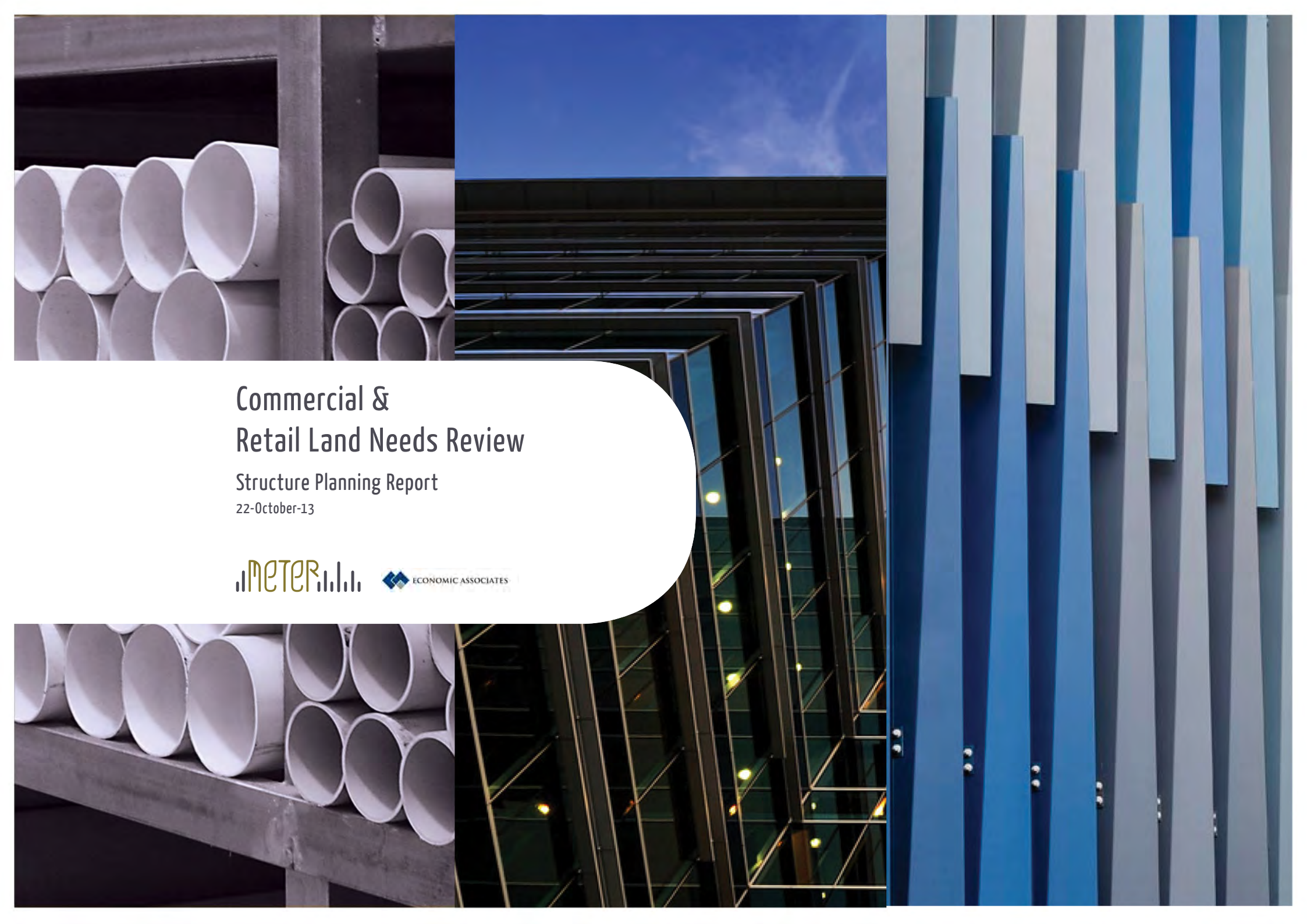


The background of the slide is a collage of three images. On the left, there are stacks of white PVC pipes on metal shelving. In the center, there is a low-angle shot of a modern building with a glass facade, reflecting the sky and showing interior lights. On the right, there is a close-up of a wall with vertical blue and grey slats.

Commercial & Retail Land Needs Review

Structure Planning Report

22-October-13



Commercial & Retail Land Needs Review

Structure Planning Report

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01

Introduction

Economic Associates, in association with METER, were engaged by Toowoomba Regional Council to undertake the Toowoomba CBD Commercial and Retail Lands Needs Review. This study consisted of two components, these being:

- » 1. Review of the Toowoomba Regional Planning Project: Activity Centres Study prepared in 2009; and
- » 2. Identification and assessment of key CBD sites for the preparation of demonstration structure plans.

The study was initiated in response to interest expressed by the local branch brand of the UDIA(Q) regarding the potential demand by large floor plate options.

This report pertains to the second component of the Commercial and Retail Lands Needs Review. Through the course of the study, the scope of the structure planning exercise evolved, from originally being limited to the preparation of three (3) structure plans for potential large floor plate office development to preparation of a :

- » Mid-block commercial office structure plan;
- » Mixed use structure plan for a key corner site; and
- » Mid-block bulky goods development structure plan.

Through the course of the study a series of Papers were prepared to facilitate discussions over three (3) workshops.

These papers found that while there may be some demand for large floor plate

options, it was not as high as anticipated. Conversely the economic review concluded the region had an undersupply of bulky goods floor space and the CBD had the potential to satisfy this undersupply but in an urban form appropriate to that setting. These are the reasons why the structure planning process evolved.

This report represents the consolidation of all these Papers and aspects of component 2 of the Commercial and Retail Lands Review, including:

- » Assessment criteria for potential large floor plate office sites within the Toowoomba CBD (core and frame);
- » Identification and assessment of potential large floor plate office sites within the Toowoomba CBD (core and frame);
- » Assessment criteria for potential bulky goods sites within the Toowoomba CBD (core and frame);
- » Identification and assessment of potential bulky goods sites within the Toowoomba CBD (core and frame); and
- » Structure plans of a:
 - Mid-block commercial office;
 - Mixed use structure plan for a key corner site; and
 - Mid-block bulky goods development incorporating template style guidelines for bulky goods developments.

The study was informed by the Toowoomba City Centre Master Plan and the Toowoomba Regional Planning Scheme.

02

Large Floor Plate Office Site Assessment

2.1 ASSESSMENT CRITERIA

Preliminary assessment criteria for large floor plate office development were formulated having regard to the Toowoomba City Centre Master Plan (TCCMP), the Toowoomba Region Planning Scheme and market factors influencing location and development of large floor plate offices. These preliminary criteria were considered at a workshop attended by Toowoomba Regional Council officers and councilors on Thursday, 7 March 2013.

The TCCMP provides strong guidance as to the types of considerations that would form genuine criteria for this study. Hence, guidance from the TCCMP was used to identify how these criteria may indicatively manifest

in site identification outcomes. The formulation of criteria considered the implications of the guidance provided by the TCCMP or market factors. From these considerations, recommended criteria were developed.

The following table is an extract from the Paper presented at the 7 March workshop and summarises the relevant TCCMP guidance and some additional market considerations. Reading from left to right the table shows what were the recommendations The final agreed criteria are summarised in Table 2.2 following.

Table 2.1: Assessment criteria tables for large floor plate office development

Guidance	Discussion	Implications	Recommended criteria
TCCMP			
<i>Master Plan principles</i>	There are 7 principles that underpin the TCCMP 2010. For this Study, the principles of : » Catalysts; » Distinctiveness; » Living centre; and » Compact centre; are considered to have a direct influence on the location and orientation of large floor plate office development, and any development that contains high employment concentrations or which represent one-off key site development.	Preferred sites would respond best to these TCCMP 2010 principles if they were: » In the city centre core; » Oriented to or addressing creek systems and/or public spaces or heightened public domain; » Where they have the potential to energise surrounding development potential; and » Where there is the flexibility for design excellence.	» Site is within the city core » Development would provide the opportunity realise Master Plan objectives <i>Discussion Point: The TCCMP seeks to guide development in the core. Should this be adhered to as part of the assessment criteria? An alternative is to identify a frame/core interface area to consider.</i>

Guidance	Discussion	Implications	Recommended criteria
Master Plan Strategy – Land Use	The strategy clearly supports strengthening the core. Whilst promoting clearly defined precinct based land use groupings, mixed use is also promoted. Heritage and sustainability are key challenges which add to the distinctiveness and sophistication being advocated.	Preferred sites could be anywhere in the core. In the retail heart, particular attention would be required for the land use mix on the lower levels. Development in the frame would not respond well to this strategy.	» Development can provide mixed use on the lower levels if within the retail heart » Development supports the viability of heritage buildings » Development advances sustainability aims
Master Plan Strategy- Built Form	This strategy seeks to build on the strengths of historical development patterns and turn around what it describes as piece-meal conditions. Some of this criticism must be linked to the areal spread of the city and as a result, the scale of the built form over such large walking distances. A commercial focus in the core is a clear strategy. Public realm excellence and design excellence and generous height allowances prevail. Silent on footprint allowances other than 'whole block' considerations in the test cases.	Concentration in the core is an unequivocally important outcome. There is clearly capacity in the core to achieve high growth projections of office space needs. Land assembly has been flagged as an issue; but no more or less than any other centre, however where large single ownership sites exist, they would clearly represent the 'path of least resistance'. Large sites, however, tend to restrict the number of potential players in the market and favor larger developer groups.	» Sites of suitable size can be assembled, generally over 2500m² » Development supports the maintenance of a strong grid pattern » Building heights are able to be transitioned between existing and proposed structures » The development is able to make a strong civic contribution Discussion Point: TCCMP sets a size of over 2,500m². Is this appropriate in a market context? Larger sites may facilitate lower rise development and reduce construction costs.
Master Plan Strategy – Movement	This strategy seeks to provide a highly connected and permeable environment for pedestrians. The road system currently supports this. Desirable initiatives (such as the 'three walks'; and the orbital vehicular movement system) optimise design flexibility and site selection and developer choice.	There are exciting opportunities, where the initiatives of this part of the TCCMP 2010 apply. The only constraint may be linking public works to private development. Private sector contribution to the public realm may also be a way of bringing forward important initiatives where there is a nexus between the development and the consequential public realm improvements.	» Development supports movement strategy, is close to PT choices and active transport options » Supports 'three walks' linkages » Public carparking choices maintained as per strategy Discussion Point: should a move to private on-site parking be explored? Discussion Point: OCR is likely to benefit a range of sites. Should the OCR circular corridor be a focus area?
Master Plan Strategy – Open Space	A special Toowoomba city asset sought to be enhanced by more open space ; and extension and enhancement of the city's green character	Orientation to the existing green network would be a plus and provide opportunity for private sector delivery of some of the detailed initiatives and recommendations. Large sites provide a clear opportunity, not afforded by compact inner city redevelopment, to provide new open space and the character sought by this strategy.	» Opportunities for new open space within the civic score are realised » Proximity to open space systems
Master Plan Strategy – Public realm and streetscape	Strong focus of TCCMP 2010 and many initiatives promoted. All focused in the core	"Key sites" provide critical mass and therefore the best opportunity for large 'chunks' of the initiatives to be delivered in meaningful and cost effective ways.	» Opportunity to provide enhanced network of linkages within the city core

Guidance	Discussion	Implications	Recommended criteria
<i>Master Plan Strategy – Sustainability</i>	Toowoomba to be the exemplar in regional urban sustainability.	Not all benchmarks can be advanced by large floor plate office development but by providing attention to design, safety, environmental responsibility and encouraging walkability, this project would be a step in that direction. The strategy is a sum of all parts of the TCCMP 2010.	» Select locations where by orientation; CPTED; and access to facilities are optimised.
<i>Master Plan Strategy – Focus areas for Change</i>	7 geographical areas are identified which include some obvious candidates for this study.	Some sites already identified which provide comprehensive design opportunity.	» Include these sites in the mix
MARKET GUIDANCE			
<i>Market – Optimise attractiveness for widest range of tenants</i>	Flexibility for changing tenant and economic conditions	A long term investor will aim to provide development that can adjust with lease reviews and new businesses; and that is to both expand and contract and to do so without adverse compliance issues and down time.	» Capacity to expand » Adaptability in floor fitout » Durable design (not fads) » Some on site car parking
<i>Market – Floor space and configuration</i>	Large floor plates 2500m2 plus	Key issues are site assembly and availability.	» 2500m2 over 12 storeys assuming a plot ratio of 4.8 maximum indicates a site area of 6,250m2. » Depth and width and hence build-ability of the assembled site. Discussion Point: TCCMP site area of 2,500m2 and associated plot ratios imply 12 storeys. Is this achievable? What is the alternative?
<i>Market – What is important to tenants?</i>	Networking and connection	Good access to clients and business services, a strong IT platform and proximity to allied services and even competitors. Also, a number of studies have shown that increasingly the competition to attract a young workforce is demanding the following key attributes » Proximity to cultural activities, a vibrant atmosphere ideally 24/7 » Pedestrian friendly locality » Access to transport for travel outside of peak hours » Proximity to home	» Well serviced sites(both hard and soft infrastructure) » CBD core

Through discussions at the workshop, a final set of criteria were resolved. These, set out in Table 2.2 following, informed the site selection process and structure planning.

Table 2.2: Final resolved criteria for site selection and design

Theme	Guidance
Land Use:	» Strengthening the core » Catalyst site
Built Form:	» Civic contribution » Single ownership » Core
Movement:	» Pedestrian environment » Accessibility & parking
Open Space:	» Outlook » New open space systems
Public Realm & Streetscape:	» Enhanced linkages » Critical mass
Sustainability:	» Orientation » CPTED
Focus Areas for Change:	» TCCMP sites
Market:	» Capacity to expand » Flexibility
Floor Space Opportunity:	» Large site
Networking & Connection:	» Proximity to services » Proximity to Public Transport

2.2 LARGE FLOOR PLATE OFFICE DEVELOPMENT SITE SELECTION

2.2.1 Context

As mentioned 2.1 above, the 7 March 2013 workshop canvassed assessment criteria that might apply to the selection and evaluation of sites/precincts suitable for large floor plate office development within the Toowoomba CBD.

A subsequent workshop was held on Thursday, 4 April 2013, to identify and agree on sites or precincts, using the agreed criteria canvassed at the 7 March workshop.

It was originally envisaged that these sites would then be the subject of structure planning for large floor plate office development. However, as stated previously, amendments to scope ultimately resolved to prepare a single large floor plate office structure plan in a mid-block location.

While only a single structure plan has been developed for large floor plate office development, the site identification and assessment process is set out in this section to illustrate the process undertaken.

2.2.2 Agreed Criteria

The tabled criteria (Table 2.2 above) drew on the criteria used in the Toowoomba City Centre Master Plan (TCCMP, 2010) in addition to certain market considerations and were supported and resolved by Council's working group.

Much discussion focused on the relative merits of developing in the core, compared to developing in the frame of the CBD. It was observed that sites within the core are likely to perform strongly with criteria that relate to proximity to services, urban form, and public realm. Frame sites were considered to remain important, however, due to the ability to secure sufficiently large sites for parking, comparatively lower land assembly costs, and for ease of access.

2.3 SELECTION APPROACH

The workshop conducted on Thursday, 4 April 2013 identified a suite of sites for assessment against the agreed criteria. Using land assembly and ownership as a starting point, the assessment process allowed six sites (in addition to the Foundry site subject to feasibility and other investigations currently underway) to be identified and analysed. These sites are shown in Figure 1 opposite.

FIGURE 1: Site locations

1. McCafferty's bus depot;
2. The Chronicle site;
3. TRC Carpark (bus depot);
4. The Gas Works site;
5. Former TAFE site; and
6. QIC lands (south of Grand Central).

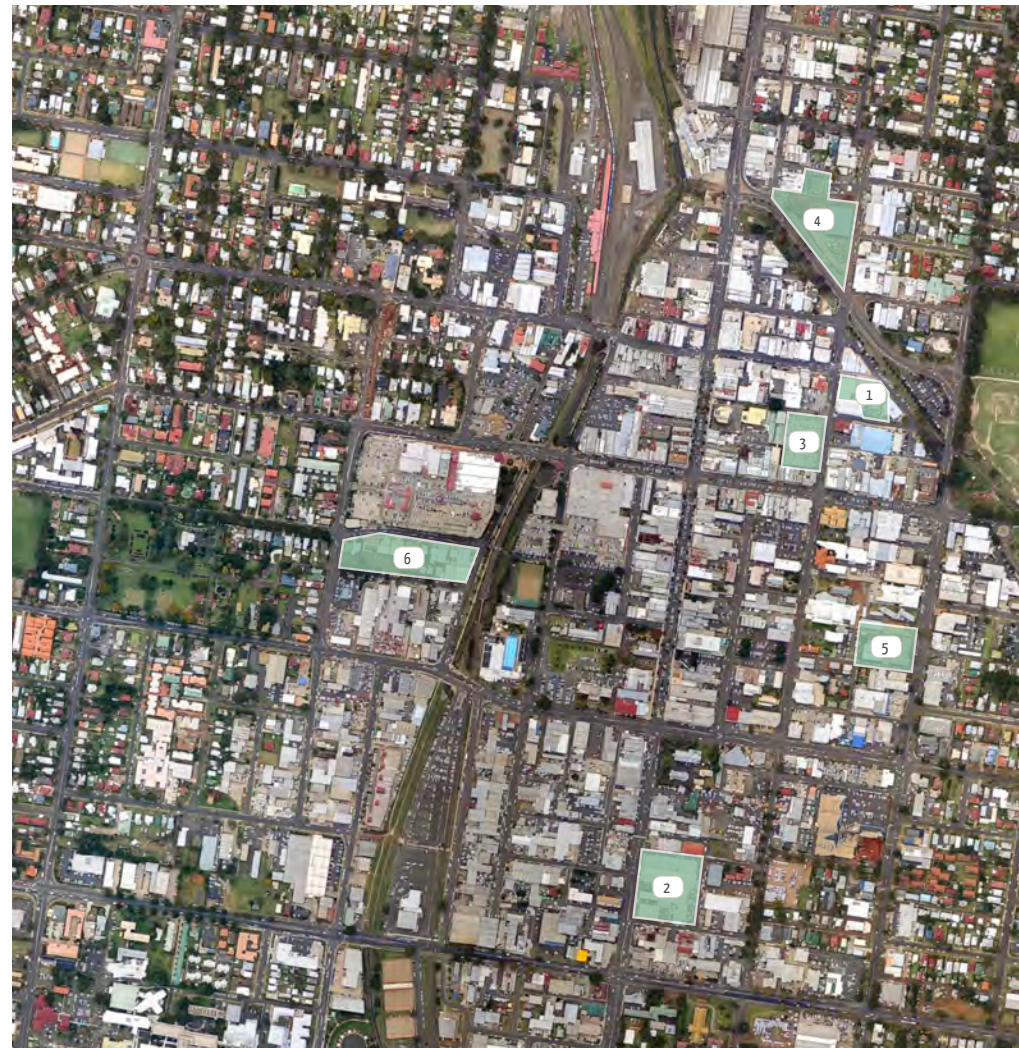


Table 2.3 below summarises the performance of each of these sites against the assessment criteria. Three within the core and three in the frame all scored reasonably well.

Of the three sites located within the Core precinct, two sites performed the strongest, namely:

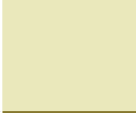
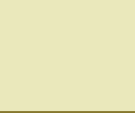
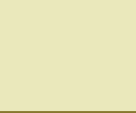
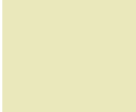
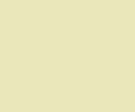
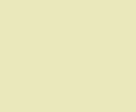
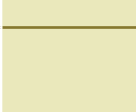
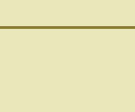
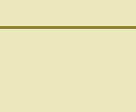
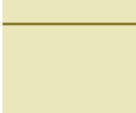
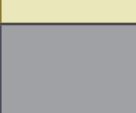
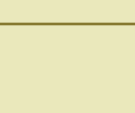
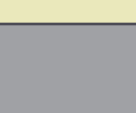
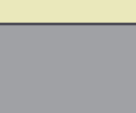
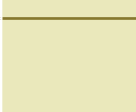
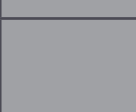
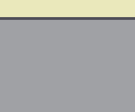
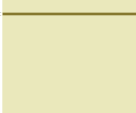
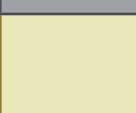
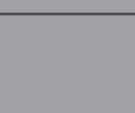
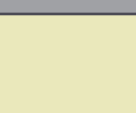
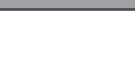
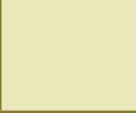
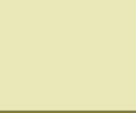
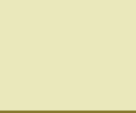
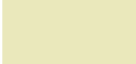
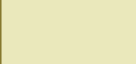
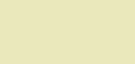
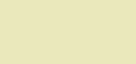
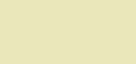
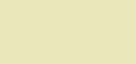
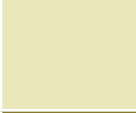
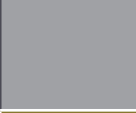
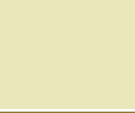
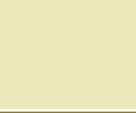
- » McCafferty's; and
- » The former TAFE.

Because McCafferty's site was in an area where office development is considered desirable and also because of its potential to act as catalyst for redevelopment generally, that site was identified as the preferred site on which to prepare a structure plan for the purposes of large floor plate office development. It should be noted that principles articulated in the commercial office structure plan can be applied to a number of the shortlisted sites, or indeed many other sites within the Toowoomba CBD. The ranking, although qualitative, sought by a single arithmetic quantum of 'best' scores, sought to identify which sites displayed a higher performance than others.

Key

	Strong Performance
	Weak Performance
	Acceptable Performance

Table 2.3: Assessment of selected sites

Location	1	2	3	4	5	6
	McCafferty's	Chronicle	Car Park	Gas Works	TAFE	QIC
Land Use: » Strengthening the core » Catalyst site						
Built Form: » Civic contribution » Single ownership » Core						
Movement: » Pedestrian environment » Accessibility & parking						
Open Space: » Outlook » New open space systems						
Public Realm & Streetscape: » Enhanced linkages » Critical mass						
Sustainability: » Orientation » CPTED						
Focus Areas for Change: » TCCMP sites						
Market: » Capacity to expand » Flexibility						
Floor Space Opportunity: » Large site						
Networking & Connection: » Proximity to services » Proximity to Public Transport						
Ranking	A	F	E	D	B	C

03

Bulky Goods Site Assessment

The first component of the Commercial and Retail Land Needs Review examined economic demand and need across a range of retail and commercial land use categories.

One of the justifications for preparing structure plans for large floor plate office developments within the Toowoomba CBD, was an expectation that there was an anticipated unmet demand and hence latent need for large floor plate office development. However, this notion of a significant unmet demand for large floor plate office development within Toowoomba was not corroborated by the findings of Component 1 of the Commercial and Retail Land Needs Review.

In response to this finding, Council sought to redirect the focus of the structure planning exercise to respond to identifying desired urban design outcomes for those types of developments for which there was an identified shortage.

The economic analysis conducted as part of the first component of the Commercial and Retail Land Needs Review identified that there is a shortage of bulky goods/showroom floor space in Toowoomba. Given that this need is current and growing, Council redirected the project to take into account what role the CBD, in particular the frame/fringes could fulfill in responding to that need.

The previously issued criteria for large floor plate office development provides an important contextual basis for any development in the Toowoomba CBD, but its direct relevance to showrooms and bulky goods is limited, as the two land use categories have quite different characteristics and market/business needs.

As will be apparent from the discussion in 3.1 and 3.2, bulky goods retailing poses urban design challenges in a central business district context. Comparative form, scale, presentation to the public realm and lost opportunity for higher more intense commercial development are just some of the issues that require consideration when satisfying the current demand for this type of development.

3.1 CHARACTERISTICS OF BULKY GOODS RETAILING

The showroom/bulky goods/homemaker retail market has experienced strong and sustained growth over the last ten to fifteen years. In 2010¹ the Bulky Goods Retailers Association of Queensland attributed that growth to:

- » Increased demand for *do it yourself* home improvement products;
- » The on-going technology revolution and the ever-increasing range of new products;
- » On-line shopping which has increased access to goods and services;
- » Improved shopper experiences and choice;
- » Emergence of the *green* market; and
- » A simple response to population growth

Bulky Goods/Showroom developments occur in many locations, such as in Centres, including CBDs; as stand-alone outlets, often integrating with or simply replacing industrial uses in industrial areas; and in clusters as part of a showroom precinct or zone. Hence, some bulky goods retailing is deliberately focused away from established commercial centres as there is a financial benefit in lower occupancy costs and economies of scale outside of the high rent and high cost retail centres.

These factors manifest themselves in a built form that is usually large (i.e. more floor space with cheaper rent); features a good supply of accessible parking; and features convenient and often large service vehicle infrastructure. This is despite the fact that the items sold are sometimes not bulky, and all stock intended to be sold may not be stored on the same site as the sale.

The very 'bulky' nature of some building types which accommodate this category is typically at odds with CBD planning opportunities.

A challenge for this study and the production of design guidelines, is how to and ensure appropriate urban design principles are applied should applications be received for CBD based bulky goods retailing.

¹ See *Bulky Goods Retailers Association of Queensland Submission (BGRA) to the Productivity Commission Issues Paper – May 2010*

3.1.1 The Bulky Goods Challenge

Local government planning documents have struggled to accommodate bulky goods retailing since the emergence of the category in the 1980s (at the time referred often to as Homemaker Centres). The principal challenge in planning for bulky goods retailing is that the segment itself is broad and diverse and overlaps with other retail formats (most notably discount department stores and department stores).

Planning for bulky goods retailing has probably not been helped through the application of over-simplified definitions, such as that provided by the Property Council of Australia², which defines a bulky goods centre as:

“A medium to large sized shopping centre dominated by bulky goods retailers (i.e. furniture, white goods and other home wares), occupying large areas to display merchandise. Typically contain a small number of specialty shops and is generally greater than 5,000 sqm (GLAR) in size.

Key features:

Generally located adjacent to large regional centres or in non-traditional retail locations (i.e. greenfield sites and industrial areas);

Purpose designed, built and operated, generally with a layout of outlets around central, landscaped areas and an overall design and colour theme to promote appearance of an integrated development.”

As stated above bulky goods retailing is a diverse segment. The dimensions of the diversity typically include:

- » **Sales productivity:** while bulky goods retailers are typically considered to operate at the lower end of sales productivity rates among retailers, there is still significant diversity across bulky goods retailers;
- » **Intermediate sales versus final sales:** a significant feature of many bulky goods retailers is the proportion of sales value attributable to intermediate sales (i.e. business to business sales) as opposed to final sales (i.e. sales to households); and
- » **Category dominance:** some bulky goods retailers can be described as category killers, that is retailers that dominate the category and hence ‘kill’ competitors.

² Property Council of Australia (2011)
Queensland Shopping Centre Directory

Category Killers - A Comment...

On the final point, some analysts argue that bulky goods retailers and category killers are one and the same, however developments within various retail categories have suggested this not to be the case. Hence, it can be said that while all category killers are bulky goods retailers, not all bulky goods retailers are necessarily category killers.

Category killers are large stores that provide an extensive range within a narrow product area at competitive prices. Toys R Us, IKEA, Office-works, Bunnings and Masters are examples of Australia's major category killers. Category killers are found in regional shopping centres, but are more commonly located on freestanding sites and in bulky goods centres.

Bulky goods centres consist of a collection of 'big box' retailers usually characterised by large stores, cheaper construction and minimal fit out. Initially, the majority of bulky good centre tenants were 'pure' bulky goods centres, featuring furniture, electrical goods, hardware and a wide range of homewares retailers, including kitchen, bathroom, brick and other display tenants. However, as the retail segment has developed, there are increasingly more 'hybrid' retailers, such as JB Hi Fi and the now defunct WOW Sight and Sound, that sell bulky goods and smaller items commonly sold in traditional retail shops.

Initially, bulky goods centres were not directly competitive with regional and sub-regional centres. Most of their tenants could not afford regional centre rents and did not require the high foot traffic of regional centres to trade successfully. There are however mutual benefits of cumulative attraction in locating adjacent to regional centres, as was the case for the Logan Home Centre/Logan Hyperdome in Loganholme, Queensland. While earlier forms of bulky goods retailers could not afford regional centre rents, evolution of the segment has given rise to higher sales productivity variants, which have begun to emerge in regional centre locations.

The product overlap between category killers and bulky goods centres and department and discount department stores is increasing rapidly. The decision of the former Coles Myer group to support the roll out of its Megamart concept store was a means of regaining furniture, furnishings and appliance

market share lost to bulky goods centres and big box retailers. Ultimately, the Megamart concept failed. The Masters concept promulgated by Woolworths is a similar example. Its ultimate success remains to be seen. It can be said with confidence however that the rapid expansion of Bunnings superstores has affected discount department store and other centre specialty shop sales.

The success of the Bunnings superstores is an example of a category killer within the bulky goods segment. Its domination of the hardware segment has had a significant impact on smaller scale hardware stores.

The range and variety of retail goods appearing in bulky goods centres and freestanding locations is growing and will continue to pressure homewares traders and department stores in traditional shopping centres. This trend is responsible, in part, for the increasing regulation of preferred centre location throughout various state and local level planning instruments.

Of course, not all free standing, or 'out of centre' bases clusters are unattractive or poorly responsive to emerging urban design principles focused on the public urban. James Street and the showroom district in Wickham Street (both in Fortitude Valley, Queensland), are examples where good design outcomes have been achieved for 'bulky' goods outlets.

3.1.2 Requirements of the Bulky Goods Retailers

Common themes regarding the locational requirements for successful bulky goods centers include:

- » Having large and extensive trade areas;
- » Being in the central position in the trade area or near the main entry of a large trade area;
- » Affordable and plentiful land for the land consumptive characteristics of this form of development (floor plates, and parking in particular) and to facilitate expansion and the creation of clusters of similar development;
- » Being on a major road with high visibility and accessibility; and desirably
- » Having an expanding trade area (i.e. many new homes) and one with higher income households.

By their nature it is likely that bulky goods retail trips will be predominantly car based. This is because of the distance people are willing to travel in their 'product search' and the need to transport their purchases (although many bulky goods would be home delivered).

Not all these locational requirements apply as a showroom may successfully exist within a multi-tenanted 'big box' retail centre or within part of a CBD building, where the requirements of centrality to a large catchment and access to other forms of transport outweigh exposure and visibility.

A corollary of having available land supply is the form of that supply. Fragmented ownership can represent a constraint to sufficient land aggregation for even a single development as much as a constraint to the creation of a cluster.

The land extensive nature of the bulky goods retail segment gives rise to the need for low rental rates. However, as stated previously there are some bulky goods retailers which experience relatively high sales productivities.

In practical terms, these requirements and characteristics represent appropriate planning criteria.

Factory outlet and clearance centres

Factory outlets, like bulky goods centres, rely on lower prices and the cumulative attraction of an agglomeration of tenants to generate consumer interest and ultimately trips. Factory outlets typically include one or more of the following elements:

- » End of run: first quality goods unsold by the manufacturer or retailer at the end of a season;
- » Seconds: imperfect or damaged goods;
- » Overruns: first quality goods that the manufacturer is unable to sell through normal retail outlets; and
- » In-store or 'own brand' labels: less expensive brand lines exclusive to factory outlets.

The factory outlet concept originated in the US in the early 1970s and experienced rapid growth. Recent estimates suggest that there are approximately 400 of these centres in the US.

Factory outlet retailing and centres are gathering momentum in Australia, despite planning (and competitor) opposition. One of the major participants in this segment has been Direct Factory Outlet (DFO), however the recent deterioration in the retail segment and possibly over-extension by the group has seen DFO face financial difficulties. Apart from DFO, the most significant factory outlet centre in Queensland is Harbour Town on the Gold Coast.

Consumer demand for value for money, coupled with an increasing frequency of sales in traditional stores, which has created a 'never pay retail' mentality, benefits factory outlet centres. Ultimately, however the expansion of the capacity of factory outlet centres and stores is likely to be limited, because too many would cannibalise their traditional retail sales base in central business district and regional shopping centres. Australia's small population base suggests that factory outlet centres will be limited to a small number in capital city and major provincial areas.

A 'proliferation' of factory outlet centres will clearly have significant impacts upon regional and sub-regional shopping centres. As their availability increases, they can lose their point of difference and simply become another centre within a network of centres. The tendency to overshoot a growth market and the subsequent oversupply of factory outlet space will tempt, if not force, owners and managers to fill it with 'normal' retailers seeking cheaper rents, to the detriment of traditional shopping centres.

Requirements of Factory Outlet Centres

Individual factory outlet shops (with the exception of furniture based outlets) do not require the same quantum of floor space as bulky goods retailers. The need for a large quantum of centre floor space is driven by the larger number of retailers as opposed to larger tenancies, although outlet tenancies may be marginally larger than that of typical specialty shops. The key locational requirement is to be located on a major inter-regional road corridor to facilitate the customer trips from a typically very large catchment.

3.2 PLANNING CHALLENGES FOR BULKY GOODS RETAILING

The principal planning challenge for bulky good retailing is the diversity of the segment and the many potential iterations of retailer typologies that would need to be considered under a prescriptive planning approach.

As stated in section 3.1 above the three main parameters for considering a bulky goods retailer, include:

- » Sales productivity (low sales productivity versus high sales productivity);
- » Intermediate sales versus final sales (wholesaling versus retailing); and
- » Category dominance (standard retailer versus category killer).

3.2.1 Sales Productivity

The sales productivity of any retailer determines its ability to pay rent.

By their nature, bulky goods retailers typically require more floor space per item sold than more traditional retailers. This proposition has been used to argue for the need for purpose built bulky goods centres. However, there is a high degree of variability in sales productivity rates. For example, Bunnings superstores operate at a basic feasibility sales productivity of approximately \$2,500/sqm, while the sales productivity of a JB Hi Fi can be as much as four to five times that.

Hence, lower sales productivity outlets are more likely to require out-of-centre or stand-alone outlets, while higher productivity uses may be able to support higher rents. The challenge for centre owners is the trade-off between higher rents and the customer attraction of a particular bulky goods retailer. The flip side of this issue is the need for larger format retailers to demonstrate their potential customer attraction as a rental trade-off. To some extent it was the failure of Borders (a large format book shop) to clearly articulate this benefit to centre owners that led to its ultimate collapse.

3.2.2 Intermediate Sales Versus Final Sales

Some bulky goods 'retailers' derive a significant proportion of their trade from business purchases. Business to business purchases represent wholesale trade, as opposed to retail trade. Retailing pertains to the sale of goods for their final use, while wholesale trade is the sale of goods as an input to the production of another good or service. Market research conducted for Officeworks demonstrated an 80/20 relationship between volume and value of sales to the household and business sector. It was shown that while only approximately 20% of Officeworks transactions were made by businesses, the value of these transactions accounted for approximately 80% of sales. The market positioning of bulky goods 'retailers' also varies.

For example, within the automotive parts and accessories segment, Super Cheap Auto is heavily focused towards households, while Repco tends to be more 'trade' focused. Even within the Repco portfolio there are examples of formats which are more focused on 'household' purchases than trade purchases.

Bunnings has attempted to better segment its customer base by developing Bunnings Trade centres, which are solely targeted at the building trade. Despite this, Bunnings continues to draw strong 'trade' sales from its mainstream Bunnings superstores. On first impressions, it would appear that Woolworths' Masters stores intend to pursuing the household sector, with their modern facade, customer amenities and slightly higher grade fitout. It remains to be seen whether this will be successful long term.

The nature of the sales profile is highly relevant to planning instruments, because wholesaling is typically considered an industrial, rather than centre use. The apparent 'overlap' between retailing and wholesaling creates a significant challenge to traditional centres planning policy.

3.2.3 Category Dominance

The emergence of category killers creates a major challenge for planning instruments. Category killers generally offer a broader range and in some cases more competitive pricing than their traditional competitors. The longevity of category killers is uncertain, with a number of narrowly focused category killers struggling to maintain their place in the market. Ironically, the world's first category killer, Toys R Us has struggled for sales in recent years, because of the seasonality associated with toy purchases. More broadly based category killers have tended to experience greater success. The most obvious example within the Australian context is Bunnings, although there are numerous examples of other successful category killers in other retail segments (e.g. Dan Murphy's, Ikea, Rebel Sport, JB Hi Fi, etc).

The range of products on offer typically necessitates large floor plates and results in lower sales productivity, although as discussed above there are exceptions. The planning challenges created by category killers will only increase with the entrance of Costco and potentially Walmart into Australia. The sheer scale of trade area of the likes of Costco and Walmart and the absence of any directly comparable retailer, would mean that a strong needs case could be formulated quite easily, leaving the major issue of impact to be resolved.

3.3 TCCMP'S ALIGNMENT TO 'BULKY GOODS' REQUIREMENTS AND CRITERIA

The purpose of this section is to identify whether there is alignment between the requirements of bulky goods retailing and the attributes of the Toowoomba CBD and the direction evident in the Toowoomba City Centre Master Plan (TCCMP).

Component 1 of the Commercial & Retail Lands Review identified that there is a significant shortfall of bulky goods or retail showroom floor space within the Toowoomba Regional Council area. This finding reinforces the findings of previous centres studies prepared on behalf of the former Toowoomba City Council.

Section 3.1.2 outlined the economic and locational requirements of bulky goods retailers. The key criteria for assessing the potential for sites within the Toowoomba CBD to accommodate bulky goods development are:

- » Central location within a populous regional catchment;
- » Availability of consolidated or easily consolidated land (consolidated tenure);
- » Access/frontage to a major arterial road;
- » High visibility and exposure; and
- » Large and extensive trade area

From a locational and market perspective the Toowoomba CBD has:

- » Good land supply, comprising a mix of high cost and affordable land stock
- » Centrality to a large and expanding catchment and diverse economic hinterland
- » A role as a 'gateway' to communities to the north, south, and west
- » Very high levels of exposure to vehicular traffic including the convergence of two national highways and a network of major cross town links giving good access to the CBD and between suburbs

For these reasons, it is considered that the CBD is well placed to facilitate bulky goods/showroom development and meet a genuine demand and community need. The TCCMP acknowledged wide development opportunities which directed the allocation of zones and code provisions in the planning scheme that followed the TCCMP.

The Toowoomba Regional Planning Scheme (TRPS) has provisions facilitating showrooms/bulky goods in both the Principal Centre Zone and Mixed Use Zone. Both these zones cover what is generally recognised as the Toowoomba CBD.

³ See EPLAN – 6.3 Centre zones category

Within the Principal centre zone code³ there is a land use allocation (See Structure Plan Figure 6.3.1.1) that has extensive land outside the retail core and commercial core areas which remain within and close to these likely high intensity core areas and which also have the visibility and exposure that showrooms and bulky goods outlets require.

However the implementation of any development pursuant to the TRPS is through the zones and the respective zone codes.

The **Major Centre** zone aligns with the 'City Centre Core' in Figure 6.3.1.1 of the TRPS. Most of the 'City Centre Frame' is in the **Mixed Use** Zone.

For the **Major Centre** zone, the potential for such uses is mentioned in the Principal Centre Zone Code specifically at Land Use P01 (e) and the corresponding Acceptable Outcome, but specifically located in the block bounded by Herries, Dent, Clifford and Hill Streets. The form of bulky goods/showroom development in that location is preferred to be with offices above (See A016). There is also a reference to the Mixed Use zone at A01.6, where showrooms involving active uses at ground level north of Margaret Street to the railyards. P031 deals with the design of showroom development but only where it shares the boundary with a residential user zone.

In the **Mixed use** zone code, a number of precincts direct land use allocation in that zone. The **City South** precinct and the **West Creek** precinct specifically envisage bulky goods and showroom development. P0 17 of that code states as a performance outcome (but no nominated acceptable outcome) that such development:

- » provides for clustering of buildings;
- » integrates car park areas and access points;
- » contributes to a contemporary urban environment; and
- » includes other commercial uses above ground level where practical.

In both codes there are numerous public realm criteria that encourage **all** development to be in context with the special setting and character of Toowoomba's CBD. Buildings surrounded by a sea of cars are not envisaged.

Many of these criteria are strategic in nature and describe preferred cumulative outcomes from the development of a number of sites and are not easily applied to an individual site about which the criterion may seek to apply.

⁴ See EPLAN – 6.6 Other zones Category

3.4 ASSESSMENT OF POTENTIAL SITES

The criteria for bulky goods/showroom development canvassed above are considered to be reflected in the TRPS. The CBD can play a role and broad opportunities are identified and flagged in that document including the nomination of 2 precincts in the mixed use zone where showrooms are encouraged.

A workshop was convened on Tuesday, 11 June 2013 to discuss the shortlisting and assessment of potential sites for which an exemplar bulky goods structure plan would be prepared.

Potential sites that may meet the criteria are summarised in the Table 3.1 opposite and shown on Figure 3.1 below.

Table 3.1: Potential bulky goods sites within Toowoomba CBD

Site	Discussion
CITY CENTER CORE - PRINCIPAL CENTRE ZONE:	
<i>Grand Central South</i>	A core CBD site in the Herries/Dent/Clifford/Hill Street area, adjoining the Grand Central development, although fragmented, it is a site that should be considered for conceptual design. Investigations of this site should be in a form which requires the capacity for office development above and its public realm relationship to the larger retail centre to be explored. Whilst this site is not a highly visible location, it is central and has a high potential to service a very wide catchment. Additionally, it could also meet the needs of patrons who are otherwise accessing the retail core.
<i>Rumours site</i>	This site represents a large consolidated holding and has previously been subject to a development application for a single bulky goods tenant. The L shape of the site tends to militate against exposure, however its location in the CBD core may overcome the lack of exposure.
CITY CENTRE FRAME - MIXED USE ZONE:	
<i>The Chronicle</i>	This is shown in the relevant code provisions as a potential showroom locality, and it meets visibility and access criteria. Its Ruthven Street location provides good accessibility back into the CBD core and a central location to the broader Toowoomba urban area. The side laneway access provides for heavy vehicle deliveries to be kept off Ruthven Street as well as potential car parking access that does not 'break' the Ruthven Street foot path. The site is in a single ownership, which enhances its market readiness.
<i>James Street corner site</i>	There are a number of potential corner sites that if consolidated could provide sufficient land for a bulky goods / showroom type development. Corner sites are preferred to provide access to the site off James Street. While there is some conflict with scheme provisions in allowing this type of development along the national highway corridor, the intra and inter-exposure afforded by such sites would ensure the success of such development. An indicative site is shown in Figure 3.1.
<i>Herries Street corner site</i>	There are a number of potential corner sites that if consolidated could provide sufficient land for a bulky goods / showroom type development. Corner sites are preferred to provide access to the site off Herries Street. From an operational perspective there is a risk that access to Herries Street sites immediately adjacent to the CBD core may be too congested for this type of shopping trip. An indicative site is shown in Figure 3.1.
<i>Gas Works</i>	The Gas Works site is strategically located on the Outer Circulating Road (OCR), hence has high levels of exposure and accessibility. Being on the very fringe of the CBD Core, it represents a highly centralised location, which could service the broader Toowoomba Region.

FIGURE 3.1: Possible Bulky Goods Sites

1. Grand Central South
2. Rumours
3. Chronicle
4. Gas Works
5. Indicative Site
6. Indicative Site



3.5 ASSESSMENT OF POTENTIAL BULKY GOODS SITES

Table 3.2 below summarises the performance of the selected sites against the bulky goods locational criteria. With all sites being located within either the Major Centre or Mixed use zone, most sites are generally well located. Hence, the assessment of locational attributes is largely relative. However, the two sites located within the CBD Core were not the best performing sites. Indeed, the Grand Central South site was a poor performer, because despite being within the CBD Core it lacked the necessary accessibility and exposure of other sites. This is not to say that it is not an acceptable site for bulky goods development, rather that it was not considered the best site for an exemplar structure plan.

The two strongest performing sites were the 'Chronicle' site and the 'Gas Works' site. At the workshop on Tuesday, 11 June 2013, there was considerable discussion regarding which of the two best performing sites would progress to having an exemplar structure plan prepared. Given that the Gas Works site was identified as a strongly performing office site, its strategic location on the OCR and its potential to provide a high quality linkage between Queens Park and other strategic sites in the northern part of Toowoomba CBD, it was determined that both sites would have structure plans prepared. However, the structure plan for the Gas Works site would be for a mixed use development, while the Chronicle site would be used to develop a bulky goods structure plan, comprising a set of template style guidelines for bulky goods development.

Table 3.2: Assessment of potential sites

Location	1 Grand Central South	2 Rumours	3 Chronicle	4 Gas Works	5 James St	6 Herries St
Central Location: » Within or fringing core						
Consolidated tenure: » Single tenure » Highly consolidated tenure						
Main Road Access: » Arterial or Highway access						
Visibility & exposure: » Extended frontage to high traffic corridor						
Anticipated by the TRPS:						
Ranking	E	C	B	A	D	D

Key

	Strong Performance
	Weak Performance
	Acceptable Performance

04

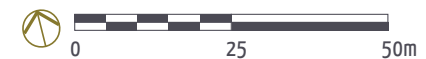
Structure Plan -
MIXED USE DEVELOPMENT
Gas Works site

4.1 EXISTING

With each structure plan, the design outcome considered the sites context locally as well as CBD wide. The schematic built form options were the outcome of balancing TCCMP urban design principles with likely commercial aspirations for each of the selected sites:

- » Gas works
- » McCafferty's

FIGURE 3: Gas Works Site Aerial (21 May 2013)



4.2 PLAN

Site Area (Phase 1 and 2)	1.3Ha
GFA's	
Mixed Use / Commercial	3,670m ²
Residential (9 Storeys)	7,560m ²
Retail/Markets	1,450m ²
TOTAL GFA	12,680m²
FUTURE COMMERCIAL / MIXED USE	
(8/10 storeys. Undercroft and carparking)	
1,000m ² FLOOR PLATE	
FUTURE TOTAL GFA (approx)	20,000m²



FIGURE 4: Mixed Use Development Plan



4.3 PHASING



Phase 1

- » Office development occupies prominent corner: parking in undercroft below or in semi basement
- » Interim retail / markets to north
- » Shared carpark
- » Shared pedestrian link through to adjoining street network



Phase 2

- » Smaller scale development at interface with surrounding mixed use development and local streets
- » Residential site developed in landscaped grounds
- » Site landscape completed along prominent frontages
- » Public realm continues to develop
- » Shared pedestrian and vehicle links through site



Phase 3

- » Retail and markets redeveloped into further commercial and mixed use: ability to respond to market conditions

FIGURE 5: Phasing

4.4 SECTIONS

Section A-A

- » Interim retail development establishes activity and repositions site in market
- » Shared public realm and pedestrian networks
- » Future medium / high density residential capitalises on proximity to CBD and open space networks



FIGURE 6: Section A-A



Section B-B

- » Shared parking and access in common areas of site
- » Landscape structure developed early



FIGURE 7: Section B-B

4.5 DEVELOPMENT PRINCIPLES

Key Development Principles

- » Maximise marketing profile opportunity for corner development
- » Incorporate public art and strong landscape framework
- » Shared use of public realm and site circulation, with a high provision for pedestrian amenity
- » Connect to surrounding pedestrian and street networks at early stages of development
- » Create new public plaza
- » Use interim uses to develop market and community positioning and attract casual users to site
- » Transition in scale with surrounding mixed use landuses
- » Minimise parking at grade through undercroft and sub basement parking: shared use of at-grade parking
- » Strong coordination of site signage, furniture, lighting etc. to establish a consistent site character
- » Incorporate residential uses that capitalise on the location and connections with open space and pedestrian networks
- » Incorporate a high level of stormwater management opportunities such as grey water re-use, green roofs, permeable paving, stormwater harvesting

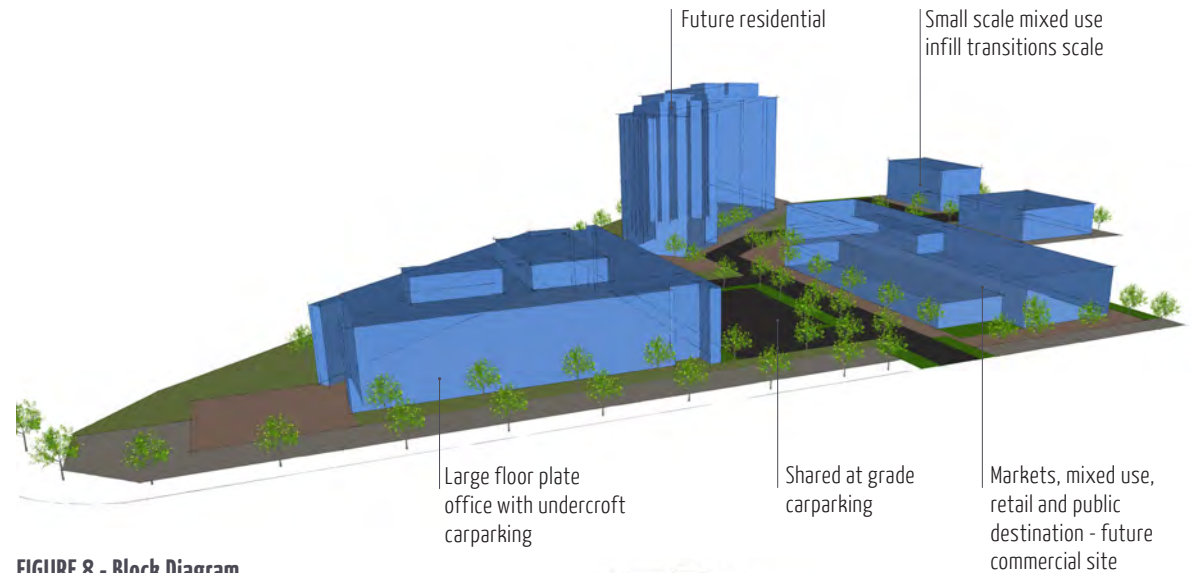


FIGURE 8 - Block Diagram

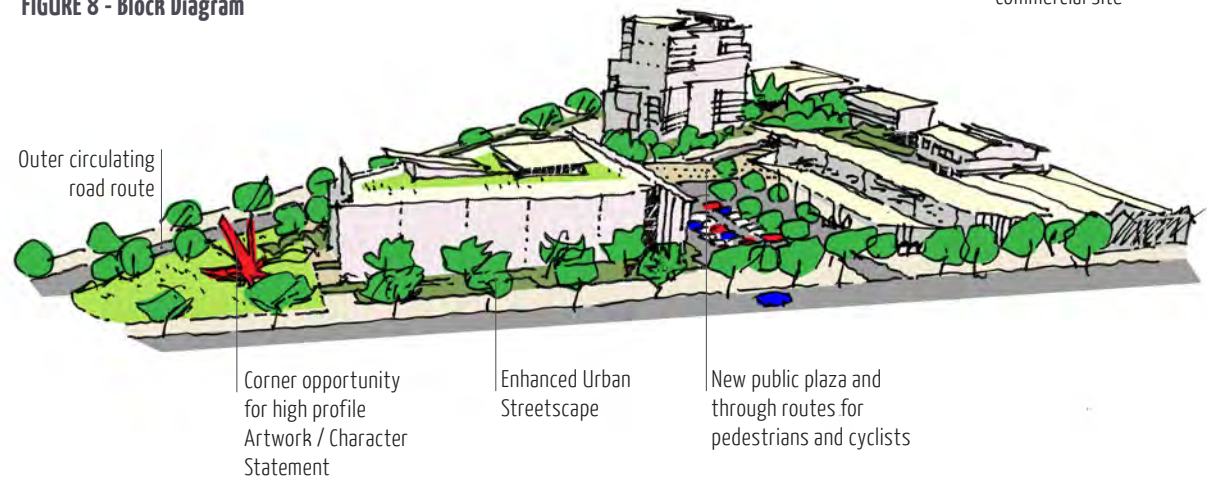


FIGURE 9 - Sketch

05

Structure Plan -
MID-BLOCK OFFICE
McCafferty's site

5.1 EXISTING



FIGURE 10: McCafferty's Site Aerial (21 May 2013)



5.2 PHASE 1

Site Area Phase 1	0.5Ha
GFA's	
Mixed Use / Commercial	2,186m ²
Carparking	45 cars
Plot ratio	0.43

- » Mixed use commercial building on main street frontage
- » Carparking at grade behind
- » Possible vehicle link through shared access from street frontage to carpark
- » Links to street network and infill development in remaining site
- » Public access gardens: Green walls, tree planting to open spaces
- » Setbacks and building form to TCCMP



FIGURE 11: McCafferty's Site Phase 1



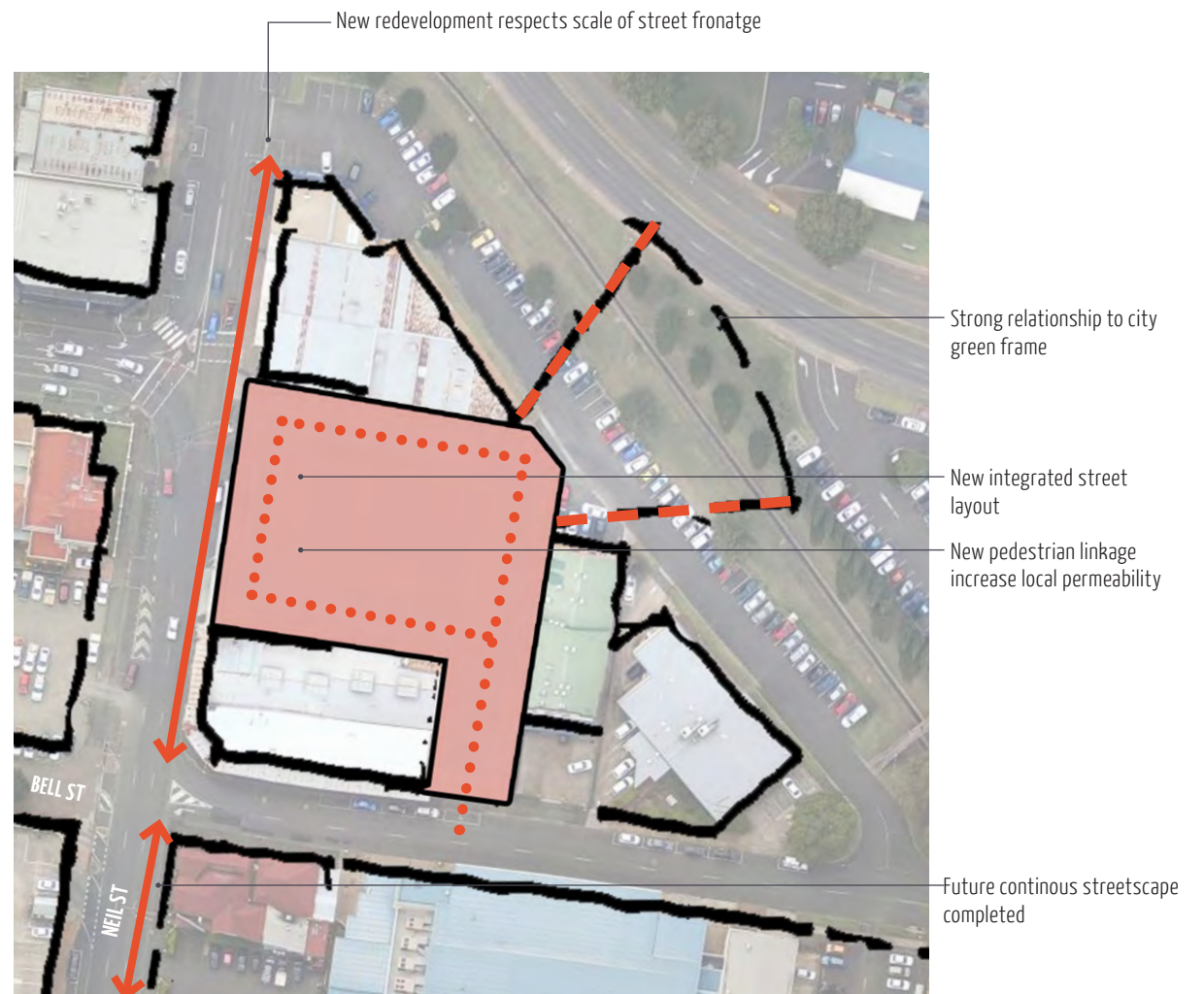


FIGURE 12: McCafferty's Urban design principles



5.3 PHASE 2

Site Area Phase 1 and 2	0.5Ha
GFA	
Phase 1	
Mixed Use / Commercial	2,186m ²
Carparking	45 cars
Plot ratio	0.43
Phase 2	
Mixed Use / Commercial	2,186m ² GFA
Residential	5,850m ² GFA
9 storeys undercroft parking	
TOTAL GFA	8,036m² GFA
Plot ratio	1.6

- » Medium / high density residential development oriented towards City Green assets
- » Carparking either provided off site or in basement
- » Retention of green network and pedestrian access ways through block



FIGURE 13: McCafferty's Site Phase 2



5.4 SECTIONS

Phase 1: Section A-A

- » Streetscape improvements to TCCMP
- » New public access through block links and public garden areas
- » New built form to main street respects height and bulk of surrounding heritage buildings
- » Parking behind building at grade in initial stages

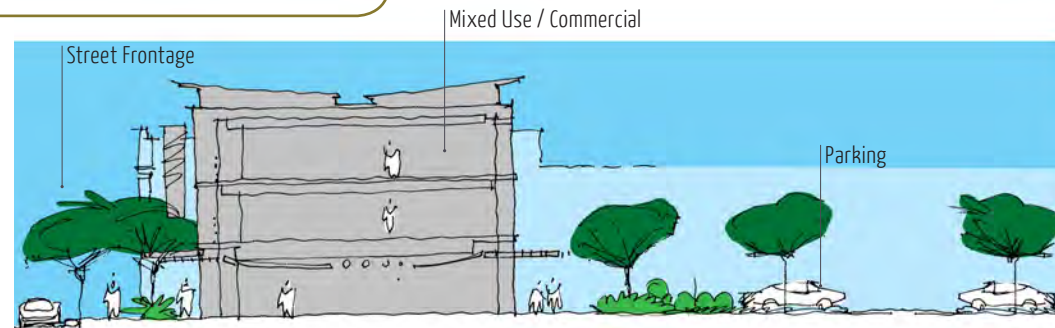


FIGURE 14: Phase 1 Section A-A

Phase 1: Section B-B

- » New residential development site within block capitalises on location and links to open space networks
- » Capture views to city open spaces and surrounding environment

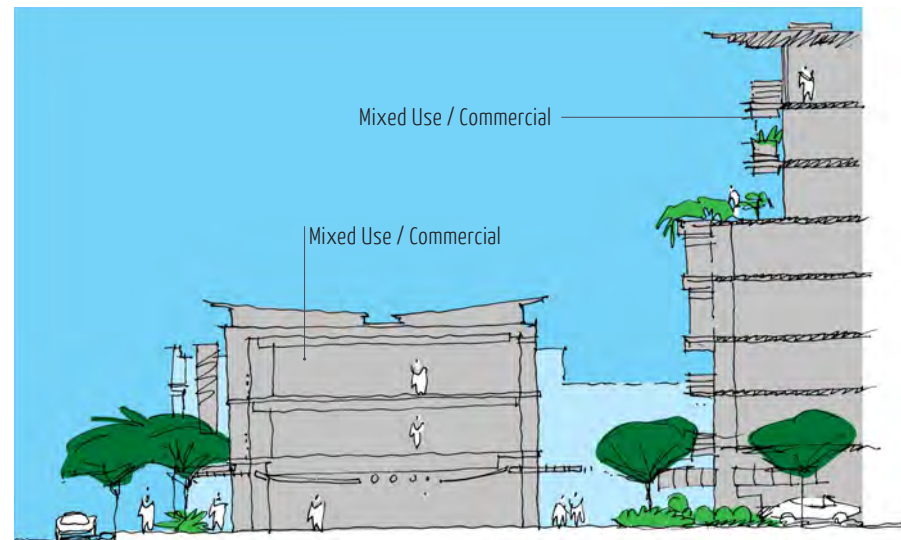


FIGURE 15: Phase 2 Section B-B



5.5 DEVELOPMENT PRINCIPLES

Phase 1: Key Development Principles

- » Formal front relates to streetscape
- » Hierarchy of fronts and back, articulated fronts
- » Large Floor Plate Commercial
- » Clear public and private spaces
- » Fine grain network of pedestrian through block links
- » Integrated entrances
- » Active occupied ground plane, enhanced public realm contributes to Garden City image

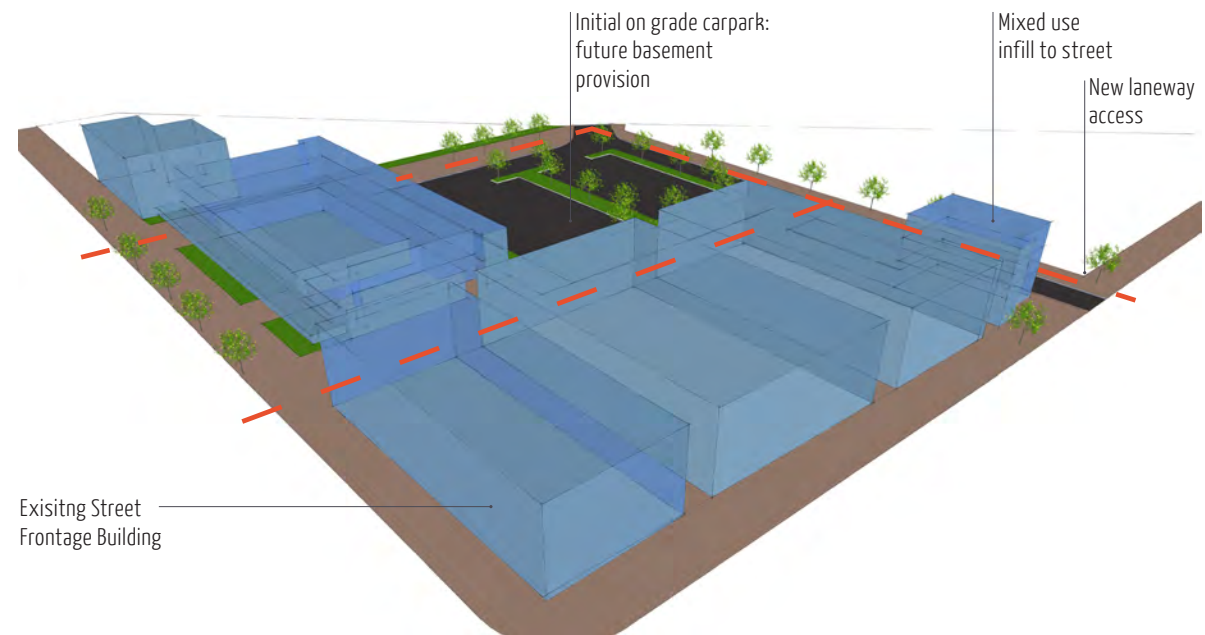


FIGURE 16: McCafferty's Site Phase 1 - Block Plan

Phase 2: Key Development Principles

- » Large Floor Plate Commercial
- » Residential with parking in basement or offsite
- » Mixed use Commercial

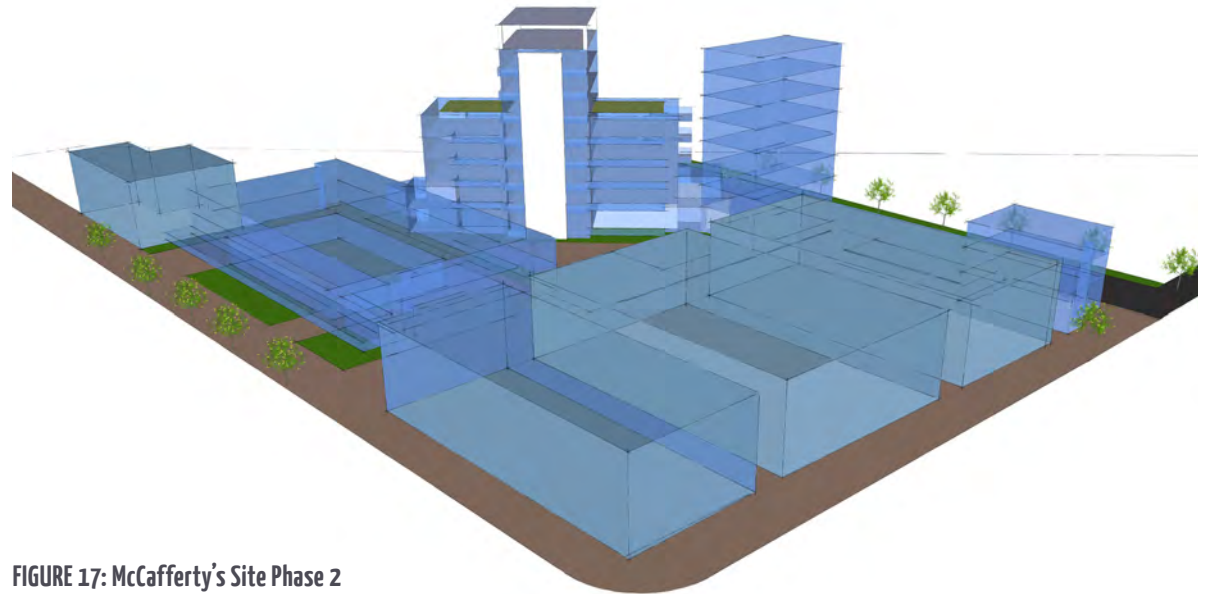


FIGURE 17: McCafferty's Site Phase 2



FIGURE 18: McCafferty's Site Street Experience

06

Structure Plan -
Chronicle site BULKY GOODS

6.1 SHOWROOMS – TEMPLATE STYLE GUIDELINES

The final output of the Commercial and Retail Land Needs Review (CRLNR) is the conversion of the Masterplan showroom images into guidelines that may be useful for pre-lodgement discussions with prospective showroom developers, and ultimately in development assessment and control.

6.1.1 Analysis of Existing Code

To know where assistance may be required for development assessment, an analysis was conducted of Part 6 Zones - 6.3.1 Principal centre zone code and 6.6.5 Mixed Use zone code as they represent the principal source of statutory design performance standards and criteria for any development in the CBD.

This analysis sought to identify where showroom performance outcomes and acceptable outcomes have been already accounted for in the code. The benefit of this analysis was to guide the substance of the template style guidelines. It was considered important not to duplicate outcomes already provided for, but just as importantly, to identify any gaps.

Whilst there are some provisions which may apply to any development in the wider CBD, the provisions which directly and expressly apply to showrooms and bulky goods are at P012 and P031 respectively in the Principal Centre zone code; and P017, 22, 27 and 29 of the Mixed Use zone code.

P022 and P031 are narrow in their application as they are locationally triggered and not applicable across the Principal Centre zone code area. They address the

circumstances where a showroom / bulky goods outlet shares a boundary with a residential use. Their terms address amenity and interface matters and are unaffected by the nature of the design considerations addressed in the CRLNR review. It is considered that these PO's can remain in their current form.

P012 and P017 are written in similar terms as follows:

“Performance outcomes

Where bulky goods/showrooms or service industry are proposed, development:

- a. ***Provides for clustering of buildings***
- b. ***Integrates car park areas, access points and landscape areas where possible***
- c. ***Contributes to a contemporary urban environment, and***
- d. ***Includes other commercial uses above ground level.***

Acceptable outcomes

No acceptable outcome is nominated.”

6.1.2 Consideration

The Performance outcomes of P012 and P017 are considered to widely embrace some of the design aspects of the showroom masterplan, but in the absence of some guidance under Acceptable Outcomes, there would be much debate about what *contributes to a contemporary urban environment* means.

Some additional wording is suggested.

Including the showroom masterplan and concepts (that follow in this report) in the acceptable outcomes or cross referencing to a policy which adopts the masterplan, are both options that would give effect to the masterplan's findings and recommendations. It would also provide robust and clear guidance to development proponents and finally give development assessment a solid platform to make its assessment of applications for showrooms in the CBD.

6.1.3 Recommendation

Using the style and graphics of the TRPS, the following suggestions are made:

P012 and P017 are reworded as follows:

“Development provides

- a. *a minimisation of apparent scale of building width and frontage by articulation to respond to pattern and rhythm of surrounding streetscape*
- b. *varied height of street elevation within a 2/3 storey profile, including where practicable high corners to book end the built form*
- c. *high glazed and transparent areas for display purposes*
- d. *a step back of any associated commercial development consistent with profiles of adjoining buildings*
- e. *an activate street frontage where possible with a focus around pedestrian intersections , such as street corners or intersection of pedestrian links*
- f. *where possible new mid-block pedestrian circulation with 24 hour safe public access*
- g. *an awning along the main street frontage including space for seating*
- h. *avenue street tree planting to front and carpark areas to support garden city image*
- i. *signage and materials to be integral and part of the design, not add-ons; and*
- j. *for the use of green roofs, vertical green walls, stormwater “rain gardens” sculpture especially on otherwise blank walls.”*

From the following Figures it is recommended that 6.3, 6.4 and 6.6 be included in the code.

6.2 EXISTING



FIGURE 19: Chronicle Site Aerial
(21 May 2013)

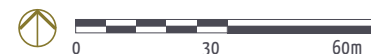


6.3 PLAN

Site Area	1.8Ha
Bulky Goods	14,400m ²
Commercial	3,600m ²
Carparking	100 cars
TOTAL GFA	18,000m² GFA
Plot ratio	< 1



FIGURE 20



6.4 SKETCH OPTIONS

Section A-A

- » High glazed and transparent frontages
- » Signage integrated within design
- » Continuous awning along street frontage with seating under
- » Rainwater capture
- » Solar / Green roof potential

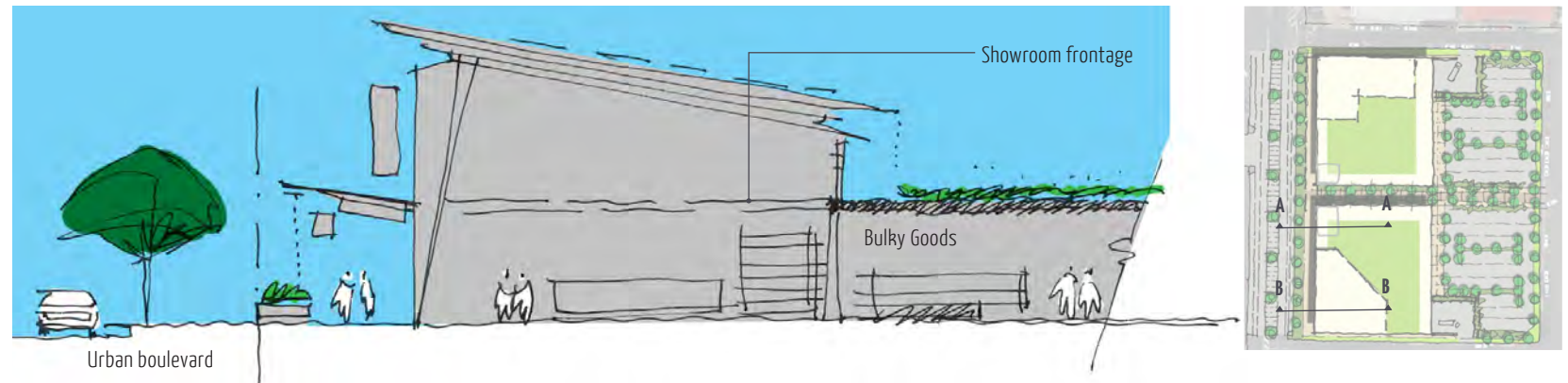


FIGURE21: Section A-A

Section B-B

- » Open and engaged active frontage
- » Solar / Green roof potential

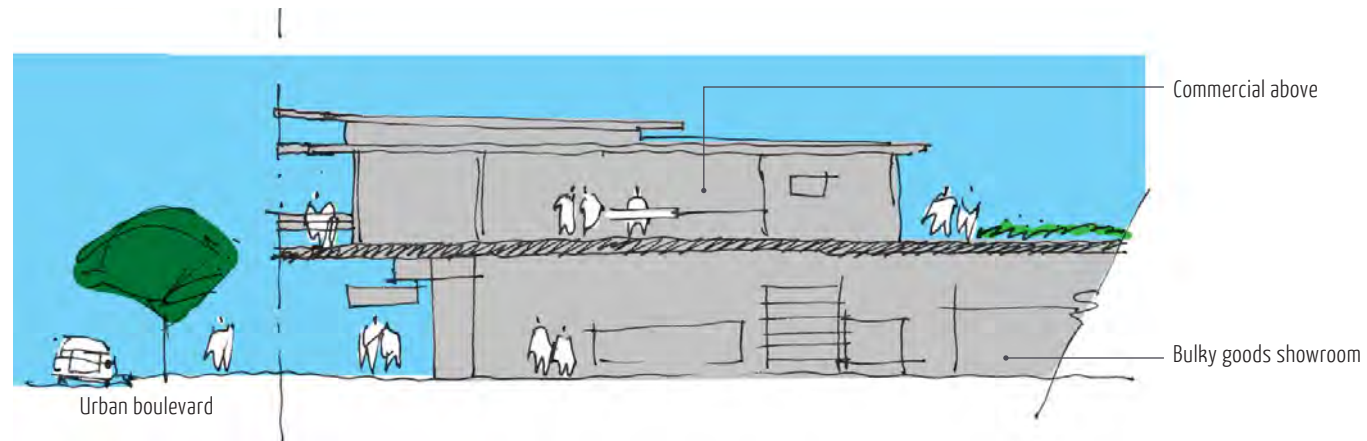


FIGURE22: Section B-B

6.5 DEVELOPMENT PRINCIPLES

Key Development Principles

- » Continuous awnings to frontage
- » Pedestrian through block link with 24 hour safe access
- » Centre parking as part of the Boulevard
- » Parking at rear
- » Increase scale at corners
- » Street frontage to contribute to Garden City image
- » Street frontage activated engaged respective to scale of street
- » Use roof surfaces eg. green roof / solar
- » Planting to enhance areas to support Garden City image

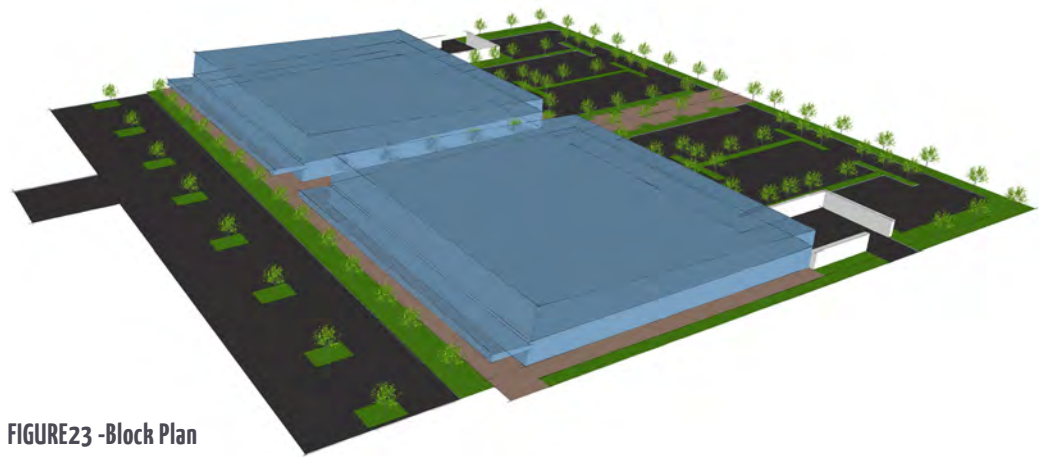


FIGURE23 -Block Plan

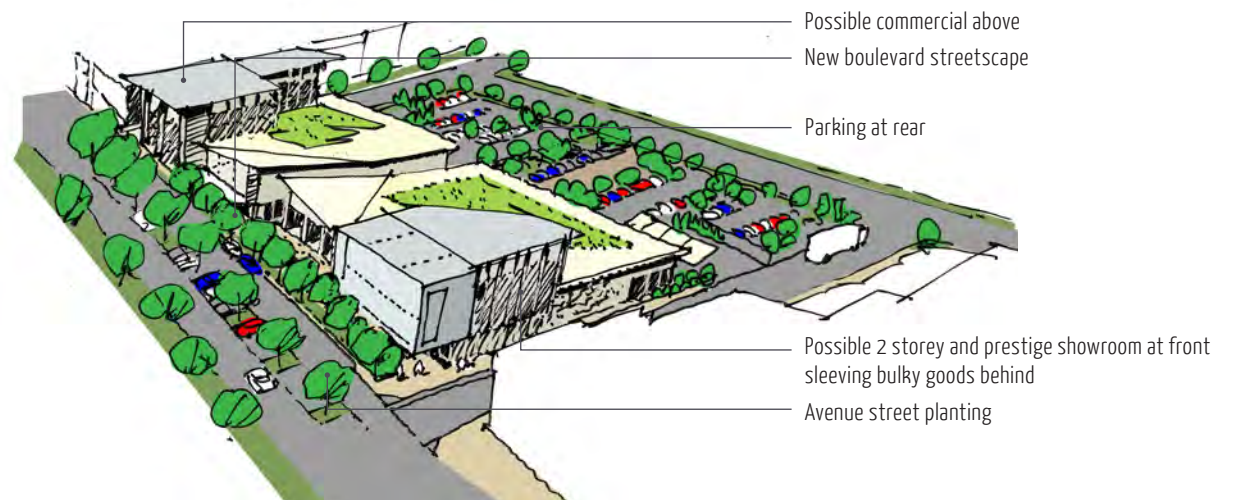


FIGURE24 - Sketch



ECONOMIC ASSOCIATES