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Queanbeyan CBD

retail growth strategy

FINAL REPORT

Australian Government
BUILDING OUR FUTURE

QPRC

Foresight partners Pty Ltd
Property Market Analysis and Development Strategies

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EyecarePlus
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1. Vision and Key Objectives

Vision

To develop a diverse mix of sustainable quality retail and hospitality businesses in the Queanbeyan CBD that attracts and satisfies local residents and gains a positive reputation with visitors and tourists and increases job opportunities in the longer term. A well-managed public realm will be improved over time to complement and support the retail offer.

Key Objectives

- To consolidate the disparate retail and hospitality offer to create a vibrant heart and a sustainable economic foundation for the City.
- To enhance the retail and hospitality offer along the key mainstreets – Crawford Street, Monaro Street, Morisset Street and the retail core.
- To optimise opportunities to increase market share of hospitality and retail household expenditure in the catchment areas.
- To enhance the convenience offer and visitor experience in the CBD to benefit and grow the business mix.
- To ensure that public realm improvements in the CBD and particularly the retail core to enhance the experience for customers and visitors.
- To optimise the opportunities provided by the CBD Transformation to create a vibrant retail and hospitality offer for the local community and visitors.
- To provide opportunities for property owners and business owners to collaborate together and work with Council to revitalise the City centre.
- To support a strong and viable City centre that supports retailers, businesses, offices and encourages new entrepreneurs and creates opportunities for increased levels of employment.

2. Key recommendations

A full list of actions can be found in the Retail Action Plan on page 89.

- Consolidate the retail offer around the anchor stores – Aldi, Woolworths, Kmart, the Riverside Plaza and the new cinemas to create a vibrant shopping, dining and entertainment heart of the City.
- Form a Retail Investment Development Group with clear project roles and responsibilities to acquire, redevelop and repurpose strategic sites and long term vacant properties and administer and deliver retail leasing plans for future development of the Queanbeyan City Centre. Council should take a lead facilitation role with property owners, leasing agents and developers.
- Develop the restaurant, café, small bar, hospitality category to create unique destinations and experiences within the CBD to meet the local demand and win back escape expenditure by attracting more customers and visitors to shop, socialise and spend time there.
- Create one or two unique restaurant precincts/laneways/streets anchored by key businesses complemented by unique urban design elements including piazzas and high quality public realm with easy access for families and visitors.
- Create a business group to guide the retail and commercial economy forward aligned with world's best practice including Place management models such as Business Improvement Districts (BIDs).
- Secure funding from private/public sources to provide resources for management, marketing, business development and streetscape to improve the quality of retail offer, customer environment and improve retail competitiveness.
- Develop a 3-5 year business plan with key actions, budgets, deliverable actions and measures of success to guide the future of CBD retail and hospitality sectors.
- Secure a major new attraction that is unique to the ACT/NSW with drawing power to bring large crowds to the CBD. Increased visitor numbers = increased retail vibrancy.
- Complete the branding exercise with the community and business sector to capture a CBD brand and identity that can be integrated through all forms of design, signage and marketing to build character and loyalty to the city centre.
- Consider a range of incentives to landlords and business owners that stimulate building improvements and upgrades that encourage new investment and encourage vibrancy in the CBD.
- Create spaces that encourage new start-up businesses. Encourage and support new entrepreneurs through mentoring and training programs that develop business planning, marketing, finance and online capability.

3. Executive Summary

Introduction
The city of Queanbeyan is undergoing significant change and has recently launched the Queanbeyan CBD Transformation Strategy to identify opportunities and implement actions to build a sustainable future. Council and the community are focused on redeveloping Queanbeyan's CBD and a significant part of this revitalisation requires the reinvigoration of the commercial and retail town centre. The **Retail Growth Strategy** and **Action Plan** are key elements in this commercial reinvigoration.

Major retail developments and shopping centre expansion throughout the ACT has had a major impact on the Queanbeyan CBD and the Retail Growth Strategy aims to bring key stakeholders together to build the foundation for a prosperous future using best practice methods that are achieving results in Cities and mainstreets around the world. The flow on benefits of developing a vibrant central core includes attracting new city residents, new city offices, more local job opportunities, sustainable businesses and reduced vacant properties.

Objectives of the Retail Growth Strategy
The purpose of the **Retail Growth Strategy** is to identify and recommend realistic and innovative strategies and actions to achieve the long-term rejuvenation of the Queanbeyan CBD and will include important actions for stakeholders, such as businesses, community and government. Importantly, the **Retail Growth Strategy** will inform objectives to be incorporated into the Spatial Business Plan (CBD Masterplan Renew) and align with the new Integrated Transport Strategy. The process of renewal will define the direction for the development and evolution of Queanbeyan into the future.

The primary aim of the Strategy is to engage Council, the businesses and the community to develop a vision and direction for Queanbeyan's town centre. The Strategy focuses on the current retail mix and retail catchment areas to better understand market share and escape expenditure, an analysis of the strengths and weaknesses of the retail offer and impact of competitor centres, strategies to increase retail opportunities and a clear action plan for the future. Engaging with private sector businesses and owners is a critical to successful implementation of the Strategy.

During the development of this report **extensive consumer interviews** were conducted to better understand their shopping behaviour. In addition businesses throughout the CBD were asked to complete a business needs survey with some additional in-depth interviews conducted to tease out more detail for the benefit of closer business engagement now and into the future. Shoppers and businesses were very concerned about the high number of vacant shops and properties.

Characteristics of Queanbeyan CBD Retailing
The Queanbeyan CBD is anchored by a very strong convenience offer including the major supermarkets Aldi, Coles and Woolworths that draw customers from both the primary catchment and secondary catchments. The leakage of grocery expenditure from local residents is low. The Riverside Plaza provides a solid foundation for shopping in the CBD however the quality of the offer is not consistent when customers venture into the streets away from the centre or major supermarkets. The centre could benefit from greater integration with the external urban design linkages and new dining experiences overlooking the river.

The fresh food category is an essential category in the business mix however additional growth and vibrancy will come from the hospitality sector including cafes, restaurants, bars, pubs and clubs. The fresh food category encourages frequent visitation from locals while the hospitality category has the power to attract customers who want a ‘unique experience’ and are willing to travel to get it. **Attracting customers from the secondary catchment area is a key to future growth and success.** Attracting new food concept businesses has proven successful in many locations including leading edge businesses including Eataly overseas and Beechworth Bakery closer to home that anchor their town centres and precincts such as Beechworth, Albury and Yackandandah.

The escape expenditure from the catchment areas is significant as the dominance of the Canberra City Centre and surrounding centres attract residents from large catchment areas. The majority of Queanbeyan residents work in Civic which supports the **loss of 64%** of the hospitality spending to the City but at the same time provides a significant opportunity for Queanbeyan. Monday to Friday dining after five and relaxed family dining on weekends can be provided by venues in the Queanbeyan CBD. The higher incomes in the surrounding catchment allow for a greater proportion to be spent on eating out as a frequent part of daily life for local residents. The benefits of more people in the City centre of an evening will attract a better mix of retailers in the future.

The business mix is heavily weighted on professional and retail **services (55 %+)** which is consistent with the provision of a convenience offer for local residents in the CBD. Services are valuable as they provide a base for all other activities in the CBD and can act as a catalyst in the growth of associated retail and hospitality businesses. A visit to physio in the CBD should ideally include a visit to a nearby café, restaurant or shop. Creating clusters of complementary businesses is the key challenge. The large number of stores closed on the weekends is a weakness of the City centre while the competitors offer full seven day trading.

The **20% vacancy** level in Monaro Street is also cause for concern and the diversion of heavy traffic and new design treatments can improve the customer amenity significantly. In the short term high quality internal shop images can be applied to the windows to reduce the impact and poor presentation of empty shops.

The Queanbeyan CBD has wide streets providing opportunities for outdoor dining, large car spaces in close proximity to retail shops and services and open public ream that can make a big visual impact when enhanced with beautification enhancements. The width of the streets also provides opportunities for **‘greening’** in the median and footpaths to create attractive customer destinations and a sense of place. The car parks remain static though as they fill up with CBD workers that do not allow shoppers and visitors to park easily. Frequent turnover of car parks is essential for successful retail businesses.

Recommendations
The Action Plan provides a comprehensive list of recommendations to proactively address the issues discussed in this Report.

Currently the CBD is lacking a defined identity and it will be important to **create strong, clear identity** based on the unique history of the centre. The unique character should be reflected through signage, urban design, placemaking and attractions that create a unique point of difference that Queanbeyan badly needs. The aboriginal name of the town Quinbean 'Clear Waters' provides a theme that can be applied to CBD in a positive way.

A **key recommendation** is to consolidate the retail offer around the retail core (Woolworths/Kmart and new cinema) block in the first instance and then grow the diversity of the mix along Crawford and Monaro Streets through strong linkages. In addition to mix improvement strategies it is **highly recommended** to adopt the best practice place-management and place-marketing techniques from around the world to attract more customers and provide them with a quality experience while engaging the business sector.

The new cinema above Kmart provides a big opportunity to improve the whole square (retail core) with complementary uses such as restaurants, cafes and well-designed outdoor dining areas. It will be important to reinforce the link between the Riverside Plaza, Woolworths and Crawford Street using urban design elements. The key is to create a **'sense of place'** and to build out from a solid successful core.

World's **best practice** models in mainstreet and City management have demonstrated how the private sector can be actively involved in improving the business environment. Businesses come together as a group to develop a business plan and budget proposal to fund the delivery of collective marketing, promotional activities and customer attraction strategies. The group is focused on increasing foot traffic and customer' spend, increasing dwell time and building business growth to increase employment and economic sustainability. Small isolated businesses are part of something bigger that delivers direct benefits to them. Councils are fully supportive of these high achieving **business led** groups. The business groups are **led by the business sector** as they have the freedom to deliver retail and business projects and activities. <u>The key is for the group to be led by business and sanctioned by Council.</u>

Councils in the UK were hesitant about these business groups until they witnessed the **outstanding results** being achieved in City centres, high streets and small towns. There are now 300 UK business groups and 200 more being formed to optimise the positive benefits for businesses and local communities. Healthy vibrant businesses are the window to the community of a healthy City centre. A **bold new approach** is needed to compete with the large centres and online shopping. Queanbeyan has this opportunity. The dream of bustling vibrant streets, busy unique shops, thriving mainstreets, low vacancies, low unemployment, outstanding events and a hive of activity in the City centre can be a reality not a dream.

Council has a critical role to facilitate, encourage and support the small business sector in one of the most competitive environments in Australia. Council can create catalysts for change, lead by example and deliver key projects detailed in the Spatial Business Plan and Retail Growth Strategy that demonstrate commitment to the future economic sustainability of Queanbeyan. **Small steps forward can deliver longer term benefits.**

4. Project Tasks and Process

Queanbeyan-Palerang Regional Council has recognised the dynamic role of retailing and the important contribution the sector makes to the local economy. Cities around the world have rejuvenated their City centres by creating a vibrant retail and hospitality core to attract visitors, increase City residential demand and significant new investment.

Queanbeyan-Palerang Regional Council appointed Premier Retail Marketing and Foresight Partners to determine the current situation of retailing in the Queanbeyan City Centre and to identify potential for future retail growth. The project is designed to provide the Queanbeyan-Palerang Regional Council with valuable understanding and clear directions to develop a quality retail offer and sustainable growth.

Project objectives include:

- Conducting an assessment of the current retail/hospitality offer and gaps in the business mix in the City centre
- Increasing the level of understanding of retail dynamics and trends affecting the City centre
- Analysing the catchment area demographics, household expenditure and escape expenditure to other precincts, shopping centres and Canberra City centre
- Providing a strategic assessment to identify opportunities to grow the retail sector
- Developing a Retail Action Plan to grow retail investment and business development

The Task

Analyse the Queanbeyan City Centre retail offer and dynamics to determine the current situation and potential for future growth. The project will provide Queanbeyan-Palerang Regional Council with information and clear directions to implement a retail growth strategy to grow the sector and create conditions for a sustainable future.

The Process

a. Review previous projects and studies.
b. Conduct an on-site shop by shop analysis to determine the mix and quality of stores and identify gaps and potential improvement to the current retail offer.
c. Collect customer visitation data to determine the catchment area.
d. Analyse demographic data from the catchment area.
e. Measure the size of the retail market and spending potential using ABS data and the escape expenditure lost to other centres.
f. Meet with the Hames Sharley urban design team to identify opportunities and synergies.
g. Include shopper information gathered from surveys to understand shopper behaviour.
h. Include business information gathered from surveys to understand key issues facing businesses.
i. Analyse competitor centres to determine their market position.
j. Observe and report the retail dynamics within the precinct.
k. Develop a SWOT analysis for the City Centre.
l. Consider the full range of target markets – residents and visitors.
m. Develop a Retail Action Plan to grow and sustain the sector.

Methodology

Premier Retail Marketing (David West) and Foresight Partners (Geoff Coghlin) have experience working within various retail environments including shopping centres, high streets and town centres. The report pursues retail principles that underpin good performance in a **favourable retail and customer** environment. Elements such as pedestrian circulation and linkages, business mix, collective marketing, management, car parking, sightlines, corner sites, anchor tenants and attractors are discussed in the Queanbeyan City centre context.

Factors evident in successful mainstreets and city centres:

1. **Management** of the public realm.
2. **Funding** to promote and improve the City centre.
3. **Identity**, character and clear points of difference.
4. **Orientation**, wayfinding, good **pedestrian circulation** past shop windows.
5. Clear **sight lines** to buildings, shopfronts, windows and signs.
6. High **quality urban design** and attractive **building presentation.**
7. Attractive, vibrant **corner stores** along mainstreets.
8. A **balanced mix of shops** and businesses and customer facilities.
9. Attractors, **anchor stores** and destinations including supermarkets and cinemas.
10. **Clusters** of retail stores to create precincts and mainstreets.
11. Attractive, vibrant and **active shopfronts** and outdoor dining.
12. **Access** by all forms of transport.
13. Adequate **well managed car-parking** for customers and staff.
14. **Collective marketing** to lift the profile of the City centre.
15. **Activation** and events to attract customers.
16. A **clean and safe** environment to improve the customer experience.
17. **Consistent trading hours.**
18. Potential **target markets** to increase market share.

Note: These success factors are discussed in the Queanbeyan CBD context in Section 13 page 39.

5. Project Area Map

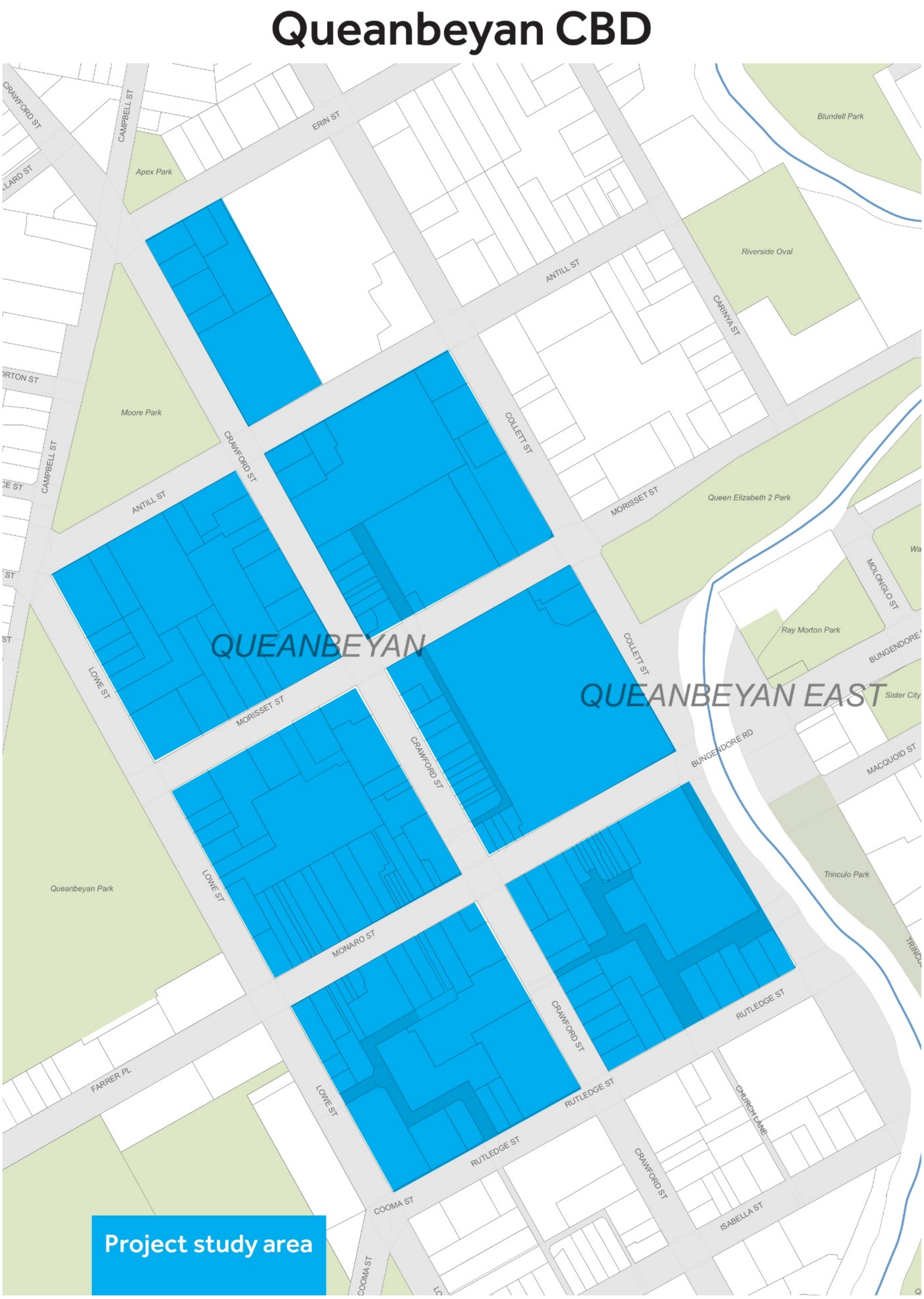


Figure 1

6. Situation Analysis

The annual population growth rate is lower in the primary trade area than the secondary trade area. Future marketing will need to target the secondary trade area to the east. The greatest expenditure potential is in the meals out/takeaway and take-home food categories and future business mix development should tap into this potential. Currently millions of dollars in dining out, apparel, homewares and gift expenditure is escaping to other centres mainly in Canberra. Developing the restaurant, café and dining categories of retail and hospitality businesses in the retail core will be a catalyst for further development of the business mix.

Retail Trade Areas - characteristics

In order to separate regular grocery and convenience and higher order shopping trips, two distinct trade areas were defined for the Queanbeyan CBD.

- A **primary trade area** that represents the likely trade area for which full-line supermarkets in the Queanbeyan CBD would draw a large portion of their regular trade; and
- A **secondary trade area** representing the likely main trade area for which Queanbeyan is more convenient than alternatives for higher order retail shops and services such as discount department stores (DDS) such as Kmart and Target.

In defining the trade areas, consideration was given to:

- the size, composition and function of the Queanbeyan CBD;
- the size, composition and proximity of competitive retail centres, namely Jerrabomberra, Bungendore, centres in the ACT and the nearest other alternatives centres; and
- the ease of access by car and foot and natural and man-made barriers to movement such as the road network and topographic features.

Figure 1 shows the defined trade area for the Queanbeyan CBD, based upon 2016 Census Statistical Area 1 (SA1) boundaries.

The **primary trade area** predominantly encompasses the areas of Queanbeyan, Crestwood and Karabar and rural areas of Kowen and Carwoola.

The **secondary trade area** is geographically extensive due to the absence of any alternative retail centres offering a DDS between Queanbeyan, Batemans Bay, Cooma and Goulburn.

Retail Trade Areas - current and forecast population

Table 1 sets out the current and forecast population and households for the primary and secondary trade areas between 2011 and 2036.

As at the 2016 census, the **primary trade area** had a population of around **25,160** people in approximately 10,850 dwellings, up from 25,090 people in 10,670 dwellings in 2011. This is forecast to increase to 26,800 people by 2036 at an average annual growth rate of around 0.3%. Approximately 55% of the total trade area population lives in the primary trade area as at the 2016 Census.

The **secondary trade area** population of **20,380** people in 6,950 households is forecast to increase significantly to 33,360 people in 11,670 households over the 20 years to 2036. This translates to a relatively high average annual growth rate of 2.5%.

Figure 1: Primary and Secondary Trade Areas, Queanbeyan CBD

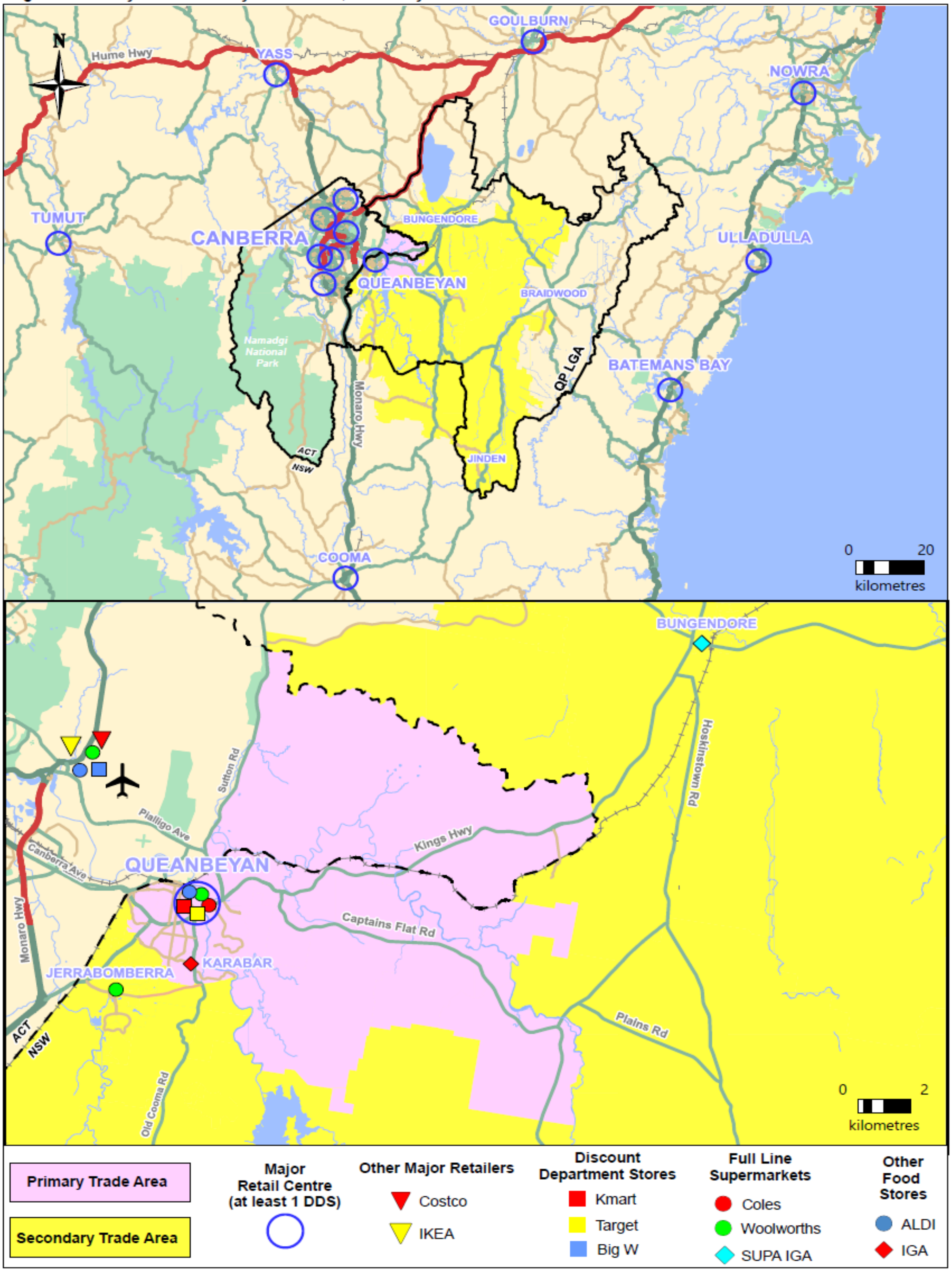


Table 1: Current and Forecast Trade Area Population and Households

	2011	2016	2021	2026	2031	2036	Annual Growth Rate 2016-36
Primary TA							
Population	25,090	25,160	25,950	26,280	26,460	26,800	**0.3%**
Households	10,670	10,850	11,290	11,530	11,740	11,950	**0.5%**
Persons per Household	2.35	2.32	2.30	2.28	2.25	2.24	-
Secondary TA							
Population	18,350	20,380	22,330	25,360	29,080	33,360	**2.5%**
Households	6,250	6,950	7,760	8,880	10,190	11,670	**2.6%**
Persons per Household	2.94	2.93	2.88	2.86	2.85	2.86	-
Total TA							
Population	43,440	45,540	48,280	51,640	55,540	60,160	**1.4%**
Households	16,920	17,800	19,050	20,410	21,930	23,630	**1.4%**
Persons per Household	2.57	2.56	2.53	2.53	2.53	2.55	-

Source: ABS Census 2011 and 2016, Foresight Partners' forecast based on Forecast ID small area population projections (December 2017). Note: Figures may not add due to rounding. Population refers to persons in occupied private dwellings.

Retail Trade Areas - current and forecast retail expenditure

Average retail expenditure levels for households in the trade area were derived using average household income data based upon the 2016 Census, the ABS 2015-16 Household Expenditure Survey and National and State Accounts data. Dollar values from these sources were inflated to common 2017 values.

Household retail expenditures consist of five broad categories:

1. **Take home food** – which includes food expenditure at supermarkets, grocery stores, greengrocers, butchers, bakers, tobacconists, delis and bottle shops;
2. **Meals out and take away food** – includes restaurants, takeaways, cafes and coffee shops;
3. **Apparel** – clothing and footwear, including hire services;
4. **Convenience homewares and personal services** – includes non-food products typically sold in chemists, newsagents and supermarkets (e.g. paper products, pet supplies, cleaning items and personal health and beauty products) and personal services (e.g. hairdresser, dry cleaning);
5. **Comparison homewares** – goods that consumers buy at infrequent intervals and would normally compare prices before purchasing (for example furniture, appliances, tools, computers, jewellery and luggage).

Table 2 sets out the estimated **average annual retail spending** by trade area households in the five commodity groups compared to **benchmarks** of Queanbeyan-Palerang LGA, NSW and ACT (2017 $ values).

Table 2: Average Annual Household Expenditure Potential by Commodity Group (2017 $ values)

Commodity Group	Primary TA	Secondary TA	Total TA	Q-P LGA	NSW	ACT
Take Home Food	11,560	14,570	12,736	12,190	11,630	12,790
Meals Out/Take Away	4,420	6,890	5,385	5,770	4,440	6,050
Apparel	3,310	4,810	3,896	4,030	3,330	4,220
Convenience Homewares/Services	5,160	6,590	5,718	5,520	5,190	5,780
Comparison Homewares	5,540	7,410	6,270	6,200	5,570	6,500
Total	**29,990**	**40,270**	**34,005**	**33,710**	**30,160**	**35,340**

Source: ABS 2015-16 Household Expenditure Survey, ABS Retail Trade Data, Foresight Partners calculations.

Expenditure Benchmark Comparison

Average annual expenditure potential on retail goods and services for households in the primary trade area is **$29,990**, which is on par with that of NSW ($30,160) but lower than the ACT ($35,340). Secondary trade area households average around **$40,270** in spending on retail goods and services annually.

This is largely a reflection of the relatively high average household income of secondary trade area residents (Refer Table 2).

Residents, Workforce and Visitor Spend and Forecast

Trade Area Residents

Multiplying average household expenditure by the trade area households at the June 2016 base year produces an estimate of total retail expenditure potential. Similar calculations for **forecast years** 2021, 2026, 2031 and 2036 produces estimates of the pool of expenditure available, as shown in Table 3.

At June 2016, trade area households generated $605.4 million in retail expenditure. This is expected to increase in line with forecast household formation to:

- **$667.5 million by 2021;**
- **$739.2 million by 2026; and**
- **$915.4 million by 2036.**

In the 20 years between 2016 and 2036, annual trade area household **retail spending potential** is forecast to **increase by $310.0 million**, of which $239.3 million (77%) will be generated by growth in the secondary trade area.

No allowance has been made for inflation in estimating future retail expenditure, as inflation does not create demand for retail floor space. However, a small increase of 0.5% per annum has been factored into expenditure estimates post-2016 to reflect forecast real increases accruing in household spending over the period.

Table 3: Annual Resident Retail Expenditure Potential, Trade Area Households, 2016-2036 (2017 $ values)

	Primary TA	Secondary TA	Total TA
2016			
Take Home Food	125.4	101.3	226.8
Meals Out/Take Away	48.0	47.9	95.9
Apparel	35.9	33.4	69.4
Convenience Homewares/Services	56.0	45.8	101.8
Comparison Homewares	60.1	51.5	111.6
Total	**325.4**	**280.0**	**605.4**
2018			
Take Home Food	128.8	107.1	235.9
Meals Out/Take Away	49.2	50.7	99.9
Apparel	36.9	35.4	72.2
Convenience Homewares/Services	57.5	48.5	105.9
Comparison Homewares	61.7	54.5	116.2
Total	**334.1**	**296.1**	**630.3**
2021			
Take Home Food	133.8	115.9	249.7
Meals Out/Take Away	51.2	54.8	106.0
Apparel	38.3	38.3	76.6
Convenience Homewares/Services	59.7	52.4	112.2
Comparison Homewares	64.1	58.9	123.1
Total	**347.2**	**320.3**	**667.5**
2026			
Take Home Food	140.1	135.9	276.0
Meals Out/Take Away	53.6	64.3	117.8
Apparel	40.1	44.9	85.0
Convenience Homewares/Services	62.5	61.5	124.0
Comparison Homewares	67.1	69.1	136.3
Total	**363.5**	**375.7**	**739.2**
2031			
Take Home Food	146.3	160.0	306.2
Meals Out/Take Away	55.9	75.7	131.6
Apparel	41.9	52.8	94.7
Convenience Homewares/Services	65.3	72.4	137.7
Comparison Homewares	70.1	81.4	151.5
Total	**379.5**	**442.2**	**821.6**
2036			
Take Home Food	152.7	187.9	340.6
Meals Out/Take Away	58.4	88.8	147.2
Apparel	43.7	62.0	105.8
Convenience Homewares/Services	68.2	85.0	153.1
Comparison Homewares	73.2	95.6	168.7
Total	**396.1**	**519.3**	**915.4**

Source: Tables 1 and 2.

Visitors
Visitor retail expenditure potential was estimated using tourism data for the Queanbeyan-Palerang LGA and Tourism Research Australia's National Visitor Survey. Table 4 sets out key tourism metrics for the Queanbeyan-Palerang LGA as at 2016. International and domestic overnight visitors spent around **700,000 visitor nights** in Queanbeyan-Palerang LGA in 2016. Domestic overnight visitors account for around **$69m** (or 71%) of total visitor spend in the region and around 45% of whom travel to the region to visit friends or relatives.

Table 4: Key Tourism Metrics, Queanbeyan-Palerang LGA, 2016 (Source: Tourism Research Australia, 2016)

	International	Domestic Overnight	Domestic Daytrip	Total
Visitors ('000)	4	202	303	509
Nights ('000)	99	601	-	700
Average stay (nights)	27	3	-	3
Spend ($m)	4	69	24	97
Reason for Visit (visitors '000)				
Holiday	N/A	63	129	N/A
Visiting Friends/Relatives	2	88	104	194
Business	N/A	42	N/A	N/A

Table 5 sets out retail expenditure potential for visitors to Queanbeyan-Palerang LGA. Any increase in visitor nights between 2016 and 2018 is forecast to be negligible, therefore 2016 tourism data was used to estimate expenditure potential at 2018. The data is based on expenditure breakdowns by retail category in the National Visitor Survey and the likely distribution of visitor expenditure potential in each trade area[1].

As at 2018, visitor expenditure potential is around $17.8m in the primary trade area and $16.9 in the secondary trade area. The two commodity groups with the greatest expenditure potential are Meals out/Take away ($18.8m or 54% of total) and Take Home Food ($7.4m or 21% of total). Visitor expenditure potential is forecast to increase only modestly in subsequent years as population growth drives visitor numbers.

Table 5: Estimated Visitor Expenditure Potential, 2018

Commodity Group	**Expenditure Potential ($m)**		
	PTA	**STA**	**Total**
Take Home Food	4.0	3.4	7.4
Meals Out/Take Away	9.2	9.5	18.8
Apparel	1.2	1.1	2.3
Convenience Homewares/Services	3.0	2.5	5.5
Comparison Homewares	0.4	0.4	0.8
Total	**17.8**	**16.9**	**34.7**

Source: TRA Queanbeyan-Palerang LGA Profile 2016, TRA National Visitor Survey, Foresight Partners estimates.

[1] Based on the distribution of estimated resident expenditure potential in each trade area.

Non-resident Workforce

Table 6 sets out workforce data for the Queanbeyan Region sourced from the 2016 ABS Census Working Population data. For the purpose of this analysis, the Queanbeyan Region is defined as five Statistical Area 2s (Queanbeyan, Queanbeyan East, Karabar and Queanbeyan West - Jerrabomberra and Queanbeyan Region).

As of the 2016 Census, around 13,900 people were employed within the defined Queanbeyan region. 8,165 (59%) of those resided within the Queanbeyan region and 5,730 (41%) resided elsewhere. Of the 5,730 non-resident workers, around 4,553 (79%) were employed in the primary trade area and 1,177 (21%) were employed in the secondary trade area.

Table 6: Non-resident Workforce, Queanbeyan Region, 2016

	Persons	% of Queanbeyan Region Workforce
Work in Queanbeyan region	**13,896**	**100%**
Live and work in Queanbeyan region	8,166	59%
Work in Queanbeyan region and live outside Queanbeyan region	5,730	41%
Work in Primary Trade Area and live outside Queanbeyan region	4,553	33%
Work in Secondary Trade Area and live outside Queanbeyan region	1,177	8%

Source: ABS Census 2016 Working Population data, Foresight Partners estimates.

Based on industry benchmarks, the average retail expenditure per employee is around $2,000/year in areas close to their place of work. However, this varies significantly based on the retail offering proximate to their place of work. Assuming an average of $2,000/employee/year, Table 7 provides estimates of non-resident workforce expenditure potential by commodity group and by trade area. Differences between non-resident workforce expenditure potential in 2016 and 2018 are forecast to be negligible, therefore 2016 workforce data was used to estimate expenditure potential at 2018.

Non-resident employees in the defined Queanbeyan region will generate an estimated $11.5m in retail expenditure potential in 2018. Around 70% of this is forecast to be in the Meals out/Take away commodity group. Due to the greater proportion of the workforce employed in the primary trade area, the Primary Trade Area accounts for around 79% ($9.1m) of total retail expenditure potential.

Table 7: Estimated Non-Resident Workforce Retail Expenditure Potential, 2018

	Expenditure Potential ($m)		
Commodity Group	**PTA**	**STA**	**Total**
Take Home Food	1.3	0.3	1.6
Meals Out/Take Away	6.4	1.6	8.0
Apparel	0.2	0.0	0.2
Convenience Homewares/Services	1.1	0.3	1.4
Comparison Homewares	0.2	0.0	0.2
Total	**9.1**	**2.4**	**11.5**

Source: Foresight Partners estimates.

Total Retail Expenditure Potential
Table 8 provides an aggregation of resident, visitor and non-resident workforce retail expenditure potential by commodity group.

Total retail expenditure potential in the defined trade areas is around $676.4m as at 2018. Of which, around 93% ($630.3m) is attributable to residents, 5% to visitors and 2% to the non-resident workforce. The two commodity groups with the largest expenditure potential are Take Home Food and Meals out/Take away which represent around 36% and 19% of total expenditure potential respectively.

Table 8: Total Retail Expenditure Potential, Defined Trade Areas, 2018

Commodity Group	Expenditure Potential ($m)			
	Residents	Visitors	Non-resident Workforce	Total
Take Home Food	235.9	7.4	1.6	244.9
Meals Out/Take Away	99.9	18.8	8.0	126.7
Apparel	72.2	2.3	0.2	74.8
Convenience Homewares/Services	105.9	5.5	1.4	112.8
Comparison Homewares	116.2	0.8	0.2	117.2
Total	**630.3**	**34.7**	**11.5**	**676.4**

Source: Tables 3, 5, 7.

Retail Trade Area – household expenditure leakage

The following tables summarise the estimated proportion of retail expenditure by trade area residents that is going to shops and services outside the trade area. This leakage is estimated for the primary trade area (PTA), secondary trade area (STA) and the combined trade areas, by comparing annual retail expenditure potential of trade area residents, visitors and the non-resident workforce with the estimated total retail turnover of retail shops and services within each trade area.

Rates of leakage vary considerably by types of shops and services, and accordingly, estimates have been made of leakage in each of five categories of retailing.

Take Home Food
Take home food purchases occur primarily at supermarkets and associated specialty shops such as butchers, bakeries, and liquor stores. As food purchases occur frequently and often include perishables, convenience is a key determinant of where people choose to shop for food. Primary trade area supermarkets and other stores have an estimated total food turnover of $157 million. This is substantially more than primary trade area household spending in food, indicating that Queanbeyan food retailers are drawing considerable additional patronage from the secondary trade area due to convenience to those who regularly travel to Queanbeyan, and limited retail selection in the STA.

Retail turnover in take home food by Primary Trade Area retailers is an estimated 17% above the take home food expenditure potential by PTA residents, workforce and visitors. The main reason is that many STA residents are also doing their food shopping in the PTA (i.e. the Queanbeyan CBD) because there is limited selection in the STA. The main trade area is already capturing an estimated 86% of food spending by main trade area residents, workforce and visitors.

It is reasonable to expect some leakage given the proximity of major centres in Canberra and the only significant growth opportunity in take home food retailing will come from growth in the trade area population. Conversely, due to limited selection, food retailers in the secondary trade area capture only around half of food spending by STA residents.

The high local capture rate indicates that:

- there is minimal potential to increase take-home food spending in Queanbeyan through recapture of leakage; and
- there is little potential to support additional retailers of take-home food/grocery/supermarket products in Queanbeyan in the foreseeable future.

Table 9: Take Home Food Market Share Leakage, 2018

Store	Turnover ($m)			Expenditure Potential ($m)			Leakage from Main Trade Area
	PTA	STA	Total	PTA	STA	Total	
DDS	2	-	2				
Supermarkets	112	48	160				
Other Food Stores	43	4	48				
Total	**157**	**52**	**209**	**134**	**111**	**245**	
Turnover in TA as % of expenditure potential				117%	47%	86%	**14%**

Source: Tables 3, 5, 7 and Foresight Partners estimates. Note: Figures may not add due to rounding.

Meals out/Take away

This category encompasses all food services including full service and quick service restaurants, cafes, and take away food outlets.

It is estimated that PTA food services capture only 62% of food service spending by PTA residents, and much of this goes to quick service restaurants and drive throughs on the fringe of the Queanbeyan CBD. With few food service outlets, the capture rate in the STA is only around 9% of STA expenditure potential.

In both the PTA and STA, a portion of leakage is due to work-based meal purchases at major employment centres in the ACT. However, it is concluded that the low capture rate in Queanbeyan is mainly attributable to a very limited selection of food services other than fast food outlets. Consequently, around two thirds of trade area food service expenditure potential is going to ACT restaurants, or is not being spent due to poor local selection. The extent of escape spending indicates significant potential for new and/or distinct food services in Queanbeyan.

Table 10: Meals out/Takeaway Market Share Leakage, 2018

	Turnover ($m)			Expenditure Potential ($m)			Leakage from Main Trade Area
	PTA	STA	Total	PTA	STA	Total	
Total	**40**	**6**	**46**	**65**	**62**	**127**	
Turnover in TA as % of expenditure potential				62%	9%	36%	**64%**

Source: Tables 3, 5, 7 and Foresight Partners estimates. Note: Figures may not add due to rounding.

Apparel

Queanbeyan's two discount department stores and a handful of other retailers collectively capture an estimated half of total trade area expenditure potential in apparel. In the absence of a regional shopping centre with full line department stores and associated higher order retailers, this is considered to be the highest share of apparel spending reasonably achievable with the current offer. Developing a market niche of start-up fashion designers and creatives could see the growth of new opportunities.

Table 11: Apparel Market Share Leakage, 2018

Store	Turnover ($m)			Expenditure Potential ($m)			Leakage from Main Trade Area
	PTA	STA	Total	PTA	STA	Total	
DDS	26	-	26				
Other Stores	10	-	10				
Total	**36**	**-**	**36**	**38**	**37**	**75**	
Turnover in TA as % of expenditure potential				94%	0%	48%	**52%**

Source: Tables 3, 5, 7 and Foresight Partners estimates. Note: Figures may not add due to rounding.

Convenience Homewares and Services

This category incorporates non-food products typically sold in convenience-oriented retailers such as supermarkets, chemists and newsagents, plus retail services such as hairdressers and drycleaners.

Like take-home food outlets, Queanbeyan retailers in this category have turnover significantly higher than PTA expenditure potential because they draw substantial additional patronage from the STA. Expenditure leakage from the trade area in this category is estimated to be around 12%, indicating that there is minimal potential to generate additional turnover by capturing spending going outside of the trade area.

Table 12: Convenience Homewares and Services Market Share Leakage, 2018

Store	Turnover ($m)			Expenditure Potential ($m)			Leakage from Main Trade Area
	PTA	STA	Total	PTA	STA	Total	
DDS	20	-	20				
Supermarkets	20	7	28				
Other Stores	48	3	51				
Total	**89**	**10**	**99**	**61**	**51**	**113**	
Turnover in TA as % of expenditure potential				144%	20%	88%	**12%**

Source: Tables 3, 5, 7 and Foresight Partners estimates. Note: Figures may not add due to rounding.

Comparison Homewares

Products in this category represent relatively large expenditures that are made at infrequent intervals and compared in terms of quality, style and price. Examples include furniture, major appliances, home electronics and jewellery.

Accordingly, comparison shopping mainly occurs in locations with a large selection of stores, and at large-scale retailers (such as major home furnishings and appliance stores) that are destinations in themselves. Shopping in this category primarily occurs in regional shopping centres anchored by full line department stores (Myer or David Jones) and showroom precincts with large scale retailers such as at nearby Fyshwick and adjacent to the airport. In this category, the Queanbeyan CBD has only limited selections in two discount department stores and a small number of independent furniture and appliance retailers.

Consequently, an estimated 71% of trade area expenditure potential in comparison homewares (over $80 million a year) is escaping from the trade area to large retail centres or precincts in the ACT. The extent to which this leakage can be recaptured depends on the potential for Queanbeyan to support major showroom retailers and/or a higher order regional shopping centre, which is assessed in a later section.

Table 13: Comparison Homewares Market Share Leakage, 2018

Store	Turnover ($m)			Expenditure Potential ($m)			Leakage from Main Trade Area
	PTA	STA	Total	PTA	STA	Total	
DDS	4	-	4				
Other Stores	31	-	31				
Total	**34**	**-**	**34**	**62**	**55**	**117**	
Turnover in TA as % of expenditure potential				55%	0%	29%	**71%**

Source: Tables 3, 5, 7 and Foresight Partners estimates. Note: Figures may not add due to rounding.

Summary

Queanbeyan captures a high proportion of spending by trade area residents in goods and services with a strong **convenience orientation** including food and groceries, other daily household needs and personal services. The retail categories with the **highest escape expenditure** are higher order comparison goods such as apparel, home furnishings and major appliances, due mainly to limited local selection and the proximity of large shopping centres and showroom precincts in the ACT.

The greatest potential to recapture escape spending is in food services category such as restaurants and cafes. In this category, almost two thirds of the household expenditure potential by trade area residents occurs outside of the trade area or is not spent at all.

Retail Trade Areas – household expenditure leakage summary:

CATEGORY	LEAKAGE
Convenience, Homewares, Services Market Share Leakage	12%
Take Home Food Market Share Leakage	14%
Fashion/Clothing/Accessories Share Leakage	52%
Meals out/Takeaway Market Share Leakage	64%
Comparison Homewares Market Share Leakage	71%

7. Demographic Information

- A summary of the key socio-economic characteristics for the defined trade areas as at the 2016 Census is shown in Table 12. Data for Queanbeyan-Palerang LGA, NSW and the ACT are included as benchmarks. The most notable differences between the trade areas and the benchmarks are summarised below:
- The proportion of residents aged over 65 is far lower in the primary trade area (13.3%) and secondary trade area (8.4%) compared to NSW (16.2%) and the ACT (12.4%).
- The average number of employed persons per household in the primary trade area (1.2) is on par with the NSW and ACT averages but lower than the secondary trade area (1.6). This is reflective of the relatively high labour force participation rate in the secondary trade area (78.1%).
- The unemployment rate in the primary (4.9%) and secondary (3.0%) trade areas is below the benchmark of NSW (6.2%) and similar to that of the ACT (4.7%).
- Average household income in the defined trade areas is relatively high:
- $96,744 in the primary trade area which is on par with the NSW average but below the ACT average; and
- $143,752 in the secondary trade area is around 47% higher than the NSW average and 18% higher than the ACT average.
- Dwelling structure varies considerably between the trade areas - the proportion of detached dwellings is 57.2% in the primary trade area and 92.4% detached in the secondary trade area compared to the benchmarks of 66.9% in NSW and 67.2 in the ACT.
- The percentage of households purchasing their homes is relatively high at 54.3% in the secondary trade area compared to 33.3% in NSW and 39.3% in the ACT.
- Very few households in the secondary trade area are without a car (0.7%) compared to the NSW (9.5%) and ACT (5.5%) averages.
- The dominant household types are lone person households in the primary trade area (35.0%) and couples with children in the secondary trade area (47.6%). In comparison, couples with children make up 32.8% of NSW and 33.0% of ACT households and lone persons make up 24.3% of NSW and 25.3% of ACT households.

Table 14: Summary of Selected Socio-economic Characteristics, Defined Trade Areas, 2016

	Primary TA	Secondary TA	Total TA	Q-P LGA	NSW	ACT
Age (%)						
0-14	17.4	23.0	19.9	19.7	18.6	18.8
15-24	12.3	12.2	12.3	12.1	12.6	14.1
25-44	30.9	26.4	28.9	27.7	27.7	31.4
45-64	26.2	30.0	27.9	28.6	25.0	23.3
65+	13.3	8.4	11.1	11.9	16.2	12.4
Employment (%)						
In labour force	71.1	78.1	74.1	73.3	63.3	70.9
Unemployed	4.9	3.0	4.1	4.0	6.2	4.7
White collar occupations	69.5	79.3	74.0	74.0	71.9	82.7
Employed per household	1.2	1.6	1.3	1.3	1.2	1.3
Household Income (%)						
$0-$41,600	23.8	8.4	17.9	18.6	26.8	14.7
$41,600-$78,000	24.7	13.7	20.5	20.6	23.2	19.1
$78,000-$130,000	27.2	25.5	26.6	26.1	24.0	28.0
Over $130,000	24.3	52.3	35.0	34.8	26.0	38.3
Average ($2017 values)	$96,744	$143,752	$114,673	$114,175	$97,626	$121,589
Dwelling Structure (%)						
Detached	57.2	92.4	70.9	73.7	66.9	67.2
Semi-detached	21.1	7.2	15.7	14.1	12.2	17.7
Flats/units	21.6	0.2	13.3	11.8	20.0	15.0
Other structure	0.1	0.2	0.2	0.3	0.8	0.1
Dwelling Tenure (%)						
Owned	26.2	27.2	26.6	28.2	33.2	27.6
Purchasing	33.3	54.3	41.6	41.9	33.3	39.3
Renting	40.2	18.1	31.5	29.6	32.7	32.6
Mobility (%)						
No car	7.2	0.7	4.6	4.2	9.5	5.5
1 Car	41.7	20.0	33.1	32.3	37.8	38.1
2 or more cars	51.1	79.3	62.3	63.5	52.7	56.4
Education (Aged 20+) (%)						
Bachelor's Degree	13.6	18.1	15.5	15.5	17.4	24.1
Grad Dip/Grad Cert	2.3	3.9	3.0	3.1	1.8	4.5
Postgraduate Degree	5.2	8.4	6.5	6.5	6.1	11.7
Family Type (%)						
Couples with Children	25.9	47.6	34.4	34.4	32.8	33.0
Couples without Children	24.1	29.1	26.0	27.0	26.8	27.1
Single Parent Household	10.6	7.4	9.3	9.0	10.8	8.9
Lone Person Household	35.0	14.4	26.9	26.4	24.3	25.3
Group/Other Household	4.5	1.4	3.3	3.2	5.3	5.7
Average Household Size	2.47	2.75	2.54	2.56	2.66	2.54
Ethnicity (%)						
Only English spoken at home	81.6	91.4	86.0	87.0	73.1	76.9

Source: ABS Census 2016.

8. Tenancy Mix Analysis

The tenancy mix analysis revealed that 280 businesses and specialty shops are located in the City Centre including Crawford Street, Monaro Street, the laneways and Riverside Plaza. The Queanbeyan CBD relies heavily on the convenience of its retailers and services to attract customers and satisfy their needs.

Tenancy Mix - retail categories and sub-categories (includes Riverside Plaza):

Category	Sub-category	Number	%
Services	Hair, travel, medical, legal	150	54%
Food	Retail, cafes, restaurants	41	15%
Vacancies	Street level shopfronts	32	11%
General	Variety, florists, tobacco	20	7%
Homewares	Tabletop, electrical, gifts	11	4%
Fashion	Women, men, casual	10	4%
Leisure	Books, music, newsagents	9	3%
Majors	Supermarkets, Discount Dept. stores	5	2%
Jewellery	Jewellery, gifts	2	1%
	TOTAL (as at 30/6/18)	280	100%

The overall CBD vacancy rate of 11% is high but the Monaro Street vacancy rate of 20% is extremely high and urgently needs attention. To add salt to the wounds some of the vacancies have laid idle for extensive lengths of time. Some quick actions can be taken including dressing and disguising the vacancies with support from the property owner. The landlords support will be a valuable contribution to the City. Promoting the vacancies as retail opportunities online will help lease the shops and achieve consistent rents. Due to the large number of office uses the rent levels tend to be slightly lower than retail uses.

The rents are in the range $250 per square metre to $300 per square metre depending on size/location/foot traffic and customer parking availability. In comparison Goulburn rents in Auburn Street varied from $300 to $360 for retail and offices advertised in the range of $150-$200 per square metre.

Currently there is a lack of information online to research these vacant shop locations and potential. Having funded design plans in the pipeline with ‘quick’ actions for traffic calming ready to go once the traffic ring route is open.

During the development of this report other street precincts and centres were also analysed to give some context to the above percentages. The tenancy mix in a street environment often develops over time and the end result is far from ideal. Main streets change character over time often influenced by surrounding precincts and shopping centres. Proactively managing the growth of the retail mix requires resources.

The close proximity of the Canberra CBD and other centres with a very significant choice of specialty shops and services has incredible retail power. Shopping centre owners have complete control of the tenancy mix plus a leasing team in place to deliver the desired mix.

The opportunities for developing the Queanbeyan-Palerang Regional Centre tenancy mix are highlighted in comparison to other street precincts and centres.

Tenancy mix – comparison table

Category breakdown (as at 30/6/18)	Queanbeyan City Centre	Comments	Canberra Shopping Centre	Mix of a successful mainstreet
Services (travel, shoe repair, dry cleaners, doctors)	54% (very high)	A very high proportion of services in the CBD	23%	24%
Food (cafes, restaurants, takeaway, hotels)	15% (very low)	A low proportion of food	25%	30%
Vacant shops	11% (high)	Vacancies are high (20% in Monaro is very high)	1%	6%
General (florist, variety, tobacco products)	7% (ok)	Could add to this category	2%	11%
Homewares (tabletop, electronics, mobile phones)	4% (low)	Some potential in this category	6%	6%
Fashion (women's, men's, youth, casual, jeans)	4% (very low)	A very low proportion of fashion	30%	13%
Leisure (newsagents, books, music)	3% (ok)	Could add to this category in the future	5%	6%
Majors (supermarkets, cinemas)	2% (ok)	Consistent with other centres	3%	1%
Jewellery (jewellery, gifts, accessories)	1% (ok)	Low due to the large selection in Civic	5%	1%

Gaps and opportunities

Displayed in the table above provides a general guide toward the development of a well-balanced tenancy mix but the extensive shopping offer in the Canberra City Centre and other nearby centres has impacted heavily on Queanbeyan's' mix.

A media report stated that Wagga Wagga, Baylis Street (main-street) had 15 vacant shops. A retail study revealed that 480 Wagga businesses were segmented into these categories: 8% groceries/specialty food, 20% food/liquor/catering, 20% fashion/accessories, 6% furniture/housewares/appliances, 12% recreational goods/entertainment, 1% general and 24% other/personal services, 12 supermarkets, 7 discount department stores and 33 bulky goods stores. A 2016 study of Bateman's Bay by Strategic Economic Solutions reported 55 vacant retail and commercial spaces in the Town Centre.

A significant worldwide trend uses the increased popularity of cafes and restaurants as a catalyst to attract customers, regenerate areas and attract complementary stores. This strategy is recommended for key areas of the CBD to regenerate retail activity and vitality. Outdoor dining and alfresco areas created on the street provide a major 'point of difference' to the enclosed shopping Malls.

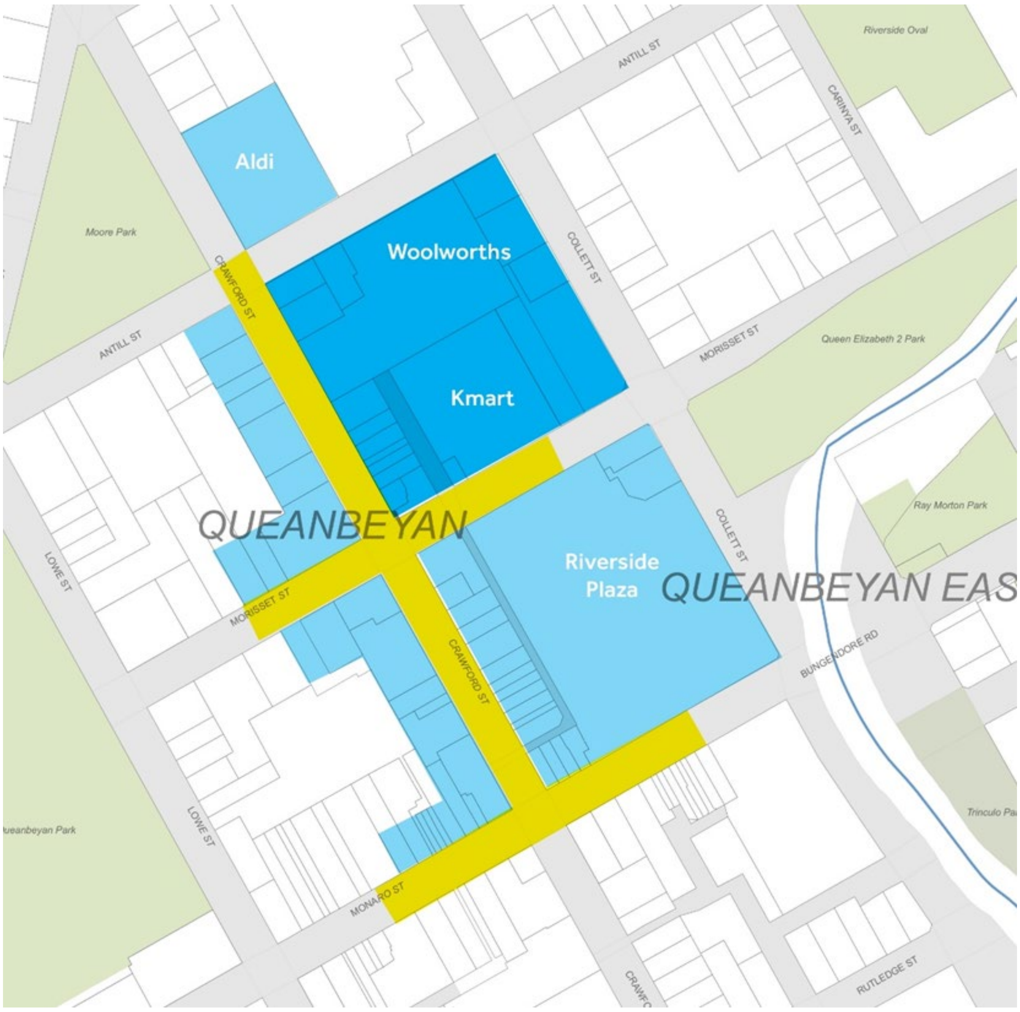
The task involves attracting clusters and groups of retailers rather than attracting single stores in isolation. The key strategy is to attract the right mix of retailers together to form streets and precincts with character in conjunction with building, signage and infrastructure upgrades to make the areas attractive to customers and visitors. Crawford Street is moving in the right direction with its wider footpaths and improved amenity for pedestrians.

The process of improvement and change is not an overnight task!

The gradual development toward a more desirable mix with distinctive niche stores situated in well-presented buildings, quality complementary uses and strong attractors may take 5-10 years to achieve. Even then retail is dynamic and the task of constant improvement will continue as customers' needs and demands change.

9. Retail Core Map, Retail Components, Street Hierarchy, Car Parking

Retail Core



Retail Components

- Riverside Plaza Shopping Centre
- Major stores - Woolworths, Kmart, Aldi
- Retail Streets - Crawford Street & Monaro Street

- Riverside Plaza Shopping Centre, Coles, Target

RIVERSIDE PLAZA (as at 30/6/18)	
Services	33%
Food	23%
Homewares	13%
Fashion	10%
General	8%
Jeweller	4%
Leisure	4%
Majors	4%
Vacant	2%

The **Riverside Plaza** attracts 3.5 million customer visits per year with an average spend of more than $36 per visit. The specialty shops are achieving sales per square metre in excess of $8,500 per annum and the total centre sales are more than $120 million per annum. The centre is a key focus for shoppers with a convenient underground carpark, Target, Coles' supermarket and a range of specialty shops including a range of fresh food, fashion and service based businesses. The offices on the upper level are nearing full occupancy. The Riverside Plaza anchors the CBD retail core alongside Kmart, Woolworths and Aldi the key major stores in the adjacent blocks.

A snapshot summary of Riverside Plaza statistics:

Riverside Plaza	***Annual sales***	$121 million
Source centre website and	***Square Metres***	21,411
Shopping Centre News 2018	***Sales per square metre (total centre)***	$6,904
	Sales per square metre (small shops)	$8,530
	Annual traffic numbers	3.5 million
	Major stores	Target, Coles
	Mini-majors	Best & Less, Go Figure Fitness, Priceline, The Reject Shop
	Specialty shops	39 specialty shops
	Spend per visit	$36.29
	Car parks	562

In comparison the Canberra Centre achieves specialty sales over **$11,700** per square metre and Westfield Belconnen achieves **$8,683** per square metre with an average customer spend of more than $47 each visit on average. These two centres in particular have achieved significant increases in total centre sales over the past ten years due to additional investment and upgrades. Belconnen has almost 3,000 car parking spaces and the Canberra Centre more than 5,500 spaces conveniently located for their customers.

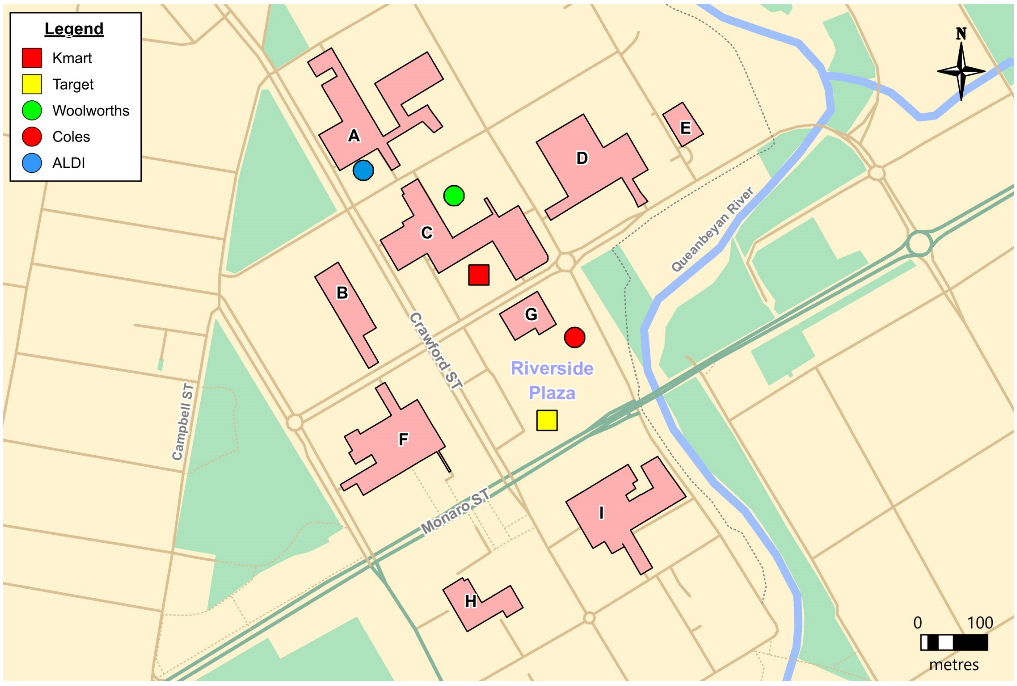
The owners of Westfield Belconnen have announced a 6,500 square metre expansion that includes more retail and commercial space with a mix of food and drink outlets, specialty retail and professional services such as solicitors and medical practitioners. The expansion is due for completion in 2021. *A full list of competitor centres and major stores is provided in the Competitor Summary on page 37.

Street Hierarchy and Car Parking

Crawford Street and Monaro Street are the two key streets in the Queanbeyan CBD that accommodate retail specialty stores and professional services. Providing customers with convenient links between the Riverside Plaza, Kmart, Woolworths, Aldi and Crawford and Monaro Streets will be important in the future development of retail in the City Centre. Physical design changes to Monaro Street to focus more on pedestrians rather than traffic will be a catalyst to filling the shops with new retail shops and reducing the excessive vacancy level.

The future prosperity of the retail sector will rely on office and business staff parking away from the key retail areas. Car parks for shoppers need to turn over at least 3 or 4 times per day to allow opportunities for them to find a park and stay longer or choose to drive to other ACT centres 10 minutes away. Locations for long term parking including safe **'staff parking'** must be considered further away from the key shopping areas along Crawford and Monaro Streets. The **Woolworths/Crawford Street car park (C)** is vibrant and active with a high turnover of spaces allowing shoppers to access retailers but other parks stays relatively 'full'.

Several areas need review including the **Morisset/Lowe Street car park (F)** behind the Home Base store in Crawford Street, the **Leagues Club' car park (I)** accessed by Shamrock Lane off Monaro Street and the **bus transit car park (D)** that is underutilised most days. Access and convenience will be critical elements for shoppers and visitors when considering the future development and growth of retail in the CBD. Integrating urban design elements that link the major destination stores and main streets in the CBD will create a 'sense of place' that attracts more customers and visitors that visit the stores and enjoy the relaxing outdoor dining environments developed within the plan. Car park locations are indicated below:



Crawford Street (91 businesses – Erin to Rutledge Street)

CRAWFORD STREET MIX (as at 30/6/18)		
Services	51	56%
General	12	13%
Food	11	12%
Vacant	9	10%
Fashion	2	2%
Homewares	2	2%
Leisure	2	2%
Major stores	2	1%

The Crawford Street design changes have improved the physical design and appearance of the street significantly. The mix of retail shops still requires attention as the vacant spaces do not present well and the uncertainty of the vacant block hoarding adjacent to Bells Dry Cleaners adds doubt to the positive future of the street. The lack of pedestrian traffic during the day does not exude an ambience of a vibrant successful mainstreet. Progress on the development of this site as a link through to the Riverside Plaza could prove to be a catalyst for more vibrant retail adjacent to quality public realm.

The outdoor dining and colourful umbrellas utilised by the two cafes are positive attributes of the street and overseas trends indicate that vibrant cafes and restaurants can be a catalyst for future development of the business mix. Council has been proactive in encouraging footpath activation but while outdoor seating at Ciao Café, 4th Seed and the Royal Hotel is very popular with customers other food outlets have not taken up this opportunity.

Strategies to improve Crawford Street:

- Clearly defining the **future role** of the street
- The **vacant site project** (next to Bells) needs to be progressed forward as a catalyst project
- **Underutilised** outdoor dining opportunities provided by wide footpaths
- **Large blocks** need to be broken up using laneways and linkages for improved connectivity
- Activate the **corner sites** to add colour, vibrancy and visual stimulation (i.e. artworks)
- Consider ways to **integrate** the Post Office into the retail heart to provide more convenience
- Consider **extending** the footpath design along to Antill Street to encourage future alfresco dining
- Upgrading building **facades** to improve the overall impression of the street
- Relocate the **information centre** for tourists and visitors closer to the retail core area

Monaro Street (107 businesses)

MONARO STREET MIX (as at 30/6/18)		
Services	62	58%
Vacant	19	19%
Food	16	15%
Leisure	4	4%
Fashion	3	3%
Homewares	3	3%

Monaro Street is a key component of the retail core but it faces many challenges. The vacancy rate of almost 20% is alarming for potential retailers and businesses considering establishing a business there. Converting Monaro from a ‘highway’ to a main street will support businesses along the street and pedestrians wishing to visit those businesses and services. Monaro Street has developed into a professional services street as many retailers have relocated to Crawford Street or closer to the retail core due to the difficult trading environment affected by the heavy and noisy traffic. The new bypass road due for completion in 2019 will be a saviour and a catalyst for Monaro Street to shine as a key retail artery and main street.

Strategies to improve Monaro Street:

- **Disguise** the vacant shops and/or install pop-up retail or displays where possible
- Consider future **traffic calming** measures that will create a better business and customer environment
- Consider traffic light **pedestrian crossings** to encourage customers to shop both sides of the street
- Activate the **corner sites** to add colour, vibrancy and visual stimulation (i.e. artworks)
- Upgrading building **facades** to improve the overall impression of the street
- Encourage car park **turnover** in car parks in close proximity to Monaro Street (i.e. Leagues Club)

Key streets - objectives and recommendations			
Street	**Characteristics**	**Objectives**	**Recommendations**
Crawford Street	56% services 2 cafes using outdoor dining 10% vacancy rate Wide footpaths	• Reduce vacancies • Disguise vacancies • Resolve the hoarding situation at 112 • Improve facades • Increase pedestrian traffic • Link to Riverside Plaza • Link to Woolworths	• Extend the wider footpaths to Antill St • Ensure strong links to the retail core are maintained • Activate each corner at street intersections with colour/artworks • Continue to promote the activation of the wide footpaths to create better amenity
Monaro Street	20% vacancy levels 58% services No outdoor dining Heavy traffic and noise Building quality is inconsistent Difficult to cross at mid-points	• Reduce vacancies • Disguise vacancies • Increase pedestrian traffic • Improve the retail and business environment • Create a main street • Improve building presentation	• Consider future urban design that enhances the customer and business environment through a complete redevelopment of the whole street • Enhance the link between the retail core and the Q precinct • Police the shorter term shopping car parks near the Performance centre and Leagues Club • Improve the vibrancy and activation on the four Crawford Street corners by working with the owners and businesses
Morisset Street	Green leafy street An important thread through the retail core Poor facades including vacant Harris Scarfe Dan Murphy corner not activated	• Integrate the street into future development plans • Enhance the link between the Riverside Plaza and the new cinema	• Ensure that future design elements encourage walking between the centre and Woolworths/Kmart • Use Morisset as an integral street element in future improvements • Improve the building facades • Remove the poorly presented bus shelter

Street issues and actions – Crawford, Monaro and Morisset streets

- 20% vacancy level in Monaro Street (as at 30/6/18) is very high
- Heavy vehicle traffic and a difficult business environment in Monaro Street
- Lack of pedestrian traffic on the main streets
- Poor pedestrian access and linkages between streets and retailers
- Inconsistent standards of presentation in building stock on all streets
- Lack of easily identified precinct themes or identity
- Activate all street corners to lift the street image
- Link Crawford Street to the retail core improvements and development
- Ensure Morisset Street is an integral element in future pedestrian links and designs

When considering the layout of the retail core and associated streets the latest trends toward customer experience includes high quality outdoor amenities with bakeries, unique restaurants and fresh food markets. Creating clusters and precincts, developing vibrant linkages and creating themed places add value to a City centre.

10. SWOT Analysis & Market Position

Strengths

- Major supermarkets – Aldi, Coles, Woolworths
- Major Discount Department stores – Kmart, Target
- Riverside Plaza – draws 3.4m customers annually
- An extensive range of professional services
- Hotels and accommodation facilities
- Easy to access from Canberra and surrounding suburbs
- Well dispersed and free car parking
- Catchment area incomes are high
- Wide, walkable streets allow for quality design
- Crawford Street footpath treatments
- Council plans support new growth

Weaknesses

- Lack of choice and variety in the retail mix
- Lack of foot traffic on the streets
- Retail sales are not enough to support higher rents in some cases
- Monaro Street environment is noisy making it difficult for retailers and customers
- Laneways between shops are not appealing (excluding Shamrock)
- No representative business group to support and guide the sector
- Many small retailers not embracing online opportunities
- No funding to deliver coordinated marketing or promotions
- No clear identity for the city centre
- Signage and definition of precincts is lacking
- Urban design elements do not link destinations
- No unique attraction to bring in families or residents
- The hospitality category lacks variety and distinctive businesses
- Some properties poorly presented
- Lack of customer facilities
- Car parking is stagnant – no turnover (exception Woolworths)
- Weekends very quiet with many shops closed
- Mainstreet shopping is not vibrant
- Fragmented ownership of buildings and land
- Inconsistent building quality and presentation
- Small businesses feel isolated
- Lack of quality building stock to accommodate unique retailers

Opportunities

- Develop a business led management group to drive the business/retail agenda forward
- Create a well-funded marketing strategy that includes small retailers
- Capture the dining market household spend available from surrounding residents
- The new cinema will add entertainment opportunities

- Develop a targeted marketing program to the secondary catchment area
- Position Queanbeyan CBD as a niche, small business shopping destination that differentiate the city from national brands in Canberra
- Expand food and hospitality offering
- Consider planning amendments to LEP and DCP in the 2019 review to meet retail objectives

Threats

- Extensive competition from Canberra Centre, Westfield Woden, Majura Park, Fyshwick DFO, Westfield Belconnen and other smaller centres
- New shopping facilities at Googong and Jeromberra
- Online shopping opportunities

Market Position

Queanbeyan's current market position is driven by the convenience offer. The shopping centre, major supermarkets, professional services and available ground level car parking are assets that attract customers frequently. The mix of shops outside the shopping centre is weak and will require a major commitment and the development of a niche marketing strategy.

11. City Centre Key Issues

a. There is significant escape expenditure (leakage) to Canberra
b. The City centre lacks a clear identity
c. The retail mix is poor and professional services are over-represented
d. The retail offer is spread widely across the City
e. The retail environment is not attractive to new businesses
f. More customers and visitors need to be attracted to the City centre
g. Destinations are not clearly linked or promoted by wayfinding
h. Lack of amenity and high quality design
i. Customers are not encouraged to walk or discover City destinations
j. Businesses are not working cooperatively together
k. Small businesses are not engaged in the bigger picture of CBD revitalisation
l. Resources and funding is needed to implement and maintain business programs
m. Building stock is old and not attractive to new business/office tenants
n. Vacancies are often poorly presented (poor maintenance, low lighting, poor signage)
o. Lack of investment into properties and vacancies to encourage new businesses
p. It is difficult in some locations to meet the rent levels expected

12. Competitor Summary

The telephone survey revealed customer preferences for a wide range of products and services in the suburbs around the Queanbeyan-Palerang Regional Centre. The most significant competitor centres identified include:

Canberra Centre	***Annual sales***	**$634 million**
Does not include all of the	***Square Metres***	**94,000 retail + 23,000 office**
shops in the street & Mall	***Sales per square metre (total centre)***	**$7,734**
	Sales per square metre (small shops)	**$11,746**
	Annual customer numbers	**18 million**
	Major stores + 9 mini-majors	**David Jones, Myer, Target Big W, Aldi, Coles**
	Cinemas	**Dendy Cinemas**
	Specialty shops	**283 shops**
	Spend per visit	**$35.10**
Source centre website and	***Food court***	**550 seats + 13 specialties**
Shopping Centre News 2018	***Car parks***	**5551**

Westfield Belconnen	***Annual sales***	**$538 million**
	Square Metres gross	**96,401**
	Sales per square metre (total centre)	**$6152**
	Sales per square metre (small shops)	**$8683**
	Annual customer numbers	**11.4 million**
	Major stores + 19 mini-majors	**Myer, Harris Scarfe, Kmart, Toys, Woolworths, Coles**
	Cinemas	**Hoyts 10 screen**
	Specialty shops	**282 shops**
	Spend per visit	**$47.32**
Source centre website and	***Food court***	**793 seats + 23 specialties**
Shopping Centre News 2018	***Car parks***	**2880**

Westfield Woden	***Annual sales***	**$362 million**
	Square Metres	**71945**
	Sales per square metre (total centre)	**$7323**
	Sales per square metre (small shops)	**$9130**
	Annual traffic numbers	**9.9 million**
	Major stores + 9 mini-majors	**David Jones, Big W Coles, Woolworths**
	Cinemas	**Hoyts 8 screen**
	Specialty shops	**242 shops**
	Spend per visit	**$36.63**
Source centre website and	***Food court***	**500 seats + 14 specialties**
Shopping Centre News 2018	***Car parks***	**2388**

Three Canberra Centres attract 39.3 million visitors per year that spend $1.5 billion

In addition to the large regional centres above there are many other competitive retail centres with extensive square metres of retail space available for customers including:

Fyshwick Outlet Centre
The Canberra Outlet Centre is just 8 minutes away. 110 leading brands including T.K Maxx, Nike, Royal Doulton, Cue, Asics, Puma, Harris Scarfe, Freedom, Snooze, Bose and JB Hi-Fi HOME offer discounts. The Fyshwick Fresh Food Markets consist of 24 specialty food stores including bakeries, butchers and fresh produce grocers. Harvey Norman, Officeworks, The Good Guys, Bunnings, Supercheap and BCF are nearby.

Majura Shopping Park
Woolworths, BigW and Aldi are located at Majura Shopping Park adjacent to the Canberra Airport. More than 30 specialty shops complement the major anchor stores and Bunnings, Costco and Ikea are close by. The centre is easily accessed by Queanbeyan residents in about 15 minutes.

Greenway (Tuggeranong)
Southpoint Shopping Centre in Greenway is located around 19km (by road) south west of the Queanbeyan CBD. The centre is anchored by three discount department stores and two major supermarkets and contains around 160 specialty stores.

Weston Creek
Weston Creek is located around 19.1km (by road) west of the Queanbeyan CBD. Cooleman Court is the largest shopping centre in Weston Creek with a total retail GLA of around 10,688m^2. It is anchored by a Target and Woolworths and has around 35 specialty stores.

Gungahlin
Gungahlin Marketplace is a sub-regional shopping centre in the north of the ACT. It has a total retail GLA of around 31,000m^2 and it is anchored by two discount department stores and two full-line supermarkets. Around 100 specialty stores are also located in the centre.

Table 15: Summarises the key centres and their major stores (Source: Foresight, Shopping Centre News & web)

Location	Full Line Department Stores	Discount Department Stores	Major Supermarkets	Shopping Centre GLA (m^2)	Drive Distance (km)
Queanbeyan	-	Kmart Target	Coles Woolworths	21,411 (Riverside Plaza)	-
Woden	David Jones	Big W	Coles Woolworths	71,945 (Westfield)	15.4
Canberra Centre	Myer David Jones	Target Big W	Coles	91,200	16.4
Greenway	-	Kmart Target Big W	Coles Woolworths	74,823 (Southpoint)	19.0
Weston Creek	-	Target	Woolworths	10,688 (Cooleman Court)	19.1
Belconnen	Myer	Kmart Target	Coles Woolworths	96,401 (Westfield)	25.9
Gungahlin	-	Kmart Big W	Coles Woolworths	31,000 (Marketplace)	28.5

13. Retail Success Factors and Best Practices

13.1 Professional management

Professional management is an essential element of a successful retail precinct.
City centres and mainstreets have endured the impact of new and expanding shopping centres for decades but now they are fighting back with professional management, long term funding, more promotional activity and business attraction strategies. Shopping centres have a distinct advantage with free parking, centre management and substantial marketing budgets. Small businesses in the centre contribute to a marketing fund that continually targets customers to draw them to the centre especially during peak consumer spending periods such as Christmas and Sale times.

However mainstreets and city centres are rising to the challenge by establishing organised management models to improve the shopping and visitor environment and deliver marketing to attract more customers and visitors thereby improving business conditions and the economic sustainability of their precincts. The world's best practice management of mainstreets includes Business Improvement Districts or BIDs. The BID management represents the business community and encourages retailers to use their collective strength to make them more competitive. Management and coordination of the fragmented ownership of a mainstreet or City centre is a key success factor but it requires stakeholder commitment.

The Queanbeyan CBD lacks a representative private sector business group that can set and drive the business agenda forward. Currently Council is the overseeing body for new initiatives and actions but it needs the support of the private sector to make a major impact and deliver effective results. Overseas examples ensure that businesses have a democratic say in localised activities for their precincts because every precinct has its own unique issues.

The Canberra CBD Ltd company representing more than five hundred businesses managed the City Centre for almost a decade until recently when the City Renewal Authority assumed responsibility for promotions, marketing, cleaning and security using a significant investment fund of almost $2 million. The consistent delivery of campaigns and events that attract Queanbeyan residents has had a profound effect on the pedestrian foot traffic and spending in the Queanbeyan CBD.

International examples of business improvement districts include Philadelphia Center City BID, Retail Birmingham BID, Worcester BID and Auckland Heart of the City. Auckland Council has been particularly active in establishing 50 business improvement districts in precincts and mainstreets in their amalgamated Council area. They have successfully adapted the BID model to suit NZ legislation and Queanbeyan can also lead the way in NSW by introducing a democratic, inclusive model.

OPPORTUNITY: Harness the collective financial muscle and skills of the private sector working together as a collective to attract more customers, lift the City profile and make the sector more competitive.

RISK: The vacancy level in Queanbeyan continues to rise and businesses are not sustainable.

ACTION: Collate the needs of the business community from recent surveys and discussions, develop a Five Year Business Plan and Budget proposal and bring businesses together to engage them in implementation.

13.2 Funding to promote and improve the City centre

Long term funding supports the effective delivery and implementation of actions in the Business Plan.
Business Plans and Strategies are implemented effectively and efficiently when supported by funding provided by all stakeholders. The largest competitor Canberra City Centre has delivered marketing and promotional campaigns over the last 10 years with a budget of more than $1.5 million and this has had a significant impact especially during key retail trading periods and key event times. The annual budget is over and above the marketing budget utilised by the Canberra Shopping Centre and is now closer to $2 million annually. Businesses contribute to the fund for the collective good of the City and their business. Studies have shown that the business receives 10 to 20 times their initial investment in benefits.

Shopping centres are very well funded as they set aside 5% of each retailer's base rent to market and promote the centre. In the extremely competitive retail market place Queanbeyan must compete with large well-funded centres like Westfield Belconnen, Westfield Woden and Tuggeranong in addition to Fyshwick, Kingston, Majura and Braddon. Well-organised mainstreets and City centres around the world use a 1% of valuation formula to establish funding and resources to attract more customers and increase spending. Geelong City Centre has a $1 million fund and recently completed a detailed study that determined that businesses received $20 in benefits for every $1 contributed.

Business committees and steering groups are high functioning if they can plan, implement actions and measure results. The implementation of actions needs to be underpinned by sustainable funding and resources. Progressive business people want to see results and outcomes in a timely manner. Even the best plans gather dust if they are not funded.

In Victoria there are 70 mainstreet programs in place that require a small business to contribute around $500 per year (just $10 per week) to receive the benefits of an organised management group that delivers actions in the business plan and unites businesses. Examples include Kew Junction Business Association ($244,000), Elsternwick ($205,000) and Geelong City Centre Marketing ($1m). In comparison Albury in NSW businesses raise $160,000.

In South Australia two very successful streets Norwood Parade ($202,000) uses its resources to establish a website directory and deliver marketing and events while Queanbeyan Glenelg ($550,000) attracts visitors and shoppers from all over the metropolitan area and interstate. Both mainstreets have close to 300 businesses. Similarly in Fremantle the businesses contribute ($350,000) per year for marketing and business support.

OPPORTUNITY: All businesses commit some funding to deliver the business plan actions and receive a significant return on their investment and sustainable growth in the face of competition.

RISK: Retailers go out of business before actions begin thereby losing many unique diverse retailers that local residents were seeking. New businesses will be difficult to attract due to the negative perceptions and realities.

ACTION: Council lead the way with 'seed' funding to investigate the feasibility of creating a fund to resource a business plan and implement it. Introduce a pilot scheme to test the concept.

13.3 Identity, character and clear points of difference

A strong identity or City brand gives customer's confidence that they will enjoy the experience each time they visit. The brand must be used in all forms of media, street signage, uniforms and all events.

What does the Queanbeyan City centre stand for?
How do residents perceive the City centre and what can be improved?

In a retail/shopping/hospitality sense the City is represented by the major supermarket brands (Aldi, Coles and Woolworths), discount department stores (Kmart & Target), the Riverside Plaza shops and the popular and shops. The professional services sector is very well represented with major banks in prominent locations and over 50% of businesses are professional services including real estate offices, lawyers, health, medical and travel agents. However the CBD lacks an umbrella brand that communicates the overall CBD market position.

The concentration of shopping centres, major brands, outlet centres and supermarkets outside the Queanbeyan city centre has stifled its retail mojo and taken the focus away from the centre. However at the same time this creates an opportunity to develop a new identity that will attract visitors for shopping and dining. The foundation needs to be established around the core retail areas to build on the concentration of car parking, retail and shopping facilities.

The revitalisation of the CBD will require a solid commitment from Council, property owners and businesses to build steadily toward a sustainable future. The door is open to establish a strong credible brand that changes the customer perception of the CBD from just a convenient location for food and the doctor to offering a much improved mix of shops, niche retail, laneway destinations, facilities and shopping activities.

There are strong images in the past of Queanbeyan including the discovery of gold, the pioneer spirit of the wheat farming industry with ground breaking initiatives and the original Aboriginal meaning of Queanbeyan 'Clear Waters'. The brand must connect with the community to give it more depth and build loyalty.

The GOOGONIANS have done it well. No matter what people think of the brand and identity they know it.

OPPORTUNITY: Research into the history and past of Queanbeyan to discover the unique elements that a brand could be built on. Review all documents from previous studies and update with community inputs and further commentary.

RISK: The City Centre loses focus and customer loyalty is lost.

ACTION: Complete the branding exercise with a range of age and occupation residents to capture a broader view. Hold a community meeting to put forward suggestions. Settle on key themes and test them. Decide and deliver the brand through signage, media, postcards and online.

13.4 Orientation, wayfinding and pedestrian circulation

Customers need to be in control of their visit through visible signage, easy access and visible cues to assist them to orientate themselves and find key points of interest in and around the City centre.

Customers can walk around the City centre with ease but there needs to be a suite of distinct signage elements that reinforce the brand and identity of the mainstreets and precincts. The CBD brand should be reflected through all forms of signage and wayfinding. Signage needs to be bold and obvious for visitors and customers alike. Linkages to key destinations within the City should be identified with easy to follow signs and key vistas or signature locations and car parking stations.

The brand that is developed through a branding exercise should be reflected through all signage including colourful banners, marketing and activities to reinforce the character of the CBD.

The circulation of pedestrians through the City along the mainstreets is important to the lifeblood of retail. The customer ant-trails can be mapped and monitored to ensure customers enjoy a great City experience. The quality of streetscape, building facades and shopfronts will encourage more walking and exploring throughout the City. Crawford Street has already received a physical infrastructure upgrade to lift the quality of the mainstreet to encourage visitation. Encouraging circulation requires cross-promotions between retailers to extend the length of visit.

OPPORTUNITY: Bring the community together to develop a brand and identity that can be integrated throughout the CBD to guide visitors and customers to the key areas and destinations around the CBD.

RISK: Customers find it difficult to get around the CBD and this becomes an impediment additional visitation.

ACTION: Clearly define key decision access points i.e. Morisset/Crawford Streets intersection and signpost with parking signage, shopping destinations and attractions. Use of clever artworks in key locations can supplement the visible signage.

13.5 Clear sightlines and vistas

Retail precincts and shopping centres use clear well planned sightlines and vistas to guide customers.

Key destination points, points of interest and artworks around the CBD will encourage circulation and movement of customers and pedestrians around the City centre. Urban design plays a big role in delivering the look and feel of a street environment and providing better customer amenity. Customers can see the buildings and shopfronts along Crawford and Monaro Streets and the Aldi, Woolworths and Kmart store signage provides some points of orientation for customers and visitors. Shoppers on either side of Monaro have their vision across the road slightly impeded by heavy foliage of trees in the central island.

The key will be to link all supermarkets, major stores, the shopping and customer car parks by very visible signage and design elements such as art works, flower displays, distinctive paving and wayfinding that start at every intersection and then flow through the CBD. Side-streets and small arcades can be signposted by high quality blade signs at key pedestrian walkways.

OPPORTUNITY: It is a very strategic move to drive a significant part of the CBD Transformation Strategy through the new design work being delivered through the Spatial Business Plan (SBP).

RISK: The City does not seize this opportunity to improve the look and feel of the CBD in a proactive manner that supports the Retail Strategy and benefits customers and visitors.

ACTION: Fully embrace the Spatial Business Plan as a catalyst for CBD revitalisation.

13.6 High quality urban design and attractive building presentation

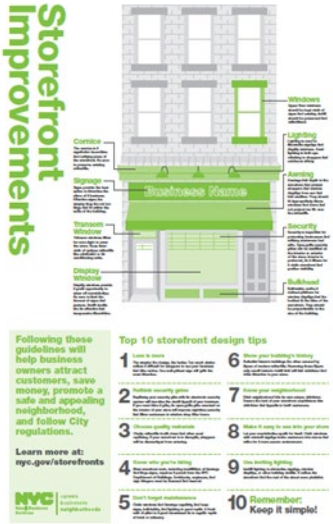
Quality streetscape is created by integrating physical design elements including paving surfaces, water features, artworks, plants, flowers and trees to provide a pleasant attractive environment and 'sense of place' for customers and visitors.

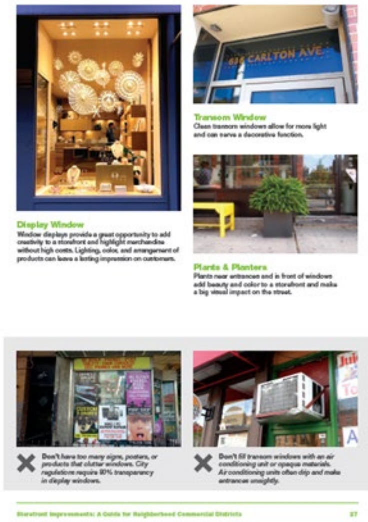
The physical presentation of the mainstreets and associated public realm is an important element in the overall image of the CBD. If streets are poorly presented due to broken dirty pavers, wilting flowers, lack of trees and buildings needing maintenance and painting it reflects badly on the on the overall shopping and dining offer. The image of the CBD starts in the street but flows through the building and shop presentation.

Studies have been conducted in the UK and USA that identify a poor visual quality rating for mainstreets and City centres without trees because they lack a 'sense of place'. Retail environments with a pleasant tree cover can encourage longer dwell times and increase visitation frequency. One study by the University of Washington also indicated an upside in dollars spent in precincts with large well developed trees. In addition the ATCM UK identified significant private sector investment generated in precincts with a pleasant green environment and 'sense of place'. Placemaking has delivered many positive outcomes around the world including in many poorly presented and funded areas. Attracting more people flows into improved businesses and better economic outcomes.

Many Australian Councils are addressing the need for greening. The City of Darebin introduced a GreenStreets Policy to improve walkability and accessibility while enhancing the community's daily experience and ensuring environmental, economic and social sustainability. Morisset Street has some well-developed trees that create a pleasant environment between Kmart and Lowe Street. Queanbeyan is very fortunate that the streets and footpaths are wide which provides adequate space to deliver high quality design elements that link the key destinations together. The work in Crawford Street forms the basis for ongoing quality design that encourages pedestrians to walk around the CBD.

The presentation of buildings and shopfronts can be improved using a Shopfront Improvement Program that uses computer enhancing of buildings to show owners the impact of painting, maintenance and signage. Council can assist by providing the services of an architect to analyse each building, list improvements and engage preferred building contractors to develop and complete work plans. The NYC Neighbourhood Storefront Improvement Program is a very good example of a step by step guide to improve the presentation of local mainstreet buildings in partnership with building owners.





In Rundle Street Adelaide the Property Owner and Council worked closely together to restore the historic facades and shopfronts to present a high quality streetscape that attracted many top fashion brands including Gorman, Jack London, Zimmermann, Sass and Bide and more. In Peterborough SA a mainstreet building upgrade program delivered 27 new painted and appointed buildings.

OPPORTUNITY: The CBD can be greatly enhanced through improvements to the urban design elements complemented by building and shop upgrades along the streets. The design project being implemented through the Spatial Business Plan will bring many of these elements together within the QCBD Transformation Strategy as a catalyst for future growth and sustainability. Including the private sector interests in the plan will increase the level of engagement and commitment.

RISK: If plans and designs are promoted without financial commitment the community may be frustrated by short delivery. If new plans are not actioned there is a risk that customers and visitors will perceive the CBD as tired and behind well maintained centres and streets across the border.

ACTION: Revisit the shop improvement program that previously saw 11 buildings improved in the CBD to begin a period of renewal to match the improvements in street amenity for the benefit of customers.

13.7 Attractive, vibrant corner stores along mainstreets

Vibrant well activated corner sites promote the level of activity in the CBD due to their prominent location. Blank windows, brick walls and poorly presented corner sites along a mainstreet do not present an upbeat image.

Developing corner sites can have a positive knock-on effect with adjacent tenancies that complement each other and add to the mix of shops and services. Restaurants and cafes with outdoor dining facilities and colourful umbrellas and furniture exude a positive image of activity and community spirit.

Many corner sites in the Queanbeyan CBD are occupied by banks and professional services which reflect the current business mix made up of a large proportion of professional services. The result is that many corners are not activated at the street level in an attractive manner.

The mix over time has been affected by the significant growth shopping centres and outlet shopping precincts nearby that draw the majority of traffic and market share.

OPPORTUNITY: The overall CBD Transformation is complemented by high quality street design and presentation and building presentation. The timing is perfect to introduce building improvement strategies and actions.

RISK: That buildings in the CBD deteriorate and efforts to improve the streetscape are let down in the eyes of the customer. Quality retailers and businesses are more likely to be attracted to quality buildings that support their image and presentation standards.

ACTION: Review each corner site using the guidelines from shopfront and building improvement programs with a view to introduce new signage, paint colours and awning designs that lift the image and vibrancy of these key locations. Council can add floral infrastructure or quality artworks to increase the level of interest.

13.8 A balanced mix of shops, businesses and customer facilities

A diverse mix attracts a wide range of customers. Shopping centres manage their mix to attract customers from locally and the wider catchment area. In addition to supermarkets and food specialty retailers they maintain a significant percentage of fashion, homewares and gift stores.

Shopping behaviour fits into three categories:

- convenience shopping (supermarkets, dry cleaners, food retail)
- comparison shopping (fashion, gifts and homewares)
- experiential (hospitality restaurants, cafes, bars)

The Queanbeyan CBD does not have a full mix of specialty retailers to attract large numbers of shoppers/diners and it must rely on the Riverside Centre, Woolworths, Aldi, Kmart, Target, the hotels, Leagues Club and a small choice of restaurants to draw customers into the City. Initially Queanbeyan will be best served by focusing on experiential businesses particularly restaurants and cafes as a catalyst to build a stronger retail core that attracts more customers and visitors.

Shopping centres continue to develop their food and beverage offer to attract more customers and increase the dwell time within the centre. In essence food and beverage is taking on more of an anchor role in centres than previously was the case. Developing the business mix further will take time but the new cinemas complemented by small businesses nearby could start a mix renewal if supported by some proactive leasing strategies.

OPPORTUNITY: The business mix in the CBD can be built up progressively from the retail core with the new Cinema, Kmart and Woolworths as key anchor points. Proactive strategies are detailed in the Retail Action Plan.

RISK: Customer visitation reduces due to the lack of retail drawing power of the precinct.

ACTION: Focus on stabilising and improving the hospitality category of Queanbeyan businesses (restaurants, cafes, bars) before seeking to extend the mix further into other retail categories. A successful base of food and beverage businesses will attract more customers and attract new retail businesses keen to benefit from the opportunities created.

13.9 Attractors, anchors and destination stores in key locations

The mix of specialty stores need to be anchored by the big drawcard anchors.

The CBD has a strong base of destination anchor stores including Aldi, Woolworths, Kmart, Coles and Target plus the cluster of businesses in the Riverside Plaza. The supermarkets are attracting a solid share of the household expenditure from the primary and secondary catchment areas. The addition of a new cinema will be advantageous as it adds a new experience element to the mix of attractions however more unique complementary experiences need to be introduced to increase the visitation frequency to the City. The Riverside playground is a great example of a permanently open attraction that attracts families and visitors and more experiences like this need to be added to the mix.

Locating the Post Office, Visitor Information centre and customer facilities in or close to the retail core will add value to the customer offer and attract new businesses. Offering easily accessible facilities in convenient locations will support developments to the business mix.

OPPORTUNITY: Utilise the cinema development as a catalyst for redesigning and remixing the businesses in the Kmart / Woolworths block to create a much stronger retail core. Nurture potential new businesses that could be attracted in the future.

RISK: That the anchor stores and supporting specialty shops are spread across the City in isolated pockets rather than in a consolidated block. The City could miss an opportunity to provide

ACTION: Consider creating a key customer hub in the retail core to serve customers and assist visitors. Consider developing a high quality unique attraction that could sustain retailers and shops into the future as a significant point of difference.

A unique family attraction could provide increased foot for retailers especially on weekends. (image Wattman's trains)

Unique toilets in Kawa Kawa NZ are a highly rated tourist attraction

Toilets are part of the business mix in Europe.

13.10 Clusters of retail stores to create precincts and interesting mainstreets

Clusters of retail stores can attract more customers and support the centre identity and brand.

Shopping centres, mainstreets and retail precincts operate effectively because of the one stop shop destination created by locating clusters of retail specialty stores near each other. The stores provide range and variety for the customers and complement each other while providing customers with broad choices and spending opportunities.

Shopping centre leasing agents work to a long term plan to develop the mix with the customer in mind. Creating precincts of fashion specialty stores, food retailers and electronics businesses close to each other helps the customer locate what they need with a flow on effect of more shops visited per visit and a longer dwell time in the centre.

Currently the only clusters are inside the Riverside Plaza where fashion is located near jewellery and food court businesses are located near seating and a children’s play area.

The Retail Strategy recommends forming a food hub in the retail core to complement the new cinema complex. The hub will support future retail developments as the offer continues to grow.

OPPORTUNITY: Focus on the retail core block in the heart of the CBD to create new clusters of restaurants and food outlets in parallel with the development of the new cinema.

RISK: Inaction will not optimise the opportunity of new and vibrant retail clusters in the heart of the CBD.

ACTION: Assess land holdings and opportunities to create a newly designed outdoor retail hub that brings new businesses together and provides high quality shopping and dining opportunities. Create partnerships with key parties including owners of land and properties to focus on areas identified in the spatial business plan and retail strategy.

13.11 Attractive, vibrant and active shopfronts and outdoor dining areas

Shopfronts with individual design characteristics supported by colourful bold outdoor elements such as umbrellas and furniture can add value to a precinct. Eating areas full of customers will create vibrancy and vitality.

Corner sites can project a positive image of vibrancy with cafes and restaurants with tables, chairs and colourful umbrellas making good corner businesses, while banks, solicitors, real estate offices and pharmacies often do not have active/appealing shopfronts. Developing corner sites can often have a positive knock on effect by attracting new retailers and improving the adjacent mix.

The wider footpaths, colourful umbrellas and public amenity in Crawford Street has encouraged some retailers such as The Royal Hotel, 4th Seed and Ciao Café to put tables and chairs out to provide al fresco dining facilities. However some businesses have not taken up the opportunity to expand onto the street and make it more attractive for customer and visitors.

OPPORTUNITY: Continue to plan shopfront improvements, footpath treatments and outdoor activations to add life and character to each street. Assess each corner site and plan ways to improve the presentation using urban design and art elements.

RISK: That blank windows and unattractive shopfronts reduce the vibrancy and life of Queanbeyan city streets. The Queanbeyan CBD remains without an attractive place magnet for people to gather and socialise.

ACTION: Continue to add more colour and vibrancy to the footpaths of Crawford Street as a main street with a pleasant mainstreet ambience and amenity. Redevelop Monaro Street to include new quality urban design elements to enable a better business and shopper environment that attracts more customers and businesses.

13.12 Access by all forms of transport

Precincts need convenient access by all forms of both public and private transport.

The Queanbeyan CBD is very accessible by car. Cars passing by shopfronts provide Queanbeyan businesses with additional exposure to passing customers while providing street movement, activity and opportunities for passive surveillance. Retail shops facing the street have additional exposure to passing customers on foot and in vehicles when compared to retailers inside shopping centres. The flow of traffic maintains constant movement and activity in the street however the type of passing traffic in Monaro Street can have a detrimental effect on retailers due to noise and dust plus the difficulty for shoppers to cross the road mid-block.

Due to the high usage of motor vehicles to access the City centre car parking is very important as it has a major impact on retail. Queanbeyan has a reputation for being a convenience centre and this is a competitive advantage that should not be lost.

The bus exchange on Morisset Street and circulating buses provide easy access to the CBD for residents and visitors and the City centre is easy to access by bicycle and walking.

OPPORTUNITY: Provide good signage and parking opportunities for customers to maintain the convenience factor. Implement actions recommended in the Integrated Transport Strategy to support good circulation and easy access.

RISK: Staff could continue to take up car parking which minimises the customer convenience.

ACTION: Review the policing of car parks to ensure customers are treated as very important guests in the CBD.

13.13 Adequate well managed car parking for customers and staff

Car parks must be turned over frequently to ensure customers and shoppers can find a park in a reasonable time. Long term parking for staff will free up medium parking and short term spaces.

Council tries to balance the needs of retailers and customers through car park management however there is a need to police parking to encourage turnover of car spaces so that customers wanting short term parking can easily access it. Encouraging the staff to park further away from the prime customer parking areas requires the use of rewards and penalties. The balance of short term, medium term and long term staff car parking is required to meet the needs of the precinct. A designated long term staff parking area would take pressure off 2-3 hour spaces.

OPPORTUNITY: To manage the car parks to ensure spaces are turned over to provide opportunities for shoppers. Consider suitable locations for staff parking in a safe easy to access position. Promote the 5 minute walk is good for your health message.

RISK: Retailers could fail if customers find it too difficult to access them. In this rebuilding process it provides a wonderful opportunity to access convenience for the customers.

ACTION: Police all car parks in line with signage displayed and seek to find a suitable location for staff. Consider a parking APP similar to Geelong City that shows where parking is available. Review the use of grade level carparks and consider their repurposing to include new development and public realm while providing replacement car parks in more consolidated multi-level car parks.

13.14 Collective marketing to lift the profile of the City Centre

Today's retail marketers must navigate a complex digital and traditional marketing world using a variety of channels. The complexity of digital platforms requires constant and consistent messaging to gain the customer's attention and motivate them to visit a centre or precinct. Precincts can harness the collective marketing strength of all businesses to provide a stronger more effective message. Retailers promoting themselves in isolation are not as effective as a message targeting a range of customer segments under an umbrella brand. Retailers and businesses can add valuable content to a coordinated digital and traditional marketing effort. In addition small businesses need assistance when building their digital capability. Online retail is now close to 10% of all sales and small businesses must embrace this new world.

The digital marketing arena is changing dramatically with new advances in technology becoming available every day providing more tools and dynamic social media channels. Email marketing will become more important and the quick uptake of smartphones in Australia heralds the need for strategies targeting mobile devices including location based marketing. Many retailers need assistance with the production of quality content that captures their targeted audience and maintain a consistent profile. The use of short video clips and audio grabs to deliver key messages will also dominate other forms of media.

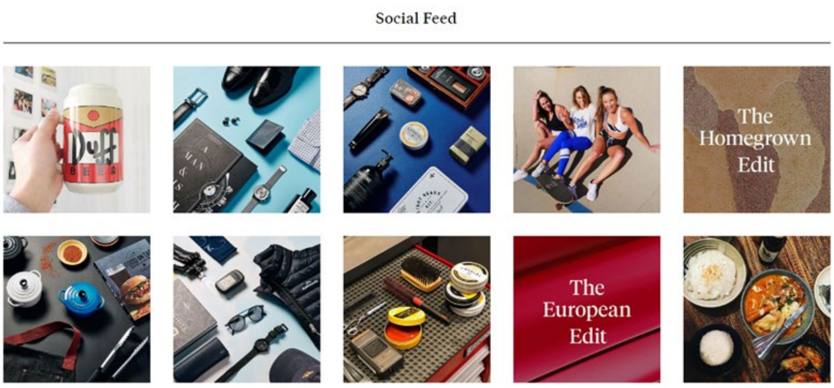
A marketing levy is needed to promote retailers and businesses in the CBD to increase pedestrian traffic and spending. Smaller retailers benefit from group marketing activities and promotions as it helps them punch above their weight and delivers cost efficiencies. In addition marketing the CBD is a benefit to potential retailers. Building retailer's digital capability will also support the overall marketing effort.

Positioning the CBD as a unique shopping and dining destination requires the delivery of campaigns targeted at the key customer segments including residents and visitors. Sophisticated marketing campaigns include digital elements, social media, websites, APPs supported by traditional media targeted at geographical areas around precincts to build frequent visitation.

OPPORTUNITY: Many opportunities are created when resources are available to promote mainstreets and city centres. Shopping centres are very advanced with marketing strategies to increase retail sales for their retailers. The Canberra Centre advertises frequently to attract residents from the centre catchment area including Queanbeyan residents. In addition the city centre has almost $2m to attract customers.

RISK: The City centre continues to lose market share to the Canberra centres. More shops become vacant and very few new retailers are attracted to the CBD.

ACTION: Council and a business steering group should consider a range of programs that can be delivered if resources are made available. Develop a financial model to build the resources needed to create a marketing fund to promote the retailers and businesses in the CBD. Council is a key facilitator in supporting a positive implementation of a consistent long term funding stream. At the appropriate time bring in marketing staff from other towns and Cities with funding streams to demonstrate what can be achieved.



Digital examples include constant social media communications from the Canberra Centre.

Promotional examples to attract foot traffic:
Perth City introduced a special discovery trail to encourage families to explore the City and discover secrets and gems. It was called ‘The Secret of Point Zero’ and special plaques were embedded in the footpath design to signify the trail.

Many centres create special retail and food offers in a booklet and digital form to distribute to the catchment area. The small booklet is easy to distribute and captures all businesses in the centre. A digital version can be created to distribute through Facebook, Instagram and other social media.

Staff loyalty cards are an excellent way to build a sense of community. Staff will receive special discounts through marketing communications distributed to them. The offers encourage staff to try different lunch and dinner options around the CBD. The same database can be utilised for staff car park incentives and giveaways.

The creation of a marketing fund to promote the City businesses would open up extensive opportunities to promote the City retail and hospitality offer to potential customers. The added benefit would be the lift in profile online and through traditional media and potential retailers would consider joining other businesses in the City centre.

Marketing is very important for brand building, attracting customers and increasing retail sales.

13.15 Activation and events to attract customers

Activation and events can support tenants and businesses in a mainstreet by boosting footfall.

Large and small events play a key role in bringing customers to the CBD. The best events involve a significant number of the retailers and businesses in City centre which takes additional resources. Providing event patrons with marketing material can encourage repeat visits and provides businesses with extra exposure.

The mid-week market in Crawford Street is an example of a small activity that could grow larger with more resources behind it. Weekend events and activities can attract families especially during school holiday periods. An attraction like the 'Wattman' train can provide a constant activity that customers will be drawn to with their children. While it requires an upfront investment the benefits will be ongoing for retailers. The playground near the Riverside Plaza is a visible example of a high quality attraction.

Activities and events need to have a unique Queanbeyan brand to them. Over time these unique events will be recognised on the quarterly and annual calendar. However the quality and consistency of events and the marketing of these events will again rely on consistent funding.

OPPORTUNITY: In addition to unique events that include businesses a big attraction could be introduced that will generate ongoing foot traffic around the CBD. Retailers rely on a constant supply of visitors and customers especially during peak shopping periods at Christmas time, Mother' Day and School Holidays.

RISK: That customer numbers in the CBD are insufficient to sustain more retail.

ACTION: Explore a range of activities that retailers can be engaged in. Geelong delivers an excellent 'retail' school holiday program that involves over 300 businesses. Show them the promotional opportunities linked with every City event to gain their support. Families are very important for the future growth of vitality in a City centre. A Monster Mural program is available from the USA and it offers a flexible / portable program that can be adapted to mainstreets and City centres.

13.16 A clean and safe environment to improve the customer experience

Cleaning and safety are two non-negotiable elements for customers.

A clean and safe shopping street is a basic expectation by customers when they are shopping or visiting in Queanbeyan. If shoppers feel intimidated or threatened they will not be encouraged to stay in the CBD for long or revisit. Many of the successful mainstreet management models started with cleaning and safety as a foundation to many other successful programs including marketing and events.

Street cleaning and monitoring conditions during the day improves presentation and conducting monthly cleaning/maintenance inspections with Council operations staff will lift standards over time. Maintaining a close relationship with the police is also important. A busy street is also less likely to have crime issues but all retail and Council staff must be diligent.

OPPORTUNITY: Improving the public amenity and urban design of the streets requires a consistent program of improvement and maintenance. Focus on Monaro and Crawford Streets and busy car park areas near Kmart and Woolworths in the first instance. An initial audit followed by a weekly monitoring program will improve conditions for the customers and visitors.

RISK: Messages about an improved city centre are not visible when customers visit. First impressions are critical when marketing to customers.

ACTION: Map key areas of the city and draw up a monitoring program with responsible staff. Reinstate a cleaning regime required to deliver an excellent result. Deal with issue identified in the audit with various sections of Council. Ensure a manager is responsible for the program.

Example: Philadelphia has turned the city around after facing serious crime and cleaning issues. The streets are cleaned daily and monitored constantly to deliver a pristine customer and visitor environment.

13.17 Consistent trading hours

Shops and attractions need to be open when the public wants to access them. Shopping centres excel in this area as they maintain a high percentage of stores open consistently.

A recent survey on a Saturday revealed that only 32% of Crawford Street shops and 37% of Monaro Street shops were open to the public. The Canberra centres are open 7 days a week with over 90% of their shops and services available to shoppers and visitors.

The shortfall is due to the fact that:

- The majority of shops in the CBD are professional services that operate mainly Monday to Friday
- The lack of foot traffic due to competition from larger shopping centres 99% open
- The strong marketing of other centres luring customers away from the Queanbeyan CBD

Shopping centres excel in this area and Queanbeyan should maintain a good percentage of businesses open on the weekends to be competitive. It is the first rule of proving high quality customer service – the shops have to be open and Saturdays and Sundays are important because customers want to visit during their leisure time with their families. Some stores even close before 5pm during the week which signals lack of demand and foot traffic at these times.

OPPORTUNITY: The opportunity created by the new cinema and businesses in the retail core can provide a catalyst for businesses to be encouraged to open longer. Marketing the City retailers and events will encourage more people that should flow through to the retailers.

RISK: More and more shops close early and customers cannot rely on them to be available if they make the effort to visit.

ACTION: Conduct spot checks to monitor retailers not open during regular trading hours and weekends. Work with the new business group to seek peer to peer business support for consistent trading hours. Deliver events and marketing programs that increase foot traffic and encourage businesses to open longer.

13.18 Potential markets to increase market share

Access to new markets will be essential to sustain future retail development.

The potential development of the secondary trade area will be an area of potential growth for Queanbeyan retailers. However new markets must be considered in addition to residents. Conference facilities, entertainment facilities such as the Performance Centre and an active events program will tap into new markets and increase visitor numbers.

If the offer is attractive there are a range of customer and visitor markets including leisure tourists - international, interstate, regional, business tourists, conference delegates, visitors staying in hotels, apartments and hostels, residents – locals living nearby and in the surrounding catchment areas, shoppers and day visitors, local workers and staff – retail, hospitality, tourism, services.

OPPORTUNITY: Identify opportunities for new markets that will sustain retail in the Queanbeyan CBD. Consider niche opportunities that may not be suitable for a large city like Canberra. Target the development of a new 4-5 star hotel in the city centre to add new vibrancy, foot traffic and fill the accommodation service gap currently in the CBD.

RISK: Growth of potential markets is limited or not optimised and opportunities are lost.

ACTION: Work closely with the Federal Government to identify future opportunities that would provide benefits for the city centre. Develop infrastructure and funding proposals that focus on the retail core and Monaro Street that provide a positive transformation for the CBD.

***please note that the Actions listed above have been collated and categorized in the Retail Growth Strategy Action Plan (page 89) for easy reference going forward.**

Current ratings of these success factors and best practices in the Queanbeyan CBD:

	Element	Poor	Fair	Good	Very Good
1	Professional management				
2	Funding to promote the City centre				
3	Identity & character				
4	Orientation, wayfinding				
5	Clear sightlines & vistas				
6	Quality urban design and buildings				
7	Attractive vibrant corner stores				
8	A balanced mix of retailers				
9	Retail anchors and destinations				
10	Clusters of retailers				
11	Attractive, vibrant shopfronts				
12	Access by all forms of transport				
13	Adequate well managed car parking				
14	Collective retail marketing				
15	Activation and events				
16	Clean and safe				
17	Consistent opening hours				
18	Potential target markets				

14. Retail Development Opportunities, Trade Area Potential, Retail Category Growth

Key points:

- The combined trade area's current population of around 48,000 is forecast to reach 60,000 by 2036, 55% of which will be in the secondary trade area.
- There will be an increase in retail demand generated by trade area population growth in the secondary trade area. Targeted marketing campaigns must reach the secondary trade areas to be effective.
- Over 60% of food services expenditure by trade area residents is estimated to be escaping from the trade area.
- It is estimated that the lack of competitiveness of Queanbeyan's mid-market restaurants and cafes is resulting in transfer of food service spending to ACT restaurants, and total food services expenditure that is below the level achieved in markets with a good provision of casual dining options. Consequently, actual food services expenditure in Queanbeyan by trade area residents is below their expenditure potential.
- It is estimated that the trade area reasonably has the potential to reduce food service leakage from an estimated 64% at present, to 25%. The reduction in escape spending would increase food service turnover in the trade area by around $45 million a year. This additional turnover could theoretically support up to 30 additional restaurants and cafes in the trade area.
- Expenditure leakage from the trade area in other retail categories is estimated to range from about 50% for apparel to 70% for homewares such as furnishings and large appliances. These stores follow high pedestrian traffic areas such as shopping centres. Creating a strong vibrant retail core of food/hospitality can generate traffic that attracts more brands and diversity over time.

Trade Area Potential

The potential for additional retail shops and services in Queanbeyan is determined primarily by the size of the market that Queanbeyan CBD retailers can realistically serve, and the extent to which the market is already served by existing retailers. In terms of trade area market potential, the two fundamental determinants are:

Size of the Trade Area

The Queanbeyan CBD has minimal potential to increase the size of its trade area **to the west** due to existing regional shopping centres and major outlet and showroom retail precincts in the ACT. These retail nodes have more selection than the Queanbeyan CBD (particularly in higher order goods such as fashion) and they are more convenient to ACT residents.

Residents to the east of the secondary trade area are unlikely to travel to Queanbeyan for convenience shopping (such as food, groceries and other everyday needs) because centres at Batemans Bay and Nowra are closer and they have a comparable selection of supermarkets and convenience-oriented retailers. For higher order goods (such as fashion, gifts, homewares, major home appliances, home furnishings and home improvement items), residents to the **east of the secondary trade area** are likely to travel occasionally to the ACT because it is the nearest location which offers a considerably greater selection of higher-order retail goods than is available in Batemans Bay or Nowra.

The Queanbeyan CBD has a **comparable retail selection** to Nowra and Batemans Bay, with full line supermarkets (Coles and Woolworths), discount department stores (K mart and Target) and associated retailers. However, like Nowra and Batemans Bay, it lacks higher order retailers such as full line department stores (Myer and David Jones), associated higher order specialty shops and a large selection of showroom retailers such as in the Fyshwick retail precinct.

As Queanbeyan has a retail offer comparable to that of the coastal centres, it is unlikely to draw significant retail patronage from **outside its main trade area**. Residents to the east of the secondary trade area who are visiting the Canberra region typically will drive past Queanbeyan in order to shop at retail centres in the ACT that are much larger with considerably more retail selection.

Current and Future Trade Area Population

The **primary trade area** has a current population of around 25,000, and is forecast to grow by only around 1,600 residents over the 15 years to 2036.

The **secondary trade area** has a current population of around 21,000, and is forecast to increase by approximately 13,000 by 2036.

The **combined** trade area's current population of around 48,000 is forecast to reach 60,000 by 2036, **55% of which will be in the secondary trade area.**

Development Potential by Retail Category

Take Home Food (supermarkets, grocery stores, butcher, baker, tobacco, liquor shops)
Retailers within the trade area already capture most take home food expenditure by trade area residents, indicating little current potential for significant expansion. Forecast population growth to 2036 has the potential to support an additional full-line supermarket within the trade area, but the distribution of future growth and limited current provision of food retailers indicates that new and/or expanded supermarkets are more likely to be developed in the secondary trade area.

Therefore, there is little potential for another full line supermarket in the Queanbeyan CBD in the foreseeable future.

Convenience Homewares and Services (chemists, newsagents, stationery, cleaning products, hairdressers, barbers, nails, health and beauty products)
Like take home food, other convenience oriented shops and services in the trade area are capturing most of spending by trade area residents. There will be an increase in demand generated by trade area population growth, but most additional demand will be in the secondary trade area.

Meals Out / Takeaway (restaurants, takeaway food shops, cafes, coffee shops)
Over 60% of food services expenditure by trade area residents is estimated to be escaping from the trade area, but the leakage is concentrated in specific sectors of the market.

The food services category has several components ranging from quick service outlets that rely on convenience and low price, to fine dining destination restaurants. Queanbeyan has a substantial number of quick service outlets including all major fast food chains including McDonalds, Kingsley Chickens, Michel's Patisserie and others inside Riverside Plaza. The relatively small size and forecast low growth of the primary trade area market suggests minimal potential to support additional quick service outlets. At the other end of the food services spectrum, there is also only limited opportunity in fine dining restaurants in Queanbeyan because of a relatively small local market in comparison to the ACT, which has a much larger trade area population, higher average household incomes, a large workforce, more expense account dining and a substantial tourist trade.

However, a significant opportunity has been identified to recapture spending in mid-market food services including casual dining, ethnic restaurants and cafes. Queanbeyan currently has about 20 restaurants, cafes and clubs in the mid-market category, but many are in traditional high street locations (particularly on Monaro Street and Crawford Street) that no longer enjoy constant foot traffic, prominent exposure and easy accessibility, and therefore are estimated to be underperforming. In some cases, this is reflected in tired and dated premises that further compromise competitiveness. Moreover, existing restaurants are widely dispersed in and around the CBD, which effectively prevents them from functioning collectively as a dining destination.

It is estimated that the lack of competitiveness of Queanbeyan's mid-market restaurants and cafes is resulting in transfer of food service spending to ACT restaurants, and total food services expenditure that is below the level achieved in markets with a good provision of casual dining options. Consequently, actual food services expenditure in Queanbeyan by trade area residents is below their expenditure potential.

It is estimated that the trade area reasonably has the potential to reduce food service leakage from an estimated 64% at present, to 25%. The reduction in escape spending would increase food service turnover in the trade area by around $45 million a year. This additional turnover could theoretically support up to 30 additional restaurants and cafes in the trade area. However, this substantial latent demand also presents an opportunity to increase the turnover and viability of existing restaurants and cafes in Queanbeyan by creating a more conducive environment for them.

Apparel (women's, men's, youth, children's clothing, footwear and fashion accessories) and <u>Comparison</u> Homewares (furniture, appliances, computers, luggage, jewellery)
Expenditure leakage from the trade area in these retail categories is estimated to range from about 50% for apparel to 70% for homewares such as furnishings and large appliances.

Higher order apparel and homewares retailers require locations that offer a large choice of outlets for comparison shopping, and accordingly are supported by a large trade area population. Consequently, retailers in these categories are concentrated in regional shopping centres and in major showroom precincts.

Regional shopping centres typically have a minimum size of 60,000m², or around three times the size of Queanbeyan's largest shopping centre, Riverside Plaza. Moreover, they typically require a trade area population of at least 75,000. However, in view of the proximity of Westfield Woden Shopping Centre, Canberra Centre, and the Fyshwick and Majura retail showroom precincts, a minimum trade area population of 100,000 is considered a more likely requirement.

The Queanbeyan trade area is currently less than 50,000 and is forecast to reach only 60,000 in the next 15 years. Accordingly, Queanbeyan does not have a market of sufficient size to support a large regional shopping centre*. Similarly, Queanbeyan is an inappropriate location for most large-scale retailers due to the proximity of major showroom precincts at Fyshwick and Majura which include Queanbeyan in their main trade areas. As the trade area market grows, it has the potential to support minor additions to existing comparison retail provision, but a significant reduction in expenditure leakage in these categories is highly unlikely.

(*Regional shopping centres require a full line department store anchor. David Jones is considered a highly unlikely candidate because of its existing stores at Woden and Canberra Centre and the demographic characteristics of the trade area. Myer (Belconnen, Canberra Centre) is also unlikely to establish in Queanbeyan in the foreseeable future due to insufficient local market size and the retailer's current strategy to reduce the number of stores.]

Retail Development Opportunities for Retail Sub-Categories

Department stores	These stores locate in shopping centres and large city centres
Discount department stores	Kmart, Target already represented in Queanbeyan, BigW possible
Mini-major stores	Many are clustered in Fyshwick, could be attracted to new precincts
Supermarkets	Well represented and performing well in the CBD
Fashion	Clustered in Civic/Canberra Centre, new designers could develop a niche in Queanbeyan, off-price stores may consider coming
Jewellery and gifts	Rely on being close to clusters of fashion/accessories stores
Food **Queanbeyan's opportunity**	**Restaurants – a big opportunity to capture resident expenditure** **Cafes & bakeries – are a critical part of the mix to attract custome** **Takeaway food – complements the restaurant/café offer** **Fresh Food – a key retail category to attract regular customers**
Homewares/tabletop	Large homewares stores can add to the retail mix especially food
Leisure	These stores open near successful retail precincts and centres
Cinemas	New entertainment options could provide a catalyst to a better mix
Services	The category needs to be complemented with other retail categories
General	This complementary category will grow in an expanding mix

DEPARTMENT STORES (e.g. MYER, DAVID JONES)
Larger retail centres are anchored by large department stores that must be near the nucleus of shopping specialties, arcades with a constant supply of traffic provided by workers, commuters, tourists and residents. Myer and David Jones are located in the Canberra City Centre where they can access constant traffic. It is highly unlikely that a department store would set up in Queanbeyan when they are consolidating sites and in some cases downsizing to contain costs. Discount department stores like Target, Kmart and Big W will locate in regional locations like they have in Queanbeyan to capture market share by providing a range of soft goods including fashion and homewares at lower price points.

DISCOUNT DEPARTMENT STORES (e.g. TARGET, Kmart, HARRIS SCARFE, BIGW)
The Discount Department store category is well represented by Target and Kmart in the CBD. The Harris Scarfe store relocated across the border to the Canberra Outlet Centre and doubled in size to 2000 square metres in 2016. The vacancy still sits idle. The changes in head office management will be considering Target and Kmart stores around the country for current performance and potential growth. The location of the Cinema on the upper level of Kmart will be a positive boost for customer and visitor numbers. Big W services the catchment area from Majura.

MINI – MAJOR STORES (e.g. HARVEY NORMAN, JB HIFI, REBEL SPORT)
The mini-major category includes stores like Rebel Sport, JB HiFi, Apple and EB Games. The stores are usually larger than a small specialty store but not as large a supermarket. If these stores are strategically placed they can attract a range of smaller specialty stores and boost the retail offer. Mini-majors are very important in the mix of stores provided by shopping centre developers because they specialise in categories, carry a wide range of product at competitive prices and use floor space efficiently. The issue in Queanbeyan is the major competition of mini-majors and bulky goods retailers so close at Fyshwick. The choice of businesses and allocated floor space makes this centre extremely competitive. The Canberra City Centre also offers a wide range of mini-majors.

SUPERMARKETS (ALDI, WOOLWORTHS, COLES, IGA, SUPERBARN, FOODTOWN)
Supermarkets are the key anchor store for many precincts and centres because of their ability to constantly draw customers frequently and provide a stable customer base for surrounding specialty shops. The CBD is fortunate to have Aldi, Coles and Woolworth's supermarkets within close proximity to each other and convenient car parking available for the benefit of customers. The escape expenditure in this category is close to 10%

compared to other retail categories with over 50% loss to competitors. The wide choice of products at a range of price points supported by aggressive advertising and promotion is very attractive to customers and is a key driver of supermarket success.

FASHION – WOMEN, MEN, CHILDREN, CASUAL, YOUTH, ACCESSORIES

The Canberra City Centre positions itself in the market as the fashion leader. The Canberra Centre alone offers 74 fashion stores for customers in addition to the fashion departments within Myer, David Jones, Target and Kmart. Fashion and accessories stores need a critical mass of stores that appeal to a wide range of customers to be successful and they must keep abreast of the latest trends such as fast fashion stock turns to keep their product fresh.

The combination of bricks and mortar stores with a very active online presence has created many challenges for the fashion industry. The short term opportunity for Queanbeyan could be the provision of short term space for up and coming designers of fashion and accessories in vacant shops or short term leasing areas.

JEWELLERY & GIFTS

The category of jewellery and gifts includes manufacturing jewellers and gift stores like Swarovski crystals. Jewellery stores complement fashion stores very well but again a critical mass of stores coupled with fashion and accessories stores is required for success. The Canberra City Centre provides and extensive range of 13 jewellers that target City workers and upmarket customers.

FOOD – Restaurants, Cafes, Takeaway, Fresh Food

The food, beverage and hospitality categories are where the biggest opportunities lay for Queanbeyan. The higher incomes in the catchment area and current escape expenditure indicate potential retail and hospitality growth with the right mix.

I. Restaurants – dining experiences, unique & diverse

The restaurant category is not well represented in the Queanbeyan City Centre and many local residents bypass it when choosing café restaurant options as evidenced by the significant escape expenditure of almost 65% out of the catchment area to other centres. However clusters of restaurants being utilised as the anchor stores for large shopping centres in all corners of the world. Customers want the staple meat, fish, pasta and chicken presented alongside the latest trend foods. In addition customers want a full offer of international flavours and cuisines including Mexican, Italian, Greek, Asian, Turkish and Australian in a more authentic setting than food courts offer.

Crawford Street provides some excellent opportunities for new cafes and restaurants while Monaro Street is full of opportunities if the environment was more customer friendly with slower less noisy traffic and traffic calming urban design that attracts customers. The availability of wider shopfronts for restaurants (and cafes) can be easily accommodated due to the availability of larger shop footprints. The opportunity to sub-lease the back 25% of very large stores can support the hospitality businesses through more appropriate rent structures. Assessing corner sites should also be considered for alfresco dining associated with restaurants and cafés.

An important strategy is to locate the restaurants into a precinct or 'Eat Street' as a food cluster that offers food choices and dining options that creates atmosphere and attractive locations for customers. New design features are capturing customer's imaginations and bringing customers from further away. Shopping Centres are focused on this the

restaurant category to build customer experiences in the centre.

The development of an 'Eat Street' with outdoor dining experiences enhanced by quality urban design elements and sought alfresco seats and tables on the footpath can add to the point of difference for Queanbeyan as a unique and attractive experience not easily duplicated by shopping centre developers.

Throughout the States of America corner restaurants and cafes are used as key anchors and people attractors to revitalise and inject life back into precincts. Corner sites are important in a street environment due to their prominence and ability to exude a quality and lively image for the precinct when motorists and pedestrians see them.

II. The Café Experience – great coffee & great food

The Australian café culture is an important part of daily life. Good quality coffee, cakes and desserts are part of travelling to a City centre to enjoy a memorable experience with family and friends. Mainstreets and City centres have the opportunity to create unique and diverse locations that provide a point of difference for customers wanting an authentic experience. The wider footpaths along Crawford Street support the 4th Seed and CIAO cafes to provide outdoor dining areas that activate the street.

The Degraves Street precinct in Melbourne is a classic example of an organic attraction that customers, workers and visitors flock to. Cafes attached to bakeries are also extremely popular as they provide a wide selection of in house cake and pastries not available in many other locations. The Beechworth Bakery is an outstanding example of a mainstreet bakery that attracts customers from a very wide catchment area and boosts the economy of the town for all traders. Authentic Italian cafes are particularly popular with Melbourne's Brunettis and the European and American sensation Eataly that leads the way by providing memorable food experiences. Eataly combines a café, restaurant, cooking school, fresh produce, wine and an outstanding customer and visitor experience that delivers the most authentic Italian cuisine imaginable.

- **The Bakery Café Experience**

The impact of a Bakery Café on a mainstreet cannot be underestimated as a retail destination or anchor. Many country towns have regenerated their retail mix after the local bakery was given a boost in the mainstreet by an entrepreneurial owner with plenty of drive. Take Beechworth Bakery is an outstanding example. What started as a humble bakery has become a phenomenon in Albury, Ballarat, Bendigo, Echuca, Healesville and Yackandandah as well. Tourists travel long distances to enjoy the Beechworth Bakery 'experience'.

Australians are well known for their coffee consumption when travelling or living overseas and they demand distinctive, high quality coffee. Customers are focused on espresso-based coffee combined with good food including pastries and other delicacies. A large bakery/café with excellent parking facilities, top quality cakes and coffee could be a game changer as a major attractor in the CBD and a catalyst for future retail businesses to establish in the CBD.

Overseas cafes focus on an excellent range of baked cakes, pastries and chocolate. Enter Café Demel in Vienna for example and you are overwhelmed by the experience, the very same experience is needed in Queanbeyan to create this must visit destination as a clear point of difference to the centres across the border. Marketing these destinations will be critical as they can be positioned as a great retail experience that families love.

III. Takeaway Food

Food courts and takeaway food outlets complement the restaurant and café offer perfectly. Takeaway food outlets provide shoppers with a location where they can consume food without the full restaurant experience. The cluster of food takeaway operators in the Riverside Plaza services shoppers and visitors to the centre but the offer in the street environment is in many separate locations such as Thai on Lowe Street, Chicken, Indian and Chinese on Crawford Street, Italian, Malaysian and Turkish on Monaro Street.

IV. Food - Farmers Market Experience

In Australia and the United States fresh food and supermarkets are proving to be a reliable anchor for regular customer visitation to centres. Even if the customer does not purchase the dress or gift they saw in the window when passing by with the food trolley, there is a solid opportunity for them to return and purchase it at a later time.
Streets and towns in Australia and overseas have introduced Farmers Markets with fresh farm produce including healthy organic food of the highest quality. These markets are proving to be very successful.

Council has worked hard to create a small market on Crawford Street each week. The Southern Harvest Market is a step forward for future fresh food options outside of the supermarket offer and could form the basis of a larger market in the future to maintain a village feel and increase foot traffic.

In Santa Monica for example the Farmers Markets were set up alongside streets near 3rd Street Promenade shopping precinct on Wednesdays and Saturdays attracting very large crowds. However the indoor Fyshwick Farmers Markets are a very formidable competitor and the Strategy to rely on fresh food outside the supermarkets needs to be carefully considered. The upside is the new life and activity they inject into City centres.

HOMEWARES / TABLETOP / GIFTWARE

The homewares category is a significant destination category with some attractive new stores from overseas entering the Australian market over the past few years. Stores like Williams Sonoma and Pottery Barn from the USA can attract customers from all over the State. The homewares category can complement the hospitality category very well as a destination category however the offer must be top shelf. While customers are browsing they can add the experience of enjoying a coffee or a meal.

Homewares stores need a significant amount of space and complimentary retail around them. It may be a future opportunity when the space is available but the larger blocks and shop footprints the City centre can provide future opportunities when the time is right.

LEISURE

The leisure category includes books, music, newsagents, communications and outdoor adventure stores. The category has been affected by the availability of online retail including Amazon. Adventure stores need to be clustered together in large footprint stores and the DFO provides a range of these stores.

CINEMAS
The new cinema is approved to be established above the Kmart building is a positive step forward for Queanbeyan but the complimentary after movie coffee, lunch and dinner offer must also be available. Shopping centre developments have previously included anywhere from 6 – 30 cinemas in the one complex, however recent developments have included smaller numbers of screens and boutique screens with less seats. Smaller cinemas have to negotiate hard to secure the best films for their patrons.

SERVICES
The services category is an important category for mainstreets, retail precincts and retail clusters. Often doctors, dentists, physiotherapy and other specialists are located in medical centres or other street locations external to a shopping centre. The opportunity for Queanbeyan here could be in the area of personalised services such as day spas, wellness clinics, hairdressers and boutique fitness gyms can support the image of Queanbeyan and its brand.

Several vacancies available currently could be considered for these uses as they are destinations in their own right. The services category represents more than 50% of the tenancy mix with dentists, doctors, lawyers, medical, travel and health businesses.

The retail approach is to extend this visit to a medical specialist by attracting customers to walk along the street and visit a cafe and one or two other stores and impulse buy. Shopping centres focus on a 20% mix of services, banks, travel and hairdressers in the overall mix. It is not uncommon for street precincts to have a solid foundation of service related businesses that make up more than 30% of the mix.

GENERAL
Hardware, garden shops, pet shops and florists generally fit neatly into the mix of a shopping centre internally or externally due to the high levels of passing traffic and ample car parking. Florists are usually located near fresh food market operators in very convenient locations. Again the opportunities here are future possibilities with changes to the available spaces in Queanbeyan.

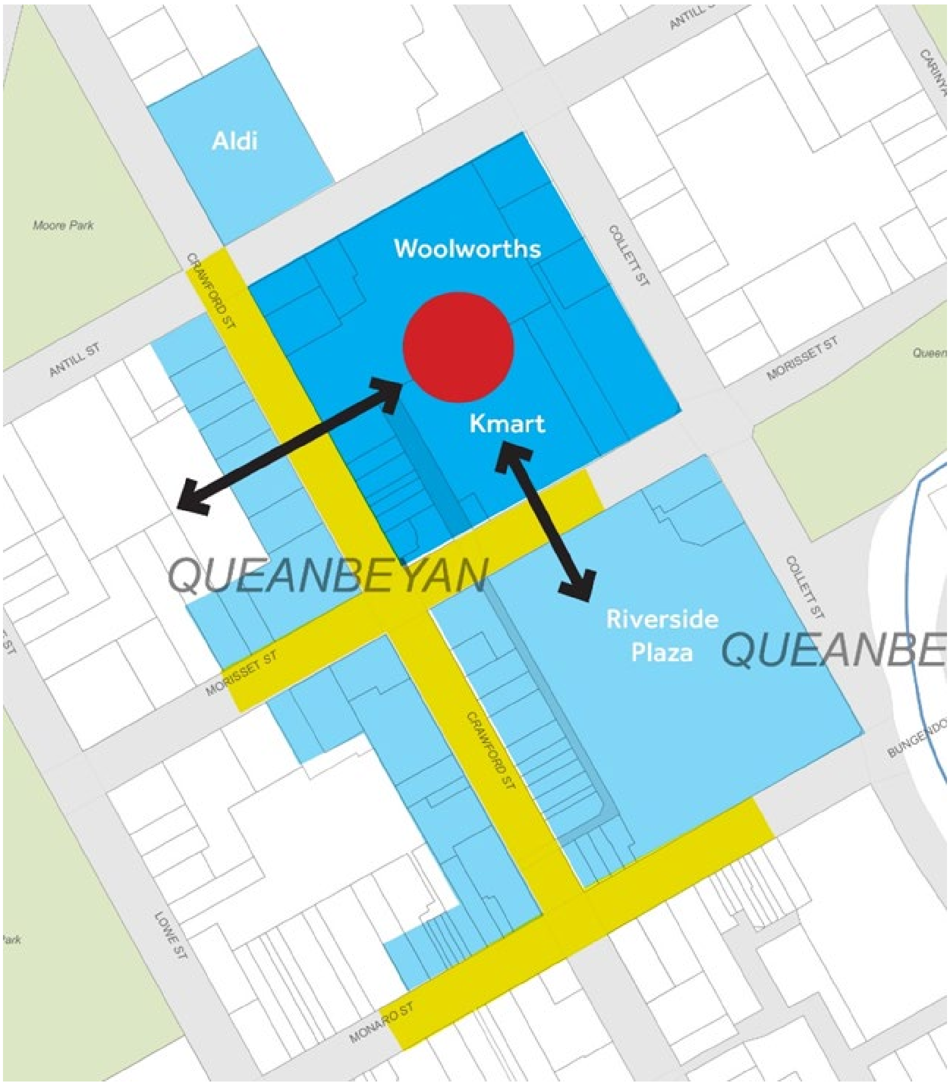
IN SUMMARY
Food is the key category that presents many opportunities for Queanbeyan however the configuration needs to support the combination of restaurants, cafes and takeaway food in clusters and groups of businesses that have the potential to optimise the use of the consistent pedestrian traffic. The personalised services category must also be considered as it offers the opportunities for quality brands to be associated with the iconic Queanbeyan. Similarly larger homewares stores should be considered in the overall mix.

The tenancy mix will continue to work according to market forces, but if a proactive approach is adopted with definite leasing and tenancy mix goals in mind, better results will be achieved. A business recruitment program should be developed and resourced, including a package of information with demographic information, pedestrian counts, traffic volume, marketing and Business Association assistance. A Queanbeyan Business Association could provide valuable support.

In Queanbeyan some physical changes to the environment coupled with a strategic plan to develop the retail offer will deliver positive results.

The retail core block that includes Woolworths, Kmart, Proposed Cinema, the Crawford Centre, Medical Centre, small specialty shops and car parking is the key location to make urban design and retail improvements for the future.

A strong link to the Riverside Plaza and Crawford Street and the treatment of Morisset Street is integral to the successfully rebuilding a balanced mix of retail businesses.



15. Retail Trends and Challenges

Retail across the world has been more challenging since the GFC due to fluctuating economic conditions and consumer confidence. The Government has provided stimulus packages in the past to boost spending over and above normal household expenditure and generate turnover for retailers but confidence levels have been inconsistent.

Australian shoppers have embraced online shopping which now accounts for 7.4% of Australian spending (source NAB Online Index) and continues to grow year on year although slower than previous years. Industry commentators suggest online could account for up to 15% of all retail by 2027 with a significant uplift in grocery sales online. The arrival of Amazon has created some uncertainty in the market related to the possible impact on small retailers and larger retailers like Woolworths. Many retailers have not broadened their marketing through online to capture a share of the digital market over and above a website or infrequent social media posts.

Successful retailers are using technology to create great in-store experiences, target customers and manage customer relationships. The increased use of mobile phones for shopping and research must be considered in retail marketing plans. Customers also want more personalized messages and contact with their favourite stores and they need to know more about their origin and content of products. Retailers should engage in basic social media such as Facebook and Instagram as a minimum to lift their store profile and contact with customers.

The convergence between digital and physical retail means it is more important to provide a captivating experience when customers visit stores and businesses. Leading retailers are providing stimulating experiences and high quality instore fit-outs to engage customers and turning browsers into buyers. Great retail examples include Apple, Top Shop, M&M, Diesel, Aesop, Waitrose, Lowes, Lego, Adidas, Nordstrom and TJ Maxx. It will be important to maintain an edge over competitors by providing leading edge design and memorable experiences when creating new Queanbeyan restaurants, cafes and specialty stores.

The hospitality category has continued to grow rapidly and much of the leasing demand has come from this sector, while enquiries for fashion, homewares and gifts has been impacted by online shopping and fewer stores are being opened in these categories. Shopping centres have revised their mix to include more services, restaurants, cafes, fresh food markets, unique experiences, leisure and entertainment.

The Queanbeyan CBD can also position itself in the market by providing unique experiences for diners and visitors to maintain a niche edge against the formidable competition but the focus needs to be on unique, independent, boutique brands that offer high quality products, services and experiences.

16. Customer and Business Survey Results

To complement the analysis and development of the Queanbeyan retail and commercial situation shopper and business surveys were conducted by telephone, online, in the CBD and through face to face interviews. Regular City shoppers, non-City shoppers, and residents were asked about their perceptions of the City centre, their likes and dislikes and improvements that could be made including the type of shops they would like to see in the CBD. The surveys also highlighted the preferred centres that residents chose to spend their household income, dine out and be entertained.

Main shopper/consumer findings:

1. Local residents travel to Canberra for Myer/David Jones and may also visit Kmart, Target or BigW
2. Consumers chose Coles, Woolworths and Aldi for their **grocery and fresh food** shopping in Queanbeyan
3. **Target and Kmart** were popular locally for department store type of goods in Queanbeyan
4. The close proximity and **'convenience'** along with easy and free parking drives loyalty to Queanbeyan
5. Canberra and the ACT centres are 'comparison' goods shopping (fashion, homewares) centres
6. Residents travel to the CBD by car and they prefer to shop in a single location to meet their needs
7. Customers **dislike vacant shops, poor buildings** and the **lack of variety** available in Queanbeyan
8. Queanbeyan has a genuine country feel and **friendliness** that is very appealing
9. The general **outdated appeal** of the CBD could be improved
10. Customers are seeking **entertainment** and **outdoor dining** options in Queanbeyan
11. Customers want improved traffic management and **pedestrian access** throughout the City centre

Main business owner findings and barriers to success:

1. Most businesses are **positive** about their businesses but less positive about the CBD
2. Businesses are concerned about high vacancy rates, poor shopfronts and traffic management
3. They acknowledge the **efforts** made to improve the CBD by Council
4. They would like to see a greater **variety of shops** to attract shoppers to Queanbeyan
5. The CBD does not have a distinct shopping and dining **brand or identity**
6. **High business operating costs including rent and taxes** are not offset by sufficient retail sales
7. **Unappealing surroundings have led to a reduction in pedestrian traffic on the streets**
8. **The CBD lacks retail identity and character**
9. **Heavy traffic along Monaro Street affects retail and service customers**
10. **Opportunities to grow** exist outside the local area residents
11. Business owners do not feel they have enough **say** in CBD plans
12. Problems can be overcome through a **collaborative approach**
13. **Creating a vibrant City centre** cannot fall on Council alone
14. The **private sector** is also responsible to improve the vibrancy of the CBD
15. Businesses are **willing** to be engaged in the Retail Growth Strategy

The top priorities identified through the research needing attention include areas identified in other sections of this **Retail Growth Strategy** including:

- **Improving the appeal and presentation** of the CBD environment including cleaning, shopfronts, buildings, vacancies and improving the business mix
- **Provide more attractive public spaces** for people to meet and gather:
- more **accessible parking** for customers
  - a reduction of **heavy traffic**
  - **increasing pedestrian foot traffic**
  - **supporting and engaging local business**, better planning and less regulation by government
  - more **events, marketing and promotion** to increase awareness and better customer **facilities**

16(c) More research findings

There are opportunities to create a unique shopping, dining and leisure experience in Queanbeyan with a niche identity and character as many other regional towns have done when faced with challenges. Residents living locally and further afield can be drawn into a new and revitalized City centre if positive changes are made through implementation of the **CBD Transformation Strategy**.

Department stores that were frequently visited outside the catchment area included Myer, David Jones, BigW and Harris Scarfe. Other popular destinations included Costco at Majura and the Fresh Food Markets at Fyshwick. 42% of residents wanting to dine or eat out travelled to Canberra or Kingston. The Royal Hotel, Leagues Club, Walsh’s Hotel Thai restaurants Lime Leaves and Queanbeyan Thai are popular eating locations with the local residents.

Shoppers and visitors usually park under the Riverside Plaza or the Woolworths/Kmart and Aldi car parks. Almost all respondents visited medical specialists, professional services or the Post Office in the CBD. They would like to see more restaurants and cafes, entertainment for children and youths, a new cinema, more shop variety, general improvements to building and vacant shop presentation plus traffic and pedestrian movement and accessibility. Filling vacant shops will require a committed approach to retail leasing.

Shopping centre competitors

Competitive centres that regularly received a mention include Canberra/Civic, Woden, Fyshwick, Majura and Tuggeranong. In the CBD Kmart, Target, Riverside Plaza, Coles, Woolworths, Aldi, The Reject Shop, Best and Less and Op shops were popular for recreational goods shopping for locals but they also accessed these stores in other centres in addition to Queanbeyan.

The feedback from survey respondents about their fresh food shopping preferences was consistent with the Escape Household Expenditure statistics provided by Foresight Partners on page 24 of this report. The Fyshwick Farmer’s Markets provided some strong competition to the Queanbeyan supermarkets and this retail category could be expanded to incorporate unique market cafes and restaurants.

Hospitality choice is limited

The dining/eating out category does evoke some loyalty from Queanbeyan residents as they named their favourite eating places in the CBD but there were just as many that were prepared to travel to Canberra to enjoy a special dining experience. The loss of household expenditure to Canberra and Kingston could be drawn back with the introduction of more variety and more opportunities for upmarket dining. The Royal Hotel was a big favourite with residents followed by Lime Leaves, the Leagues Club, Walsh's Hotel and Queanbeyan Thai. The Millhouse Café in its unique setting attracts many customers and visitors looking for a relaxed location to enjoy a coffee and wholesome food. The Royal Hotel was also extremely popular with residents enjoying a drink in the City centre.

Frequent fresh food shoppers
The extent of competition is highlighted across all surveys and the expenditure data. Despite the competition 95% of respondents had visited the CBD in the past 12 months. Over 60% visit once a week or more often and it will be important to increase their frequency of visit and spend in a range of stores through marketing and promotional activity. More than 90% come by car pointing to the importance of easily accessible and available car spaces that turnover frequently near shops and services.

Shopping for fresh food (58% shoppers), eating and dining (30% shoppers), recreational and department store shopping and medical appointments and the post office are the top reasons to visit the CBD. Management of the car parks will be very important as the new cinema opens and attracts many new patrons visiting for 2-3 hours for a movie and a meal. Convenience, accessibility, provides basic shopping needs, the country feel, friendly and easy to walk around are some of the positive attributes respondents stated. Food is an obvious strength that should be promoted more.

Customers want – better buildings, tidy shops, less empty shops
A clear message from the surveys was that shoppers and visitors disliked vacant shops and untidy shopfronts and lack of choice in the mix of retail shops. They also stated that more cafes and restaurants would reduce their visits to Canberra. The new cinema with complementary restaurants and cafes with outdoor dining in a well-designed and attractive environment would provide a catalyst to attract more shoppers and visitors and increase their dwell time in the heart of the CBD.

The long list of new specialty stores (including fashion brands) requested by customers will not be attracted unless foot traffic in the City centre is increased and a new strategy that offers a very positive future and reduced risk of failure. The CBD Transformation Strategy is such a plan that could provide the incentive to build the retail mix when complemented with proactive business attraction strategies.

Business owners want vacancies filled and image lifted
In addition to the consumer surveys a business needs survey was circulated and 81 retail and professional service businesses provided feedback on how the business environment could be improved. Some businesses were also interviewed in person to investigate their feedback in more depth. Businesses were concerned about the poor image that buildings needing maintenance and vacant shops presented to customers and visitors. They were keen to see filling vacancies as a priority.

They currently rated the desirability of the CBD as 2.9 out of a possible 5.0 and they pointed to a poor mix of retail shops, poor street environment and the lack of attractive places for customers if the CBD is to be more desirable for businesses. In addition they highlighted the need for longer term staff car parking to ease parking demand close to shops and a majority (69%) stated that traffic congestion needed improving. They did not feel like they were represented in the decision making processes and that engagement could be much improved. Many overseas Cities have addressed these issues successfully with best practice business improvement models.

Businesses said that marketing and promotion was needed to attract more customers and compete effectively. Almost 9 in 10 (85%) businesses agreed to support a coordinated marketing and promotional approach. A successful program in Canberra commenced in

2008 using the combined resources (approx. $1.5m annually available) provided by businesses similar to a shopping centre marketing model.

The world's best practice management models are called Business Improvement Districts and they engage businesses and deliver programs that improve the business environment. Retailers working in isolation can achieve better results, increase sales and profits by collectively harnessing their financial muscle.

The benefit of surveying businesses will be seen in the future when the process should be repeated after the implementation of the Transformation Strategy to compare the current survey ratings to the next period ratings to determine if progress has been made. Reporting and celebrating the successes with all businesses will boost morale and build engagement.

17. Learnings from mainstreets and City centres worldwide

Key points:
- Manage the customer experience
- Improve the shopping and dining experience by improving the business mix
- Market and promote the offer to attract customers
- Create a memorable and well-designed environment for the customers

Shopping centres vs main streets – new opportunities
Due to the complexity of issues that main streets face every day place-management takes a leadership role on behalf of the customer and visitor to ensure they have positive and memorable experiences. Government, Council, property owners, businesses, offices, retailers and the community all have a stake in the CBD.

Who coordinates the private and public sector resources to ensure their investment delivers results and desired outcomes? Ownership of a main street or City centre is professionally known as place-management.
Place-management is delivering results in main streets and City centres across the world. Shopping centres have perfected place-management systems for their centres and City centres can use many of their techniques and processes to lift standards and make their City more economically resilient.

Who is ultimately responsible for the City centre environment? City streets are not temperature controlled enclosed centres and conditions change constantly. Graffiti, oil spills, rain, roadworks and water pipe bursts are all part of a day in the life of a City. The 24 hour nature of a City centre can place extra demands on Council resources and long term funding strategies are needed to meet these demands. Cleaning and safety is very important to customers and visitors and consistent delivery can be a challenge with so many demands on resources.

Shopping centre managers are clearly the owner of all issues in the centre. Marketing, security, cleaning, events, leases and building maintenance are constantly managed to ensure customers are treated to the best conditions possible. Main street precincts and City centres have learnt that they too can improve standards and provide customers with the best experience if they have established a place-management model. Business improvement districts are proven best practice place-management models mainstreets and City centres.

Business improvement districts started nearly 50 years ago in Canada. The Toronto Business District was created by property owners and businesses facing harsh times and severe competition from external shopping centres. The private sector worked with the Government to provide extra services over and above baseline levels. Extra cleaning, security staff, marketing and events were programmed to create a better customer environment and to attract people to it.

The important ingredient is that private businesses in the mainstreet prioritise what would make a difference to their business. A major business needs survey is distributed and feedback is collated* and included in a Business Plan Proposal. Generally in Australia cleaning and safety is not as high in the priority list as marketing, events and business support, but it depends on the location and business conditions. *(Queanbeyan has just completed a business survey and collated the results)

The businesses are engaged in the process because they are directly asked to provide input, assess the Business Plan Proposal and approve the top level actions. In addition contribute a portion of the costs to deliver the program and receive the benefits. Often the extreme competition from shopping centres nearby has an impact on main street retailers and marketing and events program increases their customer numbers and sales. The Queanbeyan CBD does not have a marketing fund but the Canberra City Centre has $1.8 million and the other competitor shopping centres such as the Canberra Centre, Belconnen, Woden and the Outlet Centre all have significant financial resources.

Queanbeyan City centre businesses would all benefit from organised marketing and promotions to the various catchment areas and market segments to attract customers and increase their sales. The business survey rated retail marketing at 3.8/5.0 and 85% of CBD businesses said they would support marketing efforts to attract more customers.

The flow on effect ensures that monthly rents are paid and property values remain stable and increase over time. A Queanbeyan CBD business needs survey has been conducted in in June 2018 and property owners and businesses were asked to prioritise their needs. The results will highlight the key issues for businesses and property owners.

A tremendous opportunity to apply a place-management model is timely using the successful experiences from overseas and in Australia. A coordinated marketing and management effort will require ‘seed’ funding to begin operation to deliver business benefits.

International case studies – UK-USA-NZ

The **Business Improvement District model** works effectively in small towns and mainstreets and very large Cities. The average number of businesses involved is in the range of 250-300 but small precincts with just 50 businesses can come together as a collective.

In small and large cities like London, Philadelphia, Auckland, Canberra or Queanbeyan; mainstreets and public places don’t look after themselves. **Not only does is the City responsible for conditions in the public realm, customer facilities and services, it also must provide a quality environment for city living, shopping, entertainment, events, leisure and social activities.**

How can a city maintain high standards all day, every day throughout the year? Customers demand high standards and they will tell others if standards fall short of their expectations. The mainstreet, city or centre providing the best experiences and customer facilities attracts the most customers and increases their economic sustainability. There are almost 3000 Bids across the world – below is a small selection of examples:

United Kingdom

Bid4Bury (BURY ST EDMUNDS) population 46,000
Website: www.ourburystedmunds.com/shops-in-bury-st-edmunds

Ilford Business Improvement (ILFORD OUTER LONDON)
Website: www.inilford.com/bid

DowntownTaunton (TAUNTON) population 106,000
Website: www.downtowntaunton.org/

United States
Bryant Park
Website: www.bryantpark.org/
Philadelphia
Website: www.centercityphila.org/

New Zealand (50 examples in the Auckland City Council area)
Parnell BID (Auckland suburbs)
Website: www.parnell.net.nz/

Takapuna Business Association (Auckland suburbs)
Website: www.ilovetakapuna.co.nz

International Success Factors for Cities and Mainstreets
"Great mainstreets don't just happen" Patrice Frey – President of Mainstreet America.

Town Centre Management – UK
*"The primary aim of **town centre management** is to create active partnerships and broad networks to develop a healthy and sustainable environment that involves and benefits all of its stakeholders. The town centre is an economic competitive location and **the public and private sectors have an equal interest in its prosperity** – the private sector for reasons of investment and the public sector through the need for an environment that all sectors of the community value".*

Successful centralised management groups and Main Street revitalisation organisations focus on four **fundamental areas of precinct business development** to achieve successful results.

1. **Management & Organisation**
    - Responsibility and accountability for the City centre
    - Promoting a clean and safe environment
    - Providing strategic long term direction
    - Providing a valuable link between Council and stakeholders
    - Building and encouraging partnerships
    - Measuring results and outcomes

Marketing & Promotion
- Communicating with customers
- Delivering a consistent message and brand
- Building a positive customer perception
- Coordinating promotions and events
- Developing sponsorship partners
- Gaining positive publicity

Business & Economic Development
- Improving the business environment and reducing vacancies
- Attracting new business, retaining current business
- Building a business community through networking

Urban Design Streetscape
- Improving the appearance and presentation of the street
- Encouraging property owners to improve shop fronts and buildings
- Providing advice to Council regarding physical infrastructure projects

- Maintain a 'wish list' of future projects and priorities

Managing the public space to meet the expectations of customers and visitors will be critical factor in the future success of mainstreets and City centres. Shopping Centres deliver a predictable and high standard of shopping facilities in a clean and safe environment. **The street environment requires constant monitoring**.

Police resources are stretched, and Council cleaners and parking inspectors are focussing on other issues that need attention. There needs to be very close regulation and monitoring of activities such as begging, that deter customers from visiting an area. Shopping centres continue to provide the safest and cleanest alternative using a place-management model. **Managing a City centre requires additional resources**.

Below is a table of priorities set by Mainstreet/City Management/Town Centre revitalisation organisations from around the world. Experts in the key components of a successful mainstreet or City centre have shortlisted areas of focus:

ORGANISATION/SOURCE	Critical Success Elements
SUCCESSES FACTORS – UNITED STATES CITY CENTRES AND MAIN STREETS	• Form partnerships • Know the vision • Create and use a Business Plan • Dare to be different – find a niche in the market • Focus resources on key areas first • The indispensable 5 M's : • Management, Marketing, Maintenance, Market knowledge, Money
DOWNTOWN REVITALISATION USA	• Private/Public Partnerships • Downtown Vision • Market Driven Business Plan – market analysis • Unique Niches • Business Attraction, Business Counselling / training • Focus groups – research • Downtown housing • Marketing Campaigns – high quality • Management Techniques learnt from shopping centres – hire a manager, have a leasing plan, high maintenance standards, reliable ongoing funds
ROBERT GIBBS (USA) CITY CENTRE AND MIXED USE PLANNER	• Presentation of storefronts to the street • Pedestrian circulation • Strategic tenancy mix to attract customers • Urban Design – high quality • Ample parking for customers • Management of the public realm
BUSINESS IMPROVEMENT DISTRICTS (CANADA, USA, UK)	• Economic Development • Cleaning, Maintenance and Safety • Marketing, Events and Retail Promotions • Budget – sustainable funding sources for continuity • Strategic Initiatives

ORGANISATION/SOURCE	Critical Success Elements
MAIN STREET AMERICA	• Organisation – management, partnerships, volunteers, fund raising, public relations, manage finances • Economic restructure – market analysis, strengthen existing business, recruit new business, develop finance initiatives to aid development and upgrading • Urban Design – building improvements, public space, design regulation and review, preserve quality • Promotions – marketing strategy, special events, develop image, retail and business promotions • Research & consultation
UK TOWN CENTRE MANAGEMENT	• Attract Investment • Management • Safe and accessible • Marketing strategies • Budget • Steering Group or Board • Business Plan • Shared Vision
RUNDLE MALL MANAGEMENT (COUNCIL SUBSIDIARY)	• Management, Business Planning, Strategy & Direction • Marketing & Events, Research • Cleaning, Safety, Presentation • Budget & financial management • Economic development, Leasing plan • Performance measures – vacancies, turnover, traffic counts, brand awareness • Council liaison, Stakeholder Governance & engagement • Urban Design improvements wish list

The Association of Town and City Management and the Institute of Place Management in Manchester have developed an excellent guide called:

‘100 Ways to Help High Street’

It can be accessed at www.100ways.org.uk/

Streetscape and building façade presentation impact on the customer experience

The value of physical presentation of a main street cannot be underestimated. High quality streetscape and building facades can attract better quality retailers selling quality goods and paying higher rents that flow into the value of the property for the property owner. First impressions are very important when customers and visitors are browsing and shopping.

Many Councils across Australia have established **shopfront improvement programs** to encourage businesses and building owners to paint and upgrade their buildings. Shopping centres make no secret of the fact that every shop has a built in clause in their lease that stipulates an upgrade when the lease is renewed – usually every five years. Compare this outcome with some mainstreet buildings that have not seen paint for 20 years. **While not every mainstreet can look like a 'Disneyland Main Street' it does certainly show what a street would look like if every property was painted and maintained to provide visitors with a highly valued stunning first impression.**

Closer to home in New South Wales there are mainstreets that stand out for their attention to detail and presentation. The return to quirky small shops is what customers want when they are seeking an **'experience'.**

Great examples include:

- **Darby Street** Newcastle
- **Kangaroo Valley** and **Berry** on the South Coast
- **Leura Village** in the Blue Mountains

Private properties in the mainstreet make up almost 50-60% of what the customer and visitor can see. The Council and Government manage/own about 30-40% - roads, footpaths, banners, signage etc. of the customer visual experience and first impression.

Shopfront improvement programs around the world are showing their worth. Rundown buildings, vacant shops and broken windows do not win customers affections.

Council can provide valuable architectural, maintenance contractor, painting, glazing contacts and support for building owners to encourage improvements. The catalyst is a shopfront program that offers $ for $ support as this initiates a process and conversation between private owners and Council.

It is strongly recommended to provide support funding through a Queanbeyan CBD Shopfront Improvement Program in future budgets.

Public and private investment in visible physical features

The public and private investment in physical features will demonstrate that the City is changing for the better. The successful delivery of projects identified in the Transformation Plan will signal that investment is happening and change is progressing. Public opinion will change as each hurdle is jumped and another project whether large or small is completed.

Many cities, towns and mainstreets have conducted a 'first impressions' exercise to determine how they feel about the physical features of the city. Progress can be monitored through the use of annual surveys and interviews to determine public perception of progress. Promoting the best examples of change will provide more confidence in the process and gain more support from the private sector.

It is now becoming for common practice for a small percentage of a private development to be utilised for improvements adjacent to the development to improve the public amenity for the community benefit. Working with property owners to upgrade building facades can be a slow process but the end result will complement the progress being made through the Spatial Business Plan.

Forming a new progressive business group to support the direction and delivery of plans will provide a conduit directly to property owners to gain their support. Working closely with leasing executives in the city will provide another communication channel directly to private sector stakeholders.

It is strongly recommended that support for a business led group establish themselves to provide leadership for the business sector and to guide the Retail Growth Strategy forward.

Trading hours – core hours and extended hours

The gap between shopping centres and mainstreets is very obvious when many individual mainstreet shops run their opening hours in complete isolation from the rest of the street. Even core trading hours of 9am to 5pm can be difficult to deliver. Customers want a reliable choice when they consider driving to Canberra or taking a chance on a mainstreet shop being open. In a shopping centre the retailers vote for the core trading hours and then they follow them for the benefit of their customers.

The number one rule of customer service: the shop doors must be open when the customers want.

It could be argued that shops do not want to pay wages when there are no customers in the street. This may be true but unless there is a change businesses will find it difficult to grow. A recent survey on a Saturday revealed that **only 32%** of Crawford Street shops and **37%** of Monaro Street shops were open to the public.
The risk is that customers will not expect shops in the City centre to be open at all on the weekend. The customers will be resigned to the fact that the shops in Canberra will be open 7 days a week. In retail terms weekends are valuable shopping, dining and entertainment days when families try to avoid the hustle and bustle of a big City and choose to shop and play locally in Queanbeyan.

The new cinema complex will provide a new level of entertainment for the community. The cinema needs to be supported by a choice of food and hospitality to attract more families. The success of the cinema and associated stores will depend on the complementary retail and hospitality businesses nearby. Shops near the cinema will need to open longer hours to optimise the additional foot traffic attracted.

18. Links to the Spatial Business Plan, Integrated Transport Plan and Car Parking Strategy

Key points:
The desirable outcomes:

- High quality design & streetscape
- Good access to shopping facilities
- Good circulation and access for cars and buses
- Convenient parking for customers
- Mainstreets not dominated by heavy traffic
- Create unique customer experiences through a well-choreographed plan to attract new retailers to add to a balanced business mix to reinvigorate the CBD.
- Create conditions for new retailers to be located in the commercial centre and not on the periphery of the CBD.
- Facilitate favourable conditions for successful retailing and increasing property values through positive interventions and strategies often used by shopping centre owners.
- Consider space for small businesses and start-ups in the back sections of larger retailer premises.
- Support potential retailers when dealing with the complex planning issues that may confront them.

18(a) Investment opportunities through planning
Retail is going through a great deal of change and planning needs to respond to local issues and needs while understanding customer behaviour and changes in a dynamic retail world. New retail formats are being introduced and main streets and City centres are now embracing inner city living above retail and various degrees of mixed use development. While technology is affecting large and small retailers consumers also want social connections in locations that offer a ‘sense of place’.

Shopping centres and large format ‘bulky goods’ retail centres have impacted on the vitality and retail landscape of City centres all over the world. Locally the level of competition created by the Canberra centres is intense however the Spatial Business Plan and CBD Transformation offer a new opportunity to plan for a sustainable, vibrant and prosperous City centre. Zoning can support a compact and vibrant CBD that attracts residents, shoppers, diners, visitors and tourists.

Mainstreets such as Crawford Street and Monaro Street have an important role in the local community as they offer a valuable alternative to the multiple stores and duplicated outlets provided in centres. Strategic planning can revitalise the heart of the Queanbeyan CBD and facilitate the vibrancy and vitality residents are seeking. Customers want unique experiences and a well-choreographed plan to attract new retailers to add to a balanced business mix will sustain the CBD into the future. Encouraging new start-up businesses and unique retailers adds to the diversity and unique selling proposition for residents.

The NSW Department of Planning & Environment captures the overall objective very succinctly: “The retail sector contributes to the local productivity, place-making and the vibrancy of local communities. Place-based planning for retail should remain the hallmark of a flexible planning system in NSW. These responses are locally responsive, giving power to local communities to shape the future of their local areas while providing consistency and certainty for businesses.”

The Planning code in Queanbeyan encourages quality building form to create a sense of place and distinct character in the CBD. The code aims to create an urban landscape that residents find enjoyable and comfortable while retaining a country town feel and human scale. Adaptive reuse of old buildings is encouraged and corner sites are important in development plans. Ensuring that mainstreets maintain their character is prescribed through the code that requires active street frontages and heritage with the retailing function given priority in both Crawford Street and Monaro Street.

In Queanbeyan the large land holdings and large retail footprints present many new opportunities. Creating high quality laneways with character and vibrancy highlight the diversity and unique position of the CBD when compared to hard top shopping centres. The large retail footprints provide new opportunities for multiple use shops with start-ups, designers and creatives behind the selling space to maximise the use of space effectively. Zoning can support pop-up stores to progress emerging new businesses in the CBD.

Zoning can encourage retail and while the exact mix cannot be mandated by Council, zoning can support a prosperous business environment that retailers are attracted to. Creating great places starts with design and Jan Gehl the highly respected place maker promotes the fact that economic success can be linked directly to the design of public space and the public realm. Projects led by the public sector can attract private funding and deliver economic benefits for both sectors.

Incentives to encourage growth

Queanbeyan Palerang Council can consider a range of pro-active measures that will incentivise new development and activity in the commercial zone and more particularly in the Retail Core blocks near Kmart and the Riverside Plaza.

Council can investigate fee discounts that apply to footpath displays and signage, encroachment fees and planning approval fees in addition to fast-tracking change of use submissions that enable new business starts. Additional complications around heritage issues could be minimised through streamline processes to encourage reuse of older inactive buildings.

Council could consider financial incentives to retro-fit existing buildings from exterior facades through the Shopfront Improvement Program to supporting the relocation of retail and offices into the CBD and assisting with the cost of meeting regulations. The conditions should be based on the number of new employees relocating to the CBD and if the retailer will add value to the desired business mix.

A very successful program in Upper Hutt NZ has been extended for a further 3 years after delivering over $10 million in refurbishments and façade improvements. The CBD has benefited from $6 million worth of new investment with a cost to Council of approximately $1.5 million. Council provides $2,500 for façade improvements of $5,000 or over and $10,000 for retro-fits valued at $40,000 or more in the CBD. Significant retail stores that employ 30+ FTE can access a Council contribution of $50,000 maximum. The key is making a change by attracting attention to the improvements and economic benefits to the owner and the CBD.

Improvements that encourage Placemaking and ‘sense of place’

Consistent with the Spatial Business Plan, the Retail Growth Plan aims to improve the quality of shopping, dining and entertainment facilities for the Queanbeyan local community. The provision of diverse and unique shops and services builds a point of difference for the City centre and adds to the character and identity of the CBD. The community want to have pride in their City as a vibrant well designed and presented city centre offering quality shopping, dining and entertainment choices.

Council leadership as an 'investment enabler' will be critical throughout the delivery of the Spatial Business Plan and Retail Growth Strategy. The balance between public and private investment will be critical to encourage and deliver projects throughout the life of the plan. The opportunity to attract residents, tourists and visitors will support a strong CBD economic performance that will create new jobs, reduce vacancies and attract new start-ups and established businesses. Potential retailers will want to part of an exciting new direction and opportunity.

The Spatial Business Plan aims to create a pleasant customer experience and 'sense of place' through well-designed streetscape, quality signage and wayfinding and outdoor dining to support the social well-being of the community. Traffic calming along Monaro Street adds value to the City centre as a future gathering place and tree-lined shopping promenade with a variety of business uses including successful restauranteurs.

Market demand and access
Market demand for premises in the CBD needs to be generated through carefully coordinated media communications including success stories and the potential for future growth. Encouraging mainstreet retail on Crawford and Monaro streets visibly linked to the Retail Core is important. Activating laneways with direct access to the key destinations will require and adequate supply of parking to generate footfall through the laneways to curated retail destinations. The frequent turnover of car parks through time limitation and management will impact on the success of the laneways. In addition the narrow dark arcades should not be forgotten in the upgrade to a brighter, vibrant linkage from car parks to shops.

Future planning must encourage shopfronts to face the mainstreets to add to their appeal. Planning has a key role in delivering this outcome. The Spatial Business Plan also highlights the links with Smart City opportunities for shoppers and visitors to the City. Enhancing the customer visit and building the online capability of small businesses is valuable due to the growing share of digital marketing, social media and new technology.

The development of a Smart City will connect the City businesses and help reposition the CBD as a progressive regional destination in which to conduct business. In addition there will be opportunities through a business incubator for start-up businesses to enter the market and flourish over time. The smart technology should inform customers and visitors about available parking locations in the CBD to maintain the edge as a convenient location to visit.

Car parking APPs are working successfully in Lane Cove and Geelong as they guide their City visitors to maintain efficient turnover of car spaces. The strategic location of parking hubs and stations will have an impact on retail as key destinations where visitors start their journey walking through the CBD. Office worker parking affects the availability of shopper and visitor parking. Providing long term staff parking solutions will be essential to free up shopper car parks. More on-street parking and availability of multi-level parking could provide a solution but an off-site solution may also be found to accommodate staff parking.

Providing high quality and frequent public transport services will increase their usage. Customers want convenience when visiting a shopping destination and while City centres cannot match the sea of car parks available in shopping precincts they can provide well managed parking and transport amenities.

A key issue of best practice governance included in the Spatial Business Plan has been discussed at length in this report. It is highly recommended that a Retail Investment Development Group is created for high level tackling of some big issues around proposed new developments that could make a significant improvement to the CBD. On the ground a Business Improvement District model should be considered to engage small businesses in the future of the Centre by focusing on customer experiences, marketing, promotions and events.

Strategies to support customer parking

Maintain turnover of spaces (staff parking provision)
As detailed above the importance of maintaining the City centre as a convenient shopping destination is a key element that attracts customers and shoppers. While car parking may look plentiful from an aerial view the availability of short term 2-3 hour parking is extremely limited as many staff members leave their vehicles all day in the one location. It is essential to have turnover of car parks in the vicinity of 4-5 times per day to ensure shoppers have access. Lack of parking availability will have a detrimental effect on retailers in the mainstreets.

Free vs paid parking
The debate regarding free vs paid parking is ever present. Shoppers need short term parking (30 minutes) for quick shopping trips and medium term parking (2-3 hours) to explore a range of shopping destinations. The amount of time that shoppers dwell in a mainstreet or centre directly impacts on their expenditure. Free parking can work but spaces must be managed for turnover.

Pedestrian flow and links

Increasing pedestrian flow from locals and visitors will increase retail sales and deliver a flow on effect for the local community. High quality public realm will provide a foundation for new businesses to establish in the CBD and encourage walkability and interest from visitors around the City centre. Small independent shops generate more local benefits to the community while providing a unique offer that customers will seek out. A key aspect of the Spatial Business Plan is the provision of linkages to the shopping destinations, mainstreets and civic attractions.

Pedestrian flow is critical to retail success for all forms of retail and hospitality.

Impact on inner city living

The QPRC Zoning codes include a focus on top-shop housing and increasing the population in the City centre will provide new vitality on the streets of Queanbeyan. Inner City living provides many upsides for cafes, restaurants and retail by providing new vitality on the streets and in shopping precincts. The biggest impact is on after 5pm activity in the CBD with apartment dwellers utilising the range of shopping and dining facilities available to them. However the quality of facilities available must be high as these residents have invested in their new apartments and they want quality life experiences that the City can offer.

19. Leasing Opportunities and Strategies

Key points:

- Fresh food and successful cafes, restaurants and takeaway can attract more customers that support a wider mix of retail stores
- A proactive approach can be taken to attract new businesses
- High quality urban design will attract more customers and consequently more retailers
- Developing the retail hospitality offer will create a catalyst to grow a broader mix
- Council can take a positive new strategy to attract new businesses into the City centre by creating a retail based website and adapting other leasing tools
- Retailers and property owners can support Council efforts if a new 'best practice' business improvement district is created to increase the level of engagement

Food is the key category that presents many opportunities for Queanbeyan however careful strategic planning needs to support the combination of restaurants, cafes and takeaway food in clusters and groups of businesses that have the potential to optimise the use of the consistent pedestrian traffic. The personalised services category must also be considered as it offers the opportunities for quality brands to be associated with the iconic Queanbeyan. Similarly larger homewares stores should be considered in the overall mix.

The tenancy mix will continue to work according to market forces, but if a proactive approach is adopted with definite leasing and tenancy mix goals in mind, better results will be achieved. A business recruitment program should be developed and resourced, including a package of information with demographic information, pedestrian counts, traffic volume, marketing and Business Association assistance. A Queanbeyan Business Association could provide valuable support.

In Queanbeyan some physical changes to the environment coupled with a strategic plan to develop the retail offer will deliver positive results.

The retail core block that includes Woolworths, Kmart, Proposed Cinema, the Crawford Centre, Medical Centre, small specialty shops and car parking is the key location to make urban design and retail improvements for the future. A strong link to the Riverside Plaza and Crawford Street and the treatment of Morisset Street is integral to the successfully rebuilding a balanced mix of retail businesses.

Shopping behaviour
When implementing leasing strategies and developing the mix of businesses it is important to consider the type of shopping behaviour that customers largely follow. Customer shopping and visitation behaviour research has revealed three types of behaviour including:

- local convenience shopping – Queanbeyan's strength
- comparison shopping – Queanbeyan's weakness
- experiential retail and hospitality – Queanbeyan's opportunity

Convenience shopping (food, services) – regular weekly visits are becoming more frequent for supermarket, fresh food shopping and paying bills. Usually within 5 minutes from home, however convenience to work is also a factor. A supermarket with easy convenient parking is a basic feature of a convenience-shopping offer. The Aldi, Coles and Woolworths supermarkets meet this need very well for local residents.

Comparison shopping (fashion, homewares) – customers are willing to travel further for this type of shopping. Also called comparison shopping whereby customers will visit shopping centres, outlet centres or City centres with a large range of stores. Goods purchased include fashion, gifts, jewellery, and homewares. Customers enjoy this style of shopping as it is more leisurely. Queanbeyan is not currently competitive in these categories as the offer is not strong enough.

Experiential retail and dining – customers will travel much further to have a great day out enjoying the total experience that includes coffee, a meal, entertainment such as cinemas and other attractions. This category provides the best opportunity for Queanbeyan as growth can be created organically in small precincts, eat streets and laneways. The local residents may shop in Canberra City centre on weekdays but dining opportunities on week nights and weekends are available with some strong businesses in place.

Leasing promotional tools – online and traditional media elements:

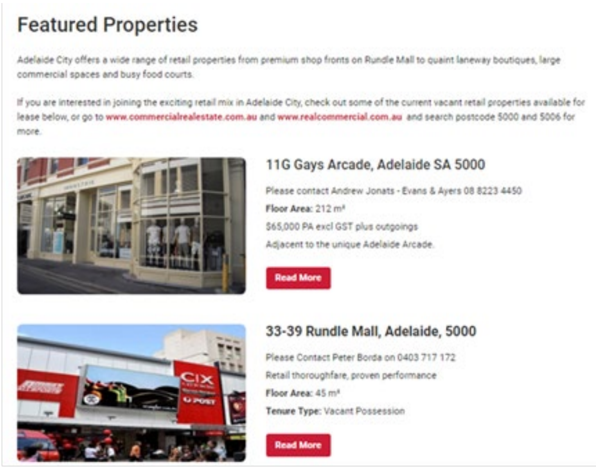
a. A Leasing Opportunities page on a business/retail website promoting Queanbeyan as a key location for retailers looking for growth opportunities will benefit the City centre. Demographic data, retail successes, new developments, store leasing opportunities and the latest retail news should be easily accessed by potential retailers.

Good quality examples of websites to attract new retailers include:

- Philadelphia Retail – www.philadelphiaretail.com
- Orion Town Centre Springfield - www.orionspringfield.com.au/leasing
- Adelaide City Retail – www.adelaidecityretail.com.au

b. Hard copy printed Leasing collateral should be aimed at the target retail property audience with key facts and positive changes to City worker numbers, City residents, tourist visitation data, demographic statistics, new development opportunities and events that attract visitor numbers and boost retail sales. The website and printed data should provide a one stop shop information point to influence retailers to consider a new store in Queanbeyan. Retailers have to make an investment decision to ensure that a new store has the best chance of success in the very competitive retail market. The aim is to create a waiting list to establish in Queanbeyan.

KEY LEASING STRATEGIES in more detail:



- **Develop, maintain and promote a vacancy opportunity list** with square metre details, rent and outgoings, property owner and desired business use information to generate demand for retail properties. This list should be on a Queanbeyan retail webpage with the details listed below:
    a. Location and photo of the vacancy
    b. Type of premises – suitable retail uses
    c. Parking available onsite and for customers
    d. Size in square metres (sales and storage areas)
    e. Neighbouring stores and established brands
    f. Positive statistics – pedestrian traffic, tourists
    g. CBD spending patterns, growth opportunities
    h. Annual rent plus outgoings
    i. Agent contact details

- **Create short promotional videos, podcasts and advertising material** to encourage new businesses into the Queanbeyan City centre. Develop positive stories and opportunities for potential businesses.

- **Build a cache of retail statistics** and information including:
    a. pedestrian counts on key corners
    b. spending patterns within and outside of the catchment
    c. catchment area residents household income
    d. the strength of Aldi, Woolworths, Kmart and the Riverside Plaza
    e. catchment area changes – postcode data analysed six monthly
    f. event patrons feedback and spending patterns

- **Work closely with an independent Leasing Agent/Agents** to utilise their searching skills and key contacts to target, seek out and approach the desired businesses. One or two key destination stores could be a catalyst to attract more stores. Set up positive regular contacts with leasing staff. Many Leasing agents have access to interstate and overseas contacts. Integrate this strategy with the high profile café/bakery concept described earlier.

- Work with the **urban design team** to create retail spaces that generate opportunities for retail and hospitality businesses through the Spatial Business Plan (SBP).

- **Generate positive marketing communications and publicity** about successful Queanbeyan businesses and their unique location in the City. Promote new meals, unique displays and products to reveal the secrets and hidden gems in and around Queanbeyan.

- **Introduce Pop-up stores** that could become future Queanbeyan businesses. Recognised brands can utilise small spaces as promotional one off brand for a day, week or month. The social media generated by the pop-up often creates a spike in interest in a location.

- **Retain and grow current businesses**
  Establish a customer mystery shopper program that assesses each shop from an independent customer viewpoint. Measuring performance from a customer viewpoint will improve it overtime. Recognise high achievers in customer service and high quality new employees working in Queanbeyan. Some quality examples of retail awards include Birmingham Retail BID, Wow! Awards Wintergarden QLD and Worcester BID UK.

- **Consider back of shop start-ups**
  Review shops with large foot prints that may be able to sub-lease to small start-up businesses in the back portion at low rent. A program of incubation could develop from this strategy.

Incentives

- Shopfront improvement programs are proving successful in many Cities and mainstreets. The funding partnerships create better buildings and premises for new retailers
- Property owners and leasing agents could be incentivized if they secure a lease for a new use not currently located in the CBD.
- Encourage the establishment of a highly functional and professional Business Association that adds value to a potential retailer leaving the security of a shopping centre.
- Target key retailers with correspondence, phone calls and meetings to attract them to the CBD.
- Fund a Renew Queanbeyan group to access vacant shops and install short term businesses with the longer term plan of signing a full lease.
- Consider fee and rates discounts in the short term to encourage new opportunities. (See Fremantle, Townsville, Upper Hutt NZ and Texas as examples.

Queanbeyan
Retail Growth Strategy

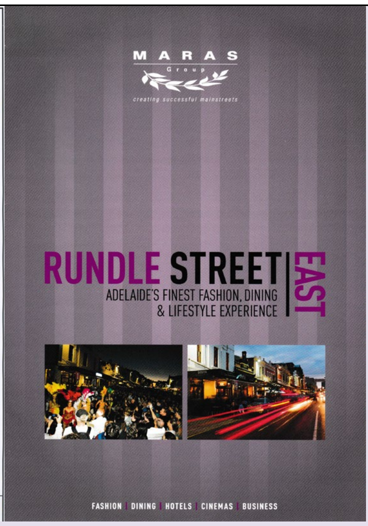
SEPTEMBER 2018

ACTION PLAN

20. Key recommendations and actions

Business Mix Development

ACTION: Form a **Retail Investment Development Group** with clear project roles and responsibilities to administer and deliver retail leasing and investment plans for future development of the Queanbeyan City Centre. Council could take a lead facilitation role with property owners, leasing agents and developers. The group could report through the Economic Development Board or through Council and it would assume responsibility for delivery of a retail investment development program moving forward and implement strategies including: • acquiring, redeveloping and reselling long term vacant sites or properties • break down large unoccupied or unaffordable premises into smaller affordable lots • identifying key leasing opportunities • seeking key retailers • marketing vacant shops to potential investors and businesses • maintain constant communication with key stakeholders
ACTION: Develop the restaurant, café, small bar, hospitality category to create unique destinations and experiences within the CBD to meet the local demand and win back escape expenditure by attracting more customers and visitors to shop, socialise and spend time there.
ACTION: Focus on stabilising and improving the hospitality category of Queanbeyan businesses (restaurants, cafes, bars) before seeking to extend the mix further into other retail categories. A successful base of food and beverage businesses will attract more customers and attract new retail businesses keen to benefit from the opportunities created.
ACTION: Approach local restaurant / cafe traders regarding creating new concepts and designs in a newly created location close to the retail core.
ACTION: Investigate the opportunity to establish a **visitor information centre** near the retail core that is shared with another service e.g. a small post office branch, childcare or customer lounge and public toilet facilities/baby changing area. Ensure RV parking is available nearby.
ACTION: Consider creating a key customer hub in the retail core to serve customers and assist visitors. Consider developing a high quality unique attraction that could sustain retailers and shops into the future as a significant point of difference.
ACTION: Review each corner site using the guidelines from shopfront and building improvement programs with a view to introduce new signage, paint colours and awning designs that lift the image and vibrancy of these key locations.
ACTION: Use professional leasing tools including the Leasing Opportunities brochure, website, promotional CD and advertising.



ACTION: Develop and maintain a vacancy opportunity list with square metre details, Property Owner and desired use information easily accessible to leasing agents and enquiring businesses.
ACTION: Utilise Leasing Agents skill to target, seek out and approach the desired businesses.
ACTION: Involve Leasing Agents in the plan by providing useful traffic counts, pedestrian counts and retail opportunities that support their leasing efforts and presentations to potential retailers.
ACTION: Utilise a range of incentives to encourage revitalisation of old premises to improve the presentation and the quality of retail space on offer. Incentives may include: Reintroducing the shopfront façade improvement program to improve the street presentation. Rate relief for landlords that attract desired retail and business categories that fill long term vacant shops and buildings to enhance the City centre. A grant to retro-fit long term vacant shops and buildings to encourage reuse and economic vitality.
ACTION: Create spaces that encourage new start-up businesses. Encourage and support new entrepreneurs through mentoring and training programs that develop business planning, marketing, finance and online capability.

Placemaking

ACTION: Consolidate the retail offer around the anchor stores – Aldi, Woolworths, Kmart, the Riverside Plaza and the new cinemas to create a vibrant shopping, dining and entertainment heart of the City.
ACTION: Create one or two unique restaurant precincts/laneways anchored by key businesses complemented by unique urban design elements including piazzas and high quality public realm with easy access for families and visitors.
ACTION: Fully embrace the Spatial Business Plan as a catalyst for CBD revitalisation.
ACTION: Work closely with the Federal Government to identify future opportunities that would provide benefits for the city centre. Develop infrastructure and funding proposals that focus on the retail core and Monaro Street that provide a positive transformation for the CBD.
ACTION: Assess land holdings and opportunities to create a newly designed outdoor retail hub that brings new businesses together and provides high quality shopping and dining opportunities. Create partnerships with key parties including owners of land and properties to focus on areas identified in the spatial business plan and retail strategy.
ACTION: Continue to add more colour and vibrancy to the footpaths of Crawford Street as a main street with a pleasant mainstreet ambience and amenity. Redevelop Monaro Street to include new quality urban design elements to enable a better business and shopper environment that attracts more customers and businesses.
ACTION: Demonstrate leadership through public investment and facilitation of private investment through future improvements to the retail core block using the new Cinema as a catalyst project.
ACTION: Ensure good quality public space features that attract a broad market are incorporated into designs throughout the CBD. Water features are used extensively in Australian and overseas Mall areas.
ACTION: Revisit the shop improvement program that previously saw 11 buildings improved in the CBD to begin a period of renewal to match the improvements in street amenity for the benefit of customers.
ACTION: Develop a public art plan to introduce smaller art works, murals and design elements along the footpaths as points of interest to better connect and link key destinations.
ACTION: Clearly define key decision access points i.e. Morisset/Crawford Streets intersection and signpost with parking signage, shopping destinations, attractions. Artworks can supplement visible signage.
ACTION: Investigate the complete redesign of Monaro Street to slow and reduce through traffic to make it a customer and retailer friendly place.
ACTION: Secure a major new attraction that is unique to the ACT with drawing power to bring large crowds to the CBD**.**
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Identity, Marketing and Communications

ACTION: Complete the branding exercise with the community and business sector to capture a CBD brand and identity that can be integrated through all forms of design, signage and marketing to build character and loyalty to the City centre.
ACTION: Secure funding from private/public sources to provide resources for management, marketing, business development and streetscape to improve the quality of retail offer, customer environment and improve retail competitiveness.
ACTION: Explore a range of activities that retailers can be engaged in. Geelong delivers an excellent 'retail' school holiday program that involves over 300 businesses. Show them the promotional opportunities linked with every City event to gain their support. Families are very important for the future growth of vitality in a City centre.
ACTION: Generate positive marketing and publicity communication about the Queanbeyan City Centre and its future.
ACTION: Plan a banner program using colourful banners in sections along Crawford and Monaro Streets using bold primary colours – red, blue, yellow, green to clearly identify precincts and themes.
ACTION: Engage with local CBD workers through a 'I work in Queanbeyan' campaign that offers an exclusive retail or hospitality deal through email to generate impulse purchases similar to a highly successful program in Geelong.
ACTION: Continue to invest in Smart City initiatives that can be leveraged by City businesses and positions the CBD as a progressive and desirable business destination.

Engage Businesses and Property Owners

ACTION: Create a business group to guide and support the Retail Growth Plan in partnership with Council. The business group should be aligned with world's best practice models including successful Place management models such as Business Improvement Districts (BIDs). E.g. Heart of the City Auckland NZ.
ACTION: Council and a business steering group should consider a range of programs that can be delivered if resources are made available. Develop a financial model to build the resources needed to create a marketing fund to promote the retailers and businesses in the CBD. Council is a key facilitator in supporting a positive implementation of a consistent long term funding stream. At the appropriate time bring in marketing staff from other towns and Cities with funding streams to demonstrate what can be achieved.
ACTION: Fund the professional property staff and resources required to implement the retail plan. The skills required include knowledge of retail property, shopping centres, street environments, development and business.
ACTION: Involve Property Owners and Managers in future plans with regular meetings and communication.
ACTION: Collate the needs of the business community from recent surveys and discussions, develop a Five Year Business Plan and Budget proposal and bring businesses together to engage them in implementation.
ACTION: Council lead the way with **'seed' funding** to investigate the feasibility of creating a fund to resource a business plan and implement it. Introduce a pilot scheme to test the concept.
ACTION: Conduct spot checks to monitor retailers not open during regular trading hours and weekends. Work with the new business group to seek peer to peer business support for consistent trading hours. Deliver events and marketing programs that increase foot traffic and encourage businesses to open longer.
ACTION: Map key areas of the city and draw up a monitoring program with responsible staff. Reinstate a cleaning regime required to deliver an excellent result. Deal with issue

identified in the audit with various sections of Council. Ensure a manager is responsible for the program.
ACTION: Police all car parks in line with signage displayed and seek to find a suitable location for staff. Consider a parking APP similar to Geelong City that shows where parking is available. Review the use of grade level carparks and consider their repurposing to include new development and public realm while providing replacement car parks in more consolidated multi-level car parks. Ensure that shoppers receive VIP treatment with easy access and availability to car parks.
ACTION: Enhance the public space management to ensure that customers and visitors always have a good experience when visiting the CBD with staff or volunteers assisting customers, direct visitors and provide Council information. Monitor conditions in the public domain to ensure the optimum standards of cleaning and safety are achieved.

Photos of good street and retail environments


Botany Downs – Auckland New Zealand

The Grove - Hollywood


Rundle Street – Adelaide Australia

Southbank - Brisbane

Valencia Town Centre
Los Angeles

Third Street Promenade
Santa Monica LA

Darling Harbour


The Grove - Hollywood

Bowie Town Centre

Hastings Street Noosa

21. Measuring Success

The measures listed below are considered basic measures in many shopping centres and dining precincts. The measurements will assist Queanbeyan management to track progress against goals and targets.

Pedestrian counts	**Monthly -** frequent monitoring will be required to develop trends and base data to show improvement.
Dwell time	**Annually -** dwell time measures if visitors stay and enjoy a precinct or only pass through.
Secret shoppers	**Quarterly** – very important to capture direct feedback from secret shoppers to improve customer service levels.
Presentation standards	**Quarterly – cleaning/safety/presentation** audits
Building improvements	**Annually – how many buildings completed the upgrade program**
Customer satisfaction	**Annual surveys**
Customer service ratings	**Six monthly surveys**
Tenant satisfaction	**Annual business survey**
Retail sales increase	**Annual survey to ask anecdotal information**

22. ATTACHMENTS

- Consumer Survey – Executive Summary
- Business Survey – Executive Summary
- Street Layouts – Crawford and Monaro Streets

Shopper Survey

Key Findings

1. The majority of those surveyed preferred to shop in Queanbeyan for fresh food; department stores related shopping, eating out and having a drink.
2. Local residents prefer to shop for fresh food in Coles, Woolworths or Aldi.
3. Most respondents prefer to satisfy their shopping needs by visiting a single location.
4. However, they prefer a wider selection of locations to shop for recreational goods.
5. The majority of respondents mentioned Kmart and Target as the preferred stores for recreational goods in Queanbeyan.
6. Local residents travel to Canberra to visit Myer or David Jones; but if they do, they may also visit Kmart, Target or Big W, resulting in escape spending or comparison shopping.
7. The majority of respondents travel to the CBD by car and park in Riverside car park.
8. Most shoppers visit several times each week, on both weekdays and weekends.
9. Loyalty to Queanbeyan CBD is mainly driven by its convenience and proximity, along with easy and free parking.
10. Many local shoppers mention the friendliness and local community ‘feel’ of shopping in Queanbeyan.
11. Consumers dislike the number of vacant shops; outdated or run-down facades; lack of retail variety and higher-quality shopping options; traffic congestion; and disconnected pedestrian thoroughfares.
12. Shoppers are seeking more cafes, restaurants and open spaces to relax and entertain, along with more department stores.
13. A call for more entertainment options for young people (e.g. cinema) was noted.

Iris Research 2018

Business Survey

Key Findings

1. Most business owners and operators have a positive outlook for their business.
2. However, they are less positive about the CBD as a place to do business.
3. Business owners are concerned about the high retail vacancy rate, poor maintenance of shop frontages and traffic congestion – especially on Monaro Street.
4. There is a perception that the unappealing surroundings have led to a reduction in pedestrian traffic.
5. There is also concern in the business community regarding the high cost of rent and taxes/government charges.
6. The business community would like to see a greater variety of shops; the development of a retail identity and character; improved visual appeal of the CBD and more parking options.
7. Business owners do not feel they have enough say in plans for the CBD.
8. However the business community would like their ideas collected, consolidated and represented but is less enthusiastic about long-term collaboration.
9. Nevertheless, owners and business operators concede that improving the vibrancy of the Queanbeyan CBD will require concerted action by more than just one party (Council).
10. Businesses would also be supportive of CBD activation initiatives by Council that promote the CBD and their businesses

Iris Research 2018

Street business listing – correct as at 30/06/18

		ERIN STREET
		Project Lighting
		Argyle Community
		RMB Lawyers
		Marland Accounting
		Vacant (ex medical)
		Reptiles Inc
		Remax Capital Real Estate
		ALDI Supermarket
ANTILL STREET		ANTILL STREET
		Australia Post
		Vacant
Olympia Hotel		Super Clinic
	C	WOOLWORTHS Supermarket
	R	Queanbeyan Newsagency
Guns & Hoses	A	Vacant (ex bikes)
	W	TSG Tobacco Station
	F	Coffee Corner
Kingsley Chicken	O	Migrant Settlement
	R	Stylez Hairdresser
	D	Cartridge World
Kmart Auto		Anglicare retail
	S	Zorans Haircare
	T	Kip Mc Grath education
Hiscocks Saddlery	R	PC Upgrade
	E	Classique Hair Designs
	E	Integrated Therapies
Dan Murphy Liquor	T	Optometrist Eyecare on Q
MORRISET STREET		MORISSET STREET
Blooms Chemist		Caltex Service Station
Centrelink		Mirage Hair Design
Medicare		Ciao Café Cakes
		Bells Dry Cleaning
		Vacant land (hoarding)
Homebase		Vacant office (ex Indigenous)
		Pizza Hut
		Vacant (ex dominos)
Salvos Stores		Barnados Aust (up)
John Barilaro MP		Queanbeyan Health Foods
		Punjabi Hut Indian 2 shops
Mid City Motor Inn		Vacant (ex blooms)

		Continental Haidresser
		Canton Chinese Restaurant
Wok it up		Debbie Maree's Fashion
4th Seed Café		City Florist
Royal Barber		
		Lucky Collection Clothing
		Intuition Education
The Royal Hotel		Aussie Home Loans
MONARO STREET		MONARO STREET
NAB Bank		Westpac Bank
H&R Block Tax	C	Head Space services
AMS Conveyancing	R	QPRC Council
Codarra Consulting	A	Masonic Hall
OCTEC Employment	W	
BEC	F	Baker Deane Nutt Lawyer
Ian Kenworthy welfare	O	
RSL sub branch	R	
Throttle Media	D	
Aboriginal Council		
Monaco Psychology	S	
Elements Face & Body	T	RB Smith Building
Hair & Flair	R	
Council Chambers	E	Orthodox Church
Vacant (ex Council)	E	Vacant (ex disability)
Fire Station	T	Eyecare Plus Optometrist
		QBN Hive
Council office		Queanbeyan Physio
RUTLEDGE STREET		RUTLEDGE STREET

LOWE STREET		LOWE STREET
Ray White Real Estate		Vacant (ex Indigenous Office)
Trendy Hair Beauty		Chinese/Malaysian restaurant
Vacant (ex Comwlth Bank)		Vacant (ex discount travel)
		Vacant office up
Elders Real Estate		Thai restaurant
		ITP Tax
Noveau Riche Bridal	M	Chamberlain Lawyer
	O	Velocity Conveyancer
Numbers Partnership Tax	N	Clarke & Di Pauli surveyors(up)
Q Clothing Alterations	A	Mike Kelly MP
AJs Takeaway chicken	R	Matrix Physio Gym & Sports
Walsh's Hotel	O	Herring Lawyers & Assoc
WJ Gibbs Real Estate		
Country Heir Interiors	S	Queanbeyan Acupuncture
Mainstreet Shoes	T	OzProperty Services
Avanti Hair	R	Keith McKinnon Acct
Vacant (ex build office)	E	Tourist Hotel
Villa Olivio Retaurant	E	Expresso Breakfast Lunch
	T	Spoil Me Pretty Beauty Salon
Service One alliance Bank		Revolution CD Games
Vacant office (up)		Vacant (ex Dick Smith)
Savvy Schoolwear		Area 51 Digital Design (up)
Queanbeyan Taxi Co		Positive Power Pscych (up)
Tonys Hairdresser		Carer Assist (up)
Vacant		Mind Healing Jo Kilner (up)
Integrated Living Support		Help Centre Linda Bruce (up)
About You		Taste a Curry
Deziner Beauty		
Vacant		On Point Hair
Family Keepsake		
VIVA Massage		Vacant (ex Today jeweller)
Kapital Care		Counterfeit Copy printer
People with Disability		Liz Maloney Psychlogy (up)
Q City Podiatry		Bevan & Co Lawyer
		Hotch Potch Café
Turkish Restaurant		Sonia's Hair Salon
Queanbeyan Curtain Centre		Saigon Pho
OCTEC employment		Saigon Bakery
Beautiful Gifting		Anytime Fitness (up)
Beauty by Nikki		
Absolute Hair		TAB
		ANZ Bank

		St George Bank	
NAB Bank		Royal Hotel	
CRAWFORD STREET		CRAWFORD STREET	
Westpac bank		Aussie Homeloans	
Work ways employment		Fitzgerald Nayor Lawyers (up)	
		CBC Home Loans (up)	
Vacant (ex QBN Age)		Vacant up	
		Slow Noodle Fast	
Vacant (ex anglicare)		Bombay Spice House	
Elringtons Lawyers		Vacant (ex Creative Living)	
Vacant (ex kebabs)	M	Vacant (ex workwear)	
RJs Hair	O	Vacant (ex central café)	
Vinnies	N	Beyond Bank	
LJHooker	A	RIVERSIDE PLAZA SHOPPING CENTRE	
Moonlight Day Spa	R	Millers Fashion	
Goodwin Life Choice	O	Lowes menswear	
Estate Realty		Sussan	
Ariels Beauty Salon	S	Spendless Shoes	
VIBE Studio	T	Autograph Fashion	
Vacant	R	Liquorland	R
Carers Yoga	E	Bakers Delight	I
Vacant	E	Michels Patisserie	V
Independent Property	T	Subway	E
Potter Travel		Little Donkey food	R
		Alloche fillings	S
		Sushi	I
		Reiya Asian	D
		Vanilla Pod	E
		Ali Baba	
		CBD Meat	P
		Rotary Cottage casual	L
		TSG Tobacco	A
		NRMA	Z
		Reject Shop	A
		Telstra	
		Universal Phone	S
		Optus	H
		Vodaphone	O
		Telephone Accessories	P
		Bailey Audio	P
		Dimetrics jeweller	I
		Prouds Jewellers	N
		Paper Shop	G
		Sanity	
		COLES Supermarket	C

- services
- food
- fashion
- general
- vacant
- leisure
- homewares
- MAJORS

		TARGET Disc Dept Store	E
		Best and Less	N
		Travellers Choice	T
		Queanbeyan Travel	R
		Massage	E
		Century Barber	
		Commonweath Bank	
		Civic Smiles	
		New York nails	
		Just Cuts	
		Hairhouse Warehouse	
		Priceline	
		Laverty Pathology	
		New York Hair Beauty	
		Mr Minit	
		Flight Centre	
		IMB Bank	
		Nails	
Leagues Club		Vacancy	