Commercial Land and Activity Centre Strategy

Prepared in association with SGS Economics and Planning

November 2015

Commercial Land and Activity Centre Strategy
Strategy Unit City of Greater Bendigo **November 2015**

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This document is based on the research and findings contained in the background reports prepared by specialist consultants SGS Economics & Planning.

INTEGRATED OUTCOMES
OF GREATER BENDIGO'S MAJOR STRATEGIES

Working together to be

AUSTRALIA'S MOST LIVEABLE REGIONAL CITY

HEALTH
A healthy and safe community with improved wellbeing

LEADERSHIP
Transparent, collaborative governance and effective community engagement

ECONOMY
A sustained and diverse economy that fosters innovation, learning, jobs and productivity

ENVIRONMENT
Celebrated and protected built heritage and natural environment and effective use of resources

SOCIETY
An equitable and tolerant city where the benefits and opportunities are accessible and better shared

Executive summary

The *Commercial Land and Activity Centre Strategy* (CLACS) has been prepared to provide a framework for how our activity centres are planned and developed over the next two decades. It replaces our existing Commercial Land Strategy from 2004 that has guided a significant amount of commercial development over the past decade.

The new strategy and its recommendations utilise the latest population and demographic information available, together with a comprehensive understanding of our existing supply of commercial floorspace. The strategy has analysed the data, investigated emerging trends and innovations in retailing, and applied the key strategic directions coming from the recently adopted *Residential Strategy*, *Economic Development Strategy* and *Connecting Greater Bendigo ITLUS* in order to reach its conclusions and recommendations.

In essence, there are two key outputs of the CLACS:

1. **A set of updated projections for the ‘demand’ for new commercial floorspace across the municipality; and**
2. **An updated Activity Centre Hierarchy.**

The updated projections indicate that there will be significant demand for new commercial floorspace over the next 15 years. In the City Centre alone, it is estimated that around 10 city centre blocks of (single storey) development will be needed over the next 15 years to meet the forecast demand. But it is important to remember that the demand is not spread equally across the different sectors or the different activity centres, rather it varies for each centre and has been broken down into categories including supermarket, specialty retail, department store, hospitality and office.

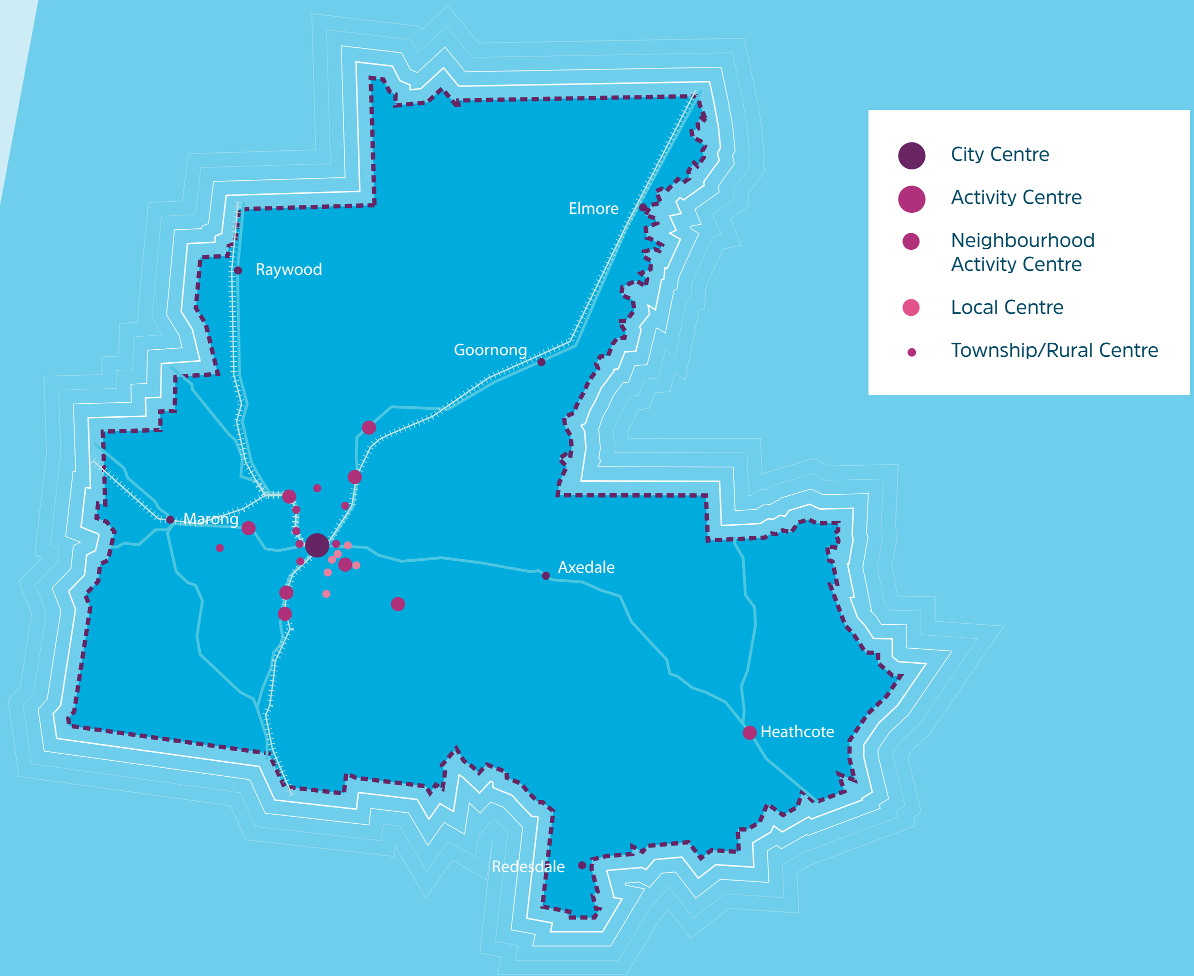
It is also important to remember that the demand may not always be met, or in some circumstances there may be an oversupply. In these instances, existing businesses will either trade better, or worse, than could be expected based on their population catchment. The breakdown of future floorspace needs for the larger centres can be found in the ‘Demand for commercial floorspace’ section of this report.

Our smaller centres have not had projections completed for them due to the difficulty in estimating when new floorspace will become commercially viable and developed. However the Strategic Directions apply to these centres just as much as they do to the larger centres. The projections for Marong are also likely to change as a result of the detailed planning that will be carried out as part of the Marong Precinct Structure Plan estimated to commence in 2016.

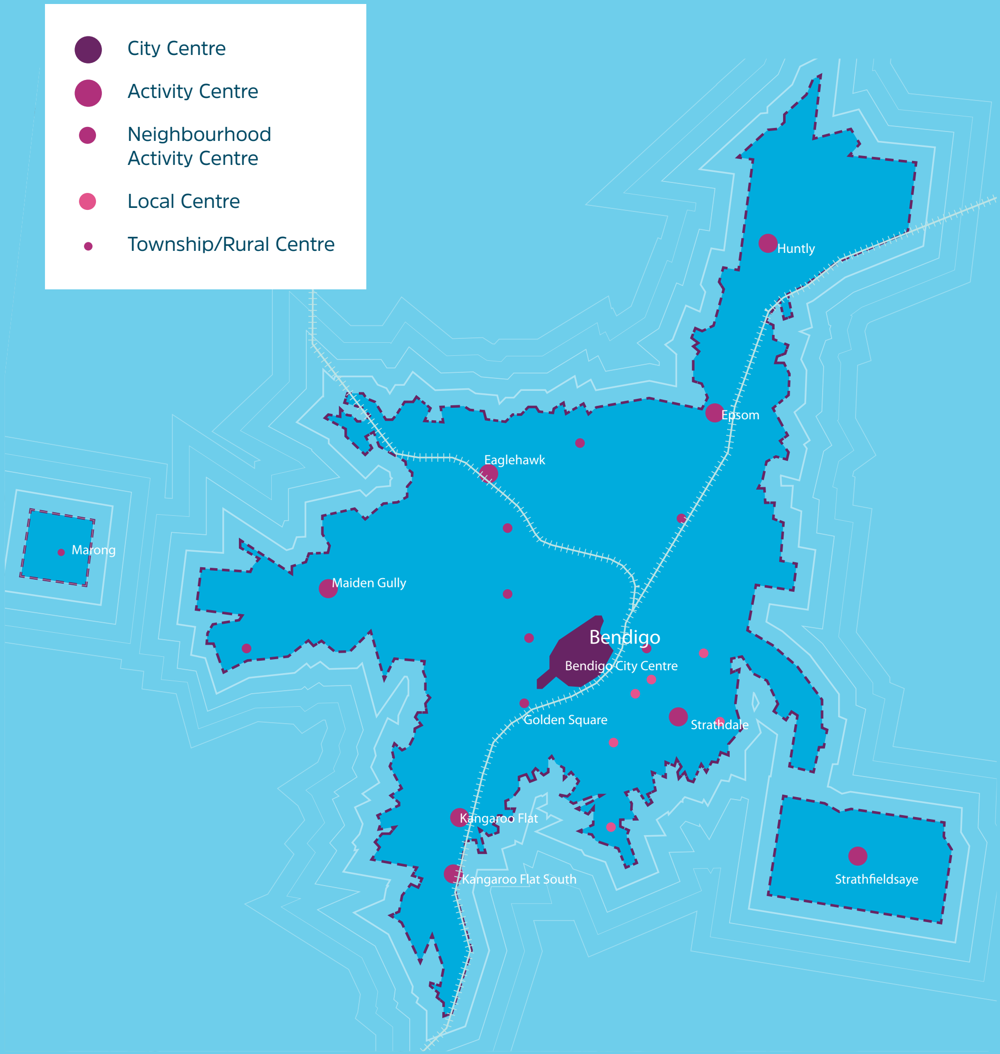
The updated Activity Centre Hierarchy builds on the existing hierarchy that we have for the municipality, however it now includes places where recent growth has occurred or significant growth is planned. The strategy also highlights the evolving role that each centre needs to take to meet the needs of its supporting residential community. While used primarily as a planning decision making tool, having an effective Activity Centre Hierarchy is essential if we are to deliver on our community endorsed vision of working together to be Australia's most liveable regional city.

Maps showing the spatial distribution of the activity centres that make up the hierarchy are included below:

The Activity Centre Hierarchy – Municipal area



The Activity Centre Hierarchy – Urban Bendigo



Introduction

Greater Bendigo, and the Bendigo City Centre in particular, is undergoing somewhat of a renaissance. There has been a significant improvement to road and rail connections to Melbourne and the wider Loddon Mallee South region. Amazingly we are now seeing more commuters *arriving* at the Bendigo Station during the morning peak than *departing!* There has also been a sustained effort in restoring and celebrating our built heritage, while at the same time embracing new contemporary buildings and architecture.

The business sector continues to evolve and Bendigo is now a significant hub for innovative financial services. Together with the impending completion of the New Bendigo Hospital there will be continued growth in the healthcare sector and more interestingly in businesses supporting that sector. Finally, we have seen continued investment in community assets such as the Bendigo Library, Bendigo Art Gallery and Ulumbarra Theatre. These facilities are the non-retail anchors that are driving a new wave of visitation and contribute to the lifestyle and opportunities that are now available to residents and visitors alike.

Our population is also growing. In 2015 Greater Bendigo's population was 110,579 and is forecast to increase to 145,375 by 2031. Or in other words, our population is forecast to increase by around 31%! This provides both opportunities and challenges for the City of Greater Bendigo.

It means more services will need to be provided to meet the population growth, more employment happens as many jobs are now about supplying services to people, and the municipality can sustain more diverse facilities and services. But it also places demands on future planning and infrastructure development, and the maintenance required to meet the needs of the residents and workforce.

This strategy will assist in meeting the opportunities and challenges mentioned above. It is one of a suite of critical pieces of strategic planning that the City has been working on to make sure that we can maximise the opportunities while we address the challenges. It is a document that has researched the changing face of retailing and commercial development and provides the framework to facilitate future commercial development in a way that will support existing and future investment in jobs, economic activity, community development and city building. It is an exciting time to be investigating this issue as we are at the convergence of policy directions relating to residential development (where we will live) and transport and land use planning (how we will get around to the places we need to go). We have also seen a lot of commercial growth in our suburban centres over the past decade or so, guided by our previous Commercial Land Strategy, and this updated policy framework is expected to do similar and guide the next wave of investment for the benefit of the entire Greater Bendigo community.

Developing the strategy

The Commercial Land and Activity Centre Strategy complements the Council Plan 2013-2017 (2015-2016 Update), and will contribute to Theme 2: Planning for growth and Strategy 2.2: Council manages the planning and development of the City through the preparation of major strategies and effective amendments to the planning scheme. The Council Plan broadly outlines how council will achieve its goals and how it will measure its progress against them.

The development of the strategy was overseen by a Steering Committee consisting of three Councillors, a representative of the Urban Development Institute of Australia, a representative of the Bendigo Traders Association and relevant City of Greater Bendigo staff. The technical analysis and first phase of key industry stakeholder consultation was led by SGS Economics and Planning, who are a well credentialed firm working in this specialised field. Consultation included major retailers, developers, centre managers, consultants and trader groups.

The strategy's development also included:

- **A review of the objectives and key themes of the existing Commercial Land Strategy;**
- **An investigation of national and international trends that impacts on activity centre planning; and**
- **An assessment of the demand for future commercial floorspace and employment growth.**

The draft of the new strategy was then prepared and released for a period of community comment between 25 March and 6 May 2015. Copies of the draft were sent to key stakeholders and briefings were held with several business groups. As a result six submissions were received and they have contributed to several changes being made, which has resulted in this final document.

Bendigo's growth and potential

The City of Greater Bendigo is expected to continue to experience strong population and dwelling growth over the coming 15 years and beyond. A summary is provided in the table below, where the two shaded columns relate to the planning timeframes of 2021 and 2031 referred to later in this strategy. As can be seen, across Greater Bendigo there is forecast to be an increase in the population of around 33,000 people and an additional 14,000 dwellings built (between now and 2031).

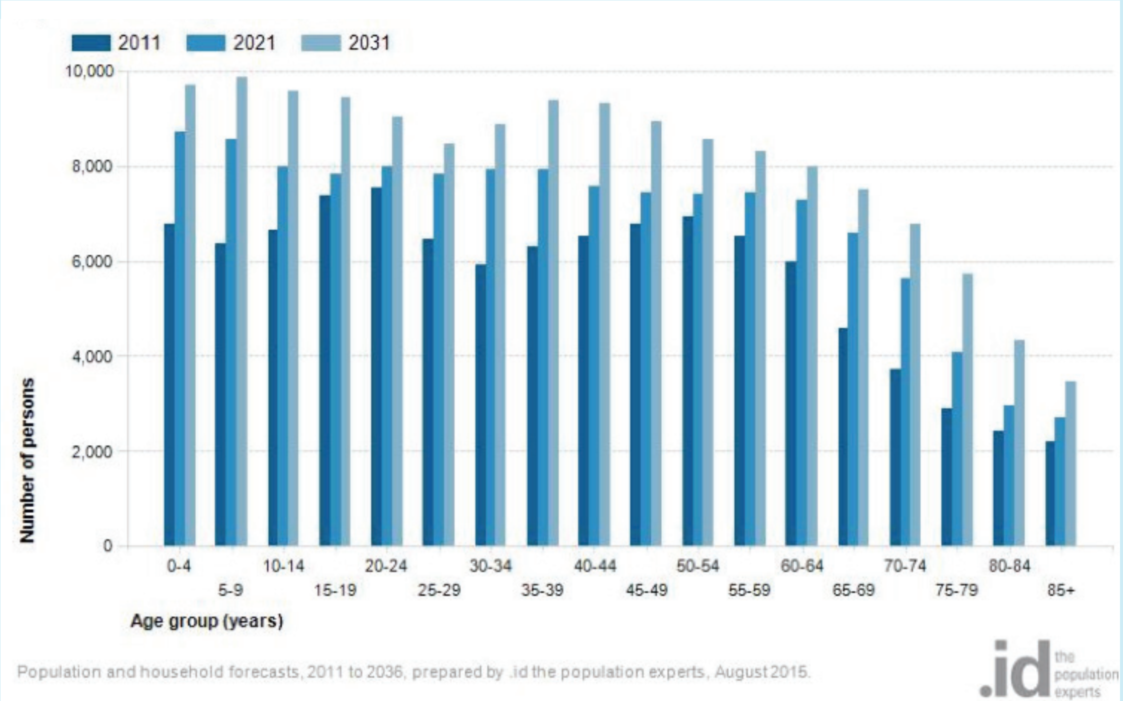
City of Greater Bendigo			Forecast year		
Summary	2011	2016	2021	2026	2031
Population	101,997	112,853	123,975	134,695	145,375
Average annual change	-	2.04%	1.90%	1.67%	1.54%
Average household size	2.46	2.44	2.44	2.43	2.43
Dwellings	43,827	48,636	53,380	57,868	62,204

Population and household forecasts, 2011 to 2031, prepared by .id, May 2015.

Looking at the age structure of the population, we can see there is growth forecast across all age groups, with slightly larger areas of growth occurring in the 0-9, 30-44 and 70+ age cohorts.

Forecast age structure – 5 year age groups

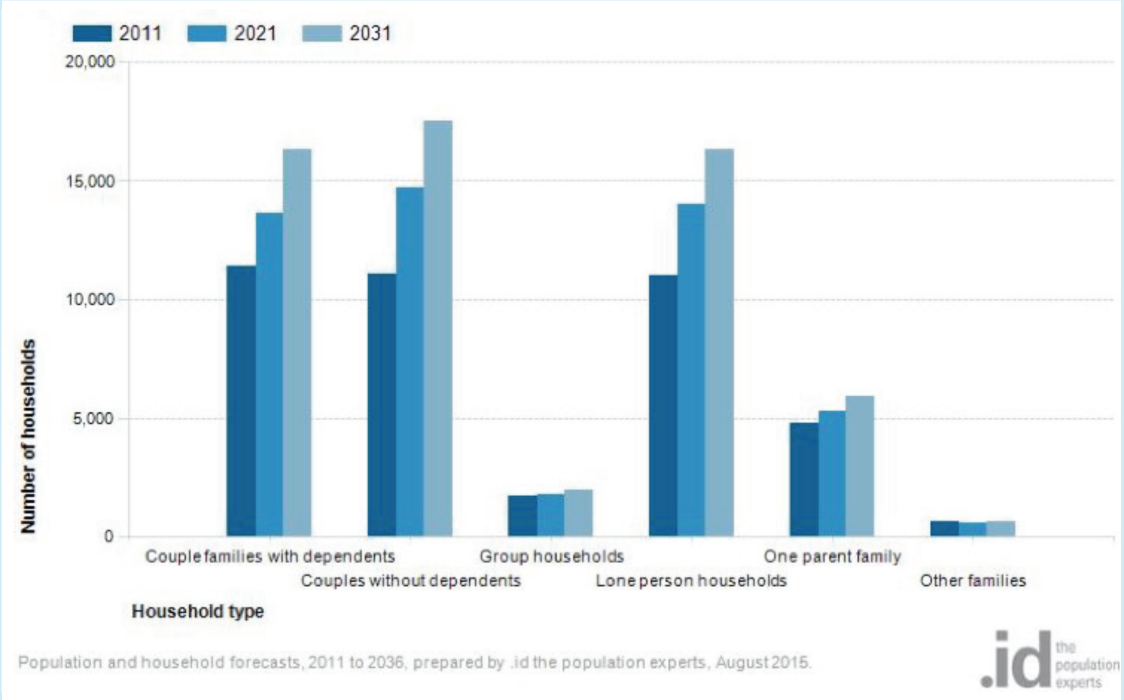
City of Greater Bendigo Total persons



With respect to the make-up of households, 'Couple families with dependents' are currently the largest group making up 28.1% of total households. However it is interesting to see that there is strong growth forecast for 'Couples without dependents' and 'Lone person households'. By 2031 well over half of all households will only have one or two people living in them.

This may become an issue if housing is not provided that meets the needs of these families. Currently around 75% of all dwellings have three or more bedrooms, which may mean that some families are living in houses that are larger than they would prefer, thereby resulting in higher housing costs that may be the case if more diverse housing options were available.

Forecast household types
City of Greater Bendigo



An analysis of where the population growth is predicted to occur indicates that there is a strong need to focus planning attention and investment on the Activity Centres in Huntly, Epsom, Eaglehawk, Maiden Gully and Strathfieldsaye. Marong is also singled out for dedicated planning attention however this will be completed as part of the structure planning process that is planned to commence in 2016/17.

Increased retail, community services and employment opportunities will need to be available to support these populations. Existing suburbs within Bendigo are also expected to grow, potentially reaching thresholds which will sustain greater levels of local commercial activity.

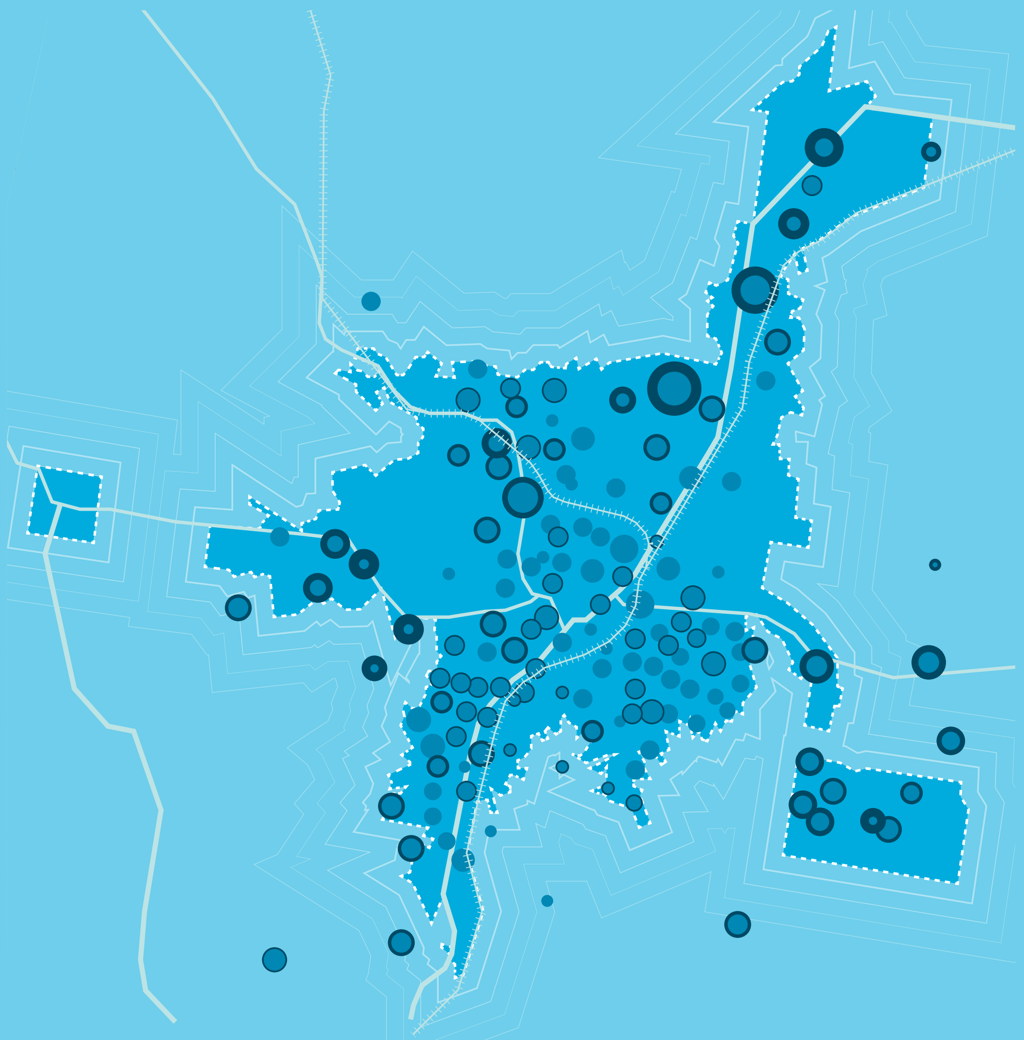
A summary of the population growth across the municipality is provided on the following page

City of Greater Bendigo	Forecast year						Change between 2011 and 2036	
							Total	Avg. annual %
Area	2011	2016	2021	2026	2031	2036	change	change
City of Greater Bendigo	101,997	112,853	123,975	134,695	145,375	156,151	54,154	1.72
Bendigo	5,948	6,048	6,526	7,648	8,410	8,780	2,832	1.57
Eaglehawk - Eaglehawk North - Sailors Gully	5,637	6,282	6,648	6,981	7,134	7,261	1,624	1.02
East Bendigo	2,126	2,283	2,505	2,636	2,740	2,852	726	1.18
Elmore - Rural North	3,246	3,345	3,460	3,595	3,721	3,792	546	0.62
Epsom - Ascot	3,902	4,823	5,284	5,390	5,467	5,525	1,623	1.4
Flora Hill - Quarry Hill - Spring Gully -	9,439	9,735	9,991	10,198	10,232	10,289	850	0.35
Golden Square	8,575	9,208	9,929	10,368	10,714	10,915	2,340	0.97
Heathcote & District	3,738	3,805	4,022	4,149	4,182	4,172	434	0.44
Huntly	2,088	3,368	5,167	7,099	8,955	10,949	8,861	6.85
Kangaroo Flat - Big Hill	10,029	11,307	12,157	12,401	12,833	13,405	3,376	1.17
Kennington	5,928	6,033	6,168	6,259	6,235	6,240	312	0.21
Long Gully - West Bendigo - Ironbark	4,872	4,896	4,969	5,027	5,207	5,313	442	0.35
Maiden Gully	4,323	4,900	5,474	6,966	8,955	11,342	7,019	3.93
Marong - Rural West	3,827	4,561	5,400	6,563	7,906	9,452	5,625	3.68
North Bendigo - California Gully	8,349	8,813	9,113	9,346	9,618	9,815	1,466	0.65
Rural East	6,316	7,491	8,353	8,793	9,073	9,470	3,153	1.63
Strathdale	5,791	5,956	6,075	6,152	6,196	6,253	462	0.31
Strathfieldsaye	4,691	5,689	7,449	9,120	11,227	13,286	8,595	4.25
White Hills - Jackass Flat	3,173	4,310	5,286	6,005	6,568	7,040	3,867	3.24

Figure:
Population growth between 2011 and 2031

Bendigo Population Forecast 2011–2031

1,000 residents 2011
2,000 residents 2031



Note: the Marong population forecasts will be updated as part of the planning work expected to commence in 2016/17. It is expected that population growth will be significantly quicker than previous forecasts predicted.

Supermarket floorspace demand

The demand for supermarket floorspace has been singled out for detailed examination on the following pages. This is because there is a very strong relationship between the amount of supermarket floorspace required and the number of people living in an area (sometimes referred to as the 'catchment').

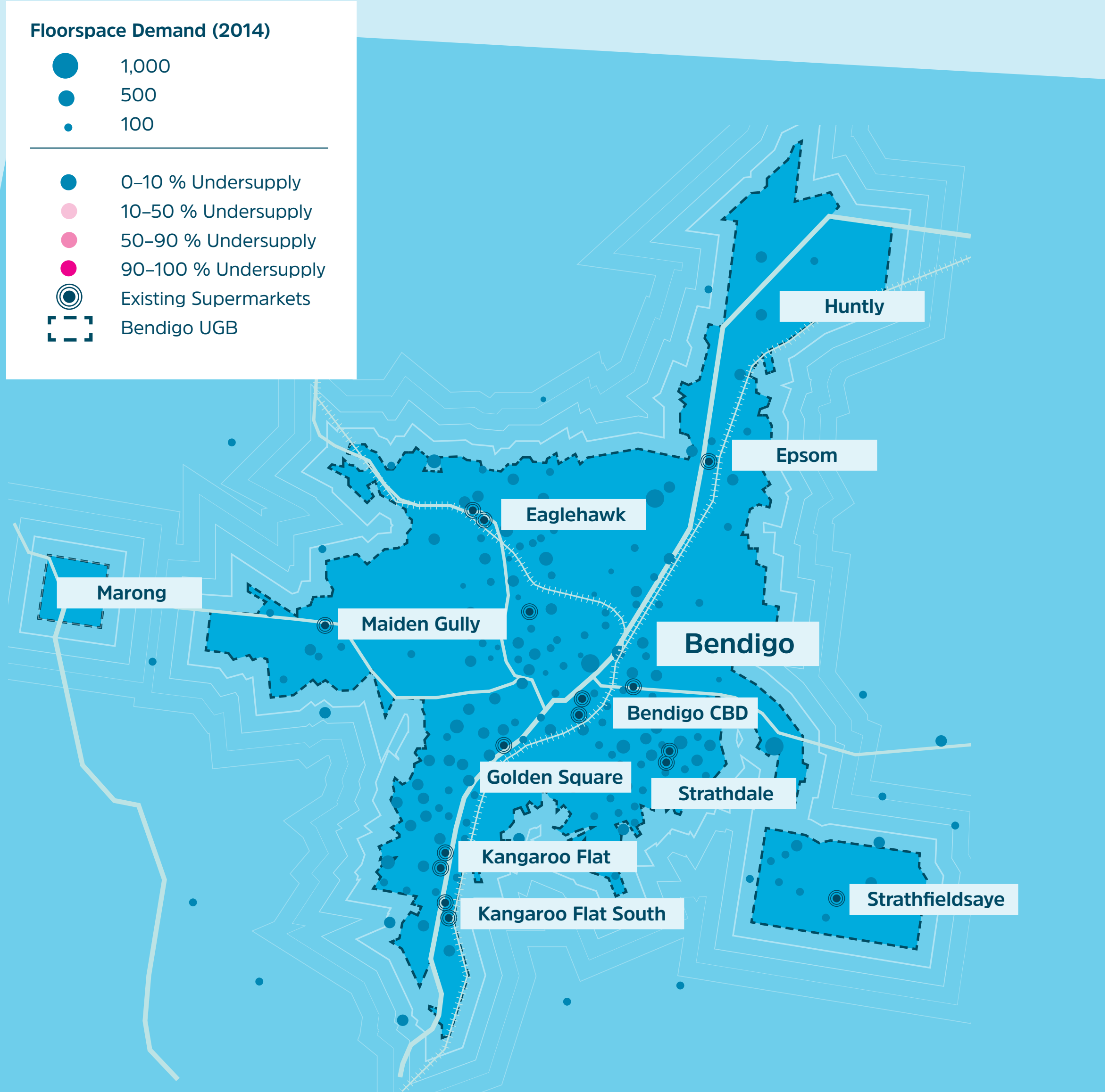
The three figures on the following pages focus on the demand for local food and groceries. Grey circles indicate floorspace demand which is met by a supermarket within a 10 minute drive, while red circles indicate unmet demand. The size of the circles represents the quantum of floorspace demand. Note, this analysis assumes no increase in floorspace supply.

Whether a circle is grey or red is driven by travel times and the underlying supply and demand equation based on trade area catchments. So when red circles appear even though those areas are within 10 minutes' drive of a supermarket, it suggests that those supermarkets are overtrading, and there is a case to supply new supermarket floorspace – either at the nearby centre OR in a new centre if (a) the nearest centre is relatively distant and (b) there is sufficient demand. Blue dots indicate the location of existing supermarkets.

Existing demand for supermarket floorspace

The analysis indicates that in 2014 most residents were able to access a supermarket within a 10 minute drive. The Bendigo urban area is well serviced by supermarket floorspace with no unmet demand identifiable across the centres network.

Note: Detailed floorspace demand for Marong will be completed as part of the Marong Precinct Structure Plan commencing in 2016. It is expected that population growth will be significantly quicker than existing forecasts predicted.

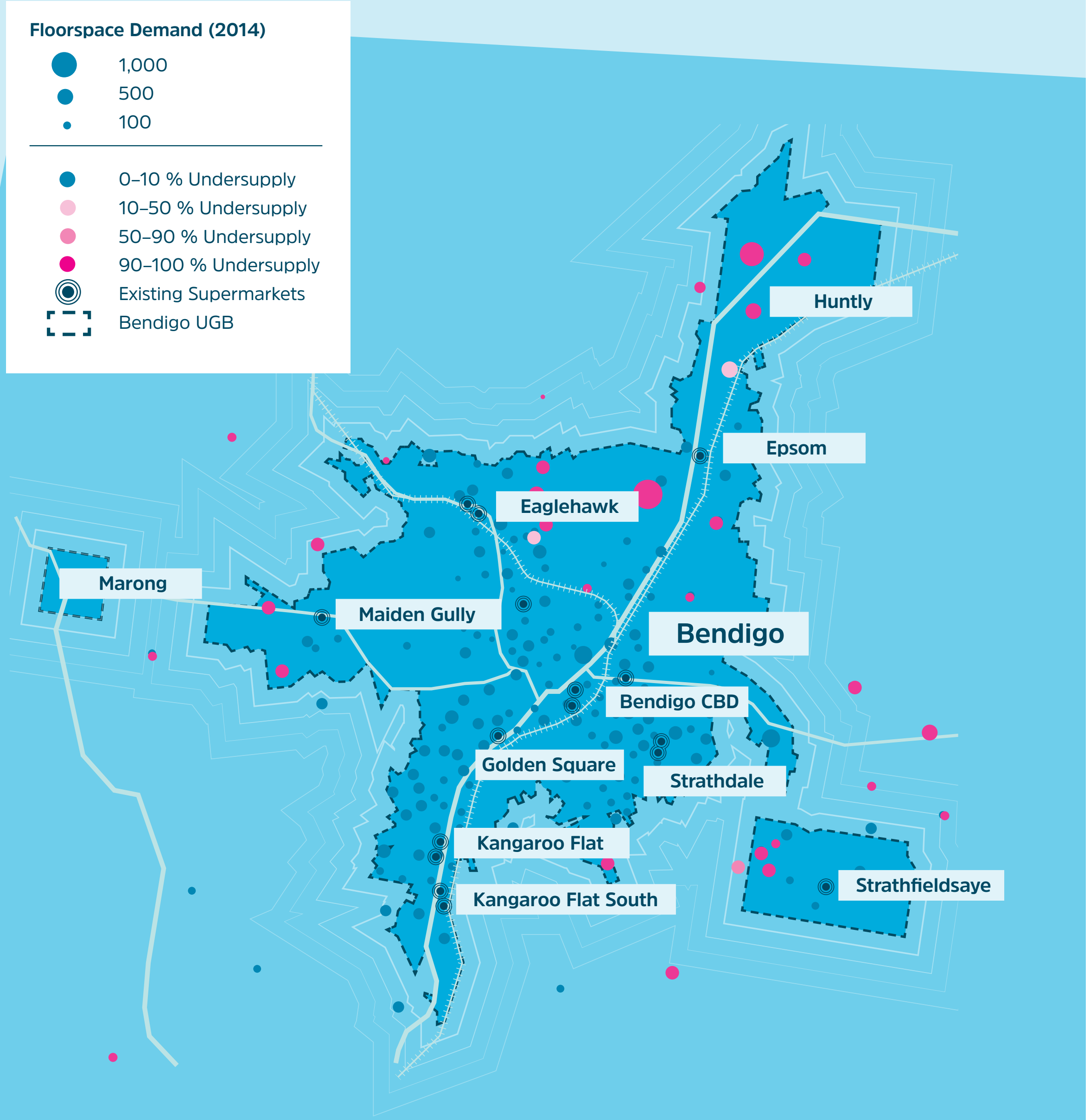


2021

By 2021 undersupply begins to emerge in Huntly, Epsom, Eaglehawk, Maiden Gully and Strathfieldsaye. There is likely to be a need for increased provision of supermarket floorspace in those areas with other forms of retailing also likely to follow.

While further supermarket floorspace provision beyond those areas could also absorb this demand (e.g. in Strathdale or Golden Square), those residents would need to travel further to access that floorspace. Hence new retail floorspace provision closer to the Bendigo City Centre, while commercially feasible would not maximise Net Community Benefit because it would require more travel and the environmental and social costs associated with it.

Note: Detailed floorspace demand for Marong will be completed as part of the Marong Precinct Structure Plan commencing in 2016. It is expected that population growth will be significantly quicker than existing forecasts predicted.

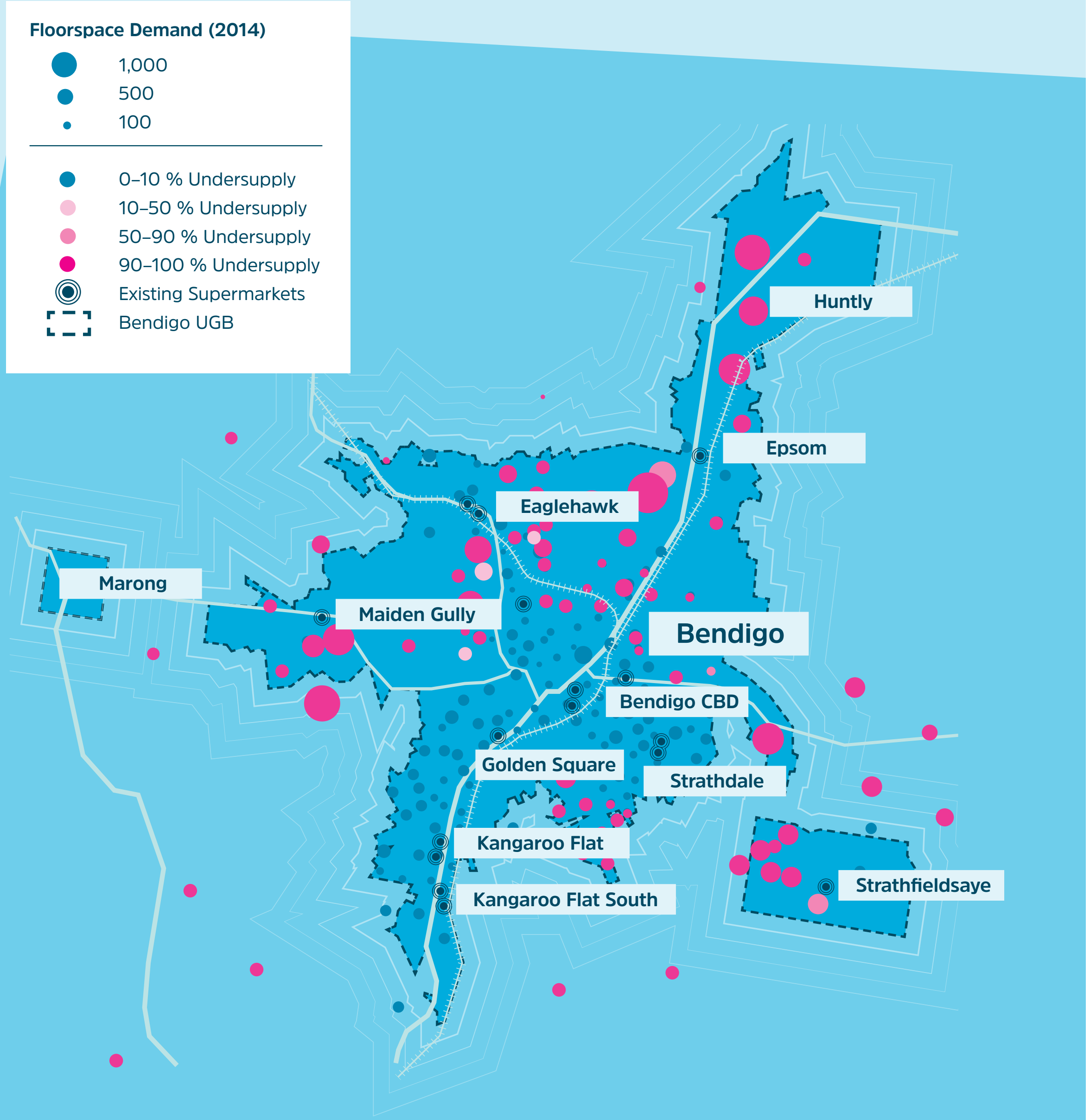


2031

By 2031 the undersupply spreads more significantly across Bendigo. Most outer and middle suburban areas of Bendigo will require increases to supermarket floorspace supply, with the need being most profound in Strathfieldsaye, Epsom, Huntly, Eaglehawk and Maiden Gully.

While much of this demand could be absorbed by existing stores, new floorspace should still be encouraged as a means of encouraging competition, greater choice and a more diverse offer. For example 8,000sqm of retail floorspace could be comprised of a full-line Coles / Woolworths, an 1,800sqm Aldi, an independent plus an Asian grocer. This in turn increases the proportion of local residents drawn to the centre optimising footfall for all businesses and increasing social integration.

Note: Detailed floorspace demand for Marong will be completed as part of the Marong Precinct Structure Plan commencing in 2016. It is expected that population growth will be significantly quicker than existing forecasts predicted.



Non Retail Employment

Despite being the major employer in Bendigo's economy, retailing alone will not deliver the full range of services that the community could potentially access in commercial centres. Tourism aside, retail businesses are also heavily reliant on local expenditure. Commercial centres that are almost exclusively anchored by retail floorspace tend to struggle during an economic downturn. In regional cities, such downturns are often a result of declining fortunes in the agricultural or manufacturing sectors.

When this occurs, local expenditure declines significantly, as employment and income levels decline. Retail expenditure falls and most retailers (with the important exception of supermarkets) tend to struggle. Retail employment also declines. While Bendigo's economy is more diverse than agriculture, manufacturing and retailing, it needs to foster growth in knowledge based industries as a valuable source of employment.

Growth of 'knowledge based industries' in regional centres

Large regional centres have emerged to undertake the lead or 'flagship' role for rural hinterlands in the new economic geography. The process of agglomeration results in a drift of people from the land and smaller towns to the big centres in search of job opportunities and services. The population is in turn followed by consumption-based services.

Retailing, banking and community services are examples of activities that have followed people to the big centres. Rationalisation and privatisation of public sector activities (e.g. government offices and hospitals) which favour fewer but bigger centres further magnify this process. In an increasingly competitive global economy, access to knowledge and creativity are central to the abilities of businesses to deliver new cost savings, or to add value through product differentiation. As a result, highly skilled workers have become the new drivers of economic prosperity.

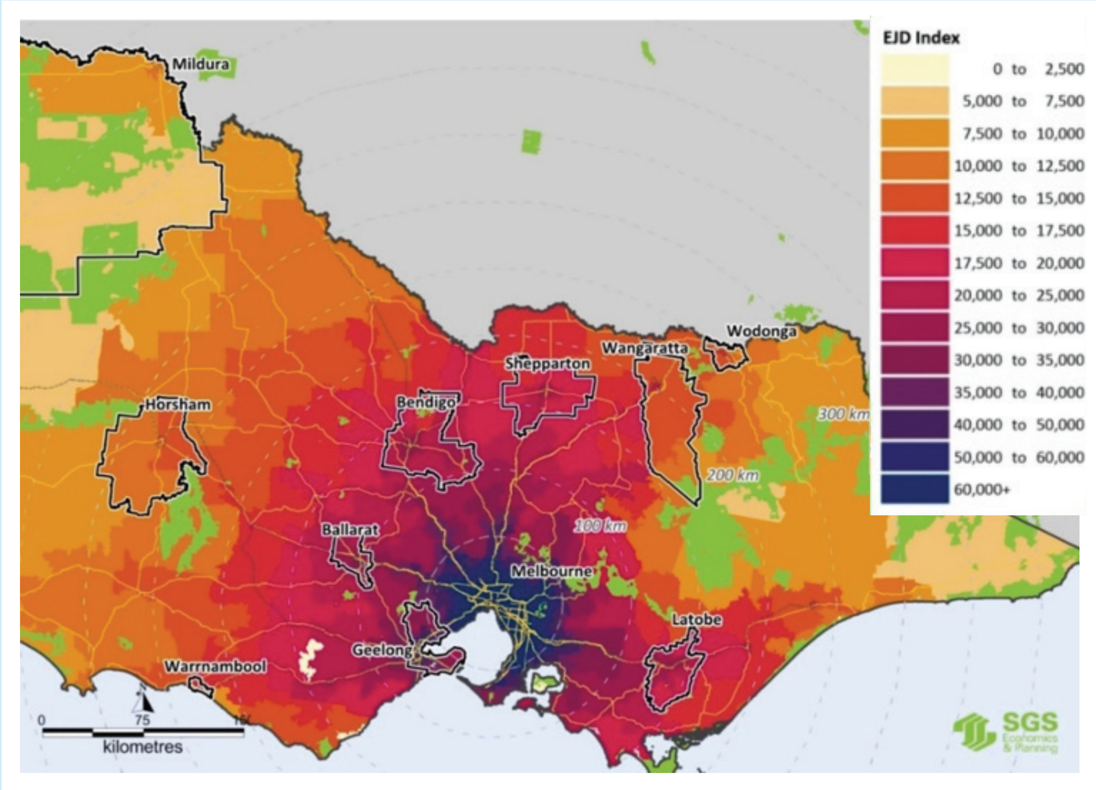
Knowledge workers bring value to the local economy because they have high economic wealth, adaptable, flexible and transferable skills, relative job security and good career prospects. Attracting and retaining these 'knowledge workers' is therefore a critical component of any investment attraction and facilitation strategy.

The knowledge services sector place a premium on an area's lifestyle attributes including its recreation, leisure, entertainment, community and cultural infrastructure. Many of these firms however must be well connected both physically and virtually and be supported by the governance of the local area – including industry, institutional and government support.

To help spatially illustrate the relative position of Greater Bendigo within the Victorian economic landscape the map on the following page identifies the Effective Job Density (EJD) Index (an accepted measure of agglomeration) across Victoria for 2011. This measure essentially discounts every job within Victoria by the time taken to gain access to that job via car. Therefore, it provides a very detailed understanding of the relative level of employment opportunities (and associated services) available across Victoria.

The dominance of Melbourne within the broader Victorian region is instantly obvious. However, concentrations of economic activity around a major regional centre like Bendigo and its connection back into Melbourne can also be observed.

The map highlights the relative advantage that different parts of regional Victoria, including Greater Bendigo have in attracting new investment and growing the local economy. The strong north-south connection through the City provides critical links between Melbourne and Northern Victoria (as well Southern New South Wales), and is one of the most significant regional employment corridors in Victoria.



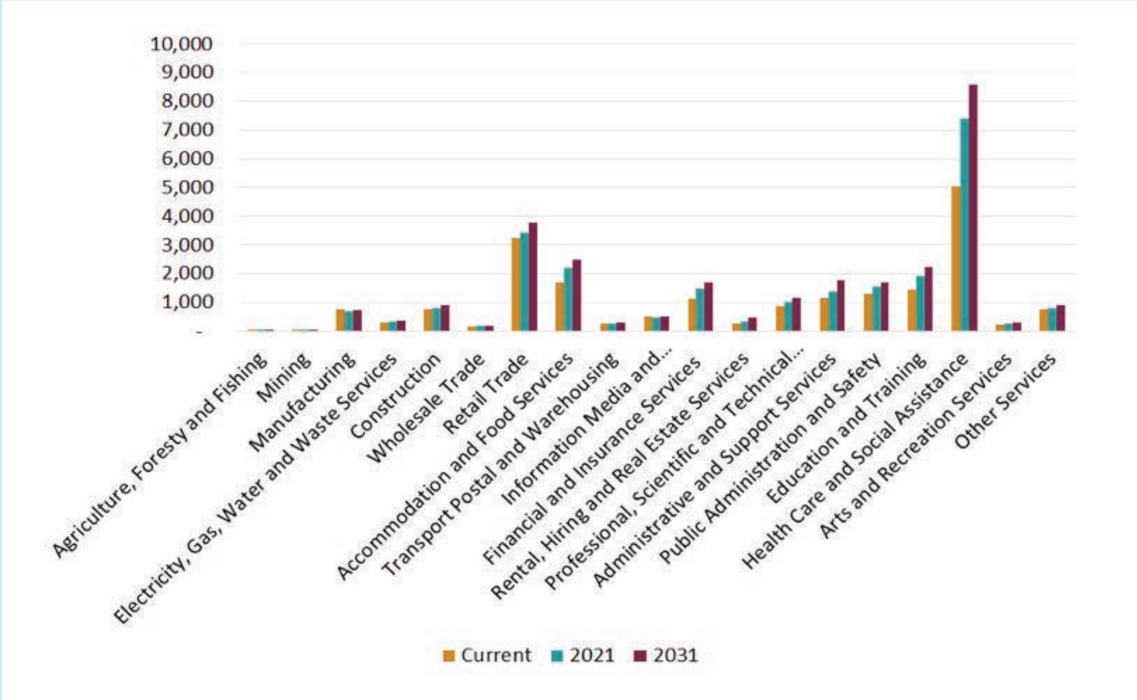
The vast majority of Greater Bendigo's non-retail commercial floorspace is concentrated in its city centre. This is a generally positive outcome as it suggests a high level of urban agglomeration, which in turn drives knowledge transfer and innovation in the advanced service industries.

> **"… the hospital alone is likely to create 1,000 new jobs in Bendigo Health"**

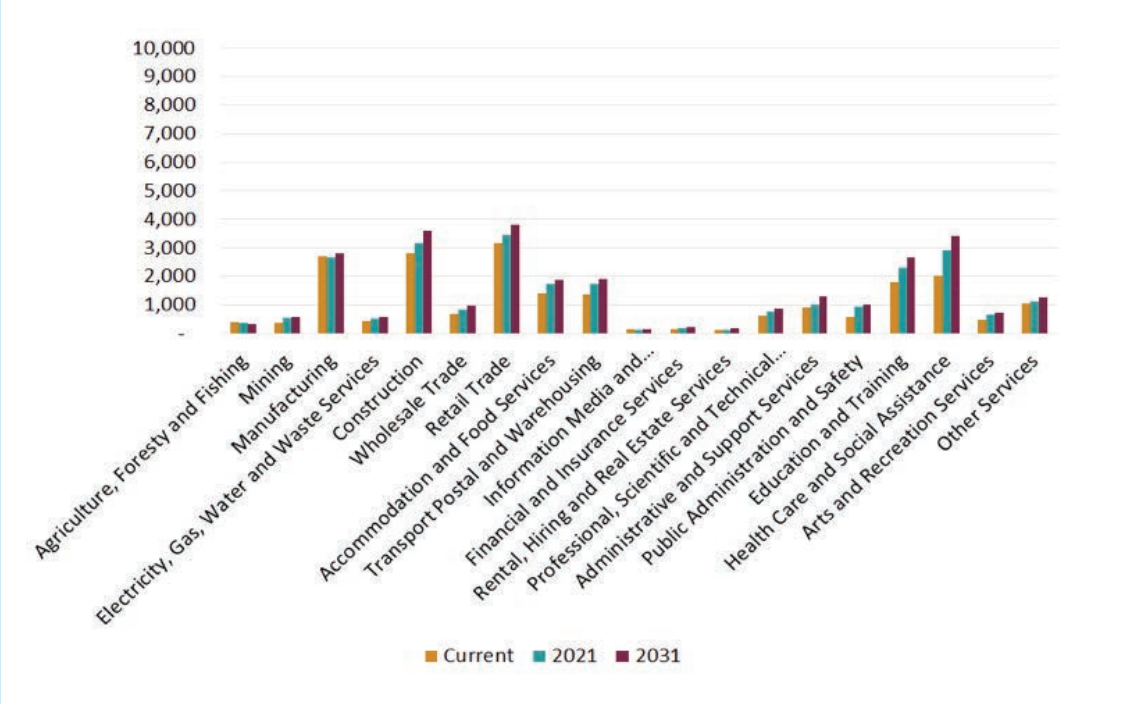
Healthcare is the largest employing industry, with the new hospital alone likely to create 1,000 new jobs in Bendigo Health. The experience in other locations across Victoria would suggest that this development is likely to encourage the establishment of a significant healthcare cluster beyond the walls of the hospital itself. Otherwise there is a diverse mix of businesses in the city centre, with no overreliance on any one or two industries in particular.

Employment projections for the Bendigo City Centre

Over the next 15 years there is likely to be significant employment growth in the Bendigo City Centre. Healthcare will continue its growth as the largest employing industry.



Employment projections for the remainder of Greater Bendigo



Projections indicate that 'non-retail' commercial floorspace will be limited beyond the Bendigo City Centre, with only a third of this floorspace being located in activity centres. Other locations where non-retail floorspace can be expected include the Deborah Triangle and townships beyond the Bendigo urban area such as Marong, Elmore and Heathcote.

The businesses in activity centres are largely limited to population serving functions such as local health practitioners, accountants and suburban lawyers. Further growth of such functions will continue in activity centres in response to population growth and demographic change.

Employment growth beyond the city centre will be modest, but still positive across most population serving functions. The construction industry will be an important employer as the rate of residential development accelerates in growth areas. However, as those communities mature, more employment opportunities will need to be made available for local residents.

It will be difficult to attract non-population serving businesses to the suburban areas. As a result, many new residents in Huntly, Epsom, Maiden Gully, Eaglehawk and Strathfieldsaye will still commute to central Bendigo to access the higher order, knowledge intensive employment.

This is a reasonable outcome for a regional city such as Bendigo. In a large metropolis like Melbourne, significant travel times mean that non-population serving jobs also need to be provided (where possible) beyond the city centre. In Bendigo, the relatively shorter travel times and distances provide even growth area residents good access to city centre jobs.

The major benefit of concentrating all non-population serving employment in the one location is that the greater the mass of activity, the higher the levels of knowledge transfer and positive spill over externalities related to co-location. With a relatively large city centre by regional standards, there should also be enough sites to accommodate all of this growth in commercial activity within the Bendigo City Centre.

Nonetheless, sufficient employment floorspace should still be provided in other activity centres to ensure that population serving businesses can be established in these locations. This will be particularly important to certain demographics which need to juggle part time employment with other responsibilities such as childcare. Many of these businesses may also compete based on cost, with lower floorspace costs available both out of the city centre and out of centres altogether.

Retail snapshot

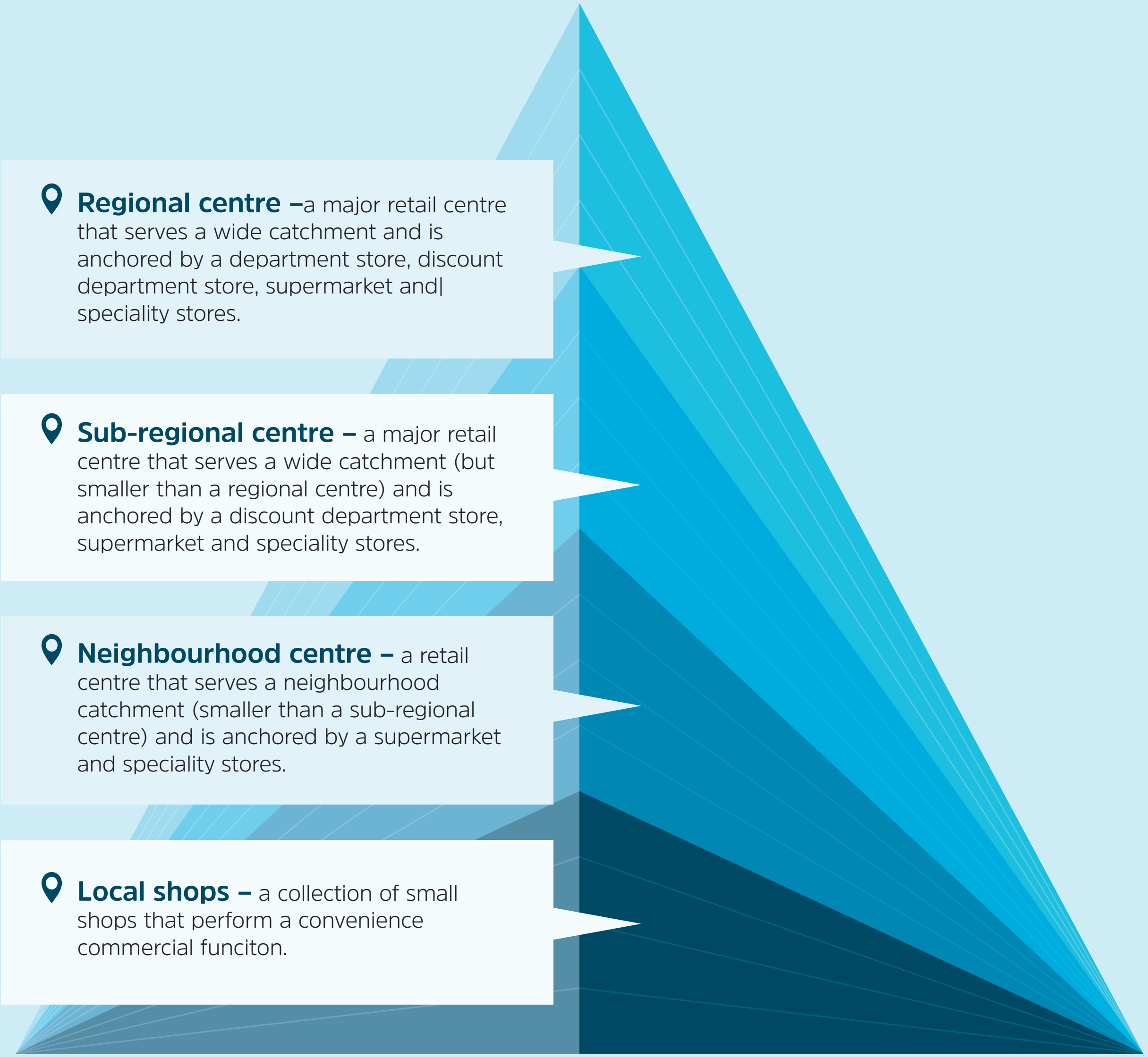
The retail industry is one of the most important economic sectors in Regional Victoria given its contribution to employment, income and the provision of goods and services. Acting as a primary shaper of local economies, the retail sector also impacts land use, form and function. It is therefore important that the location, type and amount of retail floorspace is carefully considered in order to optimise economic, social and environmental outcomes.

Consecutive State planning strategies have identified the crucial impact retail makes in the regional context, and have traditionally designated activity centres based on existing commercial nodes accordingly. The basic 'building block' of an activity centre network and hierarchy is, in most cases, retail activity.

Centres that generate a substantial number of retail visits from a 'large' catchment are well placed to accommodate other regional scale activities such as community service and commercial activities – and Bendigo is certainly one of those. This is because retailing generates a large number of trips for a variety of purposes (from daily, weekly and more infrequent purposes). This enables other land uses to co-locate with retailing and thus generate co-location benefits.

This includes the ability to undertake multi-purpose trips which may combine shopping with entertainment in the one location, and also allows the sharing of common infrastructure for public transport, open space and parking, for example. In a general sense, a region's retail hierarchy can be defined according to the pyramid on the following page.

Ultimately, population catchments determine the economic possibilities when establishing an activity centre network – that is, a quantum of retail floorspace and type of floorspace. Planning policy however determines how that floorspace is allocated across the municipality.



Number of centres across the retail network

Retail Growth

Over the past decade, only three models of retailing have experienced strong growth:

- **Fast retail –** which capitalises on efficiency, time savings and cost savings. In many respects this is a high turnover model which relies on large population catchments to capitalise on new innovations. There are some elements in the Bendigo City Centre, but in smaller centres it merely plays an incremental role.

- **Slow retail –** which engages consumers at a more comfortable pace. Typically they are owner-operated shops with individuality and personality. This model is particularly well suited to smaller rural townships, as the ability of a retailer to build relationships and repeat sales with local customers is essential given the limited populations which can support trade within the catchment. Quality of customer interaction and store design are key competitive advantages.

- **Cultural retail –** which positions the arts as the centrepiece of a unique offer. On the ground this form of retailing will usually possess cultural facilities as the major anchor of a commercial precinct. Any combination of museums, galleries, studios, arts retailers, offices and dwellings can all typically be found within a mixed use precinct. While this model can serve to attract visitors, it should be concentrated in areas where sufficient critical mass and exposure can be achieved (e.g. the Bendigo City Centre). It also requires strong collaboration between the municipality, the local arts community and retailers in implementation due to the inherent link between the private shop and the public space.

The last of these models provides the greatest alignment of how best to progress retailing in Bendigo's largest activity centre, and is certainly the basis for new approaches to place making and attracting customers. It should also be seen as a mechanism to help improve employment outcomes, as the positive amenities present in a vibrant and attractive public environment also helps to attract businesses engaged in the professional services.

Trends

Recent economic, social and technological influences have significantly changed the shopping behaviour of consumers worldwide. Retailers both globally and locally have since responded to these changing patterns of shopping and consumption. As a result, the spatial landscape of retailing in Australia is rapidly evolving.

Since 2008, the Global Financial Crisis coupled with the downturn in the Australian housing market has reduced the level of new household establishments and subsequently, expenditure on household goods and discretionary clothing has declined. Activity centres which are solely underpinned by households goods and clothing expenditure will continue to struggle while the economy remains relatively stagnant in the short to medium term.

Meanwhile the continued development of online retailing has resulted in uneven impacts across the retail landscape. While local and regional centres remain the dominant outlets for the sale of food products and household goods, clothing and apparel sales are increasingly conducted online. Online retailing offers consumers lower prices and convenience. Apparel retailers have responded in two ways, the cost reduction method, and the attractiveness method.

The cost reduction method: By reducing the cost of inputs, apparel outlet sales for the more generic apparel products are more price-competitive. The reduction of costs may involve one or a combination of the following:

- **Obtaining low value rents for floorspace in out of centre locations**
- **Recycling second hand apparel (which also allows for green marketing)**
- **Co-locating apparel with retail stores that still encourage shopper trips (household goods, food), often in the one centre.**

The attractiveness method: This involves creating and invoking the power of a brand or experience (or both). This is a complex process which requires a degree of product or service innovation coupled with strong marketing. It is better suited to high value apparel products where a unique in-store experience can be effectively price bundled with a compelling product. The spending preferences of Gen-Y and social media also play a part, with new-age consumers increasingly lured by visually stunning or quirky stores.

These two methods are not entirely mutually exclusive. More successful retailers often combine facets of each. For example, H&M offers recycled products while also marketing its own line of exclusive, limited edition or brand collection products. Others may obtain low value rents in an out of centre location, co-locate apparel with bulky goods commercial stores, as well as provide on-site entertainment to attract shoppers.

Implications for Bendigo

The discussion on the previous pages can be distilled into a typology of *'shopping systems'* that can be used in developing planning strategies for activity centres. This recognises that household spending is no longer confined to traditional shopping environments and that there can be a strong leisure and cultural dimension to retail spending when local circumstances are conducive.

This also recognises that different economic imperatives apply, and different planning responses may be warranted, depending on which planning system is under examination. It also needs to be noted that the systems in question do not operate entirely independently of each other. The retail systems are elaborated in the following paragraphs:.

Planning policies for activity centres and retail services generally have traditionally focussed on **High Street and centre based shopping**. This system continues to command the lion's share of household retail spending. Moreover, a sound centres hierarchy for this system continues to be a vital element in the development of compact and sustainable cities. These centres often build on local character and have the opportunity to create a 'sense of place' for local communities. There are well established principles for the planning and management of the retail hierarchy in this system.

The **Bulky goods and wholesale shopping** system is now a well-established, though comparatively more recent, element in retailing. There is a broad consensus in planning that this system has limited synergies with centres based shopping and can reasonably be managed independently from the latter, with due regard to key variables such as car access, availability of large footprint sites and highway exposure.

Destination and tourism shopping tends to be confined to big city downtown areas and, perhaps, dedicated tourist locations such as the Gold Coast. This system is of relevance to Bendigo to the extent that the Melbourne CBD is likely to siphon off a significant amount of discretionary spending from regional areas. Appropriate 'defence' strategies to mitigate this escape expenditure are necessary, as we note below in the context of the cultural shopping system.

Non spatial (on-line) shopping will have broad based appeal and growing penetration into household budgets. However, it is unlikely to supplant place based retail systems to any significant degree.

One of the great opportunities for Greater Bendigo lies in the 'Cultural Shopping' system. This has a strong leisure dimension and relates to sales underpinned by a distinctive locality brand (as distinct from the retailing brands represented). Neighbourhood cultural differences and signatures define this locality brand and can induce significant local and visitor spending. The merchandise and services offering is likely to be differentiated by this 'localism', with local manufacturing and food growing playing an important part. This retail offer can be strongly design and / or knowledge intensive and command a commensurate value add premium.

The City of Greater Bendigo has invested heavily in the cultural cache of its city centre, with major civic assets being created in the theatre and art gallery. The Bendigo Art Gallery in particular has developed a national reputation for innovative, crowd pulling shows. Moreover, the municipality is rolling out a well-crafted program of public domain improvements to show the city's built form heritage to best effect.

A great opportunity lies in 'Cultural Shopping'

This investment in cultural and community assets can be leveraged further to generate greater retail activity over and above what might be expected from a healthy city centre retail core which caters to the standard retail needs of the regional populace (i.e. the first of the 'shopping systems' discussed above). Much will depend on the availability of lower rent space within easy pedestrian reach of the retail and cultural hub of the city.

Elsewhere in Victoria, such spaces have proven to be dynamic incubators of design based micro businesses ranging across urban manufacturing, art production and niche food and hospitality. These include schemes to head lease or underwrite leases for shared studios and work spaces. For example, the City of Melbourne operates the 'Creative Spaces' program which has generated the River Studios initiative on the banks of the Maribrynong River and the City of Yarra has set up a foundation to help fund shared work spaces via its 'Room to Create' program.

Retail system	Examples	Characteristics
High Street & centre based shopping	Bendigo City Centre Lansell Square, K'Flat	• Form into hierarchies based on gravitational flows of shoppers • Vital to the integrity of urban consolidation strategies incl. employment concentration and public transport • Cater for routine household needs
Bulky goods & wholesale shopping	Rocklea, K'Flat Costco, Melb	• Few synergies with High Street and centre based shopping • Large footprints and land requirements • Highway exposure required • Principally car oriented • Geared to occasional household purchases
Destination & tourism shopping	Chapel St, Prahran Melbourne CBD	• Heavy concentration of retailing with national / international department stores • Availability of prestige international brands, especially in fashion
Non spatial shopping	On-line shopping	• Covers the spectrum of commodities and competes across the gamut of alternative shopping systems
Cultural shopping	View Street, Bgo Gertrude St, Fitzroy	• Neighbourhood focussed but can draw from regional population • Distinguished by locally produced merchandise links to local manufacturing / production • Heavy arts and culture emphasis

Challenges and opportunities

Population growth

As we have seen, significant population growth is expected in Bendigo – particularly for the growth areas in Huntly, Strathfieldsaye and Maiden Gully. Local employment opportunities will be difficult to come by, with the best opportunities continuing to emerge in the Bendigo City Centre.

Nonetheless local services still need to be provided. Sufficient floorspace for community services and supermarkets will need to be provided, and this is likely to require the development of a new centre in Maiden Gully, as well as significant improvement and expansion to floorspace in Strathfieldsaye, Eaglehawk and Epsom..

Employment clustering

The Bendigo City Centre will continue to attract significant demand for employment floorspace in the future. While more than half of this growth will be in retail floorspace, most of the city's non-retail floorspace is also concentrated in the city centre. This is likely to drive a number of other trends in the future:

- **Increased demand for residential apartments in and around the city centre**
- **Higher land values and rents in the city centre**
- **Retail businesses will need to be innovative to remain competitive and afford the higher rents, however there will be a big market for successful specialty retailers in particular**
- **Significant co-location benefits from the agglomeration of higher order knowledge intensive activities**
- **The new hospital will drive demand for floorspace by medical practitioners and researchers – but this floorspace needs to be readily available**
- **Car parking is likely to become inefficient unless public transport can be improved – particularly for the growth areas. Private car parks may become profitable.**

Need for more advanced business services

There is a need for Bendigo to attract more advanced business services, including creative problem solving businesses in IT, design, marketing, brokerage, strategic planning, financial management and specialised legal. Such businesses constitute the fastest growing sector in the economy but, at present, are flourishing most strongly in central Melbourne.

They are important in their own right, but also in terms of their capacity to spark and sustain innovation in their client businesses. In other words, they promote growth in the wider economy.

Rents

Some landowners may be attempting to attract unrealistic leases which may be leading to some long term vacancies. Many small retail businesses are particularly sensitive to variations in rents. This is a difficult issue to manage. Unlike industrial development where Council can rezone more industrial land to encourage new business establishment, the supply of retail floorspace needs to be kept in close sync with demand to avoid the poor visual amenities that result from even a few vacant shops in the wrong place as a result of over-supply.

Some landowners may also be unmotivated to lease out floorspace and are not compensating the community for the negative externalities that they are generating on the surrounding areas. Some local governments have decided to address this issue by increasing rates on properties that remain vacant for prolonged periods with little effort made to attract a tenant. The onus is placed on the landowner to justify why a rates penalty shouldn't apply.

Online Retail

The top three advantages of both online and store based retailing are shown below. It is clear that both forms of retailing possess their distinct advantages. Any retailer that just focuses on one and not the other is not maximising potential revenue sources. Hence there was a trend, about five years ago, towards multi-channel retailing where manufacturers and retailers attempted set up separate online shops.

The last few years have seen North American retailers attempt to combine both physical and online retail into an integrated platform – the **“omni-channel”**. For example, a customer finds the store through an online app that compares prices and decides to visit the store after registering for a coupon.

Once in store, the customer then tries on the shoes and is given expert opinion by the store assistant. The customer then purchases the product and gets a 10% discount. In the process the store logs data about how the customer found the store and their preferences, which in turn drives a better, more targeted product and service offer.

This example of best practice omni-channel distribution shows why it may be unwise to delineate between online and store based retail expenditure in the future. Most clothing and personal item retailers may need to integrate both, and whether the spending occurs online or in-store is irrelevant. Ultimately the physical store is still necessary and there are many reasons why stores will still provide an important point of difference.

Advantages of online stores	Advantages of physical stores
• Broad selection	• Personal Service
• Richer product innovation	• Ability to touch / try products
• Customer reviews and tips	• Shopping as an event / experience

Placemaking

Placemaking is a relatively new approach to reinvigorating retail precincts and it is being used by many of the larger shopping centre owners and international retailers in larger cities. In short, it is about creating places that have an authentic point of difference. Greater Bendigo is well positioned to work through a collaborative process with stakeholder groups to do this, and we are already starting to see this occur in several places such as in the View Street Arts Precinct or with the Heathcote Wine Region.

To assist, the City needs to explore the merits of establishing tools such as a collective online retail, hospitality and services platform for its businesses – a one stop shop of sorts. This could be a valuable part of the marketing effort, with potential benefits ranging from the collection of data to potentially building an integrated online store for all Bendigo businesses that serve consumers.

A similar channel for non-retail businesses that do not serve common consumers may be more difficult to establish.

Legibility and integration in the city centre

The Bendigo City Centre has all the pre-requisites to become one of Australia's leading regional cities. These include a rich array of heritage buildings and streetscapes, the skeleton of a radial rail system, a heritage tramway facility capable of expanding its offer, a major job driver (the hospital), a compact retail core and outstanding cultural and community facilities.

However, these assets are not integrated from a pedestrian and functional perspective. In many cases, they operate as 'island' generators of activity. There is scope to leverage these assets so that their impact is greater than their sum.

All available evidence suggests that a greater emphasis on urban design / public realm treatments that make it easier to move between such islands of activity for people on foot would result in improved trade and business performance.

Strategic directions

The following list of strategic directions has been formulated to assist in the planning and development of the City's activity centres. They are the key directions that provide guidance for planners, landowners, developers and investors with respect to the issues that are important to the growth of commercial floorspace across Greater Bendigo, and they reinforce the Council's policy directions in terms of planned residential growth and changes to the way we move around.

Supermarkets

- **Supermarkets will be distributed across the municipality to perform the role of primary food convenience centres for communities.**
- **The expansion of existing supermarkets is encouraged, as are new supermarkets in the City Centre, in Activity Centres and in Township / Rural Centres (as identified in the Activity Centre Hierarchy). Small scale supermarkets are encouraged in Neighbourhood Activity Centres where there is a sufficient catchment to support them.**
- **New supermarkets will not be supported outside of designated centres, including in industrial areas.**

Retail hierarchy

- **Strengthen the Activity Centre Hierarchy embedded in this report and in the Integrated Transport and Land Use Strategy.**
- **Facilitate the development of new activity centres in Maiden Gully and Huntly, and an expanded Township Centre in Marong to support new growth areas where and when there is sufficient catchment to support new centres.**
- **Facilitate the expansion of existing centres in line with population growth, particularly in Strathfieldsaye, Epsom and Eaglehawk.**
- **Utilise retail activity and especially retail anchors as the basic 'building block' and economic driver of activity centres.**

Bendigo City Centre

Consolidate and link together the anchor elements of the Bendigo City Centre (railway station, hospital, cultural precinct, library, retail core) through:

- housing infill
- public domain improvements
- encouragement of ‘urban manufacturing’ and cultural retailing, and
- strategic investment in community facilities.

A mix of land uses

Ensure that there is an appropriate supply of land or redevelopment opportunities for commercial development to meet the needs of communities and to stimulate competition.

Locate community, health and education facilities in the suburban activity centres, acting as non supermarket anchors and stimulating related commercial development.

Seek to integrate housing in all activity centres where possible, including supermarket based centres.

Provide dedicated walking and cycling facilities into centres and into their catchment areas. This will facilitate development of more accessible community hubs that focus on people, walking, cycling, connection to place and quality of life.

Employment

- Focus all knowledge intensive business service employment in the Bendigo City Centre to maximise co-location and agglomeration opportunities. This will also stimulate the growth of support services in and around the city centre.
- Encourage all new supermarket developments to provide floorspace for ancillary uses including specialty shops, delis, hospitality, small showrooms, entertainment and small offices.
- For the rural centres, some commercial floorspace and businesses services should also be encouraged to help service the industrial precincts. In particular Marong Business Park will likely generate moderate levels of demand for some service businesses in the Marong Centre.

Isolated sites

- There a number of small scale commercial developments scattered throughout the urban area. While their continued use and evolution is supported, further expansion and encroachment into adjoining residential areas will not be supported.

Demand for commercial floorspace

As mentioned earlier, there are two key outputs of this strategy – one of which is the projected demand for new commercial floorspace through to the year 2031.

The strategy also includes forecasts for the shorter time period of 2021, and recommends that much of the focus for implementation be given to this shorter time period to ensure that the planning framework is in place to stimulate private sector investment.

A summary of the projected additional floorspace needed and insights and directions for the larger activity centres is provided in the table on the following pages.

Centre name	Additional floorspace projected	Insights and directions
Bendigo City Centre	**By 2021** + 24,000sqm office + 36,400sqm specialty retail and hospitality + 1,600sqm department store	There is a need to shift emphasis from selling products to a more service oriented model. Entertainment and leisure attractions together with more interactive display stores should all be encouraged. Consumer focused businesses need to shift to omni-channel marketing and distribution as a means of embracing online retail. Significant office development will be required to accommodate growth in the health, education and professional service sectors.
	Between 2021 and 2031 + 20,400sqm office + 60,400sqm specialty retail + 8,900sqm department store + 2,900sqm supermarket	Significant growth in all types of retailing is expected given the long term population and employment growth that is expected to occur both in the city centre as well as the region (which the city centre serves). This quantum of floorspace growth will help to ensure that the city centre remains the preeminent centre in the region. However, the quality of retail anchors and the ongoing evolution of non-retail employment will be critical.
Eaglehawk	**By 2021** + 3,100sqm specialty retail + 800sqm supermarket + 300sqm office	An expansion to the supermarket is essential, while new specialty shops may be difficult to establish.
	Between 2021 and 2031 + 5,000sqm specialty retail + 2,400sqm supermarket + 400sqm office	Further expansion of the supermarket should be advocated for if there is sufficient opportunity.

Centre name	Additional floorspace projected	Insights and directions
Epsom	**By 2021** + 2,100sqm specialty retail + 1,600sqm supermarket + 300sqm hospitality	The centre is beginning to develop well and there is plenty of scope to expand as the catchment population grows. Supermarket growth is likely to be taken-up by a new Aldi.
	Between 2021 and 2031 + 3,200sqm specialty retail + 1,700sqm supermarket + 600sqm hospitality	Continued growth in line with catchment population growth.
Golden Square	**By 2021** + 400sqm specialty shops	Encourage new specialty stores to be developed on the front of the Woolworths site if possible.
	Between 2021 and 2031 + 1,700 supermarket + 1,000sqm specialty shops	Increased supermarket floorspace possible by 2031 to mainly serve the infill housing demand. The demographic should also support a variety of specialty shops.

Centre name	Additional floorspace projected	Insights and directions
Kangaroo Flat	**By 2021** + 2,500sqm specialty retail + 600sqm hospitality	Expand specialty shops and the hospitality offer so that these become key points of difference from Kangaroo Flat South (Lansell Square).
	Between 2021 and 2031 + 4,000 specialty retail + 1,500sqm supermarket + 1,200sqm hospitality	Continue development of the centre as above, with additional supermarket floorspace.
Kangaroo Flat South	**By 2021** + 7,100sqm specialty retail + 1,600sqm department store + 100sqm office	There are plenty of retail anchors in this centre, but few specialty shops and synergies with broader community needs. Prioritise specialty shop establishment. No need for further supermarket floorspace.
	Between 2021 and 2031 + 8,600sqm specialty retail + 4,300sqm department store + 4,000sqm supermarket + 200sqm office	The centre is well placed to expand significantly and capitalise on its ability to draw trade from a wider catchment. The core of this centre is a suburban shopping mall which does not directly compete with other main street centres.

Centre name	Additional floorspace projected	Insights and directions
Strathdale	**By 2021** + 1,800sqm specialty retail + 300sqm hospitality	This centre is trading strongly and additional specialty shops are likely to trade well if they are properly targeted to the demographic of the area.
	Between 2021 and 2031 + 4,100sqm supermarket + 2,000sqm specialty retail + 600sqm hospitality + 300sqm office	Significant retail demand will still be drawn from the Strathfieldsaye and Junortoun catchments (as they pass through the area on their way to and from the Bendigo City Centre).
Strathfieldsaye	**By 2021** + 2,000sqm specialty retail + 700sqm supermarket	Improvements to the supermarket anchor may help redirect some demand from Strathdale. There is underlying demand for specialty shops.
	Between 2021 and 2031 + 3,100sqm specialty retail + 1,800sqm supermarket	Higher levels of demand should be utilised to add more shops to the centre, however the attractiveness of the shops and their offer will be critical in preventing excess expenditure leakage to Strathdale.

Centre name	Additional floorspace projected	Insights and directions
Maiden Gully	By **2021** the centre could support approximately 2,400sqm of retail floorspace (2,000sqm supermarket and 400sqm specialty retail)	Establish a medium sized supermarket early in the activity centres development phase. Other types of floorspace will take longer to evolve.
	By **2031** the centre could grow to approximately 3,700sqm (3,100sqm supermarket and 600sqm specialty retail)	A full line supermarket will be viable by 2031, along with a selection of specialty shops.
Huntly	By **2021** the centre could support approximately 1,700sqm of retail floorspace (1,400sqm supermarket and 300sqm specialty retail)	Additional supermarket floorspace should be encouraged to establish shopping patterns early in the centres expansion. Other types of retail floorspace will take longer to evolve.
	By **2031** the centre could grow to approximately 2,900sqm (2,400sqm supermarket and 500sqm specialty retail)	Expansion to a medium sized supermarket.

Centre name	Additional floorspace projected	Insights and directions
Marong	By **2021** the centre could support approximately 2,000sqm of retail floorspace (1,700sqm supermarket and 300sqm specialty retail)	Establish a small to medium sized supermarket early in the activity centres development phase close to the centre with good connections to a potential future train station site.
	By **2031** the centre could grow to approximately 2,900sqm (2,400sqm supermarket and 500sqm specialty retail)	Expansion to a medium sized supermarket.

The Activity Centre Hierarchy

The second of the key outputs of this strategy is the revised Activity Centre Hierarchy.

The Activity Centre Hierarchy is based on the existing well established hierarchy of centres however it has been updated to factor in projected population growth and the planned expansion of a number of centres. The hierarchy has also been informed by the strategic directions in the previous section. The hierarchy is extremely important from a planning perspective as it defines the role and function of each level of activity centre and it identifies the range of activities that need to be provided if it is to meet the needs of the community.

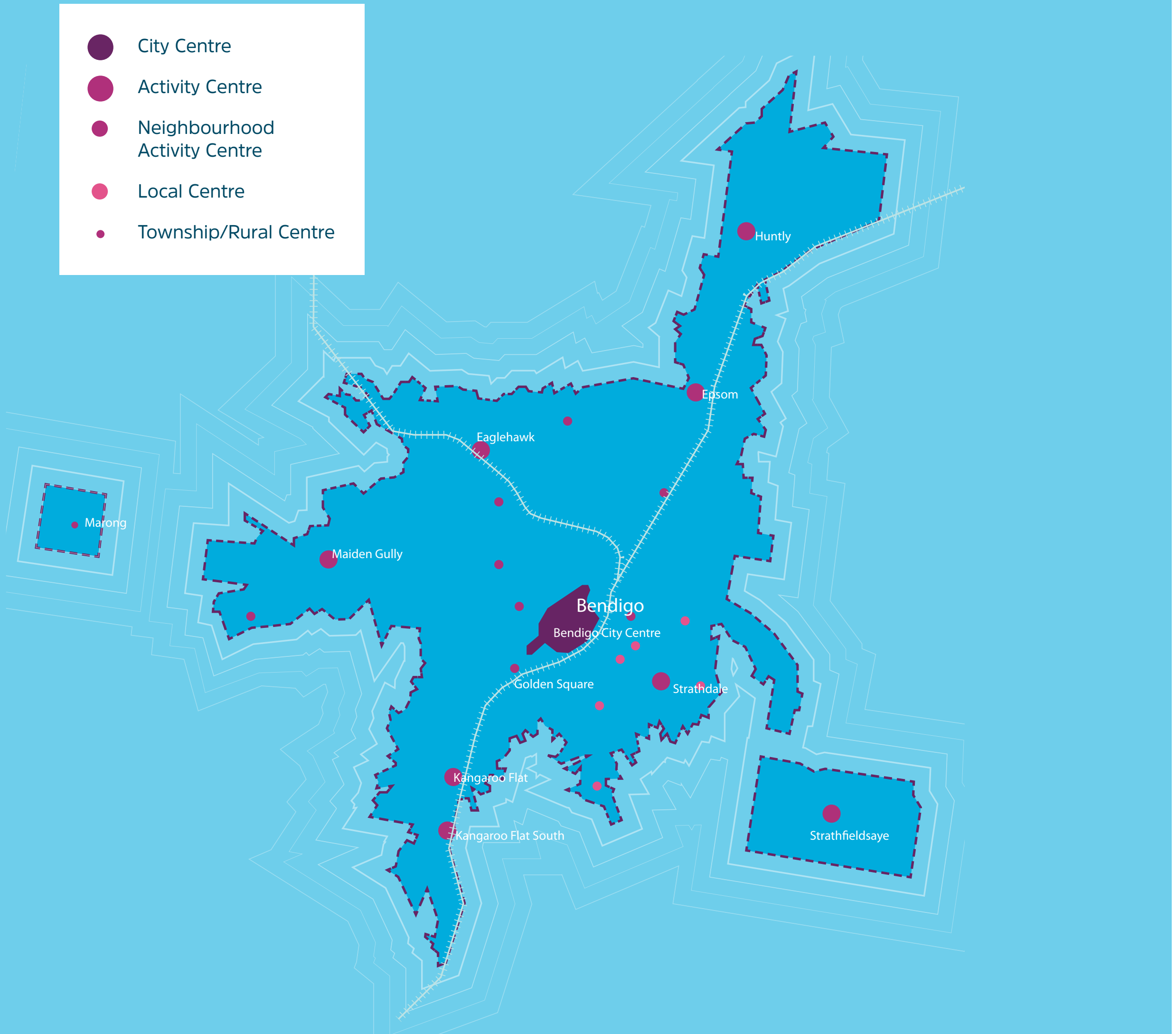
It is important as it helps to encourage healthy competition between the centres, but it also helps to protect the enormous amount of existing investment that has been made on each and every property that makes up our centres. Undermining the hierarchy by allowing out-of-centre developments could have serious implications for the 'sunk capital' (the investment already made) of existing centres, together with implications for ongoing business viability, jobs and future investment.

One level of the hierarchy relates to Specialised Activity Centres. These centres are not anchored by retail, unlike all of the other centres within the hierarchy, and therefore their planning does not focus on the demand for retail floorspace and their relationship to other complementary centres. Given there are endorsed plans for the Bendigo Airport, the Bendigo Hospital Precinct, and LaTrobe University is finalising its master plan, we have limited consideration in this document to the remaining Specialised Activity Centre – the St John of God Hospital Precinct.

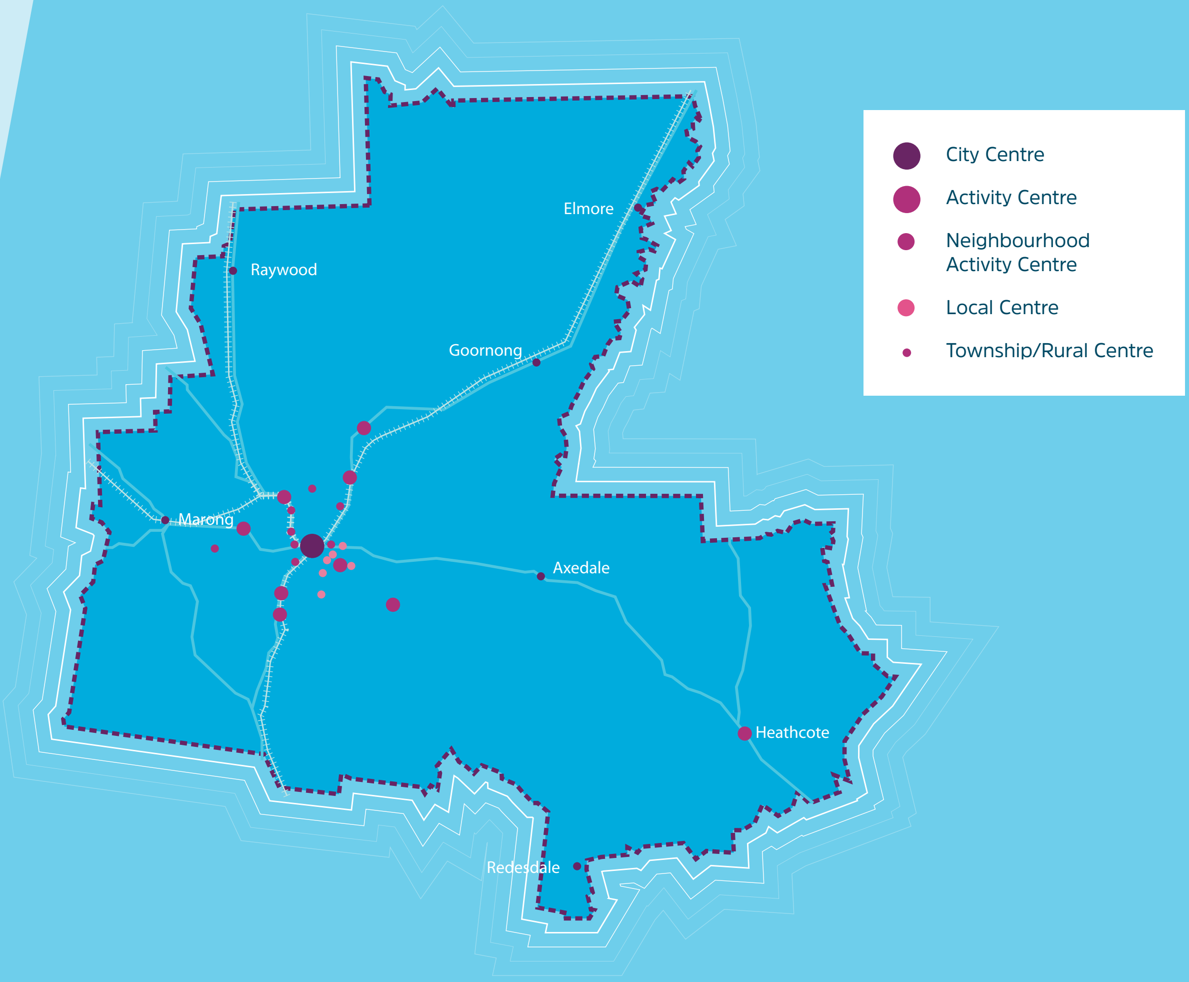
Hierarchy	Centre names	Role and function in hierarchy
City Centre	Bendigo City Centre	This is the most important retail and commercial centre for northern and central Victoria. It is Greater Bendigo's primary employment area, providing a full range of higher order commercial, retail, visitor, social, civic, cultural, tourist and entertainment activities. The City Centre is forecast to continue to experience significant jobs growth, particularly knowledge intensive business activities in the health sector, financial and insurance services, professional services and education and training – seen and used by our community as the heart of our city.
Activity Centre	Eaglehawk Epsom Heathcote Kangaroo Flat Kangaroo Flat South Strathdale Strathfieldsaye Maiden Gully (Future) Huntly (Future)	These centres provide a range of economic, social and some civic activities, together with goods and services to meet the daily and weekly needs of their suburban catchments. Some are town centres while others are larger suburban centres strategically located around the city on or adjacent to arterial roads. Some include 'destination based retailing' that draws people from a much larger catchment. They are connected to one another, and to the City Centre, by the urban bus system, while some also have a train station which encourages regional connections.
Neighbourhood Activity Centre	California Gully Maiden Gully SW (Future) Golden Square Ironbark Jackass Flat (Future) Long Gully McIvor Road White Hills	These centres primarily service their surrounding neighbourhood, much of which is within walking distance. They are relatively small centres, with a small number of shops and a mix of activities that meet common day-to-day needs. Those centres that are located on arterial routes in inner suburbs allow them to capture trade from people travelling through by car.

Township / Rural Centre	Axedale Elmore Goornong Marong Raywood Redesdale	Of similar scale to Neighbourhood Activity Centres, but service a larger rural community and potentially travellers passing through. They may expand or contract based on the needs of the population supporting them.
Specialised Activity Centre	St John of God Hospital precinct	This centre is focussed on the St John of God Hospital and the surrounding health related businesses needed to support it. A small number of ancillary businesses will be viable and necessary to support the expansion of the hospital. This may include consideration of alternative uses at nearby sites fronting Chum Street, including the broader Southern Cross Austereo site.

The Activity Centre Hierarchy – Urban Bendigo



The Activity Centre Hierarchy – Municipal area



Delivering the strategy

On the following pages is an implementation plan that outlines the actions that need to be delivered to enable both the public and private sector to work collaboratively to create activity centres that will best meet the community's needs. The actions will help implement the objectives of our broader strategic work such as the Residential Development Strategy, Economic Development Strategy and Connecting Greater Bendigo ITLUS report.

The actions cover a range of themes such as planning, property development, economic development and marketing. They will ensure that a framework is in place that enables our activity centres to evolve over time and respond to the increasing speed of change that is facing the retail sector in particular. They are about applying the basics – the tried and tested fundamental elements of activity centre planning and development combined with the latest demographic and population growth information to ensure that the community, investors, developers and planners are all working to achieve the same goals.

In summary, this strategy and its actions is about letting stakeholders know what it is that we want, rather than relying on the standard planning approach of telling users what it is that we don't want. We expect that this strategy and its approach will provide some of the necessary research that investors and developers are looking for before committing to delivering some of the new commercial floorspace that we will need in the future.

Implementation Plan

No.	Action	Lead	Partners	Period
Planning				
1	Adopt the strategy and commence a process to incorporate the key outputs into relevant corporate policy and planning frameworks.	Strategy (Place Manager)	Statutory Planning	2015/16
2	Commence the rezoning process for the following parcels to reinforce the Activity Centre Hierarchy: • 195-203 McIvor Road, Strathdale from C1Z to a residential zone • 288-302 High Street, Golden Square from C2Z to C1Z • 20 Crook Street, Strathdale from C2Z to a residential zone	Strategy	Statutory Planning	Short
3	Prepare an Urban Design Framework for Ironbark commercial centre to attract investment and to guide development in this Neighbourhood Activity Centre.	Strategy	Public Space Design (PSD) / Stat Planning	Short
4	Implement the Eaglehawk Structure Plan town centre recommendations using a Design and Development Overlay.	Statutory Planning	Strategy	2015/16
5	Ensure that the brief for the Marong Precinct Structure Plan (budgeted for 2016/17) includes an Urban Design Framework component to guide the development of the projected commercial floorspace required.	Strategy	PSD / Stat Planning	2016/17
6	Prepare an Urban Design Framework for the Strathfieldsaye commercial centre to attract investment and to guide development in this Activity Centre. As part of this project, investigate the preferred zoning of 2 Club Court.	Strategy	PSD / Stat Planning	2015/16

7	Prepare an Urban Design Framework for the Maiden Gully commercial centre to attract investment and to guide development in this Activity Centre.	Strategy	PSD / Stat Planning	2015/16
8	Prepare an Urban Design Framework for the Epsom commercial centre to attract investment and to guide development in this Activity Centre. Ensure the train station precinct is considered in the study.	Strategy	PSD / Stat Planning	Medium
9	Prepare an Urban Design Framework for the Strathdale / LaTrobe University precinct to attract investment and to guide development in this Activity Centre.	Strategy	PSD / Stat Planning	Medium
10	Prepare an Urban Design Framework for the Kangaroo Flat commercial centre to attract investment and to guide development in and around the High Street shopping strip and improving connections and development opportunities in the train station precinct.	Strategy	PSD / Stat Planning	Medium
11	Prepare an Urban Design Framework for the Golden Square commercial centre to attract investment and to guide development in and around this Neighbourhood Activity Centre, former primary school site and potential train station precinct.	Strategy	PSD / Stat Planning	Medium
12	Prepare an Urban Design Framework for the Heathcote town centre to attract investment and to guide development in this Activity Centre.	Strategy	PSD / Stat Planning	Medium
13	Prepare an Urban Design Framework for Elmore town centre to attract investment and to guide development in this Rural Centre.	Strategy	PSD / Stat Planning	Medium

Property Development				
14	Facilitate the construction of additional commercial floorspace and residential development needed to cater for projected demand. Focus on connecting the development sector with the health sector (our largest jobs growth sector).	Strategy (Place Manager)	Statutory Planning / BBC	Short
15	Commence negotiations with landowners in Eaglehawk for the redevelopment of the sites between the public toilets and 92 Victoria Street. This will create additional commercial floorspace and improve efficiency of car parking at the rear of the buildings.	Strategy (Place Manager)	Building and Property	Short
16	Subdivide 49 Napier Street, Eaglehawk and sell the house. The rear section of the land to be retained for future parking / community / commercial use.	Building and Property	Strategy	Short
17	Assist the Department of Education in the rezoning and disposal of the Golden Square Primary School Laurel Street site.	Strategy	Statutory Planning / Building and Property	Short
18	Encourage specialty store development on the Shamrock and High Street frontage of the Woolworths site in Golden Square (similar, but smaller scale than what has occurred in Strathdale on corner of Marnie Road).	Strategy	Statutory Planning	Medium

Economic development				
19	Establish a register of major retail operators and investors and develop a communications system to promote information sharing and a widely embraced activity centre vision for Bendigo. This may include the preparation of an Investment Prospectus.	Economic Development	Strategy (Place Manager) / Bendigo Business Council	Short
20	Monitor industrial development trends. Different sectors of the industrial economy often have specific needs for professional services which can potentially result in slightly altered needs for professional services.	Economic Development	Strategy (Place Manager)	Short
Marketing strategy				
21	Develop an online portal to connect businesses and potential investors with the development sector. It needs to act as an investment prospectus for each centre that can be used by landowners, existing businesses, the relevant business network and the City in a way that facilitates a more streamlined way of attracting investment and a smoother approvals process. This could also be expanded to provide a platform for a collective online shopping experience for smaller independent retailers.	Economic Development	Strategy (Place Manager)	Short
22	Gradually shift investment attraction emphasis away from the traditional department store chains towards an eclectic mix of retailers with omni-channel nous. The omni-channel retailers are those which effectively combine and integrate online with more traditional channels of sale.	Economic Development	Strategy (Place Manager)	Medium

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