remain centred around the existing supermarkets in the short to medium term, while large sites such as the Dahlsens and Eclipse site will develop more intensively with mixed uses over the medium to longer term. Residents will be able to move more easily around the Centre, including across the Midland Highway and will have the opportunity to access a range of community services and facilities as well as retail offer.

implementation

Given this Centre is anticipated to grow into the future some expansion is recommended to accommodate this growth. An expansion of the Centre boundaries to include an existing parcel of residential land to the south east and the infill of land fronting the western side of the Midland Highway would be recommended. Land within the Centre's boundary should be considered for rezoning to Business 1, including land currently zoned Residential 1 and Mix Use Zone but excluding the parcel of land zoned Special Use Zone.

public realm improvements

- Establish a high quality landscape feature along the Midland Highway including canopy trees and linked thematic street planting into the surrounding residential areas.
- Establish safe pedestrian crossings at key points along the Midland Highway, including and upgrade to the intersection of the Midland Highway and Hertford Street.
- Provide safe cycle access to the Centre, in particular provision of bike lanes along the Midland Highway and key intersecting streets.
- Investigate scope to reduce the speed limit within the core of the Centre.

private realm improvements

- Encourage the redevelopment of key opportunity sites, including Woolworths, Dahlsens and Eclipse Ford.
- Encourage redevelopment and improvements to residential properties which reinforce a high quality built form and landscape character along the Midland Highway, which should also improve the array of retail and support services within the Centre.
- Encourage the redevelopment of properties zoned Business 1, along the Midland Highway (both sides) between ALDI and Eclipse site to establish continuous and active frontages to the street edge.
- Encourage medium density consolidation around the periphery of the commercial land.

key actions

- Undertake a structure planning process for the Centre. This plan could consider the following:
  - The appropriate final boundary for this Activity Centre;
  - Appropriate zoning for land within the final boundary of the Activity Centre;
  - Weather protection and the provision of services such as public toilets, disabled access, street furniture and lighting;
  - Opportunities for outdoor dining and other mechanisms to increase activity and passive surveillance within the centre;
  - Pedestrian linkages across the Midland Highway, as well as the pedestrian environment along the road corridor (including reducing crossovers);
  - Medium density housing opportunities in close proximity to the centre;
  - Key redevelopment sites;
  - Social and community infrastructure opportunities within the centre; and
  - The intersection treatment at the junction of Hertford Street and the Midland Highway.
- Work with stakeholders to develop an Investment Attraction Strategy including a Target Tenancy Plan to increase the range of service and retail opportunities available within the Centre and branding of the Centre.
- Develop a Safety and Security Improvement Plan for the Centre and promote the consideration of CPTED principles.
- Work with transport providers to improve public transport access to the Centre.
- Begin establishing coordinated canopy tree planting along footpaths, roundabouts and central medians within the Centre, and improvements to the pedestrian pavement surface.

future floorspace

The future floorspace (sqm NLA) for Sebastopol to 2030 includes an indicative net additional:

	2015	2020	2025	2030	Total
Retail	500	1,000	-	500	2,000
Commercial	1,000	2,500	-	1,500	5,000
Special Use	4,500	6,500	-	6,000	17,000
Total Floorspace	6,000	10,000	-	8,000	24,000

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action plan

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ballarat activity
centres strategy

sebastopol
action plan

legend

- activity centre boundary
- reinforce with quality built form and landscape
- redevelop with continuous retail frontage
- medium density residential consolidation
- develop strong landscape character and image
- develop safe pedestrian crossings
- reduce speed limit
- upgrade intersection
- encourage redevelopment of key development opportunity sites

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MIDVALE

FUTURE ROLE: LARGE NEIGHBOURHOOD ACTIVITY CENTRE

future role

Midvale will grow to become an important Large Neighbourhood Activity Centre. The Centre will serve the existing community, as well as residents across the Canadian Valley, the population of which is expected to increase significantly over the strategy's timeframe. The Centre will build on its proximity to schools and other important community assets such as the Canadian Creek Reserve to become a 'hub' for community services and facilities (such as maternal and child health centres), as well as providing access to an increased range of food shopping and other personal services. Current uses of the Centre such as the gym, will be built upon by the provision of cafes, and possibly even a restaurant over time, to increase the use of the Centre into the evening. Additional medium density development will be provided around the Centre and will ideally link the Centre to the creek corridor. Some 'home office' or small business premises may develop around or within the Centre over time.

implementation

The existing Business 1 Zoning is considered appropriate, however, the Centre should be expanded to accommodate for future growth. Whilst all areas within the Centre's boundary do not need to be zoned for business uses, and indeed, some areas within the Centre's boundary are specifically recommended for medium density residential development, some additional rezoning of land would be beneficial to the ongoing development of this Centre.

The boundary shown in this action plan indicates the Centre will be expanding to both the north and to the east across the Midland Highway over time. As such the land to the north may need to rezoned in the medium term, however, no changes to the current zoning regime are recommended in the short term.

public realm improvements

- Construct a wide public footpath along the west side of Geelong Road between the IGA supermarket and Cartledge Street.
- Provide community notice boards as part of the development of any community services hub, as well as informal spaces for users of the Centre to gather, including child play areas.
- Ensure physical integration between retail, residential and community uses through well defined and wide paths with shade trees and a series of designated pedestrian crossings on Geelong Road and Whitehorse Road.
- Provide bicycle parking and a network of connected pedestrian paths within the B1Z with weather protection.
- Improve street tree planting throughout the Centre and link in with the landscape treatments in surrounding residential areas building on the image of a 'rural' landscape theme.
- Construct a pedestrian and bicycle link between the Centre and the Canadian Creek.
- Upgrade the intersection of Geelong Road, Whitehorse Road and Recreation Road with legible, convenient and safe pedestrian crossings.

private realm improvements

- Encourage development in the Business 1 Zone providing a continuous retail frontage to Geelong Road and Whitehorse Road.
- Encourage additional car parking to be located at the rear of buildings away from the primary pedestrian routes of Geelong Road and Whitehorse Road.
- Encourage redevelopment of land to the east of the Midland Highway which incorporates consolidated residential development and investigate the opportunity to create active frontage to Geelong Road (i.e. retail, business services or home offices).
- Investigate opportunities to achieve a pedestrian and bicycle link between the Centre and the Canadian Creek.
- Treat blank side walls visible from streets with landscaping or visually interesting painted surfaces.
- New buildings should avoid the development of blank side and rear walls through fenestration, material treatments and where appropriate varying buildings setbacks.

key actions

- Undertake a structure planning process including redefinition of the Centre's boundary, including consideration of the expansion of the Centre to the north to include currently vacant land along the Geelong Main Road. The plan could consider:
  - The appropriate final boundary for this Activity Centre;
  - Connections from the rear car park to the retail areas;
  - Additional medium density residential development proximate to the centre; and
  - A café and children's play area within the centre.
- Investigation of the establishment of a community services hub within or in close proximity to the Centre.
- Work with transport providers to improve the provision of public transport access to this Centre.

future floorspace

The future floorspace (sqm NLA) for Midvale to 2030 includes an indicative net additional:

	2015	2020	2025	2030	Total
Retail	-	500	-	500	1,000
Commercial	-	1,500	-	1,000	2,500
Special Use	-	2,500	-	2,500	5,000
Total Floorspace	-	4,500	-	4,000	8,500

MIDVALE

action plan

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ballarat activity centres strategy

midvale shopping centre action plan

legend

- activity centre boundary
- establish continuous active retail to street edge and car parking at the rear
- seek improvement to blank wall presentation
- finvestigate opportunity for active frontage
- encourage consolidated residential development
- establish pedestrian/ cycling through link from centre to creek
- provide wide connected footpath
- provide of wide paths with shade trees and reinforce rural landscape character
- resolve convoluted pedestrian crossing
- integrate buildings and connections with surrounds
- investigate opportunity for a cafe
- investigate opportunity for commnuity services hub in/ near centre

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BUNINYONG

FUTURE ROLE: LARGE NEIGHBOURHOOD ACTIVITY CENTRE

future role

Buninyong will develop additional retail services, particularly around food and convenience offerings to service the needs of its resident population. In addition, the Centre will develop closer links with the nearby University campus and this will also contribute to the diversification of the retail offer and the potential inclusion of some additional residential development like student housing close to the Centre. In addition, tourism opportunities within the Centre will be developed further, and additional dining and entertainment options will attract visitors from the wider Ballarat area and beyond. The Centre has been designated a 'Town Centre' rather than a 'Neighbourhood Activity Centre' in recognition of the different role the Town Centre of Buninyong plays to that of a conventional NAC. The important heritage assets of the town will be retained and enhanced by high quality, contemporary infill development, which will remain at a low scale to reflect the rural quality of the town.

implementation

The existing zoning is considered appropriate, with the Business 1 Zone area concentrated around the Midland Highway/ Warrenheip Street junction and a small area of Mixed Use zoning to the north of this. It is considered that an expansion to the Centre boundary is not warranted at this time. Should a structure plan or urban design framework be completed for this Centre, then further refinements to the boundary may occur.

public realm improvements

- Establish a consistent landscape treatment and canopy of trees along Warrenheip Street to reflect the boulevard treatment along the Midland Highway.
- Install a series of safe pedestrian crossings along the Midland Highway to match pedestrian desire lines.
- Establish Forrest Street as a designated pedestrian and cycle link with improved street landscape, wide footpaths and designated bicycle paths.

private realm improvements

- Encourage buildings fronting Warrenheip Street south of Eyre Street to develop a continuous built edge to the street.
- Encourage the development of the carparking areas associated with the Crown Hotel with new buildings to the street frontage and car parking concealed to the side/rear.
- Encourage historic building preservation and adaptive re-use.
- Encourage tourism related businesses and development which achieves an enhanced historic image and identity.
- Encourage development on the western side of Warrenheip Street between Eyre and Barkly Street to incorporate a mix of uses and building form that respects the scale and form of the historic commercial streetscape.

key actions

- Undertake a structure planning process for the Centre. This plan could consider the following:
  - Community meeting space or focal point within the centre;
  - Pedestrian connectivity across the Midland Highway;
  - Additional residential development in proximity to the centre, diversifying housing choice and mix;
  - The development of sites for tourism accommodation in and around the centre, including B&Bs and homestays;
  - Enhance opportunities for evening entertainment for a range of age groups in Buninyong; and
  - Infill development opportunities around the key junction of the Midland Highway and Warrenheip Street.
- Work with stakeholders to develop an Investment Attraction Strategy including a Target Tenancy Plan to increase the range of service and retail opportunities. This should also consider promotion and marketing strategies to capitalise on tourism and entertainment opportunities in Buninyong.
- Work with local transport providers to increase the frequency and availability of public transport between residential areas and the University of Ballarat to Buninyong.

future floorspace

The future floorspace (sqm NLA) for Buninyong to 2030 includes an indicative net additional:

	2015	2020	2025	2030	Total
Retail	500	-	500	-	1,000
Commercial	200	-	1,000	-	2,000
Special Use	500	-	1,500	-	2,000
Total Floorspace	1,200	-	3,800	-	5,000

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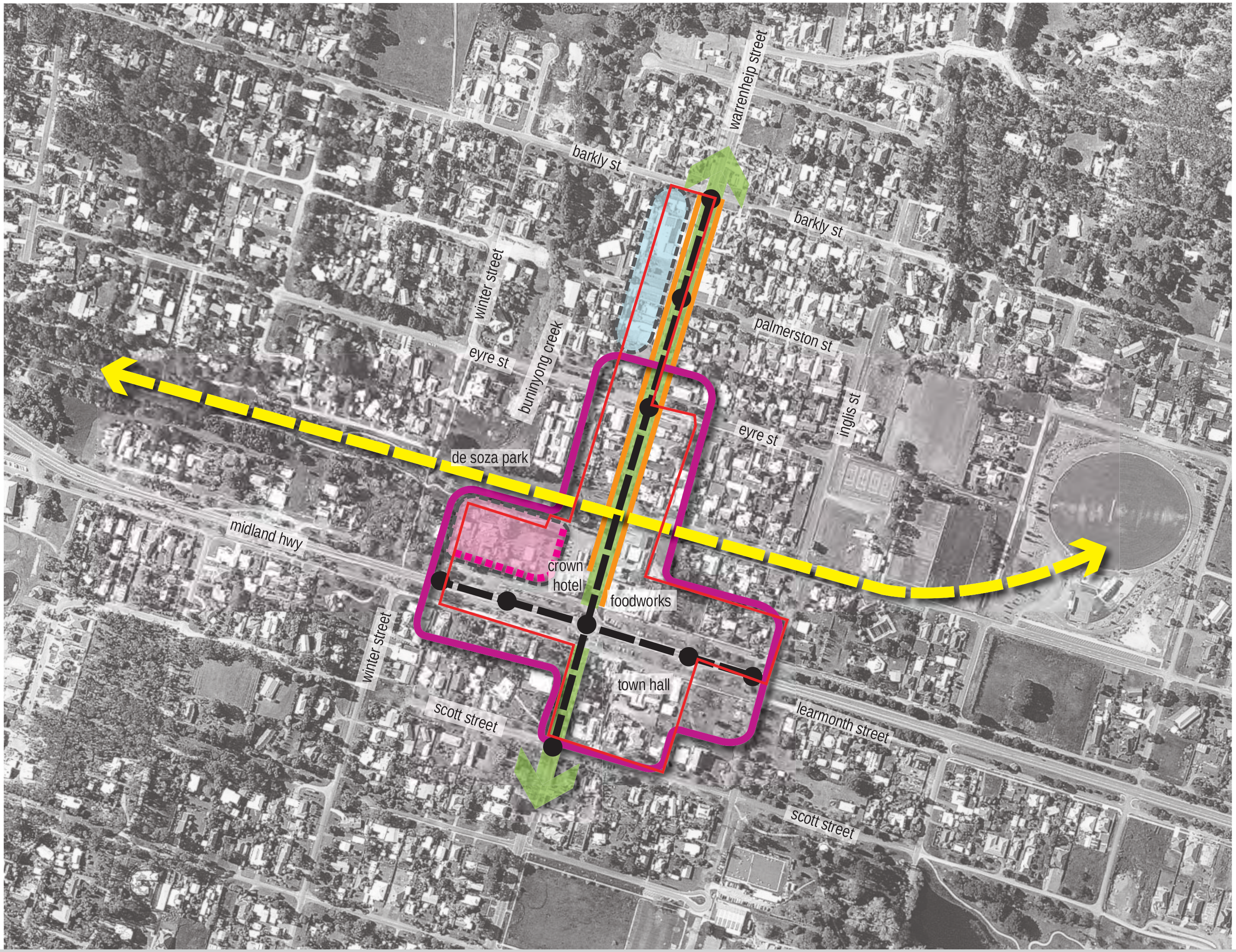
action plan



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ballarat activity centres strategy

buninyong activity centre action plan

legend

- activity centre boundary
- encourage continuous built form to street edge with footpath and canopy
- encourage redevelopment with active front and concealed car parking
- encourage adaptive reuse , mixed uses and protect traditional building scale and image
- encourage evolution of historic image and tourism activities in precinct
- establish consistent landscape themes and boulevard planting
- provide safe crossing at regular intervals to match pedestrian desire lines
- establish recreational link with wide pedestrian bicycle paths
- strengthen building edge and facilitate crown hotel development

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ballarat activity centres strategy

SEBASTOPOL SOUTH

FUTURE ROLE: NEIGHBOURHOOD ACTIVITY CENTRE

future role

Sebastopol South will continue to serve an important neighbourhood role, providing services and shopping for the local community. The existing food offering and range will increase and the activity will begin to concentrate around the supermarket and the bowling club opposite. Pedestrian movement will become safer and street tree plantings will increase the amenity of the Centre. The Centre will develop more of a community feel, with places to sit and rest comfortably for both elderly residents and younger families living in proximity to the Centre.

implementation

The existing use of the Business 1 zoning is appropriate for the centres role as a Neighbourhood Activity Centre (NAC), however it is recommended that there be some rezoning of land within the northern portion of the Centre to a Mixed Use Zone. This would more accurately reflect the existing land uses and ensure, into the future, that activity in the area remains compact and easily navigable by pedestrians. It is also recommended that the boundary of this Centre be expanded across the Midland Highway to encompass the Bowling Club and the Library/ Maternal and Child Health Centre, as these are major generators of activity and make a significant contribution to the Centre.

public realm improvements

- Establish safe pedestrian crossings at key points along the Midland Highway, including an upgrade to the intersection of the Midland Highway and Bridge Street.
- Provide safe cycle access to the Centre, in particular provision of bike lanes along the Midland Highway and Bridge Street.
- Establish a high quality landscape feature along the Midland Highway including canopy trees, and extend thematic street tree planting into the surrounding residential areas.
- Investigate scope to reduce the speed limit within the core of the Centre, particularly in proximity to the Coles and Bowling Club part of the precinct.

private realm improvements

- Encourage consistent street edge treatments, in particular, active frontages and buildings positioned close to the street edge to overcome the fragmented centre image.
- Encourage the redevelopment of Coles with buildings extending to the Midland Highway street edge, active frontages and landscaped car parking to the rear in keeping with CPTED principles.

key actions

- Undertake a structure planning process for the Centre. This plan could consider the following:
  - The appropriate final boundary for this Activity Centre;
  - Appropriate zoning for land within the final boundary of the Activity Centre;
  - Pedestrian connections across the Midland Highway in proximity to the Bowling Club and the Library/ Maternal and Child Health Centre;
  - The preferred name for the centre;
  - Improve the existing Library area with a community meeting space and outdoor landscaping improvements including seating areas;
  - Streetscape amenity (e.g. through tree planting, weather protection and improved footpaths for pedestrians);
  - Provision of public toilets, disabled access and other street furnishings; and
  - Opportunities for outdoor dining and other mechanisms to increase passive surveillance within the centre.
- Develop a Safety and Security Improvement Plan for the Centre and promote the consideration of CPTED principles.
- Work with Coles to improve the presentation, safety and retail offer of the existing supermarket, possibly through redevelopment of the site, and to encourage additional associated tenancies providing a wider range of goods.
- Work with transport providers to improve access to the Centre by public transport.
- Begin establishing coordinated canopy tree planting along footpaths and central medians within the Centre, and improvements to the pedestrian pavement surface.

future floorspace

The future floorspace (sqm NLA) for Redan to 2030 includes an indicative net additional:

	2015	2020	2025	2030	Total
Retail	200	-	800	-	1,000
Commercial	500	-	1,000	-	1,500
Special Use	1,500	-	2,500	-	4,000
Total Floorspace	2,200	-	4,300	-	6,500

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SEBASTOPOL SOUTH

action plan

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ballarat activity centres strategy

sebastopol south action plan

legend

- activity centre boundary
- consolidate retail with active frontages and weather protection to street edge
- encourage redevelopment to address street and conceal car parking
- establish safe pedestrian crossings at convenient and regular intervals
- prioritise new pedestrian crossing between Coles and Bowling Club
- provide connected bike lanes
- establish high quality consistent landscape treatment
- investigate reduction in speed limit to activity centre core
- develop community nodes

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ballarat activity centres strategy

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REDAN

FUTURE ROLE: NEIGHBOURHOOD ACTIVITY CENTRE

future role

Redan (formerly known as Maxi Food) will continue to be focussed around the supermarket (currently a Maxi Foods), with additional retailing provided to supplement this offering. Over the longer term, the Centre will expand to include more intensive land uses to the west. This may include mixed uses or small/medium office development or home offices. There is potential to improve the amenity of the area by building on the landscape character established by the presence of the ovals adjacent to the Centre and increasing pedestrian movement into and through the Centre.

implementation

It is suggested that this area should be rezoned to a Business 1 Zone to reflect its status as a Neighbourhood, rather than a Local Activity Centre. The existing boundary should remain unchanged, and the Environmental Audit Overlay also continues to apply.

public realm improvements

- Provision of a footpath along the southern side of Latrobe Street to connect the Centre to surrounding residential areas.
- Establish consistent street planting and hard landscaping features which contribute to a coordinated image and presentation.
- Provision of a through block link midway between Pleasant Street South and Adair Street.

private realm improvements

- Encourage development to establish a consistent and continuous active frontage to Latrobe Street.
- Encourage the redevelopment of properties to the west of Maxi Foods oriented to Latrobe Street and where possible to provide secondary frontage and appropriate activation of Foster Street.
- Encourage the servicing of development to occur along Foster Street with suitable acoustic and landscaping treatments to maintain the amenity of interfacing residential properties.
- Encourage the Maxi Foods site to develop active edges to LaTrobe and Pleasant Streets in the long term.

key actions

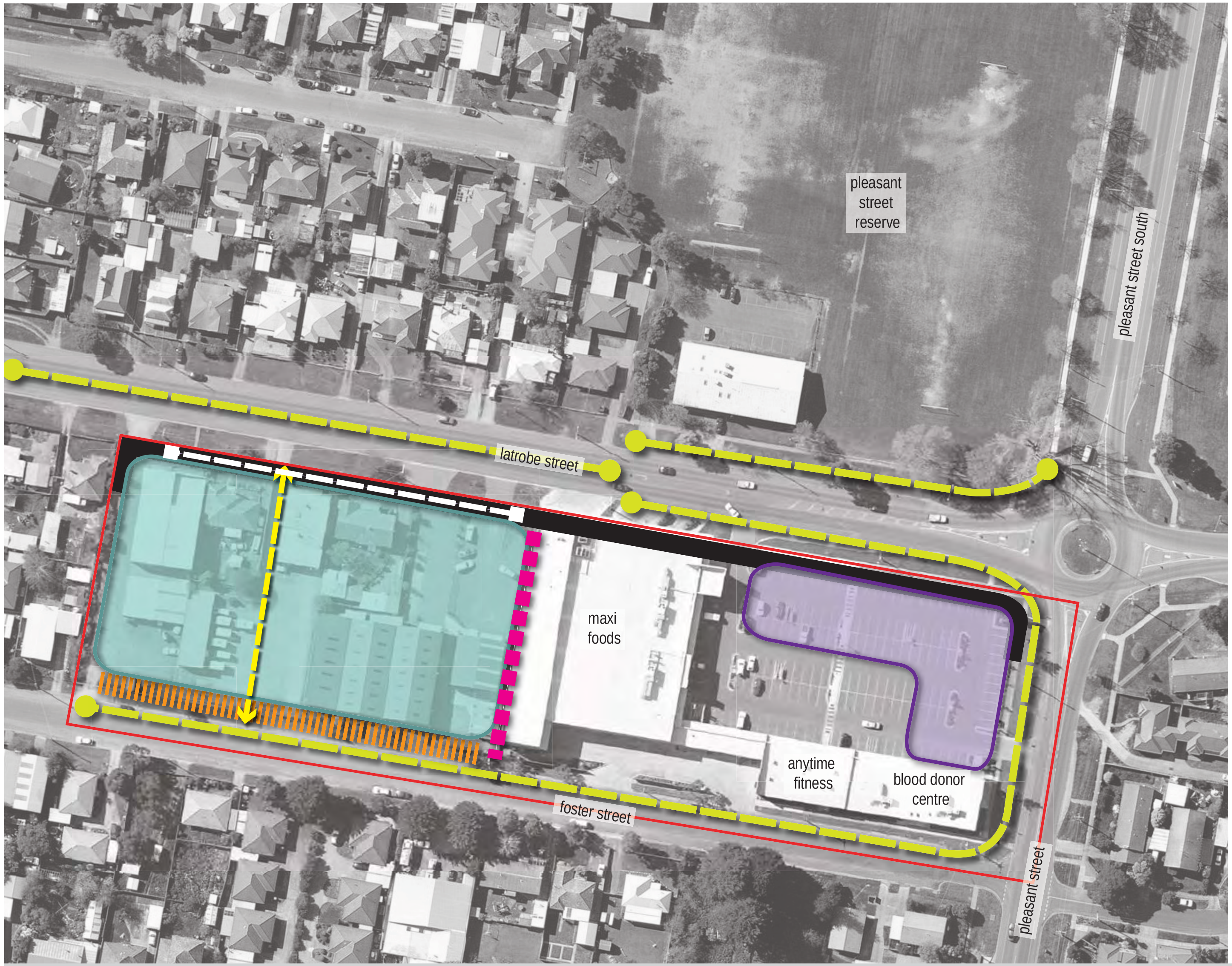
- Prepare and implement a streetscape masterplan for the Latrobe Street median / kerbside planting scheme.
- Work with the community and key business stakeholders to agree on a suitable name for the Centre such as the suggested 'Redan'.
- Improve weather protection, provision of public toilets and disabled access as well as other street furnishings, such as seating and lighting.
- Construct generous and continuous footpaths along Latrobe Street (south side) with adjoining shade planting.

future floorspace

The future floorspace (sqm NLA) for Redan to 2030 includes an indicative net additional:

	2015	2020	2025	2030	Total
Retail	-	500	200	-	700
Commercial	-	1,500	-	-	1,500
Special Use	500	500	1,000	-	2,000
Total Floorspace	500	2,500	1,200	-	4,200

action plan



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ballarat activity centres strategy

redan action plan

legend

- activity centre boundary
- establish continuous active frontage
- encourage redevelopment with primary frontage to latrobe st and secondary activity to foster st
- encourage medium- long term development of street edge
- encourage rear service and loading with positive interface, acoustic treatments and landscape to protect residential amenity
- provide wide, connected pedestrian path
- provide continuous landscape treatments include canopy trees
- create north-south link in precinct
- conceal or activate blank walls

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ALFREDTON EAST

FUTURE ROLE: NEIGHBOURHOOD ACTIVITY CENTRE

future role

Alfredton East (formerly known as Alfredton Aldi) is currently dominated by the ALDI supermarket and the Shell service station at the junction of Gillies and Sturt Street. The Centre will continue to function as a Neighbourhood Activity Centre (NAC) but there will be some increase in the mix of uses provided at the Centre. This is likely to include some small mixed use developments and the infill of street frontages within the Centre to increase the concentration of activity.

implementation

The existing Business 1 Zoning is considered appropriate, as is the current boundary for this Centre.

public realm improvements

- Establish a north-south laneway link between Sturt Street and Jelbart Place (east of Longley Street) for rear / side vehicle servicing.
- Provide hard and soft landscaping along streets, signage and generous pedestrian spaces which enhance the Centre's image.

private realm improvements

- Encourage redevelopment and new buildings which activate street frontages as a priority and locate car parking so as to minimise gaps in buildings along the street edge, i.e. locating parking to the rear.
- Encourage redevelopment of the Shell service station at the corner of Sturt Street and Gillies Street South to demarcate the intersection corner with a high quality landmark building.
- Encourage development along Longley Street to establish a landscaped and activated frontage which creates a positive interface with and amenity for the residential areas.
- Encourage renewal or redevelopment of key sites to create a high quality contemporary image that is sympathetic to the historical significance of Sturt Street and presentation with active frontages.
- Encourage provision of landscaping of surface car parking, in particular ALDI.
- Encourage new development to complement public realm landscape works and orientate buildings with active frontages towards pedestrian routes and the street edges.

key actions

- Prepare a streetscape masterplan for the Centre and implement consistent landscape, treatments, paving and street furniture treatments throughout.
- Work with the community and business stakeholders to agree on an appropriate name for the Centre such as the suggested 'Alfredton East'.
- Provide an outdoor community meeting space with seating and community information within the Centre.
- Work with property owners to pursue a north-south link between Sturt Street and Jelbart Place.
- Improve connections and visual links between the Centre and surrounding parkland.

future floorspace

The future floorspace (sqm NLA) for Alfredton East to 2030 includes an indicative net additional:

	2015	2020	2025	2030	Total
Retail	-	500	-	-	500
Commercial	-	1,500	-	-	1,500
Special Use	-	500	-	-	500
Total Floorspace	-	2,500	-	-	2,500

action plan

ballarat activity centres strategy

alfredton east action plan

legend

- activity centre boundary
- redevelopment to demarcate corner with high quality buildings
- development with active street edges, car parking to rear and positive image
- pursue priority redevelopment opportunities
- pursue secondary redevelopment opportunities
- active and continuous building frontages
- positive building interfaces with active frontages and/ or well landscaped setbacks
- establish north - south through block link
- hard and soft landscaping to define image and identity
- private realm landscape to reinforce landscape themes

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ballarat activity centres strategy

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Part D

Implementation and Management

To conclude, Part D of the Strategy provides a comprehensive summary of recommendations and an appropriate plan for implementation. This part includes an action plan for each centre and outlines key infrastructure requirements for Ballarat's Activity Centres. It also provides recommendations as to the planning process to implement the Strategy in addition to timeframes and key responsibilities.

10. IMPLEMENTATION, MONITORING AND REVIEW

The purpose of this Chapter is to identify how this Strategy can be implemented. There are a range of options available to the City of Ballarat, including statutory law through the application of the planning scheme and changes to zoning controls. There are a number of additional place management and safety measures that this Chapter recommends. Many of these matters are then summarised in the 'action plans' prepared for the larger centres within the hierarchy (as identified in the preceding Chapter). The Implementation Plan, presented in Section 10.8 brings together all these elements and provides a guide to recommended timeframes for delivery and likely lead parties.

This Chapter looks realistically at how the City of Ballarat can begin the process of achieving a vibrant network of Activity Centres throughout the municipality, by adopting a realistic methodology and timeframe for the work required.

10.1 Amendments to Activity Centre Boundaries

The Strategy proposes to adjust the boundaries of two Activity Centres. The justification for the proposed changes is provided below. It should be noted however, that suggested changes to the boundaries should be tested and finalised through a more detailed structure planning process. This is also true for other centres such as Sebastopol South and Buninyong, despite no specific changes to their boundaries being identified below.

Wendouree/ Howitt Street

The two Activity Centres previously known as Wendouree and Howitt Street (part) have been amalgamated by the Strategy as discussed in Section 9.3 (Changes to the Classification of Existing Centres). Changes to the Activity Centre boundaries for these centres are also identified in Figure 11, Section 9.3.

There are a number of sound planning reasons underpinning the recommended amendments to the boundaries of these centres being:

- It was identified that the western portion of Howitt Street functions as a smaller retail cluster independent of the more semi industrial uses occurring at the eastern end of Howitt Street. This eastern end is more appropriately characterised as an 'employment corridor' than as an Activity Centre. As the eastern and western ends operate differently, they have been considered independently.
- Given the proximity of the western end of Howitt Street to the existing Stockland Wendouree shopping centre (currently designated as Wendouree Major Activity Centre), it is rational to draw a nexus between these two clusters, and adjacent community infrastructure (Performing Arts Centre and school) to form an integrated Major Activity Centre.
- Amalgamating the centres allows for additional development of retail floorspace, and importantly offers clear opportunities for the development of higher density housing within the residentially zoned areas of the new Activity Centre boundary.
- The amalgamation will encourage Stockland Wendouree to engage with surrounding land uses. Given it is often beneficial for Activity Centres to have anchor destinations, there are opportunities to exploit the connection between Stockland and other important attractors (e.g. primary school, Performing Arts Centre and strip shopping centre), leading to a more inclusive and integrated Activity Centre.

- The separation of the Bulky Goods Centre to the west of Gillies Street from the Wendouree Major Activity Centre is appropriate given the different land uses and the clear distinction in design treatments and interaction with their public realm.

Sebastopol

The Activity Centre boundary of Sebastopol is recommended to expand to accommodate the anticipated need for additional floorspace as the centre develops over time into a Large Neighbourhood Activity Centre. While the areas identified for inclusion in the centre on the relevant Action Plan should be tested during a structure planning process, it is intended to offer a starting point for that process.

The boundary includes some additional land zoned Residential 1 and has been extended to form a more logical boundary. It was considered important to include sites such as the existing Eclipse car yard, Dalhsens, and the hotel site within the boundary to ensure that the boundary reflected the likely extent of development over time. It may be that a larger area is required in the future, but it is considered that this should be investigated further, in collaboration with landowners and stakeholders of the Sebastopol Activity Centre.

Midvale

It is recommended that the Activity Centre boundary of Midvale is expanded to accommodate the anticipated need for additional floorspace as the centre develops. An area to the north of the centre has been identified however there are also possibilities to expand to the east across the highway. While the areas identified for inclusion in the centre on the relevant Action Plan should be tested during a structure planning process, this Strategy's recommendations are intended to offer a starting point for that process.

Sebastopol South

Some adjustments to the activity centre boundary for Sebastopol South have also been identified on the Action Plan for that centre. The area to the north of the centre is recommended to become more of a transitional or peripheral area to the centre to concentrate activity in the key area of activity (around the supermarket and bowling club). The expansion of the centre to include the maternal and child health centre and the bowling club, which are currently excluded from the centre boundary, is also encouraged. Whilst the areas identified for inclusion in the centre on the relevant Action Plan should be tested during a structure planning process, the Action Plan is intended to offer a starting point for that process.

10.2 Centres that Require Additional Structure Planning

This Strategy represents a broad level strategic document, and as a result has recommended that more detailed analysis be undertaken in relation to many of the Activity Centres. The structure planning process should be initiated by Council for the following centres, as a first priority:

- Wendouree
- Sebastopol
- Midvale
- Buninyong
- Sebastopol South

The structure plans should adopt the Activity Centre boundaries identified within this Strategy, however those boundaries should be reviewed and redefined as part of the structure planning process. The identification of these centres for structure planning does not mean that there is no role for a similar process in other centres, only that a priority exists for structure plans to be prepared for these centres.

All structure planning should give due consideration to Practice Note 56- Activity Centre Zone and Practice Note 58 – Structure Planning for Activity centres and any other relevant considerations.

10.3 Potential Rezoning for Activity Centres

The structure planning process will consider in more detail the potential and suitability of areas for rezoning in specific centres[24]. As part of the structure planning process, this Strategy has identified some matters that are considered worthy of further investigation with respect to rezoning. These include:

Sebastopol

Land within the new Activity Centre boundary identified on the Sebastopol Action Plan could be investigated for potential rezoning from Residential 1 Zone and Mixed Use Zone to a Business 1 Zone.

Wendouree

Land currently zoned for Mixed Use within the new centre boundary identified on the Wendouree Action Plan could be investigated for rezoning to Business 1, to promote retail and other business uses within the centre and to discourage residential development along the Howitt Street frontage.

Sebastopol South

Land within the northern portion of the centre, as identified in the Sebastopol South Action Plan, could be investigated for rezoning from Business 1 to a Mixed Use Zone. This may be considered appropriate in order to better reflect the nature of existing uses and to encourage the consolidation of non-residential uses at the southern end of this centre, where the highest level of activity is currently generated.

Areas no longer identified as Activity Centres

It is important to acknowledge that this Strategy does not propose any rezoning within the two areas which have been removed from the Activity Centre hierarchy. The existing Mixed Use Zoning along the south side of Howitt Street (and the small area to the north between Dowling and Essex Streets) may be reviewed through the structure planning process and may be considered to continue to be an appropriate zone to encourage the uses envisaged for this 'employment corridor'.

In relation to the previously identified Ballarat Marketplace, the existing Business 1 Zone may be considered appropriate to remain, as it does along Sturt Street beyond the boundary of the Ballarat CBD Principal Activity Centre. These matters will be confirmed subject to more detailed structure planning.

[24] The structure planning process should give due consideration to Practice Note 56- Activity Centre Zone and Practice Note 58 – Structure planning for Activity centres.

10.4 Amendments to the Planning Scheme

As part of the implementation of this Activity Centres Strategy it is recommended that the following modifications be made to the Ballarat Planning Scheme:

- Modify Clause 21.04 of the Ballarat Planning Scheme to include the principles, actions (Strategies) and definitions, contained within this Strategy. This generally applies to Sub-Clauses 21.04-4 and 21.04-6. Include this Strategy as a reference document to those clauses.
- Consider the need to include a new local policy on Activity Centres into Clause 22 of the planning scheme and include this Strategy as a reference document to that clause.
- Amend Clause 21.10 to include this Strategy as a reference document.
- Rezoning in accordance with Section 10.3.

It is recommended that changes also be made to terms presently used to describe Activity Centres in the Ballarat Planning Scheme, particularly in Clause 21.04-4 'Retail / Commercial' (i.e. regional centre, sub-regional centre), to ensure consistency with the terms used in State Policy and in this Strategy.

10.5 Smaller Activity Centres

It should be noted that this Strategy only identifies and includes Activity Centres that were identified in the *Interim Ballarat Activity Centres Strategy* or which are included at Clause 21.04 of the Planning Scheme.

It is acknowledged however, that there are a number of smaller 'Local' Activity Centres located throughout the City of Ballarat which are smaller than those identified in this Strategy, often consisting of just a few shops. A definition of such a smaller, local Activity Centre is outlined below which reflects the definition of the terms used by the Growth Areas Authority and which will therefore guide development in Ballarat's large growth areas.

Smaller / local Activity Centres may include the following elements:

- they are generally limited to between 5 and 10 premises;
- they provide a limited range of convenience retailing and local services such as take away food premises and personal services;
- are easily accessible by walking and cycling;
- provide some limited opportunity for small business functions; and
- are below 3,000sqm in floorspace and serve a catchment of between 3,000 and 5,000 people.

These centres can be defined by the following uses:

A range of small businesses which may include a small supermarket, personal service and small convenience food shopping, cafes, health and community services such as medical centres or child care, opportunities for small business or home offices.

10.6 Infrastructure

The provision of appropriate and high quality buildings, public spaces and infrastructure is critical to establishing Activity Centres that are valued by their communities. Council can play a major role in revitalising and attracting private investment to Activity Centres by leading the way with urban design and other infrastructure initiatives in centres. Potential areas for infrastructure improvement in relation to Activity Centres includes the following:

- Shelter and weather protection;
- Street tree planting;
- Street furniture and seating;
- Improvements to pedestrian access, particularly for those with limited mobility;
- Improved pedestrian crossings, particularly across busy roads;
- Improved public transport generally and better public transport connections between centres;
- Improvement or the establishment of footpaths in many centres;
- Public toilets;
- Centre branding, signage and feature lighting;
- Lighting;
- Community notice boards;
- Access for deliveries;
- Car parking; and
- Local area traffic management within and around centres.

The infrastructure requirements for individual centres needs to be identified as part of a more detailed structure planning and / or urban design framework process. Given the principle of this Strategy to engage the local community in determining the future and identity of their centres, it is essential that community input occurs in the identification and prioritisation of infrastructure projects in each centre. What is required is a capital works program for each centre which identifies the highest priority projects for that centre, their cost and timing of provision.

It is noted that some actions, such as the planting of trees within median strips, could be undertaken immediately, in areas not expected to undergo change as a result of any future structure planning process. This will allow for some immediate 'on the ground' improvements in some centres. However, it is recommended that the provision of hard infrastructure such as seating, the appropriate placement of which will be influenced by the future movement patterns of pedestrians, should be considered as part of a structure planning process, which will consider this in more detail. Improvements to footpaths and working with the landowners within the various centres to improve weather protection, can also commence immediately.

10.7 Timescales and Phasing of Implementation

Timing and phasing of the implementation of this Strategy is highlighted in the Implementation Plan provided below. The plan identifies short (2011-2016), medium (2017-2021) and long term (2022-2030) timeframes for the implementation of actions.

As a first priority it is considered that the following should be pursued by the City of Ballarat:

- The incorporation of the Ballarat Activity Centres Strategy into the Ballarat Planning Scheme;
- The structure planning of the five activity centres as identified in Section 10.2; and
- Work with key stakeholders to develop an Investment Attraction Strategy for the identified centres. This may include a Target Tenancy Strategy (to attract key anchors or services presently identified as lacking). The Strategy may also include guidelines to facilitate efficient and cost effective development as well as enhanced opportunities for engagement with Council's Development and Infrastructure Department and branding opportunities for the centres.

10.8 Implementation Plan

This Strategy recommends a number of additional actions for implementation to achieve the objectives of the Strategy. These actions are summarised within the following Implementation Plan.

Table 58 - Ballarat Activity Centres Implementation Plan

Activity Centre	Action	Timeframe	Lead
Overall Actions	Prepare a planning scheme amendment to incorporate the findings of the Ballarat Activity Centre Strategy into the Ballarat Planning Scheme.	Short Term	City of Ballarat
	Prepare structure plans for Activity Centres as identified in Section 10.2.	Short Term	City of Ballarat
	Undertake a review of the CBD periphery areas and Local Activity Centres not addressed within this Strategy to identify the community's needs in relation to local shopping opportunities and services outside of larger Activity Centres.	Short / Medium Term	City of Ballarat
	Investigate the role and function of the Ballarat Marketplace site either through a highest and best use assessment or similar study.	Short to Medium Term	City of Ballarat
	Investigate the best use and future development of the land identified within the Howitt Street Future Investigation Areas 1 and 2.	Short Term	City of Ballarat
	Consider a Place Manager for centres other than Ballarat CBD. The Place Manager(s) would help shape the future of the City by providing direct links between Council and community, including local business people, retailers, shoppers and residents. A Place Manager should be considered for Wendouree, Sebastopol, Midvale, Sebastopol South and Buninyong.	Short Term	City of Ballarat
Ballarat CBD	Continue to implement the Ballarat CBD Strategy Implementation Plan, including the work of the appointed Place Manager.	Short / Long Term	City of Ballarat
	Implementation of the Activity Centres Zone over the area to guide future development.	Short Term	City of Ballarat, DPCD
Wendouree	Undertake a structure planning process for the Major Activity Centre. This plan could consider the following: ▪ The appropriate final boundary for this Activity Centre; ▪ The preferred name for the amalgamated centre and rebranding, should a change be supported; ▪ Connections for pedestrians across Howitt Street and to Stockland Wendouree; ▪ Access to public toilets and seating within the centre, as well as additional lighting and disabled access points; ▪ The intensification of retail and commercial development to the west of the Howitt Street service lane, including repairing the street edge; ▪ Better integration of land uses (for example: the aged care accommodation); and ▪ Medium density housing opportunities	Short Term	City of Ballarat, local community and stakeholders within and around the centre, DPCD
	Work with Stockland to improve public realm interfaces and amenity around the Stockland Shopping Centre and pursue improved pedestrian and vehicular linkages from the Shopping Centre to both Howitt Street and the Wendouree Bulky Goods	Short to Medium term	City of Ballarat, Stockland Wendouree Centre Management

Activity Centre	Action	Timeframe	Lead
	Centre. This should include greater activation of the eastern elevation of the centre.		
	Separate to the Structure Planning process, work with stakeholders to develop an Investment Attraction Strategy including a Target Tenancy Plan. This would consider branding improvements and aim to increase the range of service and retail opportunities available in the centre.	Short to Medium Term	City of Ballarat, local business associations, trader groups and business networks
	Council to identify short term actions to improve the amenity of the centre, including tree planting on the Howitt Street median and footpath together with improvements to pedestrian pavement surfaces to intensify centre amenity.	Medium Term	City of Ballarat, local community, business owners and other stakeholders in Sebastopol
Glenelg Highway	Implement the Precinct Structure Plan for the Ballarat West Growth Area (Bonshaw Creek Precinct), which will include the Glenelg Highway Activity Centre.	Short Term	City of Ballarat
	Define the Glenelg Highway Activity Centre as a Large Neighbourhood, until such time as the retail capacity, public transport provision and residential population proximate to the centre exist to support the designation of the centre as a Major Activity Centre.	Short Term	City of Ballarat
Sebastopol	Undertake a structure planning process for the centre. This plan could consider the following: ▪ The appropriate final boundary for this Activity Centre; ▪ Appropriate zoning for land within the final boundary of the Activity Centre; ▪ Weather protection and the provision of services such as public toilets, disabled access, street furniture and lighting; ▪ Opportunities for outdoor dining and other mechanisms to increase activity and passive surveillance within the centre; ▪ Pedestrian linkages across the Midland Highway, as well as the pedestrian environment along the road corridor (including reducing crossovers); ▪ Medium density housing opportunities in close proximity to the centre; ▪ Key redevelopment sites; ▪ Social and community infrastructure opportunities within the centre; and ▪ The intersection treatment at the junction of Hertford Street and the Midland Highway.	Short Term	City of Ballarat, local community, business owners and other stakeholders in Sebastopol, DPCD, VicRoads
	Separate to the Structure Planning process, work with stakeholders to develop an Investment Attraction Strategy including a Target Tenancy Plan. This would consider branding improvements and aim to increase the range of service and retail opportunities available.	Short to Medium Term	City of Ballarat, local business associations, trader groups and business networks
	Develop a Safety and Security Improvement Plan for the Centre and promote the consideration of Crime Prevention Through Environmental Design (CPTED) principles.	Medium Term	City of Ballarat, local community, business owners and other stakeholders in Sebastopol
	Work with transport providers to improve public transport access to the Centre.	Medium to Long Term	City of Ballarat, DoT, Local transport operators
	Council to identify short term actions to improve the amenity of the centre, including establishing coordinated canopy tree planting along footpaths, roundabouts and central medians, as well as improvements to the pedestrian pavement surface.	Immediate	City of Ballarat, VicRoads
Midvale	Undertake a Structure Plan that investigates and addresses:	Short Term	City of Ballarat, local community, business owners and other

Activity Centre	Action	Timeframe	Lead
	▪ Connections from the rear car park to the retail areas; ▪ Additional medium density residential development proximate to the centre; and ▪ A café and children's play area within the centre.		stakeholders in Midvale, DPCD, VicRoads
	Investigation of the establishment of a community services hub within or in close proximity to the centre.	Short to Medium Term	City of Ballarat
	Work with transport providers to improve the provision of public transport access to this centre.	Medium to Long Term	City of Ballarat, DoT and local transport operators
	Council to identify short term actions to improve the amenity of the centre.	Immediate	City of Ballarat
Lucas	Implement the Precinct Structure Plan that has been developed for the Alfredton West Precinct in the Ballarat West Growth Area.	Short Term	City of Ballarat, DPCD
	Define the centre as a Neighbourhood Activity Centre, until such time as the retail capacity and residential population proximate to the centre exists to support the designation of the centre as a Large Neighbourhood.	Short Term	City of Ballarat
Buninyong	Undertake a structure planning process for the centre. This plan could consider the following: ▪ A community meeting space or focal point within the centre; ▪ Pedestrian connectivity across the Midland Highway; ▪ Additional residential development in proximity to the centre, diversifying housing choice and mix; ▪ The development of sites for tourism accommodation in and around the centre, including B&Bs and homestays; ▪ Enhance opportunities for evening entertainment for a range of age groups in Buninyong; and ▪ Infill development opportunities around the key junction of the Midland Highway and Warrenheip Street.	Short Term	City of Ballarat, local community, business owners and other stakeholders in Buninyong VicRoads, DPCD, Tourism Victoria
	Work with stakeholders to develop an Investment Attraction Strategy including a Target Tenancy Plan that would aim not only to brand the centre, but to also increase the range of service and retail opportunities available. As part of this Investment Attraction Strategy consider development of a comprehensive marketing and tourism promotion plan to capitalise on local tourism attractions (heritage and environmental assets) and entertainment opportunities for tourists as well as local City of Ballarat visitors.	Short to Medium Term	City of Ballarat, local community, business associations, trader groups, tenants, landowners and business networks, Tourism Victoria
	Work with local transport providers to increase the frequency and availability of public transport between Buninyong, residential areas and the University of Ballarat.	Short to Long Term	City of Ballarat, DoT and local transport operators
	Council to identify short term actions to improve the amenity of the centre.	Immediate	City of Ballarat
Sebastopol South	Undertake a structure planning process for the centre. This plan could consider the following: ▪ The appropriate final boundary for this Activity Centre; ▪ Appropriate zoning for land within the final boundary of the Activity Centre; ▪ Pedestrian connections across the Midland Highway in proximity to the Bowling Club and the Library/ Maternal and Child Health Centre; ▪ The preferred name for the centre; ▪ Improve the existing Library area with a community meeting space and outdoor landscaping improvements including	Short Term	City of Ballarat, local community, business owners and other stakeholders in Sebastopol South, DPCD, VicRoads

Activity Centre	Action	Timeframe	Lead
	seating areas; ▪ Streetscape amenity (e.g. through tree planting, weather protection and improved footpaths for pedestrians); ▪ Provision of public toilets, disabled access and other street furnishings; and ▪ Opportunities for outdoor dining and other mechanisms to increase passive surveillance within the centre.		
	Develop a Safety and Security Improvement Plan for the centre and promote the consideration of CPTED principles.	Short to Medium Term	City of Ballarat
	Work with Coles to improve the presentation, safety and retail offer of the existing supermarket (possibly through redevelopment of the site), which in turn would encourage new and additional tenancies providing a wider range of goods.	Short to Medium Term	City of Ballarat, Coles management group and/or land owner.
	Work with transport providers to improve access to the centre by public transport.	Short to Long Term	City of Ballarat, DoT and local transport operators
	Council to identify immediate projects to improve amenity of the centre, and commence establishing coordinated canopy tree planting along footpaths and central medians, as well as improvements to the pedestrian pavement surface.	Immediate	City of Ballarat, VicRoads
Redan	Prepare and implement a streetscape masterplan for the Latrobe Street median / kerbside planting scheme.	Short to Medium Term	City of Ballarat
	Work with the community and key business stakeholders to agree on a suitable name for the centre such as the suggested 'Redan'.	Short Term	City of Ballarat, local community, business owners and other stakeholders in the area
	Improve weather protection, provision of public toilets, disabled access and other street furnishings, such as seating and lighting.	Long Term	City of Ballarat
	Construct generous and continuous footpaths along Latrobe Street (south side) with adjoining shade planting.	Medium Term	City of Ballarat
Alfredton East	Prepare a streetscape masterplan for the centre and implement consistent landscape, treatments, paving and street furniture treatments throughout.	Short to Medium Term	City of Ballarat
	Provide an outdoor community meeting space with seating and community information.	Short to Medium Term	City of Ballarat
	Work with the community and business stakeholders to agree on an appropriate name for the centre such as the suggested 'Alfredton East'.	Short Term	City of Ballarat, local community, business owners and other stakeholders in the area
	Work with property owners to pursue a north-south link between Sturt Street and Jelbart Place.	Short to Long Term	City of Ballarat
	Improve connections and visual links between the centre and surrounding parkland.	Short to Long Term	City of Ballarat, centre landowners and tenants
Northway	Undertake an assessment of existing public facilities in the centre and provide universal access and toilet facilities where required.	Short to Medium Term	City of Ballarat
	Review weather protection and pursue improvements where required.	Short to Medium Term	City of Ballarat
Miners Rest	Review the extent of the Mixed Use zone and define a smaller area of Mixed Use zoning to support the establishment of a compact centre.	Short Term	City of Ballarat
	Undertake an assessment of existing public facilities in the centre and provide universal access and toilet facilities where	Short to Medium Term	City of Ballarat

Activity Centre	Action	Timeframe	Lead
	required.		
	Review weather protection and pursue improvements where required.	Short to Medium Term	City of Ballarat
Pleasant Park	Investigate options for provision of additional on-street angled car parking to the immediate north of the centre along Sussex Street.	Short to Medium Term	City of Ballarat
	Investigate opportunities for increased landscaping in and around the centre to build on its proximity to City Oval.	Short to Medium Term	City of Ballarat
	Review weather protection and pursue improvements where required.	Short to Medium Term	City of Ballarat
	Undertake an assessment of existing public facilities in the centre and provide universal access and toilet facilities where required.	Short to Medium Term	City of Ballarat
Wendouree Bulky Goods Centre	Ensure the *Interim Guidelines for Large Format Retail Premises* (DPCD) are incorporated as a reference document within any policy on Activity Centres.	Short to Long Term	City of Ballarat
	Improve connections to the Wendouree Major Activity Centre.	Short to Medium Term	City of Ballarat
	Ensure on-going monitoring of the take up of land for bulky goods retailing in the area to allow consideration of additional land if a net community benefit can be established.	Short / Long Term	City of Ballarat

10.9 Monitoring

In relation to the ongoing monitoring and review of this strategy, it is highlighted once again that this document is intended to provide a broad framework for the short to medium term development of Activity Centres within the City of Ballarat. It is not designed to be applied rigidly and should be reviewed regularly to ensure it remains relevant to the planning of the City of Ballarat. This Strategy is based upon current trends and practises, which may change or develop over time. What this Strategy does do is set up a framework and hierarchy which defines the relationship of each centre to others and sets in place principles which should guide future decision making.

A period of 5 years is considered to be appropriate before a review of this Strategy is required, allowing the adjustment of the Strategy to reflect changes in community behaviour, residential and retailing trends, demographic and population influences and new research as required. This would allow Council to ensure the centres remain competitive in the broader economic development of the City, but also ensure the centres are meeting the needs of the residential catchments they serve.

In addition, it is recommended that Council annually review and monitor development activity (within Activity Centres), population and retail trends to effectively guide future planning and development in Activity Centres. By conducting an annual audit of development and other activity (e.g. examination of shopper habits through shopper surveys) within each Centre, a comprehensive understanding of each centre and the impact of Council actions over time can be understood. This data collected annually can then be used to guide and inform decision making.

11. Framework for Net Community Benefit

This Chapter provides a framework by which to assess the net community benefit of planning decisions and developments that affect Activity Centres in Ballarat. The framework has been established to assist applicants in preparing proposals to provide the necessary information for the City of Ballarat so that it can make informed and appropriate planning decisions.

This is also a framework by which to assess the suitability of rezoning proposals and / or development applications in light of the City of Ballarat's commitment to promoting change and development in the municipality that is both sustainable and results in a net community benefit.

11.1 What is a Net Community Benefit?

A simple explanation of a Net Community Benefit is one that *"arises where the sum of all benefits of a development or rezoning outweigh the sum of all costs"*[25].

The *Interim Activity Centres Strategy* prepared for the City of Ballarat provided a more detailed explanation definition:

> "*as the residual benefits likely to be achieved from, and directly attributable to, a proposed development project, taking account of the social, economic and environmental effects of the project and the current and future interests of local, district and regional communities likely to be affected by the project."*

11.2 What is a Net Community Benefit Assessment and why is it needed?

Section 4(1) of the Planning and Environment Act 1987 of Victoria aims, in part:

- to provide for the fair, orderly, economic and sustainable use, and development of land;
- to protect public utilities and other assets and enable the orderly provision and co-ordination of public utilities and other facilities for the benefit of the community; and
- to balance the present and future interests of all Victorians.

In order to assess whether a planning proposal is consistent with the above objectives, a Net Community Benefit Assessment (NCBA) is increasingly being applied by planning authorities. The purpose of the assessment is to consider the net social, economic and environmental implications of a proposal, to determine whether it would result in a net community gain or loss. The assessment takes into account state and local polices, as well as potential impacts on the community both at present and in the future.

It is important to note that traditionally Economic Impact Assessments have been used to assess the impact of retail proposals in Activity Centres. Owing to the growing understanding that Activity Centres comprise a broader array of uses than just retail, and play more than just an economic role in a community, a fundamental requirement is to

[25] Page 24, Draft Centres Policy, NSW Department of Planning

incorporate a triple bottom line approach (i.e. social, economic and environment) into any Net Community Benefit assessment undertaken.

11.3 When is a NCBA needed?

A NCBA should be undertaken for any significant planning proposal. Of relevance to this Strategy, a significant planning proposal is considered to be one that has the potential to adversely affect the viability, role or function of a surrounding centre(s). Dependent on its scale, an assessment of a proposed development on the role and function of Activity Centres not only within the City of Ballarat, but within the wider broader Western Region of Victorian may also be required.

The 'significance' of a proposal such as a retail proposal will vary depending on its scale, the nature of proposed uses and its proximity to other centres. For the most part, a proposed development involving a small number of specialty stores will not create a significant economic impact to surrounding centres. A greater impact may result a proposal to establish or expand a major anchor store such as a supermarket, discount department store etc. (with or without associated specialty uses).

The *Interim Activity Centres Strategy* identified that any retail development comprising 1,000sqm of more of gross leasable floor would require a NCBA. For the purpose of this Strategy, any proposed out of centre development would require a NCBA.

11.4 Important Considerations in Preparing a NCBA

Important guiding principles for the preparation and assessment of a NCBA include the following:

- The difficulty in assigning values to some costs and benefits. Accordingly a NCBA may not be an entirely quantitative analysis but rather include qualitative analysis.
- Notwithstanding Point 1, in the case of a NCBA for say a proposed retail development, there should be a quantification of the existing and forecast demand for the development and the potential impact of the development to the economic viability of other centres in the locality. These centres may include those directly adjacent to the centre in question or those that fall within its wider trade area.
- A NCBA should only include costs and benefits that have a net impact on the community's welfare (i.e. welfare effects). Impacts that simply transfer benefits and costs between individuals and businesses in the community (i.e. transfer effects) should not be included but rather be assumed to 'cancel out'.
- The scale and level of detail provided in a NCBA should always be proportionate to the likely impact of the planning proposal.
- Only the costs and benefits of a proposal that have a net impact on the community's welfare should be considered against a Base Case or Alternative Cases as opposed to transfer costs that do not result in a net change to the community.
- Impacts should be considered in light of the reasons for justifying the proposal.
- For larger and more complex proposals, it may be more appropriate to use more formal cost benefit analysis techniques.

11.5 What should a NCBA Consider?

The *Interim Activity Centres Strategy* identified a range of factors that should be considered as part of a NCBA, and these have been adopted for the purposes of this Strategy. These factors include:

1. The proposal's consistency (or otherwise) with state and local planning policies;
2. The need or demand for the development, both today and in the future and how that compares to supply;
3. The social and economic implications of relocating existing uses as part of the development;
4. The social and economic implications to consumers of altering retail offer;
5. The project's economic and social implications to investment and urban renewal within the centre;
6. The number and type of jobs generated through the construction and operation of the proposal;
7. The flow on economic multiplier effects of construction and investment;
8. Impacts to the amenity and operation of the centre in question;
9. Impacts to the ease and efficiency of travel (pedestrian, cycle, train and vehicle);
10. Impacts to the social vitality and economic viability of centres in the locality or broader region (i.e. Ballarat CBD or other existing centres in the City);
11. Any likely costs or savings to infrastructure provision and upgrades as a result of the proposal; and
12. Alternative options considered.

Having considered the above, a NCBA should balance the welfare impacts to the broader community, making a fair, justified and 'on balance' assessment.

11.6 How should a NCBA be assessed?

The acceptability of a development proposal, or otherwise, depends on a range of location and development specific matters. It is not therefore possible to generically and definitively establish what an acceptable NCBA would be or a suitable degree of impact / influence.

Rather the assessment of a NCBA should be undertaken by Council officers on a case by case basis, carefully weighing up the range of social, economic and environmental impacts to make an 'on balance' determination. This latter term relates to the fact that not all factors in what may be considered a suitable development may be positive, but by weighing up the impacts, there may be a residual benefit to the community. Importantly however this assessment would not be possible without the provision of a thorough and well researched NCBA that addresses as a minimum the requirements set out above.

The full assessment criteria outlined in the *Interim Activity Centres Strategy*, is adopted for the purpose of this Strategy.

DISCLAIMER

This report is for the confidential use only of the party to whom it is addressed (the client) for the specific purposes to which it refers. We disclaim any responsibility to any third party acting upon or using the whole or part of its contents or reference thereto that may be published in any document, statement or circular or in any communication with third parties without prior written approval of the form and content in which it will appear.

This report and its attached appendices are based on estimates, assumptions and information sourced and referenced by Hill PDA and its sub consultants. We present these estimates and assumptions as a basis for the reader's interpretation and analysis. With respect to forecasts we do not present them as results that will actually be achieved. We rely upon the interpretation of the reader to judge for themselves the likelihood of whether these projections can be achieved or not.

As is customary, in a report of this nature, while all possible care has been taken by the authors to prepare the attached financial models from the best information available at the time of writing, no responsibility can be undertaken for errors or inaccuracies that may have occurred both with the programming or the financial projections and their assumptions.

This report does not constitute a valuation of any property or interest in property. In preparing this report we have relied upon information concerning the subject property and/or proposed development provided by the client and we have not independently verified this information excepted where noted in this report.

Appendix 1 - DEMOGRAPHIC TRENDS

Dwelling Characteristics and Growth Trends

The City of Ballarat had a total of 36,100 dwellings as of the 2006 Census, of which 92% were occupied. The City comprises predominantly separate houses (85.6%) with a small proportion of semi-detached dwellings (3.7%), and flats, units and apartments (10%). However in light of key demographic trends affecting the LGA there is likely to be a shift towards the need for smaller dwellings and a greater diversity of housing types.

Ballarat also had a significantly high proportion of residents owning or purchasing their dwellings (71%). However there is also a relatively strong investor market in the City of Ballarat with 29% of households renting their homes. The high levels of rental accommodation may be consistent with a younger, higher income and more mobile population together with a student population and the City's role as a regional centre for tertiary education.

In forecasting the number and type of dwellings required in Ballarat into the future, past studies have identified two key trends influencing the demand for dwellings - the ageing population and changing household structures. Based on a range of dwelling forecasts (ranging from low to high growth scenario's) growth projections are provided in the table below.

Dwellings	2010	2015	2020	2025	2030	Av. Annual Growth to 2030
High Projections	40,777	45,901	49,996	54,033	58,198	2.1%
Labour Force Driven	40,777	43,913	47,878	51,380	54,204	1.6%
Low projections	40,777	43,914	47,000	50,189	52,999	1.2%
Victoria in Future	40,627	44,495	48,464	52,378	56,256	1.4%

Source: Demographic & Residential Assessment Stage 1 Report Ballarat, MacroPlan Australia (June 2010)

Based on VIF 2008 projections and using a predicted household size of 2.4 persons in 2010 and 2.3 persons in 2030, it was predicted that the City of Ballarat will require 56,256 dwellings by 2030. This represents an increase of an additional 15,629 dwellings by 2030, equivalent to an average annual growth rate of 1.4%.

Past studies have noted that population change is driven by migration, and this is likely to influence preferences for dwellings. Accordingly despite the emergence of a significant proportion of smaller households, strong migration from Regional Victoria as opposed to Metropolitan Melbourne is likely to drive greater demand for detached dwellings.

Characteristics of the Labour Force

According to the 2006 Census, Ballarat had a resident workforce of 36,861 people and a labour force participation rate of 59% (either employed or looking for work). Whilst this is lower than the Victorian average (61%), the City experienced a greater increase (3%) in labour force participation over the period 1996 to 2006 than the rest of the State which remained stable over the same period.

An understanding of the distribution of skill levels amongst Ballarat's labour force can be obtained by analysis of occupational types. The distribution of occupations across the City of Ballarat compared to Victoria is summarised in the following table.

Occupation Type	City of Ballarat	Victoria
Managers	10%	13%
Professionals	19%	20%
Community & Personal Services Workers	9%	8%
Clerical and Administrative Workers	14%	14%
Sales Workers	11%	10%
Technicians & Trade Workers	15%	13%
Machinery Operators & Drivers	6%	6%
Labourers & Related Workers	11%	9%
Inadequately described or N.S.	1%	2%
Unemployed	4%	5%
Total	**100%**	**100%**

Source: ABS Census Data 2006

The occupational profile of Ballarat's workforce indicates the high proportion of residents employed as professionals, administrative workers, trade workers and labourers. The results are mostly in line with broader trends of the State with the exception of the proportion of residents employed as managers, labours and related workers, indicating Ballarat's greater propensity towards manufacturing industries and the higher share of managerial roles/larger companies in other Victorian cites.

The City of Ballarat has experienced a higher unemployment rate compared to the rest of the State. Recent figures from the *Small Area Labour Market Publication* show that unemployment in Ballarat as at December 2008 was 8.0%. This was significantly higher than the Victorian unemployment rate which was 4.4% at the same time[26].

This may be attributed to the high proportion of jobs within the City thought to be most at risk in the current economic climate. According to the past studies over 79% of suburbs within Ballarat had a high proportion of jobs that were considered high or medium to high risk. Indicatively employment in the City of Ballarat could be said to be susceptible to negative market shocks, such as the Global Financial Crisis (GFC).

Resident Workforce

The ABS estimates that the City of Ballarat had a labour force of 36,861[27]. Using Journey to Work Data based on the 2006 ABS Census, it is possible to analyse where residents of the City of Ballarat travel to for employment.

The following table shows that approximately 91% or 32,000 resident workers live and work within the City of Ballarat. The remainder (3,141 people) travel outside of the City for employment. The largest flow of working residents outside of the City is to Melbourne and Hepburn, although this represents only a small proportion of the total labour force.

[26] Source: City of Ballarat Economic Strategy 2010 – 2014, SGS Economics & Planning (May 2010).

[27] It is important to note that the ABS Census data undercounts the population and may give less accurate counts of labour force participation than the official estimates derived from the monthly ABS Labour Force Survey.

Place of Work	No. of Workers	Proportion of Total
Ballarat	33,720	91.3%
Melbourne	442	1.2%
Hepburn	411	1.1%
Moorabool	351	1.0%
Greater Geelong	213	0.6%
Golden Plains	175	0.5%
Pyrenees	152	0.4%
Melton	97	0.3%
Brimbank	91	0.3%
Central Goldfields	81	0.2%
Other Locations	1,128	3.1%
Total	**36,861**	**100%**

Source: ABS Census (2006)

The table below refers to job containment. Given that a reasonable level of job capture for an area with a major employment centre is expected to be in the order of 50-75%, job containment in the City of Ballarat is considered to be strong.

Place of Residence	No. of Workers	Proportion of Total
Ballarat	31,158	82.2%
Golden Plains	2,329	6.1%
Hepburn	1,331	3.5%
Moorabool	1,313	3.5%
Pyrenees	514	1.4%
Greater Geelong	193	0.5%
Central Goldfields	119	0.3%
Melton	79	0.2%
Greater Bendigo	61	0.2%
Ararat	46	0.1%
Other Locations	759	2.0%
Total	**37,902**	**100%**

Source: ABS Census (2006)

Inward flows to the City from other areas indicate the high level of mobility that exists in rural labour markets. It also shows the important role the City of Ballarat plays in providing employment for residents of surrounding areas. The most popular origins of workers to the City were from the surrounding areas of Golden Plains (2,300 persons), Moorabol (1,280) and Hepburn (1,270) which comprised almost three quarters of the inflow.

Jobs in Ballarat

Based on ABS 2006 Census Data, the City of Ballarat generated 37,974 jobs. However, the Ballarat Economic Strategy prepared by SGS[28] provides alternative employment figures which take into account the ABS undercount and other survey errors. This data estimates that actual employment within the City in 2006 was in the order of 42,700 jobs.

The table below provides a breakdown of jobs in the City of Ballarat by industry based on SGS data. The top employment generating industries in 2006 were found to be manufacturing (14.6% of all jobs), health and community

[28] Source: City of Ballarat Economic Strategy 2010 – 2014, SGS Economics & Planning (May 2010).

services (14.5%), retail trade (13.6%), education (9.6%), construction (7.6%) and property and business services (6.8%).

Industry	Number of Jobs	Proportion of Total
Agriculture, Forestry and Fishing	445	1.0%
Mining	279	0.7%
Manufacturing	6,253	14.6%
Electricity, Gas and Water Supply	432	1.0%
Construction	3,235	7.6%
Wholesale Trade	1,421	3.3%
Retail Trade	5,831	13.6%
Accommodation, Cafes and Restaurants	2,698	6.3%
Transport and Storage	1,494	3.5%
Communication Services	1,346	3.1%
Finance and Insurance	1,174	2.7%
Property and Business Services	2,910	6.8%
Government Administration and Defence	2,458	5.7%
Education	4,121	9.6%
Health and Community Services	6,203	14.5%
Cultural and Recreational Services	1,047	2.4%
Personal and other services	1,399	3.3%
Total	**42,748**	**100.0%**

NB: Highlighted text denotes the top six industries
Source: City of Ballarat Economic Strategy 2010 – 2014, SGS Economics & Planning (May 2010).

The main employment generating industries are indicative of a number of factors. The primary factor being the City's regional role and hence the presence of some major forms of infrastructure and services that support the broader Region. By way of example, Ballarat has a high proportion of jobs:

- In **manufacturing** on account of key specialisations including motor vehicle and parts manufacturing, fruit and vegetable processing, machinery and equipment manufacturing, and manufacturing geared to the construction industry;
- In **health and community services** on account of the City's role as a health and community service provider. It has two major regional hospitals being Ballarat Health Services and St John of God Health Care. It is also host to a number of aged care facilities, disability services and other health and community services;
- In **retail jobs** on account of its role as a major regional shopping destination particularly for higher order and comparison goods;
- In **education** on account of the presence of its four universities – University of Ballarat, Australian Catholic University (Aquinas), and rural clinical schools from Deakin University and the University of Melbourne. It is understood the Notre Dame Medical School will also be developed in Ballarat. Ballarat is also host to UBTAFE and other vocational education providers;
- In **construction** on account of strong recent population growth and residential development such as The Chase, Insignia and Sailors Gully. Demand for commercial construction has also been enhanced by ongoing industrial estates in Ballarat West and major infrastructure development within the health sector. Future construction jobs

are also likely to be generated with the development of the Ballarat West Growth Area and its associated community infrastructure[29]; and

- In **property and business services** on account of the role of the Ballarat CBD and the UB Technology Park a focus for service based employment. Ballarat CBD mainly provides business services such as legal, accounting, marketing and business management services to the surrounding Region.

According to SGS employment figures, over the period 2006 to 2026 the City of Ballarat has the potential to generate an additional 20,200 jobs. Given Ballarat's strength and role as a Regional City, job growth is anticipated to grow at a rate of 2.0% per annum compared to 1.5% per annum experienced in broader Regional Victoria.

The SGS forecasts are an estimate of the possible future trajectory of the local economy in the State context. It is important to note that these are a forecast of the LGA's *potential* employment generation. The forecasts take into account the anticipated effects of economic and population growth, compositional change and climate change.

Table 12 below provides a forecast of employment growth by industry. As a summary, SGS make the following key predictions in relation to key industries particularly relevant to the City of Ballarat:

1. **Property and business services** are on a strong growth trajectory and are likely to experience 2.2% per annum growth. Growth in the industry is mainly limited to the extent that the industry is oriented towards local and regional service provision;
2. **Health and Community Services** is an established industry in the City owing to is hospitals and other service providers and is likely to increase its significance and regional role. The industry is likely to experience growth of 2.9% per annum;
3. **Education** is likely to experience steady growth (1.8% per annum). Diversification of the sector may result in the future from strong migration and ongoing changes in regional industry skills;
4. **Manufacturing** is likely to experience marginal decline in growth per annum (-0.1%) on account of structural change and globalisation, however it will remain a major employer in the Region; and
5. **Retail** is likely to experience strong growth (2.2% per annum) as the City continues to be a major regional retail centre supporting a growing resident and regional centre.

[29] Come to Life Ballarat - http://www.cometolifeballarat.com/invest/key-industries/construction-and-property.aspx

Forecast Employment by Industry in the City of Ballarat (2006-2026)

Industry	2006	% of Total	2026	% of Total	Change 2006-26	Change in % 2006-26	% growth pa 2006-2026
Agriculture, Forestry and Fishing	445	1.0%	95	0.2%	-350	-0.9%	-7.4%
Mining	279	0.7%	560	0.9%	281	0.2%	3.5%
Manufacturing	6,253	14.6%	6,166	9.8%	-87	-4.8%	-0.1%
Electricity, Gas and Water Supply	432	1.0%	535	0.8%	103	-0.2%	1.1%
Construction	3,235	7.6%	5,965	9.5%	2,730	1.9%	3.1%
Wholesale Trade	1,421	3.3%	1,306	2.1%	-115	-1.2%	-0.4%
Retail Trade	5,831	13.6%	8,992	14.3%	3,161	0.6%	2.2%
Accommodation, Cafes and Restaurants	2,698	6.3%	3,822	6.1%	1,124	-0.2%	1.8%
Transport and Storage	1,494	3.5%	2,472	3.9%	978	0.4%	2.5%
Communication Services	1,346	3.1%	2,453	3.9%	1,107	0.7%	3.0%
Finance and Insurance	1,174	2.7%	1,282	2.0%	108	-0.7%	0.4%
Property and Business Services	2,910	6.8%	4,534	7.2%	1,624	0.4%	2.2%
Government Administration and Defence	2,458	5.7%	3,440	5.5%	982	-0.3%	1.7%
Education	4,121	9.6%	5,945	9.4%	1,824	-0.2%	1.8%
Health and Community Services	6,203	14.5%	10,941	17.4%	4,738	2.9%	2.9%
Cultural and Recreational Services	1,047	2.4%	2,123	3.4%	1,076	0.9%	3.6%
Personal and other services	1,399	3.3%	2,322	3.7%	923	0.4%	2.6%
Total	**42,748**	**100.0%**	**62,951**	**100.0%**	**20,203**	**0.0%**	**2.0%**

Source: SGS Economics and Planning

Red denotes the top three declining industries, green denotes top three growth industries

Appendix 2 - SUMMARY OF CONSULTATION PROGRAMME

Strategy Consultation Summary

An effective and wide ranging community and stakeholder consultation programme is of critical importance to the preparation of a thorough and effective Activity Centres Strategy. In this light, and in order to meet the objectives of Council's Plan 2009-2013, a Consultation Plan was prepared.

A fundamental aim of the Consultation Plan was to listen to, and engage with existing businesses, landowners, shoppers, residents and visitors to Ballarat's Activity Centres in order to better understand and plan for their needs whilst enabling Ballarat to grow in a competitive and sustainable way. In order to meet this aim, the Consultation Plan was designed to extend throughout (and be implemented across) the life of the Project, from the inception and data gathering stages commencing in December 2010, to the Strategy exhibition and finalisation stages in June 2011.

Accordingly the Consultation Plan adopted a three stage approach as follows:

Stage 1: Data Gathering and Site Visits (December 2010)

Stage 2: Community Consultation Workshops (January - February 2011)

Stage 3: Exhibition and Revision of the draft Activity Centres Strategy (April – June 2011)

The methods used to consult and engage with the community during these stages are described further below in addition to a summary of the key outcomes.

Methods

The community and stakeholder consultation programme was undertaken between December 2010 and February, 2011. To ensure that the assessment was thorough and transparent, a broad range of consultation methods were applied. These methods sought to engage people working within or visiting Ballarat's Activity Centres. Consultation methods included:

- Face to face interviews;
- Telephone surveys;
- Business Surveys;
- Stakeholder workshops;
- One on one interviews; and
- Project briefings and presentations.

Further explanation of these methods has been provided below.

<u>Face to Face Interviews</u>

Between December 6th and 9th 2010, 322 shopper interviews were conducted and completed by the Hill PDA Team across Ballarat's Activity Centres. Interviews were conducted on a range of days (including Saturday) and during a spread of hours to ensure a broad catchment of shoppers / visitors.

Telephone Surveys

Telephone surveys were conducted by the Hill PDA Team between December 9th and 15th 2010 over a spread of weekday evenings. During this period, 272 households within Ballarat's primary and broader trade areas completed surveys.

Business Surveys

Between December 6th and 9th 2010 business surveys were hand delivered to businesses within each of Ballarat's Activity Centres[30]. For the larger centres (such as Ballarat CBD) the Team returned to many businesses a few days later to collect the completed surveys. The remaining surveys were returned by post or via email.

The option of completing the business surveys online was also provided with links sent to business organisations and place managers representing Bridge Street Mall, Central Square and Commerce Ballarat. A final option of completing the business survey was provided during the Stakeholder Workshops held in February 2011(discussed further below).

In total 47 business surveys were completed and returned for review and incorporation into the strategy.

Workshops

Over February 7th and 8th 2011, a series of six workshops were conducted to engage with the community and inform the Strategy. The six workshops were held over a two day period on Monday February 7th and Tuesday February 8th 2011. Members of the business community were invited through a variety of methods including:

- A letter drop to businesses;
- Advertisements in the newspaper;
- Two radio interviews;
- Emails sent directly to businesses; and
- An invitation on the Commerce Ballarat Website and inclusion on the Commerce Ballarat calendar of events.

Over 1,000 local businesses and business organisations were written to and invited to attend the workshops.

The purpose of the consultation workshops was to discuss methods by which to identify a range of actions and potential strategies that could be implemented by Council to improve centre function, appeal, retail and service offer, which in turn can lead to an increased number of people using the centres for a range of services. The workshops therefore aimed:

- To identify key issues affecting the short and long term vitality and viability of Ballarat's Activity Centres (both positive and negative); and
- To identify both short and long term actions for Council and stakeholders to implement in order to enhance the vitality and viability of Ballarat's Centres.

The workshops also provided an opportunity to give back to the community relevant market data collected during Stage 1 of the Project, namely the Consumer Preference Surveys. This data related specifically to the centres the

[30] Exceptions relate to Stockland following requests from Centre Management as well as Ballarat Marketplace, Miners Rest and Harold Street Wendouree

attendees represented and sought to provide a better understanding of consumer habits in order to assist commercial and centre management decisions.

The workshops were held at varying times during the day / evening to provide a range of options for attendees as shown in Table 72 below. The general format of the workshops included an introduction to the Project, a review of market research and background data and breakout sessions to discuss key issues affecting centres in the City of Ballarat both today and in the future.

Workshop Grouping	Date and Time	Venue
Group 1: Ballarat CBD	Monday, 7 February 2011 6pm – 7:30pm	Ballarat Town Hall Corner Sturt Street & Armstrong Street South, Ballarat
Group 2: Ballarat Marketplace	Monday, 7 February 2011 2 pm – 3:30 pm	Ballarat Library 178 Doveton Street North, Ballarat 3350
Group 3: Midvale, Northway, Pleasant Park, Maxi Food, Alfredton Aldi, Alfredton, Miners Rest IGA Activity Centres	Monday, 7 February 2011 9 am – 10:30 am	Ballarat Town Hall Corner Sturt Street & Armstrong Street South, Ballarat 3350
Group 4: Wendouree Activity Centres (Including Stockland Wendouree) and Howitt Street Activity Centres	Tuesday, 8 February 2011 9 am – 10:30 am	Robert Clark Centre Ballarat Botanical Gardens
Group 5: Sebastopol and Sebastopol North Activity Centres	Tuesday, 8 February 2011 2 pm – 3:30 pm	Sebastopol Bowling Club 213 – 219 Albert Street, Sebastopol
Group 6: Buninyong Activity Centres	Tuesday, 8 February 2011 5 pm – 6:30 pm	Buninyong Town Hall 313 Learmonth Street, Buninyong

Task	Date	Outcome
Floorspace Survey	December 6^{th} to 10^{th} 2010	Surveyed all centres
Telephone Surveys	December 6^{th} to 17^{th} 2010	Achieved 322 Surveys
Shopper Interviews	December 9^{th} to 15^{th} 2010	Achieved 272 Surveys
Business Surveys Delivery	Drop off December 6^{th} to 10^{th} 2010	Delivered surveys
Business Surveys Online	December 14^{th} – ongoing	Invite via email
Stakeholder Workshops	February 7^{th} and 8^{th} 2011	6 Workshops across the City

The consultation process raised a number of key issues and questions regarding centres in the city of Ballarat. The following sections provide a summary of the key issues raised during the consultation interviews and surveys (i.e. those conducted face to face, via telephone or online) and the consultation workshops.

The key matters raised during consultation have also been highlighted and discussed in the relevant Parts and Chapters of this Study.

Telephone Surveys

The following section provides a summary of the telephone survey results.

As outlined in brief above, 272 telephone surveys were completed by households within Ballarat's primary and secondary trade areas. The vast majority of respondents (66%) were women, indicating in part that women are often the primary shoppers in a household and in part their greater willingness / availability to undertake the survey. Respondents covered a spread of ages, from over 65 years to less than 18 years with the greatest share (59%) over the age of 45 years.

Question 1 and 2: Main shopping destination and frequency of visit

The survey comprised of 12 overarching questions, many of which had sub components. The first question found that the majority of respondents (52%) identified Ballarat CBD as their primary shopping destination. A further 15% identified Wendouree, 13% Midvale and 6% Northway Activity Centres. Close to 70% of respondents visited their nominated centre at least once a week whilst 13% visited every day and 12% visited fortnightly thus highlighting the important role Activity Centres play in the lives of Ballarat's residents.

A greater proportion of respondents visited smaller neighbourhood and local Activity Centres (such as Midvale, Northway, Maxi Food and Sebastopol) daily on account of their convenience role. In comparison more respondents visited tended to visit larger centres such as Ballarat CBD, Stockland Wendouree and Sebastopol North weekly or fortnightly on account of their dual supermarket and discretionary retail offer.

Questions 3 and 4: Why is this your primary shopping destination and what is unique about it?

The two main reasons why respondents chose to shop in a centre related to its proximity to their home and its provision of food and grocery offer. Together these reasons accounted for 59% of responses highlighting the importance of a centres proximity to residential areas and the need for a food based anchor store. A further 19% of respondents highlighted the importance of a range of shop types with particular regard to clothing offer.

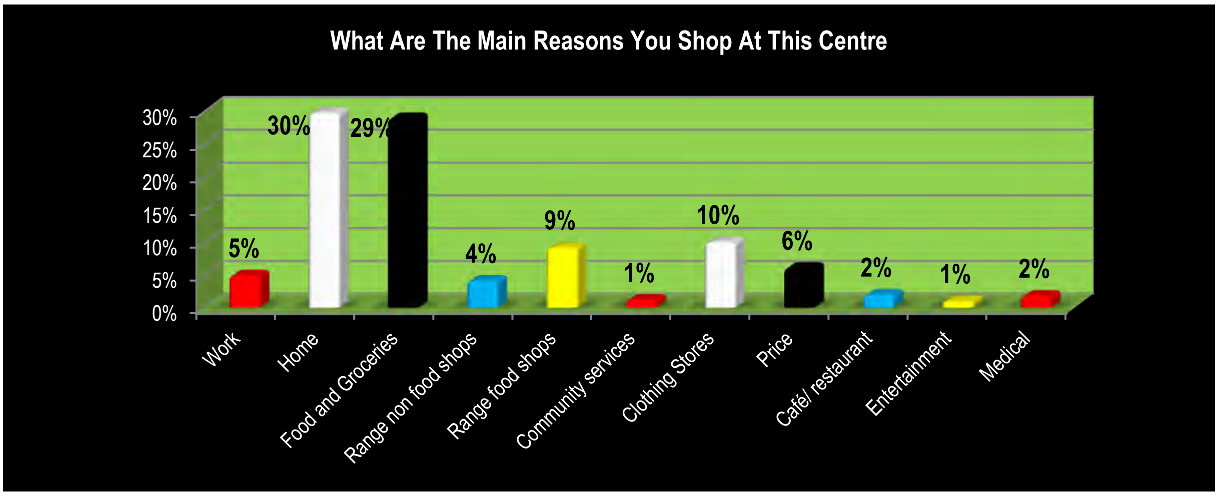
Value for money was another prominent (6% overall) reason to visit a centre, particularly for centres with discount or larger supermarkets such as Alfredton Aldi (29%), Sebastopol (22%) and Sebastopol North (40%). Value for money was considered a unique feature of the Alfredton Aldi Centre. The availability of community and medical facilities was another notable reason for visiting centres such as Wendouree (20%), Maxi Food (13%) and Stockland Wendouree (12%).

For Ballarat's larger centres (i.e. Ballarat CBD and Stockland Wendouree) the frequency and diversity of reasons for visiting increased to include entertainment, clothing stores, range of non-food items, proximity to work, cafes and restaurants. Accordingly it followed that some of the unique features of Ballarat CBD related to its range of clothing shops, higher order retailers such as Target and Myer and its range of cafes and restaurants. The convenience in terms of proximity and car parking availability were other unique factors identified in addition to it being a good environment for families.

A number of unique features were identified for Stockland Wendouree that may be anticipated on account of it being the only stand-alone indoor shopping centre in Ballarat. Unique features related to its variety of shops and its ability to provide everything *"under one roof".* Other factors related to it being 'family friendly' with a sense of community and being easy to get around.

Also of note were the higher proportion of respondents who chose to shop at Sebastopol North owing to its proximity to work (indicative of the centres location on a major highway with direct connection to Ballarat CBD); the higher proportion of respondents who shopped at Midvale predominantly for its convenience (39%) and the large proportion of residents who chose to shop at Northway and Pleasant Park on account of their proximity to home and their supermarket / grocery offer (80% and 76% respectively).

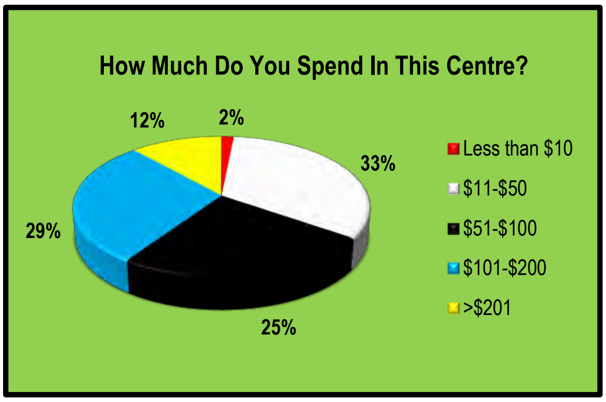
Finally it is important to note that of the households that responded to this question, close to one quarter (24%) stated that the main centre they visited in Ballarat did not have any unique features.

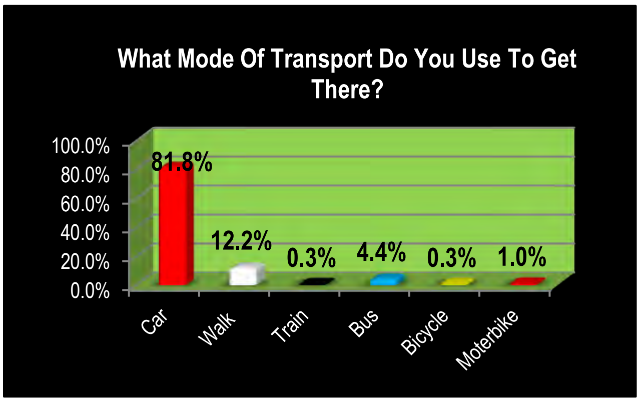


<u>Question 5: How much would you spend on an average visit to your primary shopping destination?</u>

In response to this question the majority of respondents nominated the $11 - $50 bracket (33%) or the $101 - $200 bracket (29%) on an average visit to their primary shopping destination. The remaining responses are shown in the graph below.

By centre, the greatest proportion of responses in the $101 to $200 bracket (46%) (was recorded for Wendouree Stockland and over $200 (16%)) followed by Ballarat CBD (33% and 14%) respectively. Ballarat CBD was the only centre that recorded responses for the under $10 bracket indicating its role as an employment and civic centre and therefore its attraction for reasons other than retailing.





<u>Question 6: What mode of transport do you mainly use to travel to your main shopping destination?</u>

Of the combined responses, as shown in the graph below, the vast majority of journeys (82%) were by car (including taxis) followed by walking (12%), bus (4%) and motorbike (1%). Train and bicycle each contributed 0.3% of the total.

By centre, the highest rate of walking as a means of access was recorded for Ballarat CBD followed by Midvale Activity Centres.

With respect to public transport the greatest proportion of respondents using this mode of transport were surveyed in

Ballarat CBD followed by Sebastopol and Wendouree.

Question 7: How do you think your centre could be improved?

In order of frequency, the main responses to this question for the city of Ballarat's Activity Centres as a whole were:

1. Through the provision of additional car parking (31%);
2. A better range of shops (23%);
3. More entertainment options and night time activities (10%);
4. Improved environment including landscaping, layout and pedestrian access, weather protection (20%);
5. Extended operating hours (5%);
6. The provision of additional recreational space (4%);
7. Additional and improved community facilities (3%); and
8. Transport improvements (2%).

Quotes from Telephone Survey Respondents

"Food outlets need to improve 'four fold' in Ballarat CBD and a movie outlet in Stocklands would be good"

"Needs more clothing shops, a better range of coffee shops, more quality and more 'funky'"

"Need more quality shops - people are travelling to Melbourne as they are closing many of the clothing shops in Ballarat"

"More services for older people - less younger retail shops, parking stations are difficult to navigate as an elderly person and the centre needs better disabled access"

"There are alcohol problems in the Big W carpark and vandalism. It is safe during the day but not at night"

"It is all a bit generic, could have more 'buzz'"

"Very satisfied - it has improved a lot in the last few years"

The provision of additional car parking was a key issue raised for Alfredton Aldi (50% of all responses for the centre); Ballarat CBD (34%); Howitt Street Wendouree (33%); Pleasant Park (100%); Maxi Food (100%); and Sebastopol (33%).

The provision of a greater range of shops was a key issue raised for Alfredton Aldi (25% of all responses for the centre); Ballarat CBD (22%); Howitt Street, Wendouree (33%); Sebastopol (33%) and Sebastopol North (50%). Particular reference was given to cafes and restaurants in Midvale.

Improvements to the public realm were key issues raised for Alfredton Aldi (25% of all responses for the centre) and Sebastopol (33%). Improvements to safety and security were also key issues for Ballarat CBD, Howitt Street, Wendouree and Stockland Wendouree in addition to Sebastopol North.

Responses were more diverse for Ballarat CBD with over 36% of all responses collectivley relating to layout, need for more recreational space, need for extended operating hours, more nightime acivities and entertainment options, better weather / shade protection, better predestrian access, more attractive / landscaping, more community facilities and better public tansport.

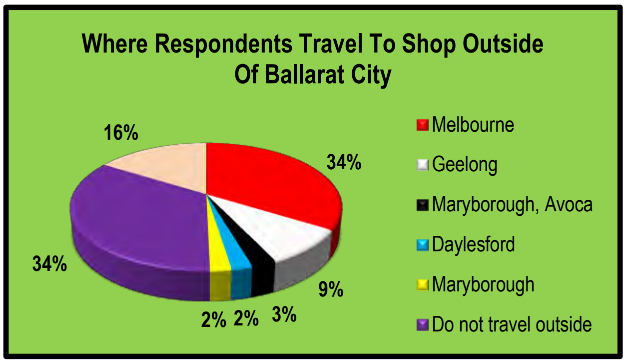
Question 8: Primary destinations for key goods

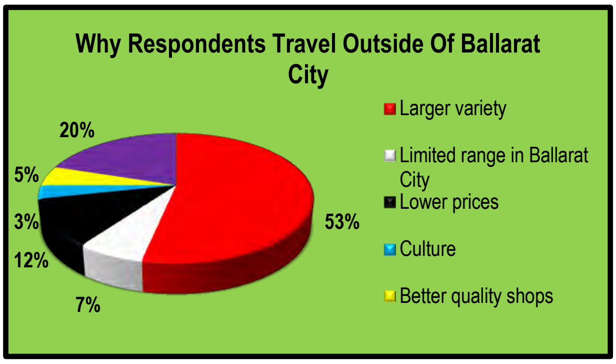
For the respondents that lived within the City of Ballarat, the vast majority shopped for the full range of goods and services within Ballarat CBD. The next most prominent location for a range of goods was Stockland Wendouree. Another prominent location for household goods was found to be Howitt Street, Wendouree whilst Stockland Wendouree was a key location for personal items. The majority of respondents banked in Ballarat CBD however a notable proportion also banked online. Following Ballarat CBD, Midvale, Pleasant Park and Maxi Food were key locations for grocery shopping.

As shown in the table below, most of the respondents who lived in the City of Ballarat were satisfied with grocery and supermarket shopping, personal items, technology and household goods. Only half were satisfied with respect to the provision of clothing stores and banking services in the city of Ballarat.

Category	Groceries	Clothes	Personal Items	Technology	Household	Banking	Average
Satisfied	96%	50%	100%	100%	100%	50%	**83%**
Dissatisfied	4%	50%	0%	0%	0%	50%	**17%**

For the respondents that lived outside of the City of Ballarat, Ballarat CBD was the key destination for the full range of goods and services. Stockland Wendouree also attracted shoppers for the full range of goods and services whilst Midvale attracted shoppers for grocery goods and Howitt Street, Wendouree for household goods. Melbourne and Geelong were attractive to shoppers for clothing and other discretionary goods.





<u>Question 9: Do you travel to centres outside of the City of Ballarat to shop?</u>

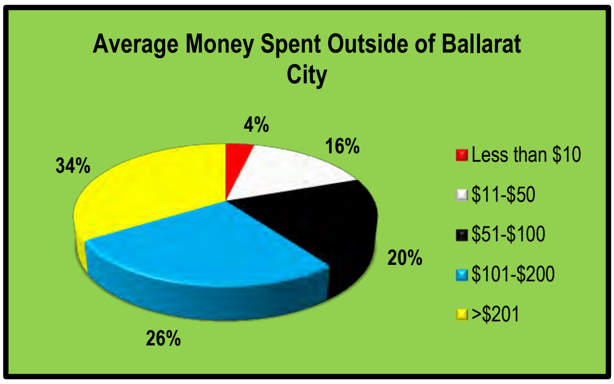
In response to this question, 66% of respondents answered 'Yes' and 34% stated 'No'. Over one third of respondents who shopped outside of Ballarat shopped in Melbourne (34%) with 9% shopping in Geelong, 5% in Maryborough and Avoca and 2% in Daylesford.

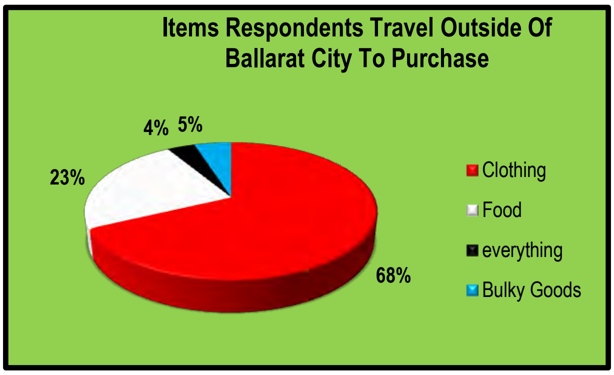
The remaining 16% of responses related to centres within Bendigo, St Amaud, Chatson and Adelaide. It is important to note that there was some confusion with this question and that some of the remaining responses related to centres located within the City of Ballarat including such centres as Ballarat CBD, Wendouree Activity Centres and Midvale Shopping Centre. .

Over half of respondents shopped outside of the City of Ballarat monthly, 18% stated yearly, 9% stated weekly, 9% stated fortnightly and 9% stated they shopped outside of Ballarat City 2-3 times a year.

Respondents travelled outside of the City of Ballarat to purchase: clothing items such as "better shoes" (68%); food items such as wine, meat and deli goods (23%); bulky goods such as furniture, homewares and electrical appliances (5%) and 'everything' (4%).

Reasons why respondents travelled outside of the City of Ballarat to purchase these goods related to: the greater range of shops and variety (60%); convenience (20%); lower prices (12%); better quality shops (5%); and better developed cultural aspects (3%).





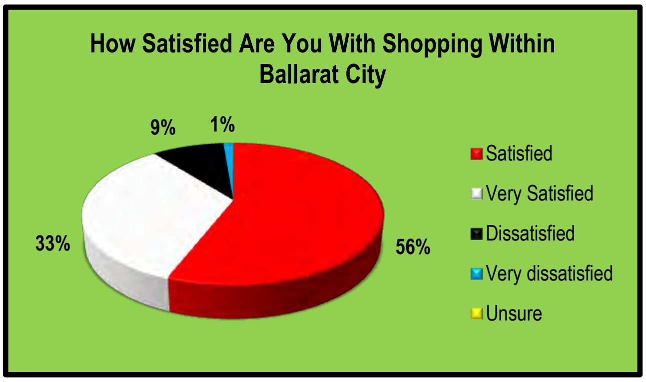
Question 10: How much do you spend on average when you shop outside of the City of Ballarat?

In response to this question, 33% of respondents stated that they spent over $200 on an average visit when shopping outside of the City of Ballarat, 26% stated that they spent $101-$200, 20% stated that they spent $51-$100, 16% stated that they spent $11-$50 and 4% stated that they spent less than $10.

Question 11: Overall how satisfied are you with shopping in the City of Ballarat and why?

In response to this question, 56% of households were satisfied with shopping within the City of Ballarat, 33% stated they were very satisfied, 9% stated they were dissatisfied and 1% stated they were very dissatisfied.

The main reasons why respondents were satisfied related to the convenience of Ballart's Centres and their proximity to home / work, their quality (particularly of local produce), the friendliness of staff, the positive atmosphere of centres in addition to their and ability to provide all of the goods needed for a household.



Whilst many responses identified that the centres met all of their needs, the key areas of dissatisfaction related to the lack of offer / range relating to discretionary goods such as clothing. There was general consensus that Ballarat lacked new and exciting clothing stores / boutiques and entertainment facilities particularly for the young and elderly.

Question 12: Are there any other comments you would like to make about improving your shopping experience in the City of Ballarat?

There were many positive responses to this question that focused on Ballarat's excellent customer service, its clean, convenient and safe environment in addition to its ability to meet all of the needs of a household. Other comments focused on how Ballarat could be improved. With respect to retail mix, comments included: the need for more boutique stores (particularly clothing) instead of chain stores; the need for more deli's and bakeries; another department store and more competition i.e. more shops to improve value for money.

With respect to infrastructure and services, comments related to the need for: more and extended hours for car parking in centres; more toilets; greater disabled access and parents facilities; better weather protection (particularly in cold months) and improvements to the design of centres to reduce loitering and enhance the sense of safety.

Summary of Face to Face Interview Findings

The following section provides a summary of the face to face interview results. The interviews comprised of 13 overarching questions, many of which had sub components.

As outlined in brief above, 332 interviews were conducted with shoppers across a broad spread of centres within the City of Ballarat. Whilst randomly selected, as in the case of the Telephone Surveys, the vast majority of respondents (64%) were women. This once again indicates that women are often the primary shoppers in a household and perhaps their greater willingness / availability to undertake the survey. The respondents covered a spread of ages, from over 65 to less than 18 years with the greatest share over the age of 65 years.

Question 1: Main reason for visiting the centre today?

The first question found that close to one third of respondents (29%) were visiting the centre in question owing to its proximity to their home, followed by 20% who were attracted to the centre owing to the quality of its shops and 14% because of the quality of its non-food shops.

Of particular note by centre, a high proportion of respondents were found to be shopping in Ballarat CBD and Stockland Wendouree for Christmas goods (20% of responses for each centre). Whilst this response is reflective of the time of year when the interviews were conducted, it is also indicative of the higher order role played by both centres and their greater range of specialty and discretionary goods.

Convenience to work and home was a major reason for visiting centres such as Alfredton Aldi and Central (49% of responses for this centre); Buninyong (52%); Maxi Food (32%); Midvale (51%); Northway (59%); Pleasant Park (29%) and Sebastopol (60%). With respect to the range and quality of food stores, the following centres were identified by respondents as particularly attractive: Alfredton Aldi (40%); Maxi Food (23%); Northway (23%); Pleasant Park (24%); Sebastopol (27%) and Stockland Wendouree (24%).

Value for money was also a prominent reason for visiting the Maxi Food Activity Centres (16% of all responses for this centre) whilst a high proportion of responses related to the attraction of Howitt Street, Wendouree (35%) and Stockland Wendouree (25%) for their range and quality of non-food stores.

Question 2: What mode of transport did you use to get here?

Travel by car was the dominant mode (85%) of transport to access each of the centres in which interviews were conducted. It was found that 9% of respondents walked to the centre and 3% caught the bus.

Question 3: How frequently do you visit this centre?

The majority of respondents (60%) visited the centre in question at least once a week, 14% stated daily and 11% fortnightly. For centres such as Midvale, Sebastopol and Northway, a higher proportion of respondents stated that they visited the centre daily or fortnightly compared to higher order centres such as Stockland, Wendouree and Ballarat CBD.

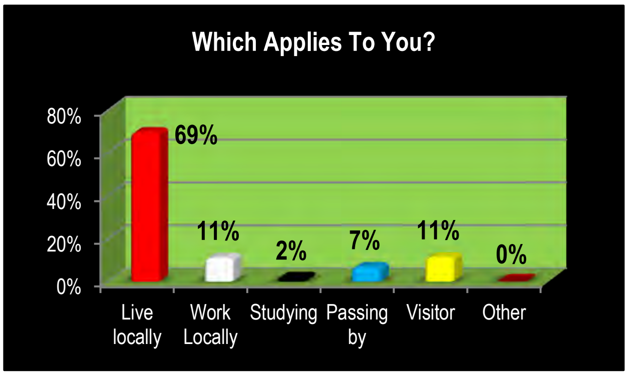
In the case of Stockland Wendouree, a greater proportion of respondents visited the centre 2-3 times per week. In the case of Ballarat CBD however, a higher proportion of respondents visited the centre every few months, quarterly or a couple of times a year compared to other centres indicating its attraction to shoppers for specific items and higher order goods, particularly during periods such as Christmas. Ballarat CBD was the only centre to have a response in the 'first time visited' category with a notable 3% thus indicating its appeal to the visitors and tourist market.

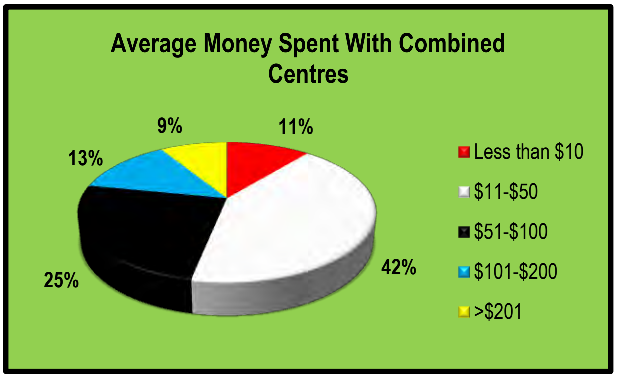
Question 4: Where do Respondents come from?

The majority of respondents (69%) were visiting the centre where they were surveyed because they lived locally. 11% were visitors and a further 11% worked locally.

Centres such as Stockland, Wendouree (26% of responses); Ballarat CBD (19%); Alfredton Aldi (19%) and Buninyong (5%) had a notable proportion of responses relating to people visiting the Centre. Others such as Howitt Street (14%); Maxi Food (13%); Midvale (19%) and Pleasant Park (21%) had attracted a higher proprotion of shoppers who had been 'passing by'.

The remaining centres had attracted the majority of their shoppers as they lived or worked locally. Stockland Wendouree was the only centre that had results recorded because respondents studied locally. The absence of this response for Ballarat CBD may also be reflective of the time of year in which the survey was undertaken i.e. during University holidays.





Question 5: On average how much do you spend on a visit to this centre?

The majority of respondents (42%) spent $11-$50 on each visit to the centre in question. The second most frequent response was in the $51-$100 range (25% of the responses) followed by 13% of responses in the $101-$200 range. 11% of respondents spent on average less than $10 within the centre in question and 9% spent greater than $200 on average.

Question 6: In which shopping centre do you do the majority of your shopping?

This question found that the three most popular centres within the City of Ballarat were Ballarat CBD (28%), Wendouree Stockland (24%) and Sebastopol (15%).

Question 7: Where do you shop for a range of goods and services?

The combined responses to this question indicated that respondents did the majority of their grocery shopping in centres close to where they lived. For higher order goods such as clothes, technology and household goods the majority of respondents travelled to Ballarat CBD followed by the Wendouree Activity Centres (including Stockland Wendouree).

Question 8: What do you think is, or could be, unique about this centre you are visiting today?

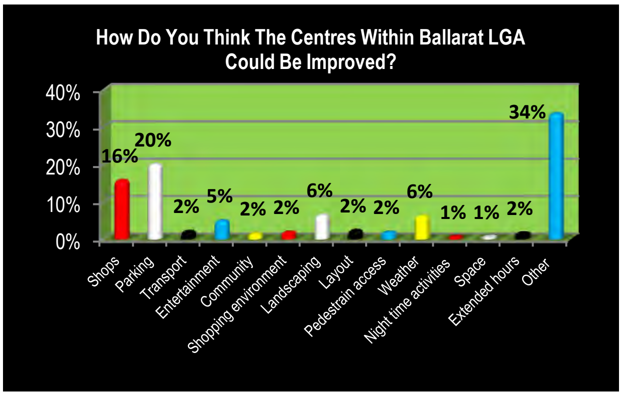
The main responses to this question can be summarised into seven general areas as follows:

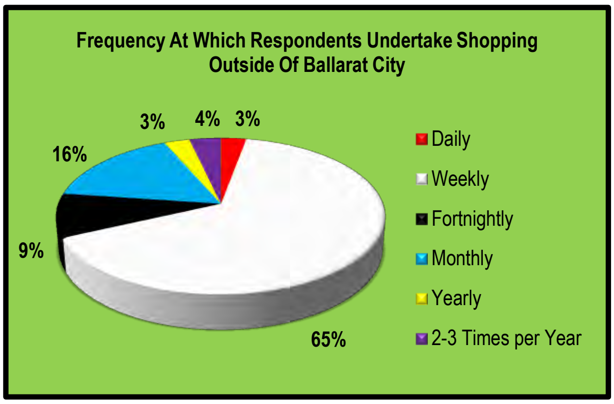
- The historical character and amenity of the centre – 4% of respondents identified this unique character of centres such as Ballarat CBD and Buninyong.
- The convenience and accessibility of the centre – 36% of respondents identified this unique character of centres such as Alfredton Aldi; Howitt Street, Wendouree; Maxi Food; Midvale; Sebastopol; Northway; Pleasant Park; Stockland Wendouree and Ballarat CBD .
- The positive feel / community spirit / friendliness and quiet character of the centre – 23% of respondents identified this unique character of centres such as Buninyong; Ballarat CBD (particularly Bridge Street Mall); Stockland Wendouree; Northway; Pleasant Park; Howitt Street, Wendouree; Maxi Food; Midvale and Alfredton Aldi.
- The variety of stores and range of goods – 17% of respondents identified this as a unique character of centres such as Maxi Food; Midvale; Sebastopol; Pleasant Park and Stockland Wendouree (the latter had a large number of responses).
- Availability of parking – 4% of respondents identified this as a unique character for centres such as Northway, Maxi Food and Pleasant Park.
- Product specials and value for money – 2% of respondents identified this as a unique character for the Maxi Food Activity Centres.

Of particular note, close to 20% of respondents identified that there was nothing unique about the centres they were in. The centres these respondents were in included: Midvale; Ballarat CBD; Stockland Wendouree; Howitt Street, Wendouree and Alfredton Aldi.

Question 9: How do you think the centre could be improved? What changes could be made to make you want to shop here more frequently?

The largest number of responses to this question (34%) was in the 'Other' category whereby respondents provided their own suggestions. Frequently made suggestions related to the planting of more tress, more seating, lower retail prices and more cafés. The next most frequent response (20%) related to the provision of more car parking followed by a better range of shops with 16% of responses.





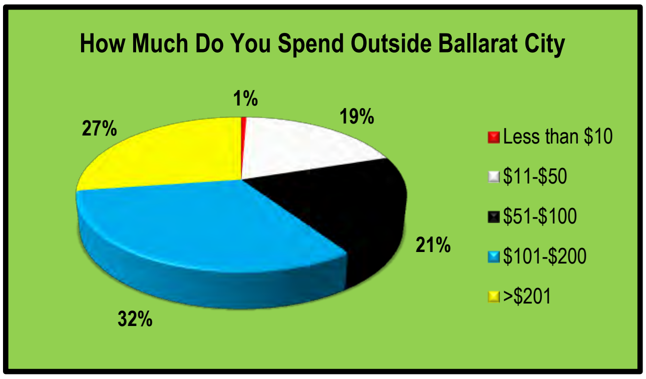
Question 10: Do you travel to centres outside of the City of Ballarat to undertake shopping? If so where, what for and how frequently?

45% of respondents stated that they travelled to centres outside of Ballarat to undertake shopping. 87% of those shoppers travelled to either Melbourne or Geelong. The majority of respondents who travelled outside of the City of Ballarat to shop sought a better range of clothing stores, a better range of food stores and restaurants and a greater variety of shops in general.

Of the respondents that stated they travelled outside of the City of Ballarat to undertake shopping, 65% stated they travelled weekly, 16% stated monthly, 9% stated fortnightly, 4% stated yearly, 3% stated daily and 3% sated 2-3 times per year.

Question 11: How much do you spend on average when you shop outside of the City of Ballarat?

32% of respondents stated that they spent on average $101-$200 when shopping outside of the City of Ballarat. 27% stated that they spent over $200 on average, 21% stated $51-$100, 19% stated $11-$50 and 1% of respondents stated they spent less than $10.
Whilst 24% of the respondents to this question spent on average more than $200 when shopping outside of the City of Ballarat, only 7% of respondents to Question 5 spent this much whilst visiting their main centre in Ballarat.



Question 12: How satisfied are you with shopping in the City of Ballarat and why?

66% of respondents stated that they were satisfied with shopping within the City of Ballarat, 25% stated they were very satisfied, 4% were dissatisfied, 4% were unsure and 2% stated they were very dissatisfied.

Reasons for the respondent's satisfaction related to the overall quality of shops within the City and the fact that *"everything you need is here".* Other positive comments related to the perception that Ballarat's centres are not overcrowded and that parking in the centres (with the exception of Ballarat CBD) is satisfactory.

Reasons for the respondent's dissatisfaction with shopping in the City of Ballarat related mainly to the lack of shop variety, the poor customer service and the limited range of shops and parking found within Ballarat CBD.

Question 13: Are there any other comments you would like to make about improving your shopping experience in Ballarat City?

As in the case of the Telephone Surveys, there were many positive responses to this question that focused on Ballarat's positive community vibe, its convenience and the fact that the existing Activity Centres provide everything that a household needs.

With respect to infrastructure and services, comments related to the need for: improved traffic flow, greater parking availability and hours; more public toilets; greater police presence and centre improvements to enhance the sense of safety; improved accessibility across Ballarat CBD – particularly for the elderly and parents with children; landscaping and public realm improvements to ensure centres look active and are more attractive.

With respect to retail mix there was an identified need for more cafes and outdoor dining options; more entertainment facilities – for the young and not so young during the day and evening periods; better range and quality of shops i.e. children's clothing shops, better butcher and deli, a footlocker, fresh produce, Myer and home maker centre in addition to an improved range of restaurants i.e. Asian food.

Other areas identified as in need of improvement related to: retail competition and thereby improved value for money; more small businesses and therefore better services; improved customer service; better weather protection and more recreational and open spaces.

Summary of Business Survey Findings

The following section provides a summary of results relating the business survey which comprised of 22 questions. Of the 47 business surveys that were returned to Hill PDA the majority (67%) were from businesses based in Ballarat CBD, the next greatest proportion originated from Howitt Street (13%) followed by Buninyong Town Centre (7%).

Question 1: What is your business type?

The largest share (26%) of businesses that responded to the survey were specialty non-food business (i.e. jewellery stores, florists, music stores, newsagencies, gift / homeware stores, stationery retailers, craft, equipment retailers, antique and art dealers). 19% were cafés and restaurants and 13% were personal service business such as optometrists, laundromats, hair dressers and pharmacies.

Question 2: Do you currently own or lease your premises?

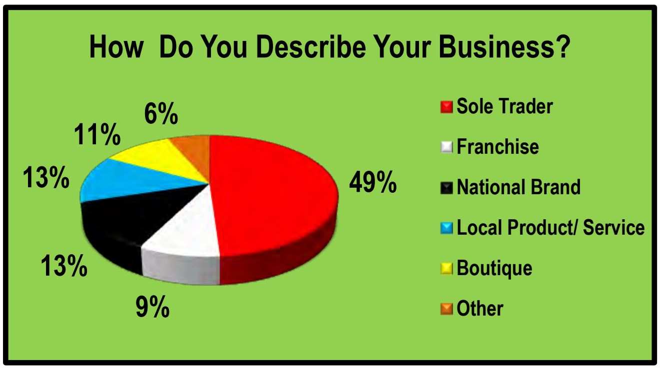
The greatest proportion of business respondents (80%) leased their premises with the remaining 20% owning their premises.

Question 3: Why did you locate your business in its current location?

Over 37% of respondents located their business in its current location as a result of factors such as: the availability of parking, good public transport; proximity to centres such as Ballarat CBD; proximity to the "best coffee shops"; location on the "sunny side of Sturt Street" and the amount of passing pedestrian and vehicle traffic. A further 18% of respondents stated that they purchased their business in its existing location. Other factors related to low rent, the scale of the shop and the centres likelihood for growth (i.e. Wendouree).

Question 4: How would you describe your business?

The greatest single proportion of respondents (49%) described their business as a sole trader, 13% were a national brand, 13% were a local product and or service, 11% were boutiques, 9% were franchises and 6% described their business as 'other'. The other category included businesses such as a charity store and a privately owned shopping centre.

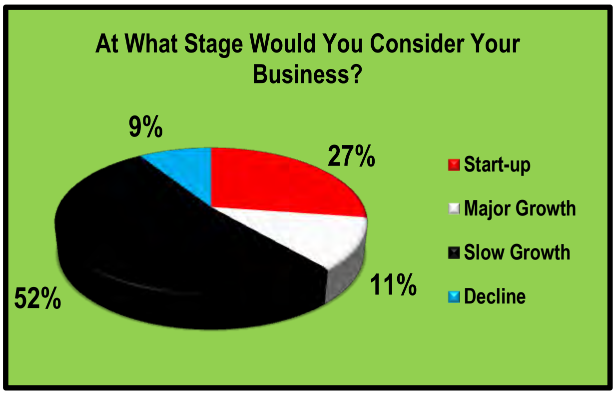


Question 5: How would you best describe your retail/ service offer?

The largest category of responses to this question (59%) described their retail/service offer as mid-range, 18% as economy, 14% as premium and 9% as 'other'. The other category was a combination of premium and mid-range.

Question 6: How long have you been trading in this centre?

The results to this question are shown in the graph below indicating that 23% of all businesses surveyed were less than 2 years old with 13% alone operating for up to than 6 months. At the other end of the spectrum, a strong 32% had been established in excess of 10 years.



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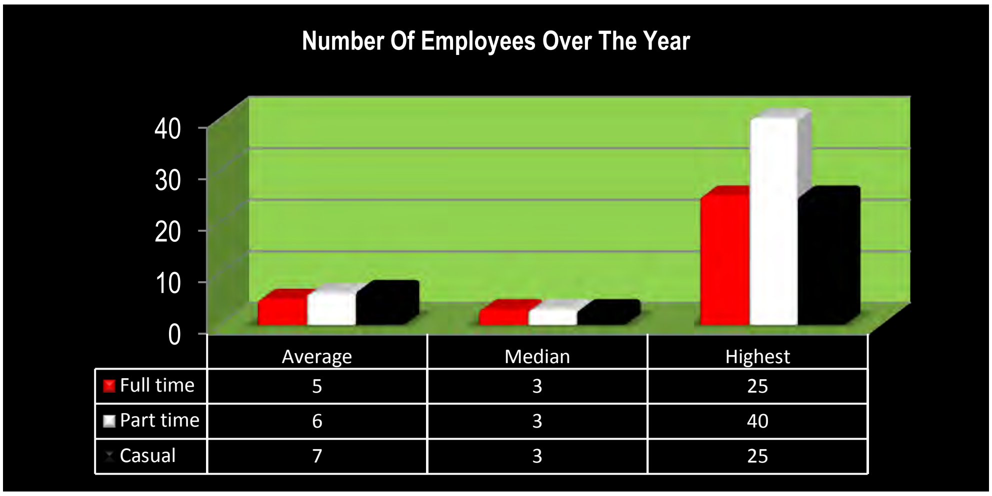
Question 7: At what stage would you consider your business?

The greatest single response (52%) was that business was in a slow growth stage, 27% stated their business was in the start-up stage, 11% stated their business was in a major growth stage and the remaining 9% stated that their business was experiencing a decline.

Question 8: What is the Average number of people you employ over the year?

For the purpose of this question the results for each of the categories of full time employees, part time employees and casual employees have been summarised into the average number of employees, median number of employees and the highest single number of employees for that category in the graph below.



Question 9: What are your trading hours?

For this question the respondents were asked to provide their trading hours for Monday to Friday, Saturday and Sunday. It was found that the vast majority of businesses that responded to the question were open weekdays and Saturday, yet only 57% were open on Sundays.

On Mondays to Friday most businesses opened between 8am and 9:30am with a 10am to 12:30pm start for some café/restaurants, clothing stores and medical centres. A further 11% of businesses started trading between the hours of 6am to 7:30am, these businesses included café/restaurants and specialty food such as bakeries. During the week most businesses (74%) concluded trading between the hours of 5pm and 6pm. 11% of businesses concluded trading between the hours of 7pm to 9:30pm including café/restaurants, supermarkets, specialty food stores (such as bakeries) and personal service stores (such as hairdressers) whilst 7% of businesses concluded trading between the hours of 10pm to 11pm (i.e. hotel/pubs and specialty food stores such as a bottle shop).

For Saturdays, opening hours were broadly similar to weekdays however closing hours were earlier with 40% of respondents concluding trading between 12pm and 3pm and 44% concluding trading between the hours of 4pm and 6pm (i.e. clothing stores, café/restaurants, specialty non-food stores, personal service stores and commercial-financial businesses). A further 11% of businesses concluded trading between the hours of 7pm and 11pm. These businesses included café/restaurants, specialty food stores, supermarkets and personal service stores.

On Sundays 62% of respondents started trading between the hours of 10am and 12:30pm. These businesses included café/restaurants, specialty non-food stores and clothing stores. The majority of businesses (54%) concluded trading between the hours of 4pm and 6pm whilst a notable proportion (23%) concluded trading between the hours of 1pm and 3pm and a further 23% between the hours of 7pm to 10pm (i.e. hotel/pubs, specialty food stores, supermarkets and personal service stores).

Question 10 and 11: What are your busiest and slowest trading days?

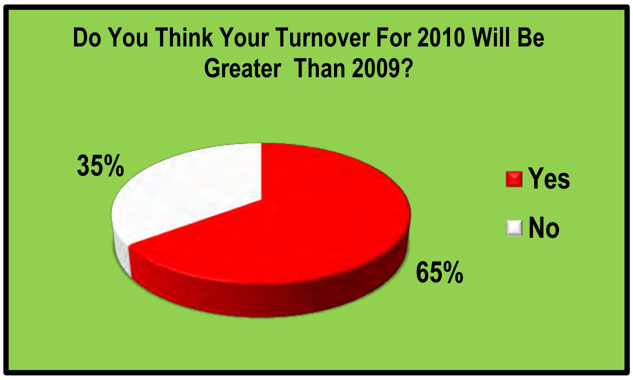
Responses to this question varied significantly depending on the nature of the business. In general it was found that:

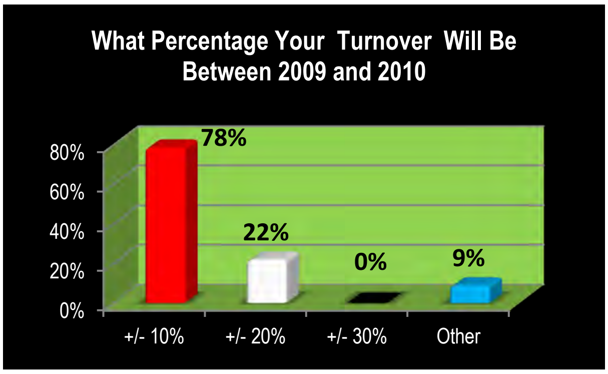
- weekdays were busiest for commercial, financial and medical businesses and medical businesses with Fridays the slowest;
- weekdays and Saturdays were busiest for personal service stores and specialty non-food stores with slower trading occurring on Mondays and Tuesdays;
- the end of the working week i.e. Thursday, Fridays and Saturdays were busiest for clothing stores, department stores and cafes / restaurants. Conversely Mondays, Tuesdays and Wednesdays were slowest;
- Friday (night), Saturday (night) and Sundays were busiest for pubs and clubs with Monday through to Thursdays the slowest; and
- Weekdays, Saturday morning and Sunday evenings were busiest for supermarkets whilst mornings were generally slower.

Question 12: Do you think your annual turnover for 2010 will be greater than 2009 and by what %?

Of the 79% of businesses that participated in the fist half of this question, 65% thought that their annual turnover for 2010 would be greater than 2009, whilst the remaining 35% felt that their annual turnover for 2010 would not be greater than their 2009 turnover as shown in the graph below.

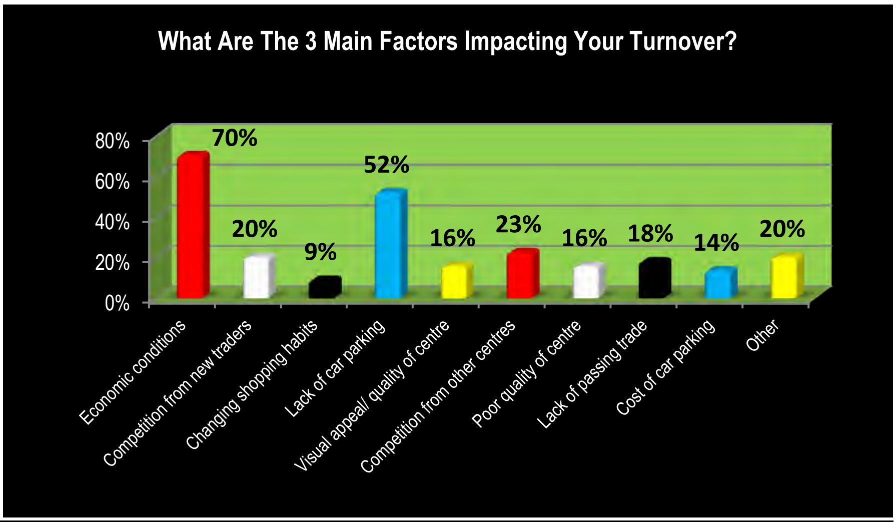
78% of businesses that participated in the second half of this question that their annual turnover between 2009 and 2010 would be +/-10%, 22% of businesses stated it would be +/-20% and 9% of businesses stated that their annual turnover between 2009 and 2010 would be another percentage (other category) these percentages ranged from 5% to 200%.





Question 13: What are the three main factors impacting your turnover?

The main responses to this question are shown in the table below.



Please note that some businesses supplied multiple answers and therefore the percentages exceed 100%.

Question 14 and 15: Who are the majority of your customers and where do they come from?

96% of respondents stated that the majority of their customers were Ballarat residents in addition 26% stated identified their customers as workers, 17% stated domestic tourists, 13% stated students and 6% of businesses identified that international tourists represented some of their main customers. Accordingly 43% of businesses stated that the majority of their customers originated from Ballarat including the suburbs of Ballarat Central and Ballarat East, 13% of businesses stated that their customers originated from Wendouree, 13% nominated other locations such as locals, rural residents and all over Ballarat with a further 11% of businesses stating that their customers originated from Alfredton.

Question 16: How would you rate the following aspects of the centre your business is based in?

For the purpose of this question a table has been provided summarising each response by category.

Category	Good	Average	Poor	Don't know
Range of shops	39%	39%	17%	4%
Cleanliness of paths/ public spaces	24%	43%	33%	0%
Signposting around the centre	23%	50%	25%	2%
Public toilets	19%	23%	53%	5%
Maintenance of pedestrian areas	32%	32%	32%	4%
Events / activates in the centre	7%	38%	43%	12%
Quantity of parking spaces	26%	17%	57%	0%
Price of parking	43%	25%	30%	3%
Access by public transport	61%	26%	9%	4%
Traffic congestion	14%	44%	37%	5%
Police presence	14%	20%	52%	14%
Security / CCTV coverage	10%	20%	49%	22%
Marketing and promotion	5%	36%	43%	16%

Question 17: What improvements to the Centre in which your business is based would help your businesses?

This question asked people to rank (with 1 the highest and 7 the lowest) improvements to the centres that could help their bussinesses.The table below shows that the majority of respondents ranked the provision of more car parking as the most significant improvement that coould be made to support their business. The cost of car parking was another notable improvement in addition to improving the variety of shops in a centre and quality of its streetscape.

Category	1	2	3	4	5	6	7
More car parking	69%	8%	3%	0%	0%	8%	11%
Reduced cost of parking	11%	32%	16%	11%	11%	11%	5%
Increased variety of shops	44%	0%	0%	8%	16%	4%	0%
Better public transport	24%	12%	6%	12%	12%	12%	12%
Better quality of streetscape	39%	25%	4%	14%	7%	11%	0%
Cleaner environment	28%	16%	20%	20%	12%	0%	4%
Increased marketing/ advertising	41%	7%	31%	7%	7%	3%	3%
More events	19%	13%	6%	6%	6%	31%	0%

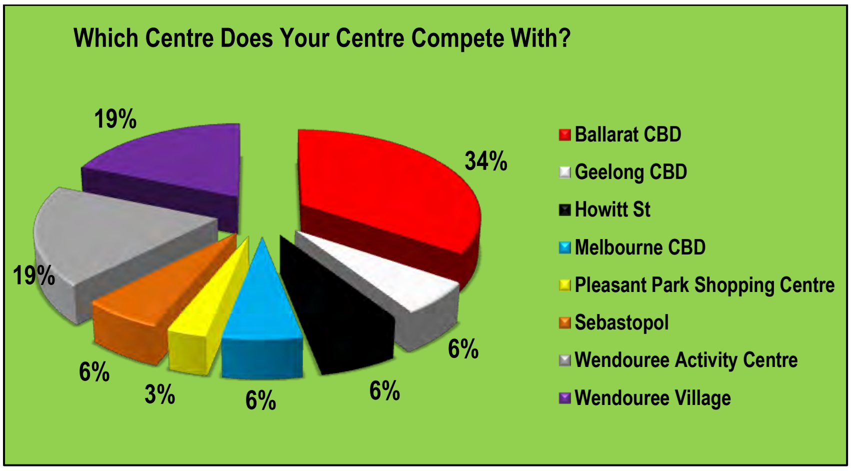
Some businesses provided other improvements that would help their businesses that were not in the categories provided. Some of these 'other' responses included: more plant boxes; better security; redirect traffic into Sturt Street; longer parking limits; better public perception; better weather protection and the provision of a free bus service "city loop".

Question 18: Which retailers are your biggest competitors?

In general it was found that businesses competed against other businesses in the same retail category i.e. supermarkets against other supermarkets and clothing stores against comparable clothing stores.

Question 18: Which centre does your centre compete with the most?

Over one third (34%) of survey respondents nominated Ballarat CBD as their main competitor, 19% stated Wendouree Village and 19% stated Wendouree Activity Centres as shown in the graph below.



Question 19: Do you belong to a business network or cluster? If no would you be interested in joining a network cluster?

Close to one third (31%) of respondents already belonged to a business network or cluster including: Commerce Ballarat, Vecci, the Bridge Mall Traders Association, Bakers Delight, Foodworks, Aldon Tutoring Centres P/L, Australian Tutoring Association and the PRD Nationwide and Property People Group. Of the 32 businesses that responded to the second half of the question 31% stated that they would be interested in joining a network or cluster.

Question 20: In your opinion what three things could the Council do to improve your business?

There was a broad range of responses to this question relating to: increased car parking; a cleaner environment; improved weather protection; improved naming and signage of shopping centres; the provision of CCTV in Ballarat CBD and Sturt Street and other safety improvements; enhanced promotion of the City of Ballarat including local businesses; more pedestrian and traffic flow; lower Council rates and greater community consultation on development applications.

Question 21: Do you have any further comments regarding the centre in which your business is based?

A wide range of responses were provided to this question relating to: the extension of Thursday night trading hours; improved parking, access and public safety; Christmas decorations and improved diversity of retail offer.

Question 22: Do you have any other general comments regarding centres and shopping in the city of Ballarat?

Additional comments raised by respondents related to the need for: greater shop diversity; centre promotion; support for local businesses; improved car parking; additional large retailers in the CBD and greater expenditure on community facilities such as swimming pools.

Summary of Workshop Findings

Overall participants welcomed the opportunity to provide input to key issues affecting Ballarat's centres and to learn more about what consumers are thinking and seeking in accordance with the survey results. For the City of Ballarat and its Activity Centres as a whole, workshop participants identified the forecast growth in population as both a positive factor and as a challenge. Whilst the growth in population would support the viability of existing businesses as well as a greater variety of retail choice, it could also exacerbate existing constraints on car parking and traffic congestion within and around centres.

To mitigate these impacts it was generally agreed that Activity Centres would need to expand and diversify to meet growing need. Supporting infrastructure such as roads, public transport routes, car parking spaces and pedestrian connections would in turn require a commensurate level of improvement.

Participants also recognised the importance of good quality spaces within Ballarat's Activity Centres in order to attract shoppers and enable them to stay longer. Quality spaces would further facilitate social interaction, a perception of safety and community.

The importance of tourism and visitors was raised for both the larger and more boutique Activity Centres. There was general agreement that methods to promote and market the City's Activity Centres to prospective visitors should be reinvigorated and tailored to a contemporary clientele. Council could also play an important role in promoting and supporting the tourism industry through its website and the hosting of events.

Group 1: Ballarat CBD

Group 1 identified some of the key strengths of Ballarat CBD related to its historical character and heritage significance. Other strengths related to the existing Place Manager as well as the centres established role at the peak of the City's Centre Hierarchy.

A key issue identified by the workshop to be influencing Ballarat CBD was the potential growth of other centres, both within the City of Ballarat and outside of its trade area. To address this challenge, participants identified the need to actively attract new retail tenants and entertainment uses to Ballarat CBD by facilitating the effective redevelopment of some of its key opportunity sites. Other recommendations related to the capping of car parking and floorspace provision within competing centres so as to reinforce the CBD's existing role in the hierarchy.

Additional issues identified for the CBD related to night time activity and the lack of entertainment attractors; the high turnover of business tenants; parking constraints and vehicle access routes; restrictions to business access during events; lack of building maintenance; the location of the tourist information centre in addition to safety and security issues.

Some solutions offered in relation to these issues included: the provision of multi-storey car parking; better event co-ordination with businesses and joint working with tourism operators; Expansion of Ballarat CBD's Place Manager's Role; Council support for heritage related matters and the provision of certainty to developers / investors through an Activity Centres Strategy along with amendments to the Ballarat Planning Scheme.

Group 2 Ballarat Marketplace

Owing to the limited number of businesses located within this centre, there was a modest turnout to this workshop. Furthermore the attendees had a greater focus on matters relating to Ballarat CBD. Notwithstanding, there was a general consensus that Ballarat Marketplace played an important role providing bulky goods retailing in close proximity to Ballarat CBD. The centre was not commonly perceived by the community however as a separate and distinct Activity Centres to Ballarat CBD.

The workshop identified some opportunities for Ballarat Marketplace including its intensification as a destination for bulky goods retailing and the creation of a market (i.e. farmers, antiques and speciality goods) to complement the role of the CBD and attract more visitors and pedestrian activity on the weekends.

Group 3: Midvale, Northway, Pleasant Park, Maxi Food, Alfredton Aldi, Alfredton and Miners Rest IGA Activity Centres

Participants identified that the strong forecast growth in Ballarat' population would positively enhance the economic viability and success of the Activity Centres in question. Centres such as Midvale, Pleasant Park, Alfredton Aldi and Northway were already performing well as major convenience destinations.

Challenges for the centres in question related largely to the availability of car parking, particularly for centres in high growth areas. Whilst centres will need to expand in the future to improve variety and provide additional retail offer to meet the needs of the growing population, opportunities for additional car parking and physical expansion were limited owing to adjacent land uses. Midvale was identified as an exception to the latter owing to the availability of vacant land to the north of the centre.

The workshop also identified a range of design, traffic, pedestrian and disabled access improvements that could be made to enhance the convenience and accessibility of the centres.

Group 4: Wendouree Activity Centres and Howitt Street Activity Centres

A key strength of the Wendouree and Howitt Street Activity Centres related to the community atmosphere. Stockland, Wendouree identified their ongoing commitment and projects to encourage a sense of community.

Key issues challenging the Wendouree and Howitt Street Activity Centres related to the high rate of Council tax, parking and traffic flow as well as the availability of land to expand. Opportunities for the Centres related to the growth of the airport (and related employment uses) in addition to Ballarat's growing population, both of which supported growing demand for retail and support services in the Centres.

Group 5 – Sebastopol Activity Centres and Sebastopol North Activity Centres

A key strength of the Sebastopol and Sebastopol North Activity Centres was identified as their location on a major thoroughfare and within a high growth trade area. The visual appeal and range of retail offered within the Centres was however considered lacking with key concerns relating to safety and security. The rate of vandalism and theft within the centres was perceived as above average which was in turn reflected in the character of the Centre's existing designs and formats. The centres also lacked places for social interaction with the Sebastopol Bowling Club playing an important role in this regard. The location of the Bowling Club across the Midland Highway however reduced the potential for pedestrian interaction within the Centre.

On the positive side, the centres (with particular respect to Sebastopol North) were considered to have significant opportunities for growth in terms of floorspace and their role in the centre hierarchy through redevelopment. This growth and redevelopment would need to be facilitated by the expansion and intensification of the centre on adjoining land. The centres also had significant scope for design improvements that would enhance their visual appeal and sense of place. These improvements could be complemented by the proposed expansion of the Sebastopol Bowling Club.

Group 5 – Buninyong Activity Centres

Participants identified a range of existing positive attributes for the Buninyong Activity Centres including the strength of its local community; the range of attractions to the centre including its heritage, charm and local sporting facilities; in addition to the socioeconomic wealth of its local trade area.

Some key issues facing the centre relate to the size of its supermarket and the existing range of retail offer. These limitations increase the need for shoppers to travel to other centres for household and grocery goods. The decline in the domestic tourism industry and visitors to Buninyong was also seen as a major issue to be addressed in addition to the lack of tourist accommodation (hotel or caravan park) in the area. The lack of housing choice and affordability in the locality was raised as a concern as it restricted the level of demand for retail in the centre.

Opportunities to address key issues influencing Buninyong's vitality include the active promotion and marketing of the centre's tourism attractions including its retail offer, heritage and village charm in addition to the range of broader attractions in the locality including sports venues, bush walks and cycle routes.

Further opportunities relate to physical improvements to the centre as well as enhancements to the linkage with the University and Technology Park; greater residential development in the locality to enhance the critical mass and thereby demand for goods in the centre; plus greater prioritisation of Buninyong by Council across its services as a place to invest and promote.

Appendix 3 - TRENDS INFLUENCING BALLARAT'S CENTRES

Introduction

There are a number of local, regional and global trends that are presently and likely in the future to influence Ballarat's Activity Centres including their size, mix of uses, location vitality and economic viability. Accordingly the opening Appendix analyses these trends at a macro and in some cases a micro level, to better understand what social and economic trends may influence the growth and success of centres in order to inform the Strategy.

Australian Economy

The global economy is in the midst of a major correction phase. Over the last 20 - 30 years the global economy has been buoyant and expansive, evidenced by low interest rates and resultant increases in the amount of corporate and private debt. The collapse of the US property bubble resulted in what is now widely referred to as the Global Financial Crisis (GFC). The GFC and its impact on consumption and world production, dominates the current economic climate in western economies. This is currently a major factor influencing business decisions and it is therefore essential to consider the longer term future trends when preparing strategies to support sustainable growth in the future.

Australia has been less affected by the GFC than many of its trading partners and this can in a large part be associated with:

- The minerals and energy boom;
- The financial system being less heavily geared; and
- Australia's main trading partner, China, continuing to experience economic growth as a result of its political/economic system.

The Australian Government's intervention including lowering interest rates, direct payments to households and individuals and significant infrastructure expenditure has further helped to mitigate the impacts of the GFC. Indeed 2010 has seen further interest rate increases on the back of improvements in many economic indicators for 2009, including house prices, employment and business and consumer confidence. However the impact of rising interest rates is affecting not only property markets but also retail spending and consumer confidence, with consequent employment risks.

There continue to be concerns in global credit markets with sovereign debt risks being highlighted in the European Union where Greece, Spain, Portugal and Ireland are burdened by unsustainable debts which combined with currency constraints are likely to see those countries suffer prolonged economic downturns. The United Kingdom is also suffering from a major debt burden and economic weakness but is not constrained by a common currency with the pound being devalued significantly since the GFC.

While China has maintained strong growth during the GFC, recent credit growth has seen major speculation in property markets sparking fears of a property bubble. Recent constraints in credit growth have seen substantial falls in some inflated markets and it remains to be seen how these markets will perform as credit continues to be wound back. This global market will continue to present risks to the resource fuelled recovery in Australia and in turn to consumer and business confidence – both factors that will influence the success of Australia's Activity Centres.

Ballarat's Economy

The City of Ballarat acts as a service and employment centre for Western Victoria. It provides a diverse range of retail, commercial and industrial opportunities. As part of its future vision, the City seeks to enhance this regional role, changing its focus from 'service delivery' to 'regional leadership'.[31]

As of 2009, across all industries, the City of Ballarat generated approximately $10.4billion in gross revenue[32]. Whilst the City has traditionally prospered from its mineral and agricultural resources, today manufacturing represents its single greatest industry in dollar output accounting for $3.8billion (approximately 36% of gross output). Significant components of the Manufacturing output relate to motor vehicles and parts and other transport; fruit and vegetable products and confectionary. As of 2009, Property and Business Services were found to be the second largest industry overall generating approximately $968million for the year and representing over 9% of gross output whilst Retail Trade ranked fourth generating $785million or 7.5%.

Whilst Manufacturing was the industry that generated the greatest level of financial output, as of 2006, Retail Trade generated the greatest single proportion of jobs within the City of Ballarat (18%). Of the 42,000 jobs estimated by the ABS to have been generated across the City for that year, Health and Community Services was another major industry generating over 16% of jobs reflecting the presence of the Hospital and various medical facilities in the City.

Manufacturing (15%) and Education (9.9%) ranked fourth in terms of employment generation reflecting the scale of the local manufacturing industry and the range of education facilities provided. The City of Ballarat seeks to build on its education role through programs such as the 'Learning City' that encourages lifelong learning for all of Ballarat's residents and the broader Region.

Looking forward, the Ballarat Economic Strategy has a 20 year vision that focuses on the following three key themes.

Theme 1: **Regional Development – To Become the Capital of Western Victoria:** in accordance with this theme the City of Ballarat will seek to consolidate its role as a the Capital of Western Victoria over the next 20 years. This role will serve the broader Region's retail, service, business, institutional, entertainment and recreational needs through enhanced government services, facilities and infrastructure linkages.

Theme 2: **Australia's Premier High Tech & Knowledge Based Regional Economy:** in accordance with this theme the City of Ballarat will build on its unique strengths including its diversified knowledge based economy to generate new jobs and attract significant investment.

Theme 3: **Capitalising on Population Growth – A Bigger and More Diverse Community:** in accordance with this theme the growth of the City of Ballarat's population through in migration will support the continued growth of facilities and services including retail, commerce and housing.

[31] Ballarat Economic Strategy 2010 – 2014, SGS

[32] Compelling Economics (November 2009), Ballarat Interim Activity Centres Strategy 2010

Retail Trends and Drivers

Over the past three decades significant changes have occurred in the retail industry such as the introduction of new technologies, the ageing of the population, increased female participation in the workplace and changing consumer preferences. These changes have placed increased pressure on many existing retail centres in the City of Ballarat to either adapt or lose market share.

In the 1980s, Australian retail floor space totalled approximately 1.8 square metres per person (excluding commercial space and automotive retailing), which was roughly divided into equal components of regional, district and neighbourhood/local centres. Today we have around 2.1sqm to 2.2sqm per capita due to increasing affluence and consumerism.

The retail industry's innovative nature is driven largely by the need to respond to, and anticipate, its customers' needs and desires. Changing demographics and lifestyles require individual retailers and shopping centres to constantly monitor these often subtle shifts and respond by repositioning their retail offer, presentation and mode of operation. The factors that are driving the changing face of retailing in Australia are described as follows:

- The increase in the proportion of working women;
- The increase in the proportion of part-time and casual employment and the reduction in full-time employment;
- The reduction in the proportion of households that match the 'traditional family' model and an increase in the number of single persons and single parent households;
- The increasing disparity of household income, ranging from high double income households to households that rely on welfare;
- The increasing levels of migration and the diversification of Australia's culture;
- The ageing of the population; and
- Increasing working hours for those in full-time employment.

In particular economic rationalism over the past three decades has resulted in increasing household income disparity. Today there are many families with high disposable incomes and many families that struggle in poverty. Families are typically cash-rich / time-poor or time-rich / cash-poor. Very few families are both time-rich and cash-rich, which provides interesting challenges for the retail industry.

Population growth, rising real disposable incomes, innovation and change within the retail industry have underpinned a rapid increase in the supply of retail floor space throughout Australia. Population growth and increasing levels of disposable income have provided the means to support new retail development, but it is the innovative nature of the industry itself that has generated major increases in more and larger centres.

As a result of changing lifestyle trends and retail formats, shoppers are increasingly spending on entertainment, technology and leisure related goods rather than traditional grocery and clothing offers. Shoppers are also seeking a broader range of activities and Activity Centres that provide both retail and entertainment options including eating out, gambling, wine bars, cinemas and video game parlours.

Key trends relevant to retail demand in the City of Ballarat are diverse. They include a deregulation in the hours of shopping, the development of larger supermarkets to operate twenty four hours a day seven days a week, the development and expansion of out of centre or stand alone retailing complexes such as Stockland Wendouree and the adjacent homemaker centre, the development of discount department stores (Big W, Kmart and Target), a diversification in the retail experience and emergence of electronic shopping.

Key trends and their likely influence on retailing within the City of Ballarat are explained further below.

Deregulation of Shopping Hours

One of the biggest changes the retail industry has made in recent years to meet the changing needs of consumers is the introduction of seven day trading. More people are juggling careers and family and increasingly must squeeze shopping in where they can rather than adhere to a standard schedule.

Whilst most forms of retail activity now operate with extended hours, the most significant impact of deregulated shopping hours has been on the trading patterns of supermarkets. Late-night trading, seven days a week and in some instances twenty four hour trading has largely been a response to the growth in food expenditure captured by convenience stores operating on a twenty four hour basis such as 7 Eleven.

There has also been a blurring of the hierarchal distinction in function between centres, as supermarkets, which trade with extended hours in major centres, compete directly with more traditional local convenience stores. The physical location of a centre is therefore critical in ensuring that the higher order centres (such as Ballarat CBD and Wendouree) do not monopolise the market and a place is maintained for easily accessible smaller local centre or convenience stores within neighbourhood centres and local centres such as Sebastopol and Maxi Food.

The broader spread of shopping hours also appears to be significantly flattening the peaks in trading patterns and may allow for some relaxation in car parking requirements in local centres or convenience centres.

Changes in Supermarkets

Beginning in the 1980s the suburban supermarket increased in size and diversity of retail offer. The objective was to provide for a large choice of food and groceries under one roof with one convenient check-out. Over time supermarkets began to expand the range to include fresh foods, meats, delicatessen, pharmaceuticals and even some non-food items such as toys, clothing, manchester and small appliances. Mainline supermarkets generally measure between 4,000 and 5,000sqm. While in most cases the impacts can be seen in lower prices and increased product ranges, this trend has placed considerable pressure on the ability of smaller local centres to compete jeopardising their long term sustainability.

A spin off of the trend to larger mainline supermarkets has been some return to smaller supermarkets (800-1,500sqm) and corner stores. These smaller format stores are becoming the core or anchor for modern local centres and can positively enhance the economic function of a centre by attracting shoppers who would otherwise travel to larger centres. These additional shoppers benefit smaller retailers through spin off spending and as such helps to create a vibrant and thriving atmosphere.

The most recent notable trend is the introduction of discount supermarkets such as Aldi, Maxi Food, Not Quite Right. These supermarkets have gone someway to diluting the duopoly of Woolworths (Safeway) and Coles, established for the more price conscious rather than convenience conscious consumers. These supermarkets have established themselves in all levels of the hierarchy from the major regional centres to small local centres and even outside of town centres (usually on busy roads attracting passing trade).

At the other end of the spectrum, high end niche supermarkets catering to shoppers seeking specialty, organic and specialised goods have emerged including Macrofoods and Leo's Fine Foods. The City of Ballarat does not presently have any of these stores.

Out of Centre Retailing

A prominent trend to emerge over the past two decades has been the development of out-of-town centres. These are most often characterised by activities which have a primary orientation to bulky goods retailing, activities which require larger floor areas and lower rent structures than those found in traditional centres. Although furnishings, lighting and other home related merchandise has been, and continues to be the primary focus of this form of retailing, the range of activities has become more diversified.

Increasingly they are becoming destination shopping venues, offering a substantial range of merchandise at more competitive prices than can be offered by traditional department, discount department and specialty stores, with resulting impacts on the overall sustainability of traditional centres.

The primary bulky goods clusters within the City of Ballarat are located in areas adjacent to or peripheral to Centres such as Ballarat CBD (i.e. Ballarat Marketplace providing approximately 13,400sqm of bulky goods retailing) and Wendouree (i.e. the homemaker centre on Gillies Street providing a further 10,250sqm). In line with the trends discussed, approval has been granted for the development of over 40,000sqm of additional floorspace on the South Western side of Learmonth Road, Wendouree with Project Oxygen accommodating approximately 14,000sqm of this space (please refer to Chapter 2 for further details).

The City of Ballarat also has automotive and medical clusters located outside of centres along major road corridors such as the eastern end of Howitt Street. Whilst these areas may not form part of Ballarat's established centres, there are considerable attractors of activity and their relationship to centres should be carefully considered.

Out of centre retailing has and continues to have significant impacts on the structure and dynamics of urban systems. In particular, these are being felt by traditional nodes of retail activity, which are now experiencing a loss in trade. The impacts are being seen in the way in which transport infrastructure is used, with out of town centres most often being removed from public transport infrastructure and dependent on car access. Furthermore, Bulky Goods Centres are often located within employment lands and therefore compete for site area with industry and manufacturing. This can be a particular concern where employment lands, suitable for industrial uses, are limited.

Specialty Stores and Franchises

Specialty stores provide a range of goods and thereby greater choices for consumers. Ranging between 80sqm and 150sqm, specialty stores provide broader choice with respect to quality, price and type of offer. Some specialty stores are increasingly forming part of a state or national chain such as Bakers Delight, Dymocks, Ojay, Witchery and Starbucks. These chains may be franchised and owned by either national companies or local business persons.

Specialty stores often position in close proximity to an anchor store such as a supermarket (particularly in the case of specialty food) or a discount department store / department store (particularly in the case of specialty non-food stores i.e. clothing and book stores). This positioning seeks to benefit from the stronger shopper draw of the more major stores to a centre and generators of passing trade. Spaces directly adjacent to the anchors form prime retail opportunities with rent declining with distance away from prime spaces to more secondary locations. These locations provide more affordable options for smaller businesses supporting a range of specialty and niche boutiques.

Greater Size and Diversification

Traditionally retailing has followed a hierarchy from regional through to district to small neighbourhood centres. In the 1950s Australia's first planned suburban shopping centres replaced the traditional strip centres that had built up around railway stations. The ample, off-street parking and shopper amenity offered by these new enclosed malls appealed to customers, especially as motor vehicle usage increased and became more widely affordable.

The introduction of the discount department store in the mid-1960s spawned a wave of new centre development and expansion, which continued throughout the 1970s and early 1980s. Today, centres covering in excess of 60,000sqm of floorspace (such as Chadstone, Fountain Gate and Highpoint) are commonplace. The late 1980s and early 1990s saw the diversification of the retail experience with innovations such as food courts, in-centre cinemas, family entertainment centres, library, medical and other services and larger supermarkets further fuelling increases in centre size and numbers. This trend is evidenced by the Stockland, Wendouree indoor shopping centre.

A more recent trend is the expansion of the shopping experience to not only include entertainment but also accommodation (hotel/serviced apartments) and a lifestyle focus including eat streets and street theatre (busker and public performances).

These larger centres, often in private ownership and single management, are frequently refurbished to provide a high amenity shopping experience that adapts to the need of retailers and visitors alike. Accordingly their coordinated and fresh environments often have a competitive edge on more traditional street based centres that lack the coordinated management approach.

Convenience Shopping

The concept of retail convenience for the consumer has expanded considerably, particularly over the past two decades. Previously it meant physical proximity, usually to home. With two income families where partners might work in quite different locations, and where an increasing choice of time-consuming activities compete with shopping, the concept of retail convenience is becoming far less location-specific and more performance oriented. Consumers want one-stop shopping at hours convenient to them.

One response from the retail industry has been the development of 'convenience community centres'. These are usually dominated by a supermarket to meet daily and weekly shopping needs but they also include a range of specialty shops such as butcher, fruit shop, liquor shop, take-away food, video rental and petrol station. Where they differ from traditional neighbourhood centres around railway stations is that a large proportion of their turnover comes from commuters in the PM peak on the way home and so they have generally located themselves on the PM peak side of main roads. They also provide ample parking and convenient access in and out to the main road. An example of this format is Midvale or Northway Activity Centres.

Another response has been the emergence of 'convenience service centres' which are petrol stations on main highways but also offering a 'just-in-time' shop with a range of groceries and fast foods (e.g. 7 Eleven, Quix, Ampol Shop Stop, BP Shop). Typically the size of the food, groceries and take-away foods component is around 150-500sqm. Rather than being the primary destination for food and grocery shopping they offer a range of products for 'just-in-time' impulse shoppers. Often they co-locate with operators such as McDonalds, Burger King and KFC. An example of this type of Centre is 'Alfredton Aldi, a centre located on the corner of Sturt Street and Gillies Street in Alfredton which has a BP service station that incorporates a Subway and Wendys.

Changing Shifts in Trade

The trends discussed are polarising the retail hierarchy with the larger regional centres positioning themselves for a more dominant role in the provision of entertainment and customer services matched with increased retail floor space. The more successful smaller centres have moved towards the concept of convenience centres with greater emphasis on food retailing, just-in-time shopping, fast foods, local services and petrol.

More and more we are witnessing shifts in trading patterns in a number of areas. In competing for consumer dollars some centres are winning and others are losing. The trends can be summarised as follows:

- Principal and major Activity Centres (such as Ballart CBD and Wendouree) are expanding and taking trade away from district centres and even some neighbourhood centres. These regional centres are capturing a larger proportion of trade by increasing their retail offer and providing a range of activities including entertainment, comparative goods shopping and convenience shopping with larger supermarkets;
- Convenience centres on major roads are taking trade away from the traditional neighbourhood centres that are based around public transport nodes. This is evident with some traditional retail centres that have experienced rising vacancies and the introduction of "low rental" tenants without fitout costs to fill the vacancies (e.g. liquidators, etc.);
- Bulky goods retailers on the fringe of large shopping centres and in industrial areas are taking trade in bulky goods away from the traditional retail centres. In 1990-91 40% of department stores' turnover was in bulky goods commodities (furniture, floor coverings, electrical appliances, hardware, homeware, sports and camping goods, soft furnishings). This figure fell to 25% by 1998-99 and is probably less than 20% today. The large national department stores are also continuing to lose trade to the rise of discount department stores;
- Older style centres typically located at train stations have lost market share. This is particularly the case with centres that shoppers experience difficulty in access and parking and where there is a poor retail mix and lack of major tenants by contemporary standards; and
- Some traditional centres have become successful through the reinvention of their role / theming, marketing and improvement programs – in some cases developing into an 'eat street' theme or ethnic theme (e.g. Asian or Arabic).

Emerging Retailers and Formats

As mentioned above, new players such as ALDI have opened up numerous food stores in Victoria over the past decade. Being predominantly food stores (but with some component of personal and household goods) there is competition to the existing supermarket operators – Coles, Woolworths and IGA. However they differ from these supermarkets with Aldi in particular having fewer product lines (less than 1,000 compared to 20,000 or more in the full-line supermarkets) at discounted prices. Its trade area is considerably wider but thinner than other supermarkets and is often seen as complementary to other supermarkets as it is competitive.

Supabarn is also beginning to open some other supermarkets in metropolitan areas after already establishing itself through stores in the ACT. Supabarn features a complete gourmet delicatessen and seafood department.

The Coles and Woolworths quasi-duopoly is entering the hardware market. The smaller independent hardware stores have been losing trade to the Bunnings hardware houses (owned by Westfarmers which owns Coles supermarkets). Now Woolworths is negotiating sites around Australia to provide even larger hardware houses that will directly compete with Bunnings – the approved development on Learmonth Road, Wendouree is a prime example. Woolworths and US retailer Lowe's plan to open 150 hardware and home improvement stores in Australia over the next five years.

US discount retail giant Costco has identified the Asia-Pacific Region as a key area of growth, particularly in Australia. Costco is a membership warehouse club that provides a wide selection of merchandise at a substantially lower price to both businesses and individuals. Costco Warehouses provide groceries, electrical appliances, automotive supplies, hardware, sporting goods, homewares, apparel, health and beauty goods, furniture and office supplies. It operates seven days a week for its members.

Costco's first warehouse in Australia opened in August 2009 in the Docklands in Melbourne. A second Australian warehouse of 14,000sqm (approximately) has been approved in Auburn in Sydney's West. Costco plans to open 5-6 new warehouses in Australian over the next three years. The emergence of Costco in Australia will likely intensify the battle between Coles and Woolworths.

Internet Shopping

Internet shopping (also called e-tailing and electronic retailing) is a retail format in which the retailer and customer communicate with each other through an interactive electronic network. A growing proportion of Australians have access to the internet at home. The rate of access has quadrupled in recent years, from 16% of households in 1998 to 64% in 2006-07.

In 2006-07, 61% of the 11.3 million people who used the internet at any site reported using it in the past 12 months to buy goods or services for private use. Among all age groups, people aged between 25-34 years were most likely to have used the internet for this purpose (71%)[33].

Despite increasing household access to the internet, the growth in internet shopping has not been as dramatic as predicted by some futurists in the early 1990s. Currently internet shopping accounts for approximately 5% of total retail sales. Most sales have been made by higher socio-economic households and only with commodities that are suited for that type of shopping including second hand items, music, computer hardware and software and office durables. In many cases internet shopping is used to acquire knowledge, rather than make purchases.

Electronic retailing is generally considered to have growth potential. But this will be dependent on whether or not it can, and is perceived to be able to, provide superior benefits over existing retail formats. The critical benefit that electronic retailers can offer is the opportunity for consumers to search across a broad range of alternatives, develop a smaller set of alternatives based on their needs, and get specific information about the alternatives they want.

[33] Australian Social Trends - ABS 2008

Whilst there may be some opportunity for internet shopping to capture an increasing proportion of total retail sales, the impact will not be as dramatic as initially forecast as shoppers still preferring to shop physically as the best method of comparing goods, brands, stores and prices and as a means of entertainment / leisure and socialising. Accordingly the impact to traditional bricks and mortar retailers is not likely to be as significant or detrimental as initially forecast.

The New Economy

The New Economy is a term used to describe a knowledge and idea-based economy. In the New Economy the key to higher standards of living and job creation is the incorporation of innovative ideas and technologies in services, products and manufacturing processes. It is characterised by technological innovation, e-commerce, digital transformation, higher education, skills and open trade. It differs from the previous economy where there was less of a reliance on skills and education, technology and innovation and the key driver of economic growth was the mechanisation of the production process.

Some of the key characteristics of the 'New Economy' as it emerges include:

- Higher levels of entrepreneurial dynamism and technological innovation due to increased competition. Such innovation is characterised by research and development, and is the key driver of productivity and ultimately wage growth, which benefits both consumers and the wider community;
- An increase in knowledge based employment that stems from technological innovation, highlighting the need for education and training;
- An improvement in the efficiency of the design and production process, resulting in faster times to the marketplace and to the end-user;
- An increase in diversity in the products and services provided to consumers;
- Increased reliance on the internet and other forms of information technology, especially in the service sector. 'Digitisation' (using digital information technologies to produce goods and services) is also a key driver;
- Globalisation of the marketplace;
- The restructuring of the hierarchical organisational structures with the emergence of the need for government to co-invest and collaborate with other organisations, so as to achieve a wide range of public policy goals; and
- An increase in the importance of understanding the changing economy.

The goal for growing regional centres, such as the City of Ballarat and more specifically its CBD, will be to foster innovation and adaptation, in order to secure a range of employment options and industry diversity. In many industries, education and training, creativity and adaptation have become the principle sources of competitive advantage. Efforts made by communities to foster the New Economy need to be proactive so as to ensure that the community has access to tertiary education and lifelong learning opportunities. The University of Ballarat, Australian Catholic University, UBtec, the Deakin and Notre Dame University Medical School facilities represent strong opportunities to build Ballart's role as an innovative and pivotal factor in the Western Victorian economy.

It is increasingly important in the New Economy that a City such as Ballarat is attractive to 'knowledge workers', as they are the key driver in the success / failure of implementing the New Economy's principles. There are many factors to contribute to the attractiveness of an area, the most important of which is the quality of life / lifestyle on offer. This is affected by such things as crime, amenities and transportation. Ballarat has many lifestyle benefits that could attract knowledge workers including; the natural environment, a proactive Council, the range of educational facilities, its heritage, affordable housing and an abundance of recreation and leisure pursuits.

It will be imperative however, that the City of Ballarat embraces the complementary lifestyle factors sought by today's knowledge workers, including good quality office space, a choice of restaurant and café destinations, a range of entertainment facilities and an attractive night time economy.

Commercial Trends and Drivers

Traditionally commercial office space has been located within centres where it could cluster with a centre's retail, civic and community facilities. Ballart CBD remains the main location within the City for commercial and professional businesses comprising some 140,000sqm of commercial floorspace accommodating a range of private, local and state government organisations. The commercial services provided within Ballarat CBD support the function of the City as a whole in addition to the broader regional catchment in finance, insurance, legal, information technology and employment services.

These businesses choose to locate in areas that suit their scale and offer and provide suitable access to their clients. Locations range from prime space within the CBD core in commercial only buildings, through to more peripheral units above ground floor retail to smaller neighbourhood centres (such as College Street). Some commercial services may also operate from private residences or converted properties on main roads.

Continued Demand for Commercial Offices

Deindustrialisation is a trend that is continuing to result in the decline of industrial jobs. This trend is a global trend owing to the greater efficiencies of technology and mechanisation. Conversely, the increasing affluence of Victoria's population and growth of the New Economy (otherwise referred to as a knowledge and ideas based economy) is expected to strengthen demand for commercial floor space especially in key locations, close to tertiary education and transport links.

Barkham (2002) notes that *"Service sector organisations, both public and private sector, are the main users of office space."* The key long term trend in office development has therefore been the growth in the service and knowledge sectors. These sectors relate to civil service and public sector administration; banking, insurance and finance; private sector administration (corporate headquarters etc.); business services (law, accountancy and consultancy) and consumer services (health, education, media etc.).

In the 1970's there were predictions that with technological advances, a much larger proportion of people within the service and knowledge sectors would work from home, reducing employers' overheads and demand for office floorspace. This phenomenon has not been realised, with technology increasing the amount of out of hours work taking place at home or on public transport, but more than 80%[34] of the persons employed across Australia still work in business premises. Rather than a move away from businesses premises, technological advances have contributed towards a greater choice of locations and higher densities of employment within offices with wireless networks and the like facilitating initiatives such as "hot-desking".

[34] ABS Locations of Work Survey 2005

Emergence of Business Parks

With the decline of the office market in the 1970's in Australia and changes in business composition and technology, over the last decade and a half there has however been a significant shift in the location of office-based activities. This shift has been towards business park developments and industrial zones.

Business parks have become a successful alternative location for commercial and industrial businesses to traditional centres. An example of a business park in the City of Ballarat is the Technology Park in Mt Helen.

Business parks are now recognised as highly successful. Consistent across these parks are the following key characteristics:

- They are predominantly office parks with a component of warehousing, and in some cases a component of research and development and high-technology users;
- Apart from providing A-grade commercial space, often with cheaper rent than CBD locations, business parks enable purpose designed buildings and plenty of on-site car parking;
- The provision of on-site amenities that attract large corporations, which follows in the footsteps of business park developments in Britain and the USA;
- They hold a sense of prestige, which is a further factor that attracts large corporations. Tenants sign up with a business park for its marketable image. There is a preference for a good clean suburb, which is away from polluting industries. Business parks enable large corporations to custom build their headquarters, providing them with their own standalone identity, which cannot be achieved in a City Centre building of mixed tenants;
- They have lower floorspace ratios, typically 1:1 or lower compared to 2:1 (or higher) in established commercial centres (such as Melbourne or Sydney). This allows more cost-effective building construction; and
- They have flexible floor plates and cheaper ground rent, which allows warehousing and office space to be integrated.

Sustainable Communities

With rising fuel prices and the introduction of mandatory energy efficiency disclosure for large commercial buildings (>2,000sqm) by the Federal Government in the second half of 2010 sustainability will become an increasingly important driver of price and demand[35]. Sustainability is already a key driver, with the Jones Lang LaSalle survey (2009) finding that whilst only 37% of corporate occupiers were willing to pay rental premiums of between 1-10% for sustainable floor space but almost 90% considered green building certification when selecting premises.

The Jones Lang LaSalle Survey confirms our own view that energy efficient buildings are becoming the norm and moving forward sustainability will increasingly affect all aspects of construction and services. From a planning perspective a sustainable approach should result in the more efficient use of land in established centres to integrate employment opportunities and minimise the need to travel between home and places of work.

Furthermore, with strategic planning policies (global and regional) focussed on the delivery of sustainable communities, zoning for new business parks in out-of-centre locations should decline. While there is evidence that investors and

[35] The Jones Lang LaSalle 2009 global survey on Corporate Real Estate and sustainability indicates that an increasing number of corporate executives consider sustainability to be a critical business issue.

developers are beginning to revisit traditional centres which offer a greater variety and choice of shops and services together with higher levels of accessibility by sustainable modes of transport, the economics of amalgamating sites and meeting market expectations will determine whether development of these centres will eventuate. Furthermore in the case of Ballarat CBD, complexities may arise in relation to the cost effective refurbishment of heritage buildings in a sustainable way.

Work Life Balance / Lifestyle Choices

An increase in the number of working hours per household has resulted in time pressures for the workforce. Linked to this is the impact of a greater proportion of dual earning households that means less time for family responsibilities. The employment rate for women in Australia has steadily increased from 29% in 1954 to 47% in 1980 to 61% in 2000[36] with almost half of these having dependent children. In addition a large number of workers are responsible for caring for an ageing population (population aged 65 years and over projected to rise from 12.2% in 1999 to 22% in 2030 and 26% in 2050[37]).

As a result work places that enable workers to conveniently combine paid work, leisure and family responsibilities are becoming increasingly attractive. Business parks and large scale City Centre / edge of City Centre developments have generally endeavoured to emulate these features to some degree but often do not provide the diversity and mix of uses to compete with a vibrant City Centre location.

It is considered that the need for offices to be conveniently located within a vibrant mix of uses will become increasingly important to office workers and their employers. As such, work places that enable workers to conveniently combine paid work, leisure and family responsibilities, are likely to be attractive to employers and workers alike. City Centre locations must offer improved access to high quality retail shops and services as an added benefit which is often limited in business park locations. These should include a wide range of health, legal, banking and government related outlets, as well as consumer outlets.

Child care is another critical factor which attracts a wider range of employees to consider a work location and business parks often provide higher quality provision to ensure competitiveness, a factor which City Centre locations often lack.

Tourism Trends in Ballarat

In recent years domestic tourism across Australia has experienced a decline as a result of factors such as the growing strength of the Australian dollar and the increasing offer from budget airlines providing cheap flights to foreign destinations. As a result travel abroad has become more affordable and attractive for Australians compared to holidaying domestically. The strength of the Australian dollar, and the impact of the Global Financial Crisis, has also contributed to a decline in the number of international tourists holidaying in Australia. Notwithstanding the decline, in 2009 Tourism remained as a major industry across Australia with domestic tourism contributing a total economic value of $63.3 billion as of 2009 alone[38].

[36] ABS 2004

[37] ABS 2000

[38] Source: Tourism Research Australia.

In keeping with the Australian economy, Tourism is an important industry within the City of Ballarat given the legacy of gold mining and the historical importance of the events at the Eureka Stockade. Today the significance of tourism to the local economy is reflected by the number of tourist related facilities provided across the City. The key attractions to the City of Ballarat include, but are not limited to, the following:

- The Ballarat Aviation Museum;
- Ballarat Bird World;
- The Ballarat Fine Art Gallery;
- Sovereign Hill; and
- The Gold Museum.

Tourism Research Australia (TRA) defines a tourist business as: *an active business entity which relies significantly on visitors through both direct and indirect consumption of the tourism characteristic or tourism connected industry products or services the business produce.*

Tourism businesses are split into two groups – tourism characteristic and tourism connected businesses. The two groups are defined as follows[39]:

1. Tourism characteristic businesses: 'those [businesses] that would either cease to exist in their present form, or would be significantly affected if tourism were to cease. In the Australian Tourism Satellite Account, for an industry to be "characteristic", at least 25% of its output must be consumed by visitors.'
2. Tourism connected businesses: 'those [businesses], other than tourism characteristic [businesses], for which a tourism related product is directly identifiable (primary) to, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer.'

At June 2007 there were 465 tourism businesses recorded in the City of Ballarat. The statistical breakdown of businesses based on their size indicates that the City has a greater proportion of 'micro businesses' employing 1 to 4 people than the State average.

Information regarding tourism in the City of Ballarat is available from the ABS for the quarter to September 2010 (published January 2011). This details data for hotels, motels, guest houses and serviced apartments with 15 or more rooms/units. It indicates that at September 2010 the City had 29 hotels, motels and serviced apartments which provided 884 hotel rooms and 2,829 bed spaces. 336 people are directly employed by these accommodation facilities.

Comparable information is provided for 2009 which allows consideration of the change in tourism in the City of Ballarat over the 2009 to 2010 period, however no data prior to 2009 is provided for the City. Comparison of the data sets for the September quarter 2009 and the September quarter 2010 indicates the following:

- The number of room nights occupied fell by 9% from 41,281 (Q3 2009) to 37,597 (Q3 2010). This compares to a recorded rise of 9% for Victoria over the same period;

[39] Source: Australian Bureau of Statistics 2007, Count of Australian Businesses, including Entries and Exits, Catalogue No. 8165.0, ABS, Canberra.

- Room occupancy rates declined from 49.2% (Q3 2009) to 46.2% (Q3 2010), which compares to a rise from 59.1% to 63.3% in Victoria;
- A fall in the number of guest arrivals from 53,120 visitors (Q3 2009) to 45,479 (Q3 2010). This equates to a fall of 15% over the period and compares to a Victoria wide increase of 5% over the same period;
- A 13% reduction in the number of guest nights rooms were occupied from 91,143 nights (Q3 2009) to 79,560 nights (Q3 2010). This compares to an 8% increase for Victoria State;
- The average length of stay remained constant at 1.7 nights;
- Average takings of $4.3m in Q3 2010 compared to $4.7m in Q3 2009, a decline of 9%. This compares to a Victoria wide increase in takings of 12%; and
- A slight increase in the average takings per room per night occupied, from $113.14 in Q3 2009 to $114.73 in Q3 2010.

Overall these figures appear to indicate a decline in the tourism sector for the City of Ballarat over the Q3 2009 to Q3 2010 which is contrary to the State trend for this period, however given that data is only provided for a one year period it is not possible to determine whether this change reflects a broader decline. In addition, they do not take into consideration day visitors, those staying at hotels, motels and serviced accommodation with fewer than 15 rooms, or those staying in other forms of accommodation such as caravan parks or camping grounds.

Tourist data relating to the City of Ballarat is also published by the TRA which provides a profile for 2009/2010. Based on the TRA Data, 453,000 domestic overnight tourists and 1,432,000 domestic day tourists travelled to the City of Ballarat annually for the 2009/2010 period. The average stay for domestic overnight tourists is 2 nights which is lower than the State average of 3 nights. The average spend per night in the City of Ballarat by domestic overnighters ($291) is well below the regional average ($532), as is the average spend for day trippers to the City of Ballarat of $85, which compares to a State average of $98.

The difference in tourist expenditure in the City of Ballarat compared with Victoria may be attributable to the dominance of Melbourne in attracting tourists and its broader retail and entertainment options for spending compared to the City of Ballarat. Melbourne attracts 39% of domestic tourists visiting the State making it the top tourist destination in Victoria.

Ballarat's tourist visitor profile also indicates that for domestic overnight visitors:

- The majority of overnight domestic visitors to the City of Ballarat (81%) travel from intrastate locations which is higher than the State average (67%);
- The main purpose for overnight domestic travel to the City of Ballarat was either to visit friends/ relatives (39%) or to have a holiday (39%). Across the State, the most popular reason for visits was for holiday purposes (47%);
- When staying in the City of Ballarat the most popular form of accommodation was staying at a friend's or relative's home (43%); and
- The main activity undertaken once in the City of Ballarat was eating which was undertaken by 47% of visitors. This was lower than the State average (59%).

In addition, the City of Ballarat attracted some 15,000 international visitors during 2009/2010. These visitors stayed for an average of 12 nights in the City of Ballarat. Two-thirds of international visitors came for holiday purposes and 87% indicated that their primary reason was for cultural and heritage purposes. 66% of international visitors indicated that their primary data source for informing their visits was the internet.

The 2009/2010 TRA regional profile provides an update of the three to four year averages to July 2007. Comparison of these two data sources indicates that over the 2004/2007 to 2009/2010 period:

- The annual number of international visitors to the City of Ballarat declined by 32% from 22,000 per annum (2009/2010 period) to 15,000 per annum (2009/2010 period);
- There was a 15% reduction in the number of annual domestic overnight visitors to the City of Ballarat from 532,000 per annum (2009/2010 period) to 453,000 per annum (2009/2010 period); and
- There was a 19% increase in the annual number of day trippers from 1,204,000 per annum (2004/2007 period) to 1,432,000 per annum (2009/2010 period).

Residential Trends and Drivers

Regional Residential Growth Trends

It is likely that the future will see an increase in the residential market in regional areas of Victoria as a result of affordability issues affecting home ownership in metropolitan Melbourne, in addition to the existing trend of in-migration from other regional areas. Increased growth is likely to occur in regional centres which have strong and diverse economies, such as the City of Ballarat. Average house prices in the City of Ballarat, which is considered one of the larger regional centres of Victoria, are around half that of metropolitan Melbourne. In addition to this the cost of living in regional centres is often substantially lower than metropolitan Melbourne. Both these factors means regional centres such as Ballarat are likely to see an increase in population as more home buyers look to these centres as they are priced out of the Melbourne market.

The ease of access to Melbourne provided by the fast rail link in Ballarat increases the attractiveness of this option, in many cases making it faster and easier to access Melbourne's CBD than from many areas of outer suburban Melbourne. The potential increase in new residents from Melbourne may supplement the existing trend which has seen an influx of residents to Ballarat from other areas of regional Victoria, in particular the surrounding municipalities. It may also mean Ballarat become more attractive to new residents arriving in Victoria.

The other major demographic trend which will influence residential housing stock facing all areas of Victoria, and indeed Australia, is the rapidly ageing population. This will have a major impact on the demand for different housing types than current selling patterns indicate, including retirement and aged care housing. The recent trend towards 'ageing in place' means consideration needs to be given to providing dwelling types which are low maintenance, involving smaller dwelling sizes with greater proximity to services and facilities.

While the trend towards older populations is clearly documented and acknowledged this has not yet fed through into a change in types of dwellings being provided, with the vast majority of housing construction (particularly in regional areas) being detached stock. There will be a significant gap between the housing stock suitable for an ageing population and types of housing stock being constructed in the coming years. This has been flagged as a major issue likely to affect all areas of Australia.

Another significant demographic trend which is affecting regional Victoria, and is likely to impact on the housing requirements within Ballarat into the future is a decrease in couples with children across regional Victoria. In 1996 couples with children made up 33% of the population, however this is projected to decrease to around 23% by 2026. Combined with a significant increase in lone parents and couples without children, these changing household demographics will influence the types of housing stock required into the future.

Trends Particular to the City of Ballarat

Within the City of Ballarat itself, residential growth has occurred predominantly to the southwest. Since 2001 the growth has occurred primarily to the west (Alfredton) and given the designation of the south west as the areas to accommodate future growth in the City, it is clear that this trend will continue. These populations will need an improved level of local access to services and facilities.

To highlight the lack of diversity in housing stock discussed above, residential dwelling trends to date within Ballarat have been primarily dominated by detached housing, with only 6% of building approvals in the three years to 2008/ 09 being semi-detached and only 1% apartments. The remaining 93% of building approvals were for detached housing. While dwelling types approved have been relatively uniform, growth in house prices have not been, with the largest increase in price being found in Sebastopol, Wendouree and Alfredton. It is interesting to note that these are all areas which are considered 'affordable', but all these areas also have access to one or more Activity Centres.

There are a number of areas within the City of Ballarat which are experiencing a shift in demographics which will need to be considered as part of this Strategy. One of the key trends within the City of Ballarat is the loss of population in Ballarat Central and an associated decrease in property prices. It appears that a combination of factors is contributing to this. The population in Ballarat Central has been one of the most rapidly ageing in the town although this trend is beginning to slow, and a number of residences within this area are likely being converted from housing to commercial uses.

The other factor considered likely to be influencing the declining population within this central area are development controls (such as heritage overlay and flooding impacts) which may be restricting larger scale residential developments which often provide population boosts in inner city locations (such as Geelong). However, central Ballarat is one of the key destinations for in-migration and there is a likelihood that, as with many other centres, particularly those with student populations, that if appropriate housing is provided within a central area this trend may be reversed.

Another key trend is the on-going transition of Wendouree from what was a predominantly lower socio-economic area to a more conventional residential suburb. The proximity of to a major industrial area is likely to be reflected in the residential demand in the area. This is reflected in the house price increases mentioned above. It is worth noting that Wendouree (along with Lake Wendouree and Ballarat North) has the highest proportion of residents aged 75+ years. While there are some large scale aged care and retirement developments within the area, the older population is also likely to result in a turnover of housing stock as older residents may move from the area.

Appendix 4 - DESIGN PRINCIPLES

Design Principles

While any future structure planning process should identify design guidelines specific to particular centres and be in keeping with the *Activity Centre Design Guidelines* prepared by the State Government, the design guidelines identified below for the public and private realm are encouraged to be broadly applied across Activity Centres in the City of Ballarat

Urban Design Principles for development in the ***private realm*** *should seek the following design outcomes:*

- Encourage a mix of uses that create a sense of vitality to Activity Centres, in particular cafes, community services and a range of retail activities.
- Site buildings abutting street edges with retail or related activity, primary access doors and weather protection canopies directly to the street.
- Facilitate a mix of uses in multi-storey buildings which support active frontages and encourage appropriate activity throughout the day and evening, of a scale appropriate to individual Centres.
- Minimise gaps between buildings along key street frontages to maintain a continuous and interesting pedestrian interface.
- Buildings to incorporate architectural detailing, materials and massing which achieves a high degree of visual interest and positively contributes to the vibrancy and character of the Activity Centres.
- All visible building interfaces should be fully designed and the presentation of blank walls or loading areas to the public realm should be avoided wherever possible.
- Locate primary building entries along higher order street frontages and / or key pedestrian frontages.
- Minimise vehicle crossovers along primary retail streets.
- Site and design car parking areas to the rear of buildings / properties wherever possible.
- Include defined pedestrian paths and canopy trees at regular intervals within surface car parks.
- Encourage natural surveillance of the public realm, in particular streets, pedestrian spaces and car parking areas through building configuration that facilitates interaction between the public and private spaces via windows, fenestration, balconies and a range of activities.
- Facilitate improvements to Activity Centres where there is an opportunity to create or improve accessways / laneways which can service car parks at the rear of properties or provide additional through block links.
- Encourage development to facilitate the provision of through block links, particularly for pedestrians and cyclists, which enhance safety, legibility and permeability.
- Encourage the provision of landscaping which complements public landscape themes and character to reinforce the image of the Activity Centres.
- Encourage development which addresses sustainable development opportunities and provides an appropriate outcome measured in terms of social, economic and environmental considerations.
- Encourage development and investment which integrates retail and community activities.
- Encourage renewal, maintenance and improvement of buildings which will enhance the image and identity of the Activity Centres.

Urban design principles for development in the public realm should seek the following design outcomes:

- Encourage the creation of public spaces which provide informal gathering opportunities.
- Provide bicycle parking, bins, seating, amenities and other street furniture in convenient locations.
- Provide public infrastructure in a coordinated manner and maximise opportunities to enhance a Centre's identity and image through consistent signage, infrastructure, amenities, etc.
- Provide high quality, wide, well lit public footpaths in Activity Centres with clear and legible connections to surrounding areas to facilitate walking.
- Utilise consistent landscape themes throughout each Activity Centres which contribute to a positive centre image and identity.
- Employ water sensitive urban design treatments in the provision of public spaces and work towards integrating precinct-wide water sensitive infrastructure servicing the public and private realm.
- Ensure bicycle infrastructure, in particular bike paths and lanes are well connected, safe and legible.
- Support a safe and comfortable pedestrian environment with:
  - provision of road crossings at regular intervals and which reflect natural pedestrian desire lines;
  - canopy street trees for shade and image;
  - verandas along shopfronts for weather protection;
  - good natural surveillance from within the public space, and between public and private spaces;
  - supporting amenities (i.e. seating, water fountains, lighting, toilets); and
  - street based activity.