GLADSTONE REGIONAL COUNCIL

RETAIL AND COMMERCIAL STRATEGY

2012 UPDATE

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The sole purpose of this report is to provide the Gladstone Regional Council (the Client) with information in accordance with Foresight Partners Pty Ltd's scope of services set out in its proposal to the Client.

Foresight Partners has relied upon information relevant to this report provided by government agencies, the Client and others. Except as otherwise stated in the report, Foresight Partners has not attempted to verify the accuracy or completeness of such information.

This report is a partial update of a report originally prepared in 2010. It incorporates revised population forecasts by the Queensland Government's Office of Economic and Statistical Research (OESR) for the Gladstone Regional Council area that were released after completion of our 2010 report. This report updates population forecasts, average household incomes and retail expenditure potential, and also updates the recommended retail strategy to reflect some significant changes to the population forecasts since completion of the original report in 2010.

This report does not update other trade area demographic characteristics which were only partially available from the 2011 census at the time of this report's preparation. It also does not update the 2010 report's regional overview, the inventory of existing retail and commercial floorspace, stakeholder consultation, retailing trends, design guidelines or draft zone codes.

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Summary

The Gladstone Regional Council is preparing a new planning scheme to replace those of the former Gladstone City, Calliope Shire and Miriam Vale Shire Councils which were amalgamated in March 2008. As part of the planning scheme review, Foresight Partners Pty Ltd and PSA Consulting were commissioned by Council to provide input into the likely future need for retail and commercial floorspace within the Council area over the next 20 years to 2031.

This report updates selected portions of the report prepared by Foresight Partners in 2010, most notably population forecasts, retail expenditure forecasts and the recommended retail strategy.

The six key outcomes of this project are:

- preparation of a retail centres hierarchy for the GRC area;
- projection of floorspace needs to 2031 for food, non–food personal, bulky goods and commercial uses, and their preferred spatial distribution;
- identification of the preferred size and location of any new centres or significantly expanded existing centres;
- identification of excess capacity in existing zonings and, where necessary, recommendations of appropriate zoning changes;
- preparation of draft zone codes compliant with standard planning scheme provisions made under the *Sustainable Planning Act 2009*; and
- formation of guidelines for shopping centre developments to achieve community and social interaction goals.

Gladstone's Retail Network

Foresight Partners undertook a floorspace survey of all existing centres within the Region in January 2010. The distribution of retail space was recorded by location and by use, and included Gladstone City, Boyne Island, Tannum Sands, Calliope, Miriam Vale and Agnes Water – Seventeen Seventy.

Within the Gladstone Regional LGA, the survey identified a total of 739 retail premises with a total of 179,000 m^2 of floorspace. (This included premises considered appropriate for retailing that were either vacant or used for non–retail purposes.) Key characteristics include the following:

- 133,000 m^2 of floorspace across the Region is occupied by retail shops and services, in addition to 32,000 m^2 of professional services/ commercial offices and 13,000 m^2 of vacant shopfronts;
- over 83% of all retail floorspace (149,000 m^2) is within the former Gladstone City LGA, the largest component of which is homewares and personal service retailing, accounting for over 77,000 m^2 of floorspace;

- the former Calliope Shire has 21,000 m^2 of retail floorspace, the largest part of which is for take home food retailing (8,600 m^2); and
- over 8,000 m^2 of retail floorspace is within the former Miriam Vale Shire, of which the largest component is 2,550 m^2 of professional services/commercial offices.

The former Gladstone City LGA has five major retail precincts which account for 106,000 m^2 of floorspace, or approximately 71% of the total for Gladstone City. The largest precinct by floorspace is Kin Kora which has approximately 30,000 m^2 of floorspace. Approximately 22,000 m^2 of retail floorspace is available in purpose built retail showroom facilities.

The major centres are supported by a network of smaller centres, retail strip centres and freestanding stores totaling 43,000 m^2 of floorspace. These premises are located around the former Gladstone City, including in the Hanson Road industrial precinct.

Overall, the Gladstone Region had a 2010 retail vacancy rate of 7.5%, which suggests a reasonable balance of retail supply and demand. The vacancy rate was the highest within Gladstone City at 8% of identified retail floorspace. A healthy retail network requires some vacant space (typically 5% – 8%) to allow new businesses to enter the market and to enable existing businesses to move to large or smaller premises in response to changing market conditions.

Market Fundamentals

The Gladstone Regional Council area is the main retail catchment for most of the Region's retail activities. The Gladstone Regional LGA has been segmented into six areas based on natural geographic and economic zones, which are considered to be the main local catchment areas.

In 2006 approximately 53,980 persons lived within the Gladstone Regional Council area. The Region's population is estimated to be nearly 63,000 persons as at June, 2011. It is forecast to increase to:

- 74,500 persons by June 2016;
- 85,700 persons by June 2021;
- 98,200 persons by June 2026; and
- 111,700 persons by June 2031.

Overall, the Gladstone Region's population is forecast to increase by 48,700 persons from 2011 to 2031. The majority of this growth is expected to occur in Gladstone City (24,800) and Boyne Island – Tannum Sands (14,000).

The socio–economic characteristics of the Region were derived as at the 2006 Census and have the following key implications:

- The Gladstone City, Boyne Island – Tannum Sands and Calliope areas are forecast to have more per capita disposable income for retail and other discretionary goods and services. In these areas, spending is likely to be stronger in homewares, including bulky goods, and apparel.

The higher proportion of couples with children also suggests spending on apparel is likely to favour budget and mid–market retailers rather than upscale fashion.

- In the Agnes Water – Seventeen Seventy and Rural South–East Areas, households are likely to have lower average per capita levels of retail spending overall. Take–home food spending is likely to be higher as a proportion of total household retail spending, with lower spending on apparel and meals out–take away food.

Households from the Gladstone Region generated an estimated $763 million in retail spending potential as at June 2011. At constant 2011 dollar values, the pool of available retail expenditure is forecast to increase to:

- $936 million by June 2016;
- $1,120 million by June 2021;
- $1,334 million by June 2026; and
- $1,580 million by June 2031.

Stakeholder Consultation

In accordance with the project brief, stakeholder consultations were held with representatives of major retail stakeholders and selected community and business organisations as recommended by the Gladstone Regional Council.

Stakeholders indicated that, on the whole, the current retail/commercial strategy has remained effective and responsive to the requirements of the community.

The main issues that were identified included:

- the constraints posed by Sunday trading in the former Gladstone City;
- the desire for an expanded Stockland Gladstone;
- a CBD retail/commercial precinct that is weak and lacks a clear role and function;
- the absence of a destination dining precinct in the Gladstone Region; and
- the imbalance in the supply of retail/commercial land in Agnes Water between the existing town centre precinct and the commercially zoned areas on the fringe of the community.

Trends in Australian Retailing

Retailing is a dynamic industry which must respond to, and often anticipate, demographic and social changes in order to compete and survive in a highly competitive environment. Among the key retailing trends of relevance to the Gladstone Region are the following:

- demographic changes such as increased labour force participation and an ageing population are generating demand for new products and formats such as more convenient parking and longer operating hours;
- lifestyle changes such as increased demand for convenience, the centre as an entertainment destination and technological advancements have also resulted in changes to retail formats including local centres that are convenient to homeward–bound traffic and the use of self–serve checkouts in supermarkets;
- although bulky goods centres are a mature retail format elsewhere in Australia, within the Gladstone Region a bulky goods centre is a relatively recent development and demand for this type of facility is expected to grow over the forecast period;
- hardware megastore developments are a growing retail component throughout regional Queensland; however the establishment of additional such facilities in the Gladstone Region will face locational challenges such as the availability of suitably sized and zoned land;
- Aldi's discount supermarket retailing model was first established in Australia in 2001 and has contributed to changed shopping patterns and enhanced competition. It is anticipated that the population base, forecast population growth within the Region and Aldi's expansion plans makes the Gladstone Region a potential location for Aldi over the 20 year forecast period; and
- market penetration in Australia by internet retailers is increasing, with nearly one third of all Australian retail businesses receiving some orders via the internet. As credit card security improves and mainstream retailers increase their online presence, it is anticipated that internet based purchases in the retail sector will increase.

Future Demand for Retail Facilities in the Gladstone Region

The demand for retail floorspace and facilities within the Gladstone Region can be assessed in terms of:

- typical per capita floorspace requirements;
- population thresholds required to support new stores and centres; or
- expenditure based forecasts.

The most robust methodology for demand based retail forecasting is a household expenditure based methodology as it enables a closer link between growth in the retail expenditure pool within the Gladstone Region and the magnitude of additional retail floorspace supportable.

Based on a forecast increase in the Region's retail spending potential of $817 million between 2011 and 2031, it is estimated that an additional 135,000 m^2 of retail floorspace will be theoretically supportable within the Region. However not all of this floorspace will be absorbed by new centres throughout the Region. Some will be taken up through the occupation of vacant premises, and an estimated 10% of the additional forecast demand will continue to flow to Rockhampton, Bundaberg, Brisbane and other destinations.

The equivalent forecast floorspace demands indicate that over the forecast period to 2031, the following could be theoretically supported:

- an additional 35,000 m^2 bulky goods or retail showroom centre;
- an additional discount department store based centre; and
- around 23,000 m^2 of retail floorspace in the form of convenience centre retail facilities.

The required additional floorspace will not be evenly distributed throughout the Region. Gladstone City residents are expected to generate the greatest growth in retail floorspace demand. The next largest generator of demand is projected to be Boyne Island – Tannum Sands, although some of this demand will be accommodated by the growth of higher order retail facilities within Gladstone City. Similarly, demand growth in regional locations such as Calliope and Agnes Water – Seventeen Seventy will be met by additional convenience retail facilities locally while contributing to demand for additional comparison retail shops in Gladstone City.

Recommended Retail Strategy

The form and format of retail development in the future will be influenced by population growth and distribution, the characteristics of the existing retail network, the role of the CBD and escape expenditure. Under the six level hierarchy for centre types per the Sustainable Planning Act 2009, it is recommended that the CBD/Valley is designated as the principal centre and Kin Kora is designated as the region's single major centre. In addition, seven existing centres should be designated as neighbourhood centres.

It is also recommended that:

- provision is made for a new bulky goods or retail showroom centre within Gladstone City to meet demand growth and mitigate pressure to place bulky goods retailers in the Hanson Road commercial area;
- the Gladstone City Centre is developed as a mixed use precinct incorporating residential, commercial and entertainment activities (including a destination dining precinct);
- an urban planning solution is established for the Valley so as to promote a more cohesive and vibrant retail/commercial node;
- provision is made for future expansion of Stockland Gladstone to a regional shopping centre of at least 50,000 m^2.

- provision is made for future redevelopment of the Boyne Island retail precinct as a District Centre accommodating larger scale, higher order retailing facilities when warranted by demand;
- although not required in the near future, provision is made for a future additional supermarket anchored centre within the township of Calliope; and
- future retail development within Agnes Water – Seventeen Seventy is directed towards the existing centre to ensure that retail shops and services are located within a single cohesive, walkable precinct.

1 Introduction

The Gladstone Regional Council is preparing a new planning scheme to replace the schemes of the former Gladstone City, Calliope Shire and Miriam Vale Shire Councils that were amalgamated in March 2008. The primary goal of the Gladstone Regional Council's planning scheme review is to guide and accommodate future growth and development of the larger regional council area.

The GRC area is poised for significant economic, employment and residential growth over the next 20 years. Its 2011 residential population of around 63,000 persons is projected to increase to almost 112,000 people by 2031; an increase of around 49,000 people over 20 years. The magnitude of the increase will generate a significant future need for additional retail and commercial infrastructure to serve this future population, through the expansion of existing centres, as well as the provision of new centres.

Foresight Partners and PSA Consulting have been commissioned by the Council to provide an input into the preparation of the new planning scheme in relation to the likely future need for retail and commercial floorspace within the Council area over the next 20 years to 2031.

1.1 PURPOSE OF REPORT

The primary goals of the development of a retail and commercial strategy for the Gladstone Region are to establish a clear centre hierarchy strategy and to prepare draft zone codes suitable for use in the new scheme for the GRC area.

The Gladstone Regional Council has identified six key outcomes of the project:

- preparation of a retail centres hierarchy for the GRC area;
- projection of floorspace needs over time to 2031 for food, non–food personal, bulky goods and commercial uses and their preferred spatial distribution;
- identification of the preferred size and location of any new centres or significantly expanded existing centres;
- identification of excess capacity in existing zonings and where necessary recommendations of appropriate zoning changes;
- preparation of draft zone codes compliant with any standard planning scheme provisions made under the *Sustainable Planning Act 2009*; and
- formation of guidelines for shopping centre developments to achieve community and social interaction goals.

1.2 METHODOLOGY

To deliver the *Retail and Commercial Strategy, Gladstone Regional Council*, the following activities have been undertaken:

- A review of the current Gladstone City, Calliope Shire and Miriam Vale Shire Council planning schemes, as well as identification of emerging and recent trends in retail within Australia and Gladstone specifically. This included a review of the 2005 Gladstone Retail Study produced by Economics Associates and GHD Pty Ltd for the Gladstone City Council.
- Delimitation and demographic analysis of the GRC catchment area for Gladstone's key urban and rural centres, including retail expenditure potential per household to 2031 based on PIFU's 2031 medium series projections.
- A comprehensive reconnaissance and floorspace inventory of Gladstone's existing retail centres and areas, noting changes and additions since 2005. Existing centres and retail/commercial areas and major free–standing stores, zoned vacant and under–developed land and vacancy clusters (indicating market stress or poor design) were also identified.
- Relevant stakeholders including a range of public and private sector organisations have been canvassed to ascertain a brief overview of the key economic drivers of growth in the Region, as well as to identify any concerns about the existing retail strategy and how it should be amended to reflect the now much larger Regional Council area.
- Estimates of future demand for retail and commercial floorspace within the GRC area have been developed based on forecast population and expenditure potential, available zoned land, under–developed centres and sites and the outcomes of stakeholder consultation. This future demand is distilled and presented in terms of retail composition and centre hierarchy for the key urban and rural areas within the Region.
- Draft zone codes consolidating the existing scheme content and inconsistencies within each scheme have been developed. This includes the development of a centre hierarchy and the draft codes for each relevant provision.
- The community and social interaction goals that can be delivered through retail developments have been identified, as well as the preparation of draft guidelines.

1.3 REPORT STRUCTURE

Section 2 of this report provides a strategic overview of the economic base and planning context of the GRC area. Section 3 examines the composition of the Region's retail offer and competitive centres in Rockhampton and Bundaberg based on the function and scale of existing and planned future centres.

Section 4 provides an overview of the demographic characteristics of the Region's retail catchments, population growth and the growth in retail spending generated by catchment residents and visitors. Section 5 provides a summary the stakeholder consultations, with particular attention paid to the development of a consensus overview on the Gladstone Region retail provision, and any future expansion plans each stakeholder sees for the Region.

Section 6 provides an overview of emerging trends in retail development and shopper behaviour throughout Australia and interpreted in terms of their implications for the future composition, function and scale of Gladstone's retail and commercial areas. Section 7 quantifies the future demand for centres and retail and commercial floorspace within the catchment.

Section 8 formulates recommendations for the centre hierarchy and the community and social interaction goals to be delivered through retail developments.

2 Overview of the Gladstone Region

This section provides a brief overview of some key economic drivers and prospects for future growth within the Region. It also provides a general background to the planning context of the GRC area.

2.1 GLADSTONE REGIONAL COUNCIL

The Gladstone Regional Council was formed in March 2008 as a result of state wide local government reformations. The GRC consists of the former Gladstone City, Calliope Shire and Miriam Vale Shire Councils and has an estimated residential population of 59,644 persons as at June 2009.[1] It is located approximately 525 kilometres north of Brisbane and 108 kilometres south of Rockhampton and has a strong coastal and hinterland orientation.

The key urban areas of the GRC include Gladstone City, Boyne Island–Tannum Sands, Calliope, Miriam Vale and Agnes Water–1770. Approximately 47,175 persons live within these areas as at June 2009, representing nearly 80% of the GRC residential population. These communities are predominantly coastal (excluding Calliope and Miriam Vale) and often represent a lifestyle choice for local residents. A high proportion of the Council's social services are provided within these towns, including health and education facilities, as well as the main retail and commercial facilities within the Region.

The coastal communities are supported by a number of small, hinterland communities. There is a reduced level of access to retail and commercial facilities within these communities with residents required to visit either Gladstone or Rockhampton to access more than day–to–day basic food items.

2.2 STRATEGIC ECONOMIC OVERVIEW

As one of Queensland's major regional centres, Gladstone City has a large range of social and economic services which support residents throughout the Region and in other parts of regional Queensland.

In March 2010 SGS Economics and Planning prepared an Economic Development Strategy for Gladstone Area Promotion and Development Limited (GAPDL). The following strategic economic overview is drawn from the SGS report and Tourism Queensland's Regional Snapshot for the year ended June 2009.

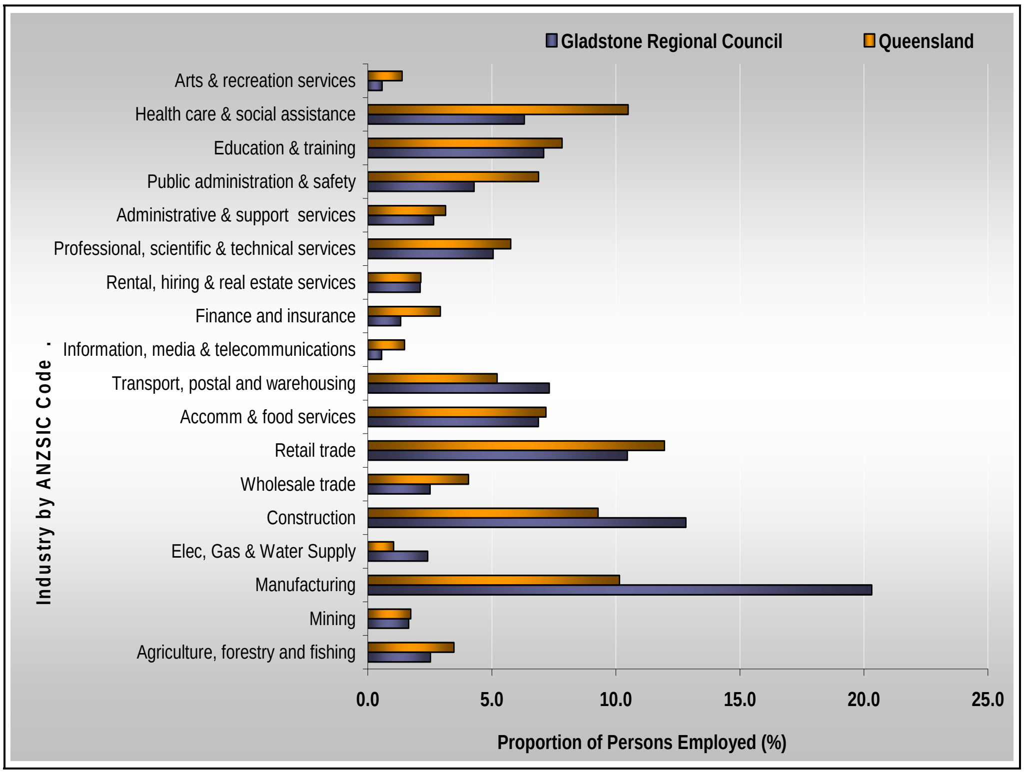
Gladstone's Manufacturing Sector

Manufacturing plays an integral role in the economic prosperity of the Gladstone Region. As at the 2006 Census manufacturing was the Region's greatest employer, with around 4,560 persons employed in the Region in this

[1] Source: ABS Regional Population Growth, Australia

sector (Figure 2.1). Within the Gladstone Region major businesses which are active in the manufacturing sector include metal processing refineries and smelters such as alumina and concrete.

Figure 2.1: Industry of Employment, Gladstone Region, 2006



Source: ABS 2006 Census.

In 2005/06 the manufacturing sector contributed around 21% to the Gladstone Region's Gross Regional Product. When compared to the proportional influence of manufacturing to the State of Queensland, manufacturing contributes twice as much to the Gladstone Region as it does to the State of Queensland.

Other Employment Sectors

The second and fourth largest employment sectors within the Gladstone Region are the construction and transport, postal & warehousing sectors (Figure 2.1). Respectively, these sectors employed 2,354 persons and 1,517 persons in the Gladstone Region in 2006 with these persons employed across a range of construction and transport types, including residential construction and transport support services.

The transport support service sector includes associated terminal operation activities for port facilities such as the Port of Gladstone. The Port of Gladstone exports a range of natural resources including coking coal, thermal coal, magnesia and grains such as sorghum, wheat and chickpeas. The Port of Gladstone is one of the world's top five coal exporters, and has the capacity to export over 75 million tonnes of coal per annum.

Gladstone's Tourism Sector

The Gladstone Region has a diverse range of industrial and natural attractions which draw visitors to the Region. For the year ended June 2009 there was a total of 354,000 domestic and international overnight visitors to the Gladstone Tourism Region,[2] with visitors staying a total of 1,487,000 nights.[3] An estimated 55% of all visitor nights in the Tourism Region were for the purpose of a holiday, with many visitors attracted to the islands, national parks and beachside communities.

Domestic visitation to the Gladstone Tourism Region declined over the year to June 2009. Visitation rates fell by approximately 11% which is comparable to the fall in visitation levels experienced State wide. Whilst the fall in domestic visitation levels can be partially attributed to the fall in the number of business related visits, it is estimated that around 19% of all domestic visitor nights in the region were for business purposes and employment related trips.

International visitation to the Gladstone Tourism Region declined by around 8% between 2008 and 2009, which is similar to the decline for the whole of Queensland. Approximately 25% of international visitors to the Gladstone Tourism Region arrived from the United Kingdom. The backpacking market represents 57% of all international visitors to the region, with a considerably high proportion of international visitors choosing to travel to the region via a private motor vehicle.

GAPDL estimates that international visitors spent $30.5 million in the Gladstone Region in 2008/2009 with domestic visitors (including day visitors) contributing an estimated $218.0 million to the local economy over this same period. Collectively, tourists and visitors to the Gladstone Region generated approximately $248.5 million for the Gladstone Regional economy in 2008/09.

Gladstone's Gross Regional Product

GAPDL estimates that the 2009 gross regional product of the Region is around $1.9 billion, which is largely underpinned by the manufacturing, construction, property & business services and mining sectors.

2.3 OVERVIEW OF EXISTING PLANNING SCHEMES

There are four existing planning schemes currently being administered by Gladstone Regional Council, including the Gladstone Plan (2006), the Calliope Shire Planning Scheme (2007); the Planning Scheme for Miriam Vale (2009); and the Superseded Planning Scheme for the Shire of Miriam Vale (1999). A comparison of the three most current Planning Schemes and their provisions relating to the retail elements, reveals the following key differences.

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[2] The Gladstone Tourism Region includes the Gladstone Regional Council area, the Banana Shire and the former Monto Shire (which is now part of the North Burnett Regional Council).

[3] Source: Tourism Queensland, Gladstone Regional Snapshot, year ended June 2009

2.3.1 The Gladstone Plan

The Gladstone Planning Scheme establishes a centres hierarchy through the Strategic Framework, DEO's, Locality Codes and Commercial Use Code. The centres hierarchy is detailed through the consistent use of location–based strategic intent statements through each component of the Planning Scheme. These intent statements outline each centre's preferred outcome based on the scale of development and mix of uses.

The Gladstone Plan identifies the following centres:

- **Central City –** (hereafter referred to as the CBD) is the **principal** centre in the region and the city providing administration, business services, office accommodation, cultural and entertainment, personal services and specialised fashion retailing;
- **Kin Kora –** an **important** centre in the City for retail shopping, also providing some personal services, banking services, community services and service trades;
- **The Valley –** a centre providing **convenience** shopping and small scale, mixed business services to the inner city;
- **Toolooa –** a centre providing **convenience** shopping and small scale mixed business services mostly to South Gladstone and Toolooa;
- **Dawson Road –** a centre on the corner of Park Street and Dawson Road providing non–retail commercial services and **convenience** shopping;
- **Hanson Road –** no further expansion of retail focussed activities will be provided for and the centre will retain and increase the level of non retail mixed business and industry activities;
- **Racecourse –** a centre providing for an integrated development of retail focused activities where the range of goods are predominantly of a **non convenience** nature including hardware, housing service trades, service industries, showrooms and warehousing, bulky goods, storage and distribution and chandlery to the City; and
- **Kirkwood Road –** a centre providing for an integrated development for a **convenience** based shopping centre also providing limited personal services, banking services, community services and service trades.

The Scheme mapping uniformly identifies all centres within the Commercial Zone. Assessment criteria contained within the Locality Code outlines in more detail the outcomes sought for development within the Commercial Zone in each discrete locality. Assessment Criteria contained in the Use Codes outlines generic outcomes sought for commercial uses regardless of any centres hierarchy.

A Retail Study also supports the Planning Scheme, which was prepared to provide recommendations regarding the need and desirable locations to accommodate future retail development to service the Gladstone region's current and future population, as well as prepare amendments to Council's then draft Town Planning Scheme to give effect to its preferred course of action.

2.3.2 Calliope Shire Planning Scheme

The Calliope Planning Scheme Strategic Framework mapping identifies two business centres at Boyne Island and Tannum Sands. A centres hierarchy is established though location based strategic intent statements included in the Locality Codes. These intent statements outline each centre's preferred outcome based on the scale of development and mix of uses. The Boyne Island Tannum Sands Locality Code identifies the following centres:

- **Boyne Island** Neighbourhood Centre;
- **Tannum Sands** Local Centre; and
- **Tannum Sands** Civic Site**.**

The Locality mapping identifies these centres as key sites. The scheme's Zone mapping uniformly identifies all centres within the Commercial zone.

Assessment criteria contained within the Locality Codes outlines the detailed outcomes sought for development within the Commercial Zone in each discrete Locality. There is no generic Commercial Zone Code.

Assessment Criteria contained in the Use Codes outlines generic outcomes sought for commercial uses regardless of any centres hierarchy.

2.3.3 Planning Scheme for Miriam Vale

The strategic framework within the Miriam Vale Planning Scheme includes broad intent statements for development across the sub region as well as locality based intent statements. These broad intent statements identify **Agnes Water** as an important centre with other minor centres also highlighted in locality based intent statements.

The Miriam Vale Planning Scheme principally establishes a centres hierarchy through the following zone plans and codes:

- local business;
- district business;
- commercial service; and
- retail showroom.

Assessment criteria contained within the Zone Codes outlines in more detail the outcomes sought for development within the specific Zone. Assessment Criteria contained in the Use Codes outlines generic outcomes sought for "commercial uses" regardless of any centres hierarchy. Uses are defined and classified based on their primary function as Retail, Bulky Retail, Catering or Office Professional.

The Superseded Planning Scheme (1999) for Miriam Vale Shire has not been assessed in relation to the way in which it deals with retail. This is because it is considered that this represents an outdated or superseded view of the way in which Council previously dealt with retail centres in the Miriam Vale region in its 1999 Scheme. The current 2009 Scheme has therefore been used for the purposes of this analysis.

2.3.4 Summary of Planning Scheme Comparisons

All three of the reviewed planning schemes approach the establishment of a retail hierarchy and the management of retail development differently. The drafting of each scheme is robust enough to manage retail development toward a preferred outcome. While each of the three schemes contains elements of a hierarchy, the zoning framework adopted by the Miriam Vale Planning Scheme provides the example that most closely aligns to the Queensland Planning Provision's (QPP) standard planning scheme structure, to which the new Gladstone Planning Scheme will need to adhere.

The Gladstone and Calliope schemes consistently identify retail centres within the commercial zone, relying on site specific criteria contained in the Locality codes to differentiate the centre hierarchy. QPP provides for an option to use a hierarchical network of centres zones within new Planning Schemes, ranging from Principal centres to Specialised centres.

In preparing a new planning scheme for the Gladstone Region, a number of decisions will need to be made, to establish a consistent policy position that will guide the drafting of the planning scheme in relation to dealing with its retail hierarchy.

3 Gladstone's Retail Network

This section provides estimates of the current retail provision of Gladstone's retail network as at January 2010. The distribution of retail space has been recorded by location and use and includes Gladstone City, Boyne Island, Tannum Sands, Calliope, Miriam Vale and Agnes Waters–1770. Although not wholly comparable, data from the 2005 Gladstone Retail Study conducted by Economics Associates and GHD provides a broad indication of change over the past six years. Competitive centres and areas in Rockhampton and Bundaberg are also examined.

3.1 RETAIL NETWORK DEFINED

An Excel database has been developed to provide Council with a record for each individual retail establishment inventoried within the Gladstone Region. Information contained in the database comprises shop location, type of use and estimated floor space. Direct comparisons are available with the 2004 inventory completed for the 2005 Retail Study for Gladstone City.

Six specific classifications were used to establish the proportional distribution of retail floorspace among different uses:

- Take Home Food – includes supermarkets and specialty food stores such as greengrocers, butchers, bakeries, tobacconists, delis and bottle shops;
- Meals Out/Take Away – includes restaurants, take away and cafes. Two notable exceptions are public bars/bistros and restaurants inside hotels (bottle shops attached to public bars have been included in Take Home Food);
- Apparel – includes clothing, footwear, accessories and clothing hire services;
- Homewares/Personal Services – includes chemists, newsagents, hardware, homewares, department and variety stores, other durable goods and personal services (e.g. hairdresser, video hire, dry–cleaning);
- Professional Services/Commercial – includes businesses such as banks, real estate agencies, travel agencies, Australia post, medical services, solicitors and offices for commercial activity. Only those businesses with shopfronts directly attached to retail establishments, or in the immediate vicinity of retail precincts, were included. This excluded evidently purpose–built freestanding office buildings, and all businesses above ground floor (with the exception of those within planned shopping centres); and
- Vacant Space – includes all vacant premises potentially useable for retail purposes in the future i.e. those with shopfronts directly attached to retail establishments, or in the immediate vicinity of retail precincts.

Outside of major shopping centres only ground floor space was included.

3.2 RETAIL PROVISION OF GLADSTONE CITY COUNCIL 2004

In 2004 an inventory of all retail premises was undertaken by Economics Associates as part of the Gladstone Retail Study. The survey identified a total of 499 potential retail premises within the Gladstone City Local Government Area (LGA) boundary, and the equivalent of 106,213 m^2 of retail floorspace (including vacancies, professional services and commercial offices in the immediate vicinity of retail establishments).

As at June 2004, the total occupied floorspace was an estimated 99,098 m^2, or 445 premises. This represents a vacancy rate of 6.7% of total floorspace, or 10.8% of available premises. The main occupants of the inventoried floorspace were homewares/services retailers at 53,545 m^2 (or approximately 50% of inventoried floorspace) (Table 3.1), with a further 15,960 m^2 occupied by professional services and commercial tenants.[4]

Table 3.1: Distribution of Floorspace by Retail Classification, Gladstone City, June 2004

	Take Home Food	*Meals Out/Take Away*	*Apparel*	*Homewares / Personal Services*	***Total Retail***	*Professional Services/ Commercial*	*Vacant*	***Total***
Floor Area (m^2)	15,342	6,642	7,609	53,545	*83,138*	15,960	7,115	**106,213**
Distribution (%)	14.4	6.3	7.2	50.4	*78.3*	15.0	6.7	**100.0**
Premises (no.)	42	54	38	200	*334*	111	54	**499**

Note: This distribution of retail floorspace refers to Gladstone City only and excludes the former Miriam Vale and Calliope Shires.
Source: 2005 Gladstone Retail Study, Economics Associates and GHD.

In 2004 there were four major retail centres in Gladstone City: the CBD, the Valley area, Kin Kora and the then Nightowl Shopping Centre. The four centres accounted for 52,981 m^2 of retail floorspace (63.7% of the total Gladstone City floorspace), with the largest concentration at the Kin Kora centre. There were a number of other minor centres located around Gladstone City which mainly served local, convenience oriented catchments. There was no dedicated bulky goods precinct in Gladstone City, however a number of freestanding bulky goods retailers were located in the industrial precinct along Hanson Road.

[4] As some stores sell multiple commodities each store has been classified by its dominant use. For example, a supermarket sells food, apparel and cleaning items (amongst other goods) but is included in the Take Home Food category under the dominant use principle.

3.3 RETAIL PROVISION OF GLADSTONE REGIONAL COUNCIL 2010

A full retail inventory of the Gladstone Regional LGA was carried out over a one week period in January 2010. Retail provision is dynamic and thus minor changes to the figures presented here are likely to have occurred since the recording period. As a consequence, retail provision needs to be regularly monitored, especially for vacant space. All major centres under active management were contacted to obtain information regarding floorspace and economic prospects of the Gladstone Regional LGA and most supplied the requested information. This information was then compared directly with the 2004 retail inventory which is discussed in section 3.4.

As at January 2010 a total of 739 retail (or potential retail) tenancies were identified in the Gladstone Regional LGA. This figure includes 81 vacant retail shopfronts and 211 professional services/commercial tenancies. The 739 retail locations yielded an estimated total floorspace of 178,732 m^2, with nearly 83,200 m^2 dedicated to homewares/personal services shops. In addition to the dedicated retail shops and services identified in the inventory, Gladstone's commercial provision also includes a seven–screen cinema and a ten pin bowling alley.

The 739 retail locations were spread across sixteen distinct retail precincts, with a number of smaller minor centres and freestanding bulky goods retailers located around the Gladstone Region. Approximately 83.4% of total retail floorspace (149,005 m^2), is located within the former Gladstone City LGA. Nearly 21,300 m^2 (11.9%) of retail floorspace is located in the former Calliope Shire in the townships of Boyne Island, Tannum Sands and Calliope (Table 3.2; Figure 3.1).

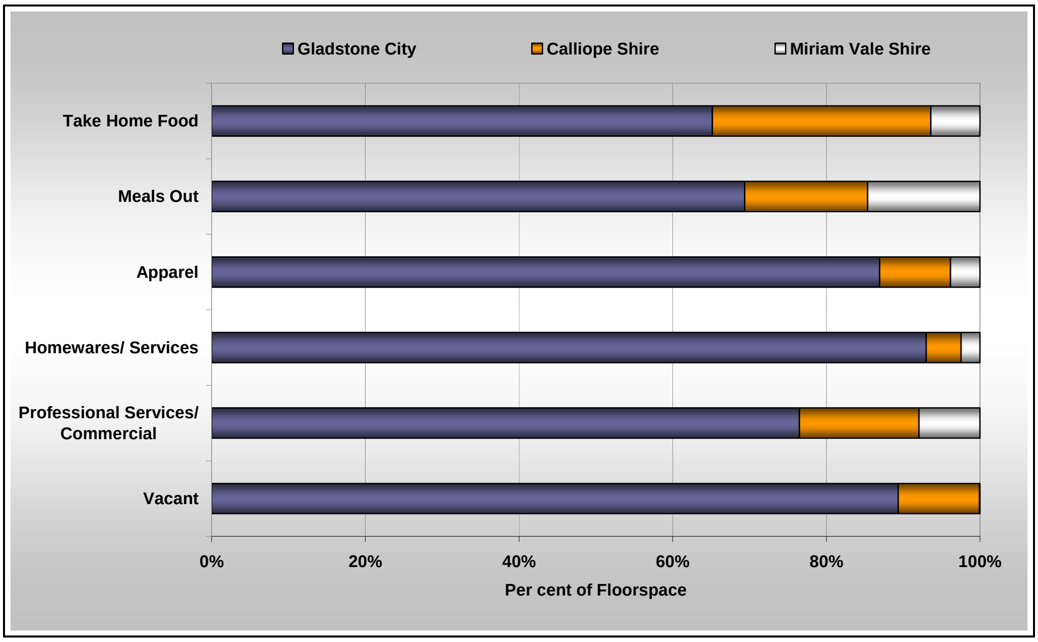
Table 3.2: Gladstone Regional LGA Retail Inventory by Location and Commodity Group, January 2010

	Floorspace							
	Gladstone City		*Calliope Shire*		*Miriam Vale Shire*		*Total Gladstone Region*	
	(m^2)	*(%)*	*(m^2)*	*(%)*	*(m^2)*	*(%)*	*(m^2)*	*(%)*
Take Home Food	19,582	13.1	8,547	40.2	1,920	22.7	30,049	16.8
Meals Out/ Take Away	7,352	4.9	1,696	8.0	1,550	18.3	10,598	5.9
Apparel	8,273	5.6	880	4.1	365	4.3	9,518	5.3
Homewares/ Services	77,357	51.9	3,760	17.7	2,060	24.4	83,177	46.5
Total Retail	**112,564**	**75.5**	**14,883**	**70.0**	**5,895**	**69.7**	**133,342**	**74.6**
Professional/ Commercial	24,514	16.5	4,978	23.4	2,550	30.2	32,042	17.9
Vacant	11,927	8.0	1,411	6.6	10	0.1	13,348	7.5
Total	**149,005**	**100.0**	**21,272**	**100.0**	**8,455**	**100.0**	**178,732**	**100.0**

Source: Foresight Partners estimates.

The former Gladstone City LGA has the greatest proportion of the Region's higher order retailing opportunities with nearly 93% of all homewares and services shops in the Region located within the Gladstone City area. Similarly, 87% of the 9,500 m^2 of apparel shops are located within Gladstone City. This indicates that the retail catchment of centres within the Gladstone City area extends to the former Calliope and Miriam Vale Shires.

Figure 3.1: Gladstone Region LGA Retail Provision by Area and Commodity Group, January 2010



Source: Foresight Partners estimates.

3.3.1 Former Gladstone City LGA

Within the former Gladstone City LGA there are five major retail precincts; the Central Business District (CBD), the Valley, Kin Kora, Gladstone Central and the Centro Home precinct. The larger centres are supported by a network of smaller centres, retail strip centres and freestanding stores. These centres are shown in Figure 3.2.

Gladstone City's five major retail precincts account for 106,302 m^2 of available retail floorspace, or 71.3% of the total for Gladstone City (Table 3.3). This includes 21,791 m^2 of dedicated bulky goods floorspace in the Centro Home Gladstone retail development on Dawson Highway, Clinton. Approximately 42,700 m^2 of retail floorspace is located in smaller centres around Gladstone City, including the Hanson Road industrial precinct and several local convenience centres.

Overall, approximately 16.5% of Gladstone City's retail floorspace is occupied by either professional services or commercial offices (e.g. real estate agents or solicitors), and a further 8.0% is vacant. Table 3.4 shows the composition of floorspace by commodity group in each of the major centres in Gladstone City.

Figure 3.2: Centre Locations Around Gladstone City

Table 3.3: Geographic Distribution of Retail Floorspace, Former Gladstone City, January 2010

Centre/Area	*Total Occupied Retail Floorspace* (m²)	(%)	*Total Occupied Retail and Commercial Floorspace** (m²)	(%)	*Total Vacant Floorspace* (m²)	(%)	*Total Retail and Commercial Floorspace* (m²)	(%)
CBD	5,910	5.3	12,430	9.1	1,726	14.5	14,156	9.5
Valley	14,980	13.3	22,371	16.3	2,173	18.2	24,544	16.5
Subtotal	*20,890*	*18.6*	*34,801*	*25.4*	*3,899*	*32.7*	*38,700*	*26.0*
Kin Kora	28,428	25.3	29,554	21.6	140	1.2	29,694	19.9
Gladstone Central	10,988	9.8	15,682	11.4	435	3.6	16,117	10.8
Centro Home	20,871	18.5	20,871	15.2	920	7.7	21,791	14.6
Total Major Centres	***81,177***	***72.1***	***100,908***	***73.6***	***5,394***	***45.2***	***106,302***	***71.3***
Hanson Road	12,452	11.1	13,662	10.0	–	–	13,662	9.2
Tooloola Street	3,287	2.9	3,753	2.7	654	5.5	4,407	3.0
Clinton	1,963	1.7	2,675	2.0	654	5.5	3,329	2.2
Mellefont Street	514	0.5	514	0.4	177	1.5	691	0.5
Airport Village	616	0.5	784	0.6	84	0.7	868	0.6
Sun Valley Road	2,690	2.4	2,690	2.0	2,465	20.7	5,155	3.5
Avion Centre	840	0.7	965	0.7	295	2.5	1,260	0.8
Other	9,025	8.0	11,127	8.1	2,204	18.5	13,331	8.9
Total Minor Centres & Other	***31,387***	***27.9***	***36,170***	***26.4***	***6,533***	***54.8***	***42,703***	***28.7***
Total All Centres	**112,564**	**100.0**	**137,078**	**100.0**	**11,927**	**100.0**	**149,005**	**100.0**

Note: Totals may not add due to rounding.
**Includes Professional Services and Commercial Floorspace.*
Source: Foresight Partners estimates.

CBD and Valley

The CBD has been defined as the area bounded by Lord Street to the north, Auckland Street to the east, Bramston Street to the south and Central Lane to the west. The Valley is bounded by Bramston Street to the north, Toolooa Street to the east, Eden Street to the south and Goondoon Street to the west. These areas are consistent with the 2005 Gladstone Retail Study as there have been no apparent changes to the boundaries of the retail precincts.

Within the CBD retailing precinct there is a total of 14,156 m^2 of available retail floorspace distributed across 90 premises. The average size of premises within this precinct is 157 m^2 which is reflective of a tenancy mix which has a high professional services/commercial component (6,520 m^2 or 46.1%) and a very low representation of take home food retailers (approximately 70 m^2 or 0.5% of all CBD retailing).

The Gladstone CBD can generally be described as an older strip retail precinct comprising buildings constructed when Goondoon Street was Gladstone's premier retail and commercial precinct. Council has started implementing a rejuvenation program to the CBD which to date includes the development of Library Square along Goondoon Street between Roseberry and Yarron Streets. This precinct links Council's library and the Gladstone Entertainment Centre and includes an emerging dining precinct.

Approximately 2,400 m^2 of retail floorspace is dedicated to apparel retailing in the CBD. This represents nearly 30% of all apparel specialty floorspace throughout Gladstone City (and 25% of all apparel retailing throughout the Region).[5] Despite this, there are very few national retail chain operators within the CBD precinct, with the majority of premises occupied by independent operators. The proportion of floorspace dedicated to apparel retailing in the CBD is the highest of all centres within the City at 17.0% of available floorspace. Discussions with Council has indicated that a large proportion of the apparel retailers within the CBD are only located there because of the lack of available space in the Stockland Gladstone centre.

Over 12% of the retail floorspace within the CBD is vacant (1,700 m^2), which is very high when compared to the provision of other uses within the precinct. A large proportion of the vacancies within the CBD appear to be long–term vacancies of between two and seven years, including the former Target Country premise which remains unoccupied since its relocation to the Stockland Gladstone centre prior to the 2005 Retail Study. This suggests that some of the vacancies in the CBD could be due to broader fundamental factors such as the CBD's retail market positioning and competitiveness.

The Valley area includes Centro Gladstone on the corner of Goondoon and Tank Streets, Valley Plaza and Palms Shopping Fair on Herbert Street. This precinct is anchored by Centro Gladstone which includes a full line Woolworths supermarket, a discount variety store (Crazy Clark's) and 25 specialty shops. Geographically, the Valley also includes the highly concentrated selection of retail shops, commercial offices and professional services along Tank Street. There is a total of 24,500 m^2 of retailing and related floorspace in the Valley distributed amongst 136 premises.

There is a considerable homewares and personal services offer within the Valley (41.2% of available space), and includes a discount pharmacy, Lincraft and Retravision store. There is also a high proportion of professional services and commercial offices within the Valley (30.1%) which is reflective of its adjacency to the CBD.

The Valley has a lower vacancy rate than the CBD at 8.9% of all available shops. These vacancies are predominantly long–term vacancies which have been brought about by relocation to larger premises elsewhere in Gladstone City. The majority of vacancies within the Valley are located in ageing buildings along Tank Street.

[5] The total floorspace inventoried for apparel excludes floorspace contained within the discount department stores as stores are assigned to a commodity group based on the main type of stock.

Kin Kora

The Kin Kora retail precinct consists of the Stockland Gladstone regional shopping centre and the Windmill Centre along Philip Street. It consists of 29,700 m^2 of retail and related floorspace across 62 premises. Over 99% of the Kin Kora retail precinct is occupied, with only one vacant shopfront within the precinct as at the 2010 survey.

Stockland Gladstone is the Region's largest shopping centre and its major take home food and comparison goods shopping destination, with 95% of all shops within the precinct occupied by homewares, apparel and take home food shops. The distribution of apparel shops at Kin Kora (3,500 m^2 or 11.7% of the precinct's floorspace) is also reflective of its strong comparison goods shopping role. Only 1.1% of the floorspace is dedicated to meals out/take away retailing, and less than 4% to professional services/commercial offices.

Stockland Gladstone has developed in two precincts straddling the Dawson Highway (access between the car parks of each precinct is via an underpass). The eastern section, which is the newer section and has direct access off Philip Street, is anchored by Big W and Woolworths and contains all of the centre's specialty shops. The western precinct consists of Kmart, Coles, Target Country and McDonalds and has an older appearance. The only access to the western precinct is from the Dawson Highway/Philip Street roundabout. An application has been lodged to improve connectivity between the two precincts but as of June, 2012 there are no specific plans or timetable for their consolidation.

Gladstone Central

The Gladstone Central precinct lies along the western side of Dawson Highway between Far Street and Park Street. It includes the two–to–three level Gladstone Central Shopping Centre (formerly known as the Nightowl Shopping Centre and associated shops) and a few surrounding shops including an Autobarn. There is over 16,100 m^2 of available retail floorspace within this precinct over 56 tenancies, including 435 m^2 of vacant premises.

The Gladstone Central Shopping Centre is anchored by a Supa IGA supermarket and a seven screen cinema complex. Gladstone Central has a number of national retailers including Mr Toys Toyworld, Loot Homewares and The Coffee Club. It has the Region's largest concentration of meals out/take away retailers with 1,700 m^2 of retail floorspace, as well as a significant homewares/services component (32.9% of available floorspace).

There is a considerable professional services/commercial precinct within Gladstone Central (4,700 m^2 or 29.1% of available floorspace) which is predominantly medical services related. This concentration of medical specialists benefits from the proximity to the Gladstone Hospital.

The centre is located on sloping land, with three distinct sections. There is a small number of takeaway food retailers and access to Dicey Reilly's from the lower section, the middle section is the largest and includes direct access to the cinemas, medical specialists and the Supa IGA, whilst the upper section includes a burgeoning after hours food retailing precinct with a small number of restaurants/cafes. Whilst pedestrian access between the upper and middle sections is relatively straight forward, access to the lower section is inconvenient. The linear layout of the centre would encourage people to drive between the lower and upper sections.

Centro Home Gladstone

Centro Home Gladstone is located at 220 Dawson Highway, Clinton and is Gladstone's only dedicated bulky goods retailing precinct. The 21,800 m^2 centre opened in 2007 and has eight tenancies, seven of which were occupied in January 2010.

This centre is anchored by a 13,000 m^2 Bunnings Warehouse; other major tenants include Harvey Norman, Betta Electrical and BCF. The development of Centro Home Gladstone introduced new retailers to the City (e.g. BCF), as well as allowed for existing Gladstone City retailers such as Bunnings Warehouse, Harvey Norman and Betta Electrical to relocate to a high quality, dedicated bulky goods precinct.

Smaller Centres within Gladstone City

There are a number of smaller retail centres/strips within Gladstone City. The main smaller centres include:

- The **Sun Valley Road** precinct is a retail area located opposite Kin Kora State School and includes the older Sun Valley Plaza and the newer Sun Valley Road Marketplace. Sun Valley Plaza is a small, run–down centre of approximately 600 m^2 which is currently untenanted. The adjacent Sun Valley Road Marketplace is a Supa IGA anchored centre which opened in 2007/2008. There is a total of 5,200 m^2 floorspace within this precinct, with approximately 2,465 m^2 currently vacant and 1, 900 m^2 of take home food retailers.

- The **Tooloola Street** retail precinct is a small retail centre and precinct of approximately 4,400 m^2 in the block bordered by Tooloola Street, Bonar Street, Off Street and Coon Street. There are approximately 23 occupied shops and services in this precinct (3,800 m^2) including a Supa IGA, medical centre and pharmacy. This precinct has experienced a substantial number of relocations in recent time with nearly 15% of the precinct vacant.

- The **Clinton** retail precinct is located along Dawson Highway opposite Centro Home Gladstone and includes Garden Lover's Plaza and three clustered retail strips along Ballantine Street. There is 3,000 m^2 of retail floorspace within this precinct over 21 premises. Approximately 12.2% of the available retail floorspace is currently vacant, the majority of which is in the Garden Lover's Plaza precinct which has recently received approval for a considerable redevelopment of the site.

Table 3.4: Classification of Floorspace by Commodity Group and Retail Precinct, Gladstone City, January 2010

	Take Home Food		*Meals Out/ Take Away*		*Apparel*		*Homewares/ Services*		***Total Retail***		*Professional Services/ Commercial*		*Vacant*		***Total Floorspace***
	(m^2)	*(%)*	*(m^2)*	*(%)*	*(m^2)*	*(%)*	*(m^2)*	*(%)*	***(m^2)***	***(%)***	*(m^2)*	*(%)*	*(m^2)*	*(%)*	***(m^2)***
CBD	70	0.5	1,563	11.0	2,413	17.0	1,864	13.2	**5,910**	***41.7***	6,520	46.1	1,726	12.2	**14,156**
Valley	2,674	10.9	1,482	6.0	717	2.9	10,107	41.2	**14,980**	***61.0***	7,391	30.1	2,173	8.9	**24,544**
Subtotal	*2,744*	*7.1*	*3,045*	*7.9*	*3,130*	*8.1*	*11,971*	*30.9*	*20,890*	*54.0*	*13,911*	*35.9*	*3,899*	*10.1*	***38,700***
Kin Kora	6,901	23.2	339	1.1	3,473	11.7	17,715	59.7	**28,428**	***95.7***	1,126	3.8	140	0.5	**29,694**
Gladstone Central	3,265	20.3	1,669	10.4	755	4.7	5,299	32.9	**10,988**	***68.2***	4,694	29.1	435	2.7	**16,117**
Centro Home Gladstone	–	–	–	–	–	–	20,871	96	**20,871**	***95.8***	–	–	920	4.2	**21,791**
Total Major Centres	*12,910*	*12.1*	*5,053*	*4.8*	*7,358*	*6.9*	*55,856*	*52.5*	*81,177*	*76.4*	*19,731*	*18.6*	*5,394*	*5.1*	***106,302***
Hanson Road	91	0.7	375	2.7	360	2.6	11,626	85.1	**12,452**	***91.1***	1,210	8.9	–	–	**13,662**
Tooloola Street	1,480	33.6	333	7.6	256	5.8	1,218	27.6	**3,287**	***74.6***	466	10.6	654	14.8	**4,407**
Clinton	504	15.1	382	11.5	–	0.0	1,077	32.4	**1,963**	***59.0***	712	21.4	654	19.6	**3,329**
Mellefont Street	514	74.4	–	0.0	–	0.0	–	0.0	**514**	***74.4***	–	0.0	177	25.6	**691**
Airport Village	350	40.3	98	11.3	–	0.0	168	19.4	**616**	***71.0***	168	19.4	84	9.7	**868**
Sun Valley Road	1,890	36.7	170	3.3	–	0.0	630	12.2	**2,690**	***52.2***	–	0.0	2,465	47.8	**5,155**
Avion Centre	550	43.7	80	6.3	–	0.0	210	16.7	**840**	***66.7***	125	9.9	295	23.4	**1,260**
Other	1,293	9.7	861	6.5	299	2.2	6,572	49.3	**9,025**	***67.7***	2,102	15.8	2,204	16.5	**13,331**
Total Minor Centres & Other	*6,672*	*15.6*	*2,299*	*5.4*	*915*	*2.1*	*21,501*	*50.4*	*31,387*	*73.5*	*4,783*	*11.2*	*6,533*	*15.3*	***42,703***
Total All Centres	**19,582**	**13.1**	**7,352**	**4.9**	**8,273**	**5.6**	**77,357**	**51.9**	**112,564**	***75.5***	**24,514**	**16.5**	**11,927**	**8.0**	**149,005**

Note: Totals may not add due to rounding.
Source: Foresight Partners estimates.

- In 2009 the **Avion Centre** opened on the corner of Beak and Shaw Streets, New Auckland. It is a 1,260 m^2 centre which is approximately three quarters occupied. The highest proportion of floorspace is used for a SPAR supermarket and other take home food retailing (43.7%), with a further 16.7% dedicated to homewares/services retailing. Approximately 135 m^2 of the vacant floorspace is on the first floor of the building and is intended to be used for a medical centre or similar.
- The **Mellefont Street** retail precinct consists of three small strip centres at the Dawson Highway end of Mellefont Street. It occupies eleven premises totalling 1,650 m^2 and includes two vacant shopfronts of approximately 180 m^2. Within this precinct a new professional services/commercial building was developed in the past two years, however overall the precinct is aged.
- **Airport Village** is made up of seven premises totalling 870 m^2. This centre includes take home food retailers, medical centre and beauty services. There is a single 84 m^2 vacancy.

3.3.2 Former Calliope Shire

Within the former Calliope Shire there are three retail areas: Boyne Island, Tannum Sands and Calliope. There is nearly 21,300 m^2 of retail and related floorspace over 117 premises throughout the former Calliope Shire. The largest retail precinct is located in Tannum Sands (9,700 m^2) and accounts for 45.6% of all retail shops and services within the former Calliope Shire (Table 3.5).

Calliope Shire retailers provide for a significant portion of take home food, meals out/take away and convenience related homewares and services needs of local residents. However, residents will still shop in Gladstone City and Rockhampton for much of their higher order shopping such as apparel and major homewares items.

Tannum Sands

The Tannum Sands retail precinct consists of Tannum Central, Tannum Village and the Garnet Street retail precinct. There are 56 premises within this precinct and it is a main source of convenience shopping in Boyne–Tannum. Take home food retail represents approximately 37.6% (3,650 m^2) of total retail floorspace, with a further 10.6% classified as meals out/take away retailing. Professional services/commercial offices are also highly represented within the area with 23.8% of all available floorspace. Only four vacancies, or 460 m^2 of floorspace, were identified.

The Tannum Sands retail precinct represents a mixture of a high quality, recently developed centre (2004) and an older, slightly run–down strip retail precinct. The largest retailer within the Tannum Sands is the Coles supermarket in Tannum Central.

Boyne Island

The Boyne Island retail precinct is the original retail precinct in the Boyne–Tannum area. It is primarily located around the Wyndham Avenue/Centenary Drive intersection and consists of Boyne Plaza and some associated strip retailing. This is an older precinct which offers around 8,200 m^2 of retail floorspace over 37 premises. The precinct, anchored by a Woolworths supermarket, has a very poor, run–down appearance reflecting an apparent lack of investment in refurbishment and periodic updating of this ageing centre.

Over 40% of the available floorspace is occupied by take home food retailers, with a further 24.0% occupied by professional services/commercial offices such as accountants, physios and a medical centre. This precinct has a high vacancy rate of 11.1% (900 m^2), all of which are located within Boyne Plaza. The concentration of vacancies within Boyne Plaza suggests that the vacancies may be the result of issues pertaining to the centre itself, rather than the location.

Calliope

The township of Calliope is served by Hazelbrook Village, Calliope Shopping Centre and a small collection of shops located along the Dawson Highway at the southern entrance to the town. There are 24 shops or premises within the township and approximately 3,365 m^2 of floorspace.

The Hazelbrook Village is an older, but well managed shopping centre that provides a range of retail services and serves a predominantly convenience. The adjoining Calliope Shopping Centre is a newer centre anchored by a Supa IGA supermarket which is the township's major take home food retailer.

Take home food retailers account for 47.3% of the available floorspace within the township, with a further 20.8% occupied by professional services/ commercial offices (excluding Council offices). Homewares/services (16.2%) also play an important role within the township's retailing area, with Australia Post, a bank branch and local real estate agents amongst tenants within the township.

There was only one vacant shop within the area as at January, 2010.

3.3.3 Former Miriam Vale Shire

There are 64 tenancies and an estimated 8,455 m^2 of floorspace within the former Miriam Vale Shire (Table 2.5). There are two retail precincts: Agnes Water – Seventeen Seventy and the township of Miriam Vale. Approximately 77% of the former LGA's retail floorspace is located within the twin townships of Agnes Water and Seventeen Seventy.

Agnes Water – Seventeen Seventy

There are 50 retail shops and related premises in the townships of Agnes Water and Seventeen Seventy. Residents and visitors are served by approximately 6,535 m^2 of floorspace in two distinct centres and scattered shops and services.

Professional services/commercial offices dominate the retailing landscape with 31.1% of all floorspace. Take home food retailing also features, representing 22.5% of floorspace, including Foodworks and IGA supermarkets.

There is a particularly high representation of meals out/take away retailers in Agnes Water – Seventeen Seventy (18.5% of the available floorspace) which is reflective of the townships' function as a tourist destination and the need to provide appropriate dining facilities.

The majority of the Agnes Water – Seventeen Seventy retail provision is located in the township of Ages Water in its two shopping centres. However there is a small amount of outlying retail provision located on the main road into Agnes Water and along the road to Seventeen Seventy. The retail facilities along the main road into Agnes Water are limited, and mainly include a medical centre, hardware store, factory outlet and a drive thru bottleshop attached to a hotel. These facilities complement the Agnes Water town centre.

There is a small amount of retail facilities between Agnes Water and Seventeen Seventy, including two restaurants and a small marina precinct. There were no vacant premises recorded in either Agnes Water or Seventeen Seventy.

Miriam Vale

Miriam Vale's 1,920 m^2 retail precinct lies along Blomfield Street and is distributed across 14 premises. The retail precinct provides a range of convenience retailers for local residents and passing travellers, however residents would need to travel to Gladstone City or Bundaberg for comparison goods shopping and major food shopping.

Homewares/services retailers feature within the township using approximately 31.5% of all floorspace. The one take home food retailer within Miriam Vale is a small supermarket which represents an estimated 23.4% of the floorspace. There is a small professional services/commercial precinct (26.8%) within the township which includes representatives such as an accountant, real estate agent and a bank. There was only one vacant shopfront in the area in January, 2010.

Table 3.5: Classification of Occupied Floorspace in the Former Calliope and Miriam Vale Shires, January 2010

	Take Home Food		*Meals Out/Take Away*		*Apparel*		*Homewares/ Services*		***Total Retail***		*Professional Services/ Commercial*		*Vacant*		***Total Floorspace***
	(m^2)	*(%)*	*(m^2)*	*(%)*	*(m^2)*	*(%)*	*(m^2)*	*(%)*	***(m^2)***	***(%)***	*(m^2)*	*(%)*	*(m^2)*	*(%)*	***(m^2)***
Tannum Sands	3,650	37.6	1,032	10.6	325	3.4	1,929	19.9	**6,936**	***71.5***	2,306	23.8	459	4.7	**9,701**
Boyne Island	3,307	40.3	384	4.7	345	4.2	1,286	15.7	**5,322**	***64.9***	1,972	24.0	912	11.1	**8,206**
Calliope	1,590	47.3	280	8.3	210	6.2	545	16.2	**2,625**	***78.0***	700	20.8	40	1.2	**3,365**
Calliope Shire	***8,547***	***40.2***	***1,696***	***8.0***	***880***	***4.1***	***3,760***	***17.7***	***14,883***	***70.0***	***4,978***	***23.4***	***1,411***	***6.6***	***21,272***
Miriam Vale	450	23.4	340	17.7	–	–	605	31.5	**1,395**	***72.7***	515	26.8	10	0.5	**1,920**
Agnes Water–1770	1,470	22.5	1,210	18.5	365	5.6	1,455	22.3	**4,500**	***68.9***	2,035	31.1	–	–	**6,535**
Miriam Vale Shire	***1,920***	***22.7***	***1,550***	***18.3***	***365***	***4.3***	***2,060***	***24.4***	***5,895***	***69.7***	***2,550***	***30.2***	***10***	***0.1***	***8,455***

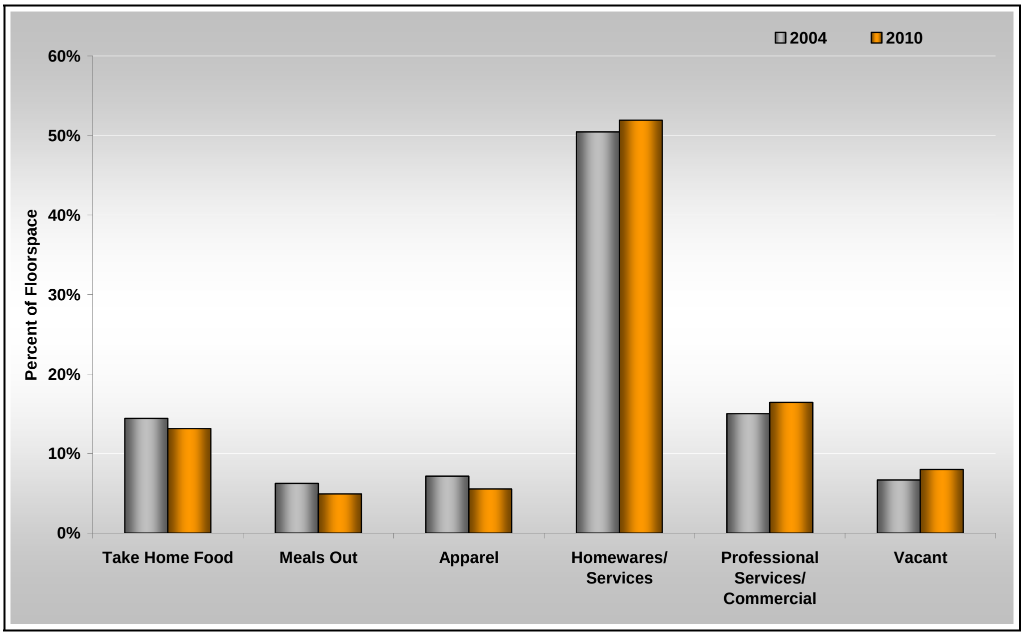
Note: Totals may not add due to rounding.
Source: Foresight Partners estimates.

3.4 CHANGES TO THE RETAIL NETWORK OF GLADSTONE CITY, 2004–2010

Whilst the 2010 Gladstone Regional Retail and Commercial Strategy study area encompasses a larger area than that of the 2005 Gladstone Retail Study, it is possible to identify some key changes that have occurred in Gladstone retailing over a six year period. Initially it is evident that there has been considerable growth in the total retail floorspace available in Gladstone City – 106,213 m^2 in 2004 compared to 149,005 m^2 in 2010, representing an increase of approximately 42,710 m^2 (40.2%) over the six year period. This increase can be mainly attributed to the opening of Centro Home Gladstone, Sun Valley Road Marketplace and the expansion of Gladstone Central (formerly known as the Nightowl Centre).

With respect to the percentage distribution of floorspace by commodity group, Figure 3.3 suggests that the major changes in retail provision have occurred in the apparel and homewares/services commodity groups. The decline in apparel as a proportion of the retail mix is reflective of the overall increase in retail facilities across Gladstone City, and is representative of an overall increase of around 664 m^2 of apparel floorspace. The increase in the homewares/services commodity group is representative of an increase of nearly 24,000 m^2. The increase in the homewares/services floorspace is somewhat understated because the 2010 survey excluded sites located in the Hanson Road industrial precinct that were used for bulky goods retailing in 2004 but were occupied by more traditional industrial facilities in 2010 as a result of a relocation of some retailers. For example, the Hanson Road site occupied by Harvey Norman in 2004 was made available for non–bulky goods uses once the retailer relocated to the Centro Home Gladstone complex.

Figure 3.3: Changing Retail Provision in Gladstone City, 2004–2010



Source: Economics Associates 2005 Gladstone Retail Study, Foresight Partners estimates.

However, the proportional decline in the provision of take home retail facilities is a function of the absolute increase in retail facilities, rather than a decline in the provision of take home food services. There was an increase in take home food floorspace in the order of 4,200 m^2 between the 2004 survey and the 2010 survey.

3.5 SPECIALISED RETAILING PRECINCTS

3.5.1 Bulky Goods Retailing Precincts

Retail warehouses/showroom centres evolved in response to the demand from large, low volume retailers who wished to relocate from industrial precincts (or other secondary space) to dedicated centres. This is evident within Gladstone through the establishment of the Centro Home Gladstone centre on Dawson Highway, Clinton which included the relocation of retailers from other non–retail precincts within Gladstone.

Gladstone’s 36 bulky good/showroom retailers are primarily located in either the new Centro Home Gladstone dedicated bulky goods centre or within the Hanson Road industrial precinct. The average bulky goods store size in the Region is approximately 1,054 m^2 (or 714 m^2 if the Bunnings Warehouse is excluded). There is nearly 38,000 m^2 of bulky goods floorspace in the Gladstone Region. Two vacancies noted within existing bulky goods floorspace, with one vacancy located within the Centro Home Gladstone complex.

Centro Home Gladstone is the GRC area’s premier homemaker/bulky goods centre. It is a facility dedicated to retail showroom provision and has attracted a mix of hardware (Bunnings), electrical (Betta Electrical) and homewares/furniture retailers (e.g. Harvey Norman, Pillow Talk).

The majority of the remaining bulky goods retailers are integrated with light industrial and commercial uses in the Hanson Road area. There are 16 bulky goods/retail showrooms within this precinct making up 7,915 m^2 of floorspace. Whilst a number of these are complementary to the existing industrial uses (such as plumbing and flooring centres which cater for both households and trades business), a significant proportion of these users (including the furniture retailers) would be more appropriately catered for in purpose–built showroom retail facilities outside of an industrial precinct.

There are a small number of bulky goods/showroom retailers located elsewhere in Gladstone City, including Retravision and Gladstone Hi–Fi within the Valley. There are limited vacant premises outside of Centro Home Gladstone that are of an appropriate physical size for bulky goods/retail showroom uses with the largest vacant premises available at the Sun Valley Road Marketplace (an estimated 1,500 m^2), or at the former Lifeline Store in the Valley (560 m^2). However these premises are not suitable locations for many bulky goods retailers given their location within a residential community (Sun Valley Road Marketplace) and within the Valley retail precinct due to lack of off–street parking.

The 2005 Retail Study recommended the establishment of a bulky goods retail precinct so that bulky goods retailers located within the Hanson Road industrial precinct could relocate, thereby reducing the potential conflict between shopper and industrial traffic and parking. Whilst Centro Home Gladstone is a realisation of this recommendation, 15 bulky goods/showroom retailers remain within the Hanson Road precinct, and growing demand is likely to increase the demand by bulky good retailers for sites at Hanson Road or elsewhere. It is likely that these retailers remain within the Hanson Road precinct for one of the following reasons:

- they are unable to find suitably sized premises elsewhere in Gladstone City, and as such, elect to remain within the Hanson Road precinct;
- operating from Hanson Road allows retailers to serve both households and businesses, as well as enhance their ability to access their warehouses; and
- Hanson Road premises can be individually owned (unlike tenancies within Centro Home Gladstone), thus giving owner–operators security and a further investment in their business.

3.5.2 Dining and Entertainment Precincts

Dining

Between the 2005 Retail Study and the 2010 inventory, two burgeoning dining precincts have developed within the former Gladstone City. The first is located along Goondoon Street between Roseberry and Yarroon Streets in the Gladstone CBD in the Library Square Precinct. As the first stage of a CBD revitalisation project Council redesigned the streetscape fronting the library through plantings, street furniture, public art and inviting sightlines. Whilst the dining precinct currently consists of only two fine dining restaurants, a takeaway shop and a juice bar it is understood that an aim of Council's revitalisation project is to establish Library Square as a fine dining precinct. For this precinct to develop into a Gladstone's premier dining precinct additional restaurants ranging from mid–to–fine dining will need to be actively attracted to establish in this precinct, preferably supported by complementary leisure retailers such as boutique specialty stores such as bookshops and gift stores which encourage passers by to stop.

Gladstone's other up–and–coming dining precinct is more established and is located within the upper section of Gladstone Central. There are nine take away food or café retailers located in the upper section (1,325 m^2), however only six of these are open at night, with only two providing sit down meal destinations. The Coffee Club and Gloria Jeans both offer al fresco dining, however only The Coffee Club operates at night. These restaurants are located in a L–shaped building around a large carpark, and as such this precinct lacks some cohesiveness. This precinct presents a more mid–range offer than that at Library Square, CBD.

Entertainment

There is no dedicated entertainment precinct within the GRC area. The cinemas are located at the Gladstone Central Shopping Centre and the ten pin bowling alley is located alongside the industrial precinct along the Gladstone Benaraby Road on the eastern side of town. There is no connectivity between these two locations, which are also located outside the main residential areas, thus limiting their accessibility to residents who do not have access to motor vehicles.

The cinemas relocated from within the Gladstone Benaraby Road industrial precinct to the middle section of the Gladstone Central Shopping Centre. They are separated from the centre's food services precinct on its upper level, and therefore do not form a particularly cohesive dining–entertainment precinct within the centre. There are few examples of associated food retailing surrounding the Gladstone Central cinemas, with its access from the carpark either past medical services or through a shared carpark with Dicey Reilly's. Creation of a dedicated and compact entertainment precinct within Gladstone Central would most likely require a redesign of the centre.

In view of the size of the Gladstone Regional market, it is highly unlikely that another cinema complex would be viable in the foreseeable future. However, there is an opportunity to provide additional, casual entertainment through the continuing development of al fresco dining areas at Goondoon Street and Gladstone Central.

3.6 NETWORK PERFORMANCE

An indication of the performance of a retail network can be gauged through an examination of the amount and quality of its vacant floorspace. Some vacant space is essential in a healthy retail network as it allows new retailers to enter the market and existing ones to move to larger (or smaller) premises in response to shifting market conditions and consumer demands. Some vacant space within a network also helps moderate rental levels.

A vacancy factor of between 5% and 8% of total floorspace is a reasonable level which can allow timely changes to the network in response to market demand. This represents an increase in the generally accepted 'industry average' vacancy rate from 3% to 5% commonly used in the early 1980s, before large format retail showrooms (e.g. bulky good furniture and electronic retailers) were common and average shop sizes were considerably smaller.

There are 82 vacant or unoccupied retail premises within the Gladstone Region. These premises account for nearly 13,400 m^2 of floorspace and represent 7.5% of all available floorspace (Table 3.6). Gladstone City has the highest vacancy rate amongst the former Councils, with 8.0% of its available retail floorspace currently vacant. An estimated 6.6% of the Calliope Shire's and 0.1% of the Miriam Vale Shire's available retail floorspace is currently vacant. It is unsurprising that nearly 90% of the vacant floorspace in the Region is in the former Gladstone City as it accounts for over 83% of all available floorspace within the Region.

There are vacant premises within the majority of the existing centres; however the vacancies are not evenly distributed. The CBD and Valley have a significantly higher proportion of vacant premises than the Regional average at 10.1%, which is in stark contrast to a vacancy rate of less than one percent at Kin Kora. Vacancies are also very low in the Gladstone Central (2.7%) and Centro Home Gladstone (4.2%) precincts. The considerable difference in vacancy rate between the CBD & Valley and the other nominated centres is likely to be attributable to higher quality premises, dedicated off–street parking and premises designed specifically for retailing within the centres with fewer vacancies.

Table 3.6: Vacancies by Centre and Former Council, January 2010

	# Shops Vacant	*Vacant (m^2)*	*Vacant (%)*	*Total Floorspace (m^2)*
CBD & Valley	31	3,899	10.1	38,700
Kin Kora	1	140	0.5	29,694
Gladstone Central	3	435	2.7	16,117
Centro Home Gladstone	1	920	4.2	21,791
Hanson Road	–	–	–	13,662
Tooloola Street	4	654	14.8	4,407
Clinton	2	654	19.6	3,329
Mellefont Street	2	177	25.6	691
Airport Village	1	84	9.7	868
Sun Valley Road	8	2,465	47.8	5,155
Avion Centre	4	295	23.4	1,260
Other	12	2,204	16.5	13,331
Total Gladstone City	*69*	*11,927*	*8.0*	*149,005*
Tannum Sands	4	459	4.7	9,701
Boyne Island	7	912	11.1	8,206
Calliope	1	40	1.2	3,365
Total Calliope Shire	*12*	*1,411*	*6.6*	*21,272*
Miriam Vale	1	10	0.5	1,920
Agnes Water–1770	–	–	–	6,535
Total Miriam Vale Shire	*1*	*10*	*0.1*	*8,455*
Total Gladstone Region	**82**	**13,348**	**7.5**	**178,732**

Source: Foresight Partners reconaissance, January 2010.

Within the Region the largest amount of vacant floorspace as a proportion of total floorspace is located in the Sun Valley Road precinct. There is an estimated 2,465 m^2 of vacant floorspace within this precinct, which represents nearly 48% of its floorspace. These vacancies are located in both the older, obsolete centre and in the newer centre which is yet to be fully tenanted. The majority of the vacant space in the Sun Valley Road precinct is within one large tenancy which could be suitably sized for a discount variety store or an expanded supermarket.

Significant vacancies were also noted in the recently developed Avion Centre which opened in 2009 and is yet to be fully leased. Nearly 20% of the Clinton precinct is currently vacant, however a considerable portion of these vacancies are earmarked for redevelopment with the recent development approval for the Garden Lover's Centre.

Throughout the remainder of the Region there are vacancies within a range of small to medium sized centres:

- The Emmadale Heights Convenience Centre on the corner of Emmadale Drive and Skyline Drive, Emmadale Heights. This centre is a 500 m^2 convenience centre offering four tenancies. It was built in 2005 but has never been tenanted. The centre does not appear derelict and off–street car parking is provided.
- The Boyne Plaza Shopping Centre is a tired, older centre which does not appear to have been upgraded in the past ten years. Approximately 912 m^2 of the Boyne Island retail floorspace, or 11.1% of the available space, is currently vacant, with many of these vacancies long term.
- The Toolooa Street centre has a vacancy rate of nearly 15%. The vacant floorspace consists of four vacant premises, some of which have relocated to other tenancies within the centre.

3.7 OTHER CENTRES IN THE WIDER REGION

The Gladstone Regional Council retail network lies within a wider competitive network of centres which also includes Rockhampton, Bundaberg and even Brisbane.

Rockhampton is the major urban centre for the Capricorn Coast–Central Queensland Region. It is located 108 kilometres to the north of Gladstone City, or a 1.5 hour drive. There are an estimated 64,247 persons living within the former Rockhampton City LGA as at June 2009, and as such there is a significantly greater range of retail shops and services than that available in Gladstone City. Residents of the Gladstone Region would rely on Rockhampton for major comparison goods shopping, including homewares, particularly in light of the January 2010 decision of the Queensland Industrial Relations Commission to grant a request to allow the major shopping centres to trade on Sundays. Furthermore, the 2005 Gladstone Retail Study identified (through a telephone survey) that around 20% of Gladstone City residents had visited Rockhampton City in the previous six months for apparel shopping, with nearly 5% of respondents nominating Rockhampton as the single destination used for the majority of their apparel shopping.

There are two major centres in Rockhampton:

- **Stockland Rockhampton** is a 53,800 m^2 regional shopping centre which is currently undergoing refurbishment and expansion. It includes a Big W, Kmart, Coles, Woolworths and six screen cinema, as well as over 100 specialty shops. The current refurbishment and expansion plans include increasing the size of the food court, as well as adding another 20 shops by mid–2010. There is a large apparel component to this centre, with many retailers not found in Gladstone.

- **City Centre Plaza** is a 14,000 m^2 sub–regional shopping centre anchored by Target and Coles and has 40 specialty shops. Whilst the range of specialty shops at City Centre Plaza is similar to that of Stockland Gladstone, in combination with Stockland Rockhampton is offers a significantly greater selection than is available in Gladstone.

Bundaberg City is approximately 217 kilometres drive to the south of Gladstone City, and as at July 2009 has a retail floorspace provision of around 73,000 m^2 in its CBD and Fringe retailing area.[6] It is a major commercial centre of the Wide Bay Burnett Region, and provides for the delivery of higher order goods and services and employment opportunities for this region. Bundaberg's comparison goods shopping facilities include Target, Best and Less, Dimmeys and The Warehouse. It also has an Aldi supermarket as well as a range of bulky goods retailers such as The Good Guys and Spotlight. Approximately 5% of the 2004 survey respondents had visited Bundaberg in the six months prior to the survey to undertake some of their apparel shopping. However, less than 2% of respondents nominated Bundaberg as the major destination for their apparel shopping needs.

Brisbane is a one hour flight from Gladstone and also draws some retail expenditure from the Gladstone Region. The June 2004 telephone survey indicated that nearly 12% of all respondents had visited Brisbane and the Gold Coast for apparel shopping in the previous six months; with nearly 5% indicated that they undertook the majority of their apparel shopping in Brisbane and the Gold Coast.

The flow of retail sales is not solely one–way out of Gladstone as the Region benefits from sales drawn from the Banana Shire into Gladstone centres, and from holiday and business visitors staying in the Region.

3.8 PROPOSED RETAIL DEVELOPMENT

Discussions with Council's planners and developers indicate that a number of projects are pending or active and include the following:

Gladstone City

- An application has been lodged for a neighbourhood shopping centre to be built on the corner of Glenlyon Road and Victoria Avenue, Glen Eden as part of the Gecko Valley residential estate. It is for a total floorspace of 1,366 m^2, including a service station, fast food restaurant, medical centre/commercial offices and 559 m^2 of retail floorspace. In addition a childcare centre is proposed for the site.

[6] Source: Urban Economics, Bundaberg Centres Network Strategy, July 2009.

A previous development approval for similar uses on the subject site has lapsed. The current development application is at the information request stage.

- In June 2010 Council approved a development application for the Forest Springs Marketplace on the corner of Kirkwood Road and Dixon Drive in the Kirwood South Precinct. The proposal is for a supermarket anchored centre of approximately 5,395 m^2, including a 3,200 m^2 supermarket. This application was submitted by Woolworths and includes scope for the expansion of the supermarket in the future.
- In 2007 Council approved a stand–alone shop/pharmacy on a site adjacent to the Sun Valley Road Marketplace and Sun Valley Plaza. No construction has started on this site as at January 2010.
- In 2008, as part of the Proxima, Gladstone Harbour higher density residential development, Council approved the development of 750 m^2 of retail shops and 1,490 m^2 of commercial offices.
- Council has recently (November 2009) approved the refurbishment and expansion of the Garden Lover's Centre on the corner of Chapman Drive and Dawson Highway, Clinton. The refurbishment and expansion will involve the removal of some of the existing floorspace and the addition of new floorspace. Overall, there will be a total floorspace of 1,269 m^2 in the redeveloped centre, including an 835 m^2 supermarket. This represents an approximate 40% increase in GFA of the centre.

Calliope Shire

- In August 2010 Council issued a preliminary approval for a large mixed use centre to be located on the north–eastern corner of Malpas Street and Hampton Drive, Boyne Island. The approval includes a 3,400 m^2 supermarket, a 3,705 m^2 of specialty shops, 500 m^2 for medical services, a tavern and a cinema in addition to a motel and four residential towers with a total of 108 units.
- As part of the masterplanning for the Tannum Waters residential estate in Tannum Sands provision has been made for at least 500 m^2 of retail/commercial facilities. A development application is yet to be submitted to Council for development approval.

Miriam Vale Shire

- In 2007 Council issued a preliminary approval for a tourist village and catering premises (including a restaurant) for Captain Cook Drive, Agnes Water. No further applications (such as operational works) have been lodged for this site.
- In 2008 the Planning and Environment Court approved the development of a supermarket anchored shopping centre for the corner of Captain Cook Dive and Discovery Drive, Agnes Water. The centre

is to comprise of a 2,580 m^2 Coles supermarket and 1,220 m^2 of specialty shops. No operational works or building applications have been received by Council.

- In 2008 Council approved the development of a shopping centre to be located on the corner of Round Hill Road and Heights Entrance, Agnes Water. The centre is to comprise of a 767 m^2 supermarket and 400 m^2 of specialty shops. It is understood that the intent is to relocate the existing Foodworks and Australia Post tenancies to the approved centre.

Discussions with Council also indicated that there are a number of development applications which have been submitted over the past 10 to 15 years which have lapsed. These include the following:

- A development approval for 780 m^2 of shops and a tavern on the corner of Glen Eden Drive, and Gladstone Benaraby Road, Glen Eden. Council has rezoned the site for commercial purposes; however any new development will need to be submitted to Council for approval.
- Queensland Alumina Ltd controls a site on French Street, near the QAL Access Road in South Gladstone. Previously Council has approved the development of a convenience centre of approximately 2,000 m^2 on the site. However Council has indicated to Foresight Partners that its does not expect QAL to develop the site in the near future.
- Council has rezoned a site for commercial purposes at Glenlyon Road/Hanson Road between Roseberry and Yarron Streets. There has previously been a development approval dating back approximately 15 years for the site which includes around 4,000 m^2 of retail showroom and other commercial uses. Any development on this site will be required to submit a new development application to Council.
- Council issued a development approval for a service station, car wash and fast food outlet on a commercially zoned site on the corner of Boles and Breslin Streets, West Gladstone in 2005. Whilst this approval has subsequently lapsed, the previous buildings on the site have been demolished which suggests that a new development application for the site may be submitted in the near future.

In December 2009 the Gladstone Ports Corporation called for submissions to engage consultants to prepare the masterplan for the future redevelopment of land on the eastern bank of Auckland Inlet, Gladstone. From the masterplanning it is intended that a land use pattern for the site is developed which will include an appropriate mix of residential, business, recreational, hospitality and tourism uses. The uses within the Gladstone Ports precinct are likely to be complementary to the CBD. It is understood that the masterplanning process is currently underway; however timing for the completion of the masterplanning and subsequent development of the Gladstone Ports precinct is unknown.

Vacant Commercially Zoned Lots

The inventory of retail facilities identified a number of commercially zoned vacant lots throughout the Region. The vacant lots represent spare capacity within the existing zonings. Table 3.7 summarises the commercial lots identified as vacant as at January 2010.

Table 3.7: Vacant Commercial Zoned Lots, Gladstone Region, January 2010

Street	*RP Description*	*Zoning*	*Area (ha)*	*Status*
Dixon Drive and Kirkwood Road, Kirkwood	N/A	Commercial	N/A	DA Approved June 2010
Boles Street and Breslin Street, West Gladstone	L1 CP 843206	Commercial	0.73	Lapsed DA
French Street and QAL Access Road, South Gladstone	L1–2 RP 615087	Commercial	6.71	DA Approved
Glen Eden Drive and Gladstone Benaraby Road, Glen Eden	L33 RP 897099	Commercial	0.66	Lapsed DA
9 Captain Cook Drive, Agnes Water	L4 RP 619978	Local Business	1.01	–
5 Captain Cook Drive, Agnes Water	L101 SP 133045	Local Business	0.55	–
Heights Entrance and Round Hill Road, Agnes Water	L11 SP 102425	Local Business	0.43	DA Approved 2008
Captain Cook Drive and Discovery Drive, Agnes Water*	L1 RP 856969	N/A	1.50	DA Approved 2008
Round Hill Road, Agnes Water	Various	District Business, Commercial Services, Retail Showroom	~ 85	–

** This site is the proposed Coles supermarket development site in Agnes Water. At the time of the preparation of the Miriam Vale Shire Council Planning Scheme in February 2009 this site was zoned Low Density Residential.*

Source: PriceFinder, Foresight Partners reconaissance, January 2010.

3.9 BENCHMARKING THE GLADSTONE REGION'S FLOORSPACE PROVISION

Nearly 60,000 people live within the Gladstone Region as at June 2009. As noted above these residents are served by nearly 179,000 m^2 of retail/commercial floorspace. This represents a provision of 2.98 m^2 of retail floorspace per person. If the professional services/commercial floorspace is removed (that is, the retail floorspace which is currently occupied by non–retail users), the floorspace per capita provision in the Gladstone Region falls to 2.45 m^2 per person.

Broad comparisons can be made with other areas such as Bundaberg and Mackay, for which recent floorspace information is available. However, it should be noted that differences in scope of coverage and estimation methodologies mean the inter–regional comparisons are necessarily imprecise and indicative only.

In 2009 the Mackay and Bundaberg Regional Councils commissioned retail network strategy reports which examined the provision of retail facilities within the respective Council areas. The *Mackay Retail and Commercial Strategy* was prepared by MacroPlan Australia and identified that there is around 206,000 m^2 of lettable retail floorspace within the Mackay Region. As at June 2009 this translates to around 1.77 m^2 per person.

The *Bundaberg Region Centres Network Strategy* prepared by Urban Economics in 2009 identified that there was 266,000 m^2 of retail and commercial floorspace (including Council offices, community facilities and vehicle saleyards which are not usually included in a retail inventory), or 106,150 m^2 of retail floorspace only. As at June 2009 this translates to a provision of between 1.16 m^2 of (retail only) floorspace per person to 2.80 m^2 per person (all retail and commercial floorspace).

In 2007–2008 studies undertaken in Victoria and New South Wales by Essential Economics Pty Ltd and Hill PDA for the State Governments of New South Wales and Victoria indicated that the 'required' retail provision in Australia is 2.1 m^2 of retail floorspace per head. However this figure was derived by applying benchmark retail productivity levels (turnover per square metre) to expenditure estimates, rather than an inventory of actual retail floorspace.

A comparison of the Gladstone, Mackay and Bundaberg per capita provision of retail floorspace[7] would initially suggest that the Gladstone Region is roughly in balance with that of Australia, and that Mackay is currently undersupplied when it comes to retail (only) floorspace per head.

In addition to inherent definitional and methodological issues in comparing per capita floorspace ratios amongst different Regions, there are more fundamental difficulties in the use of per capita measures for all but the broadest level of generalisation in planning for future retail infrastructure. Therefore, whilst the Mackay, Bundaberg and Gladstone Regional studies have all been performed for (purportedly) the same reason the results are not directly comparable and caution should be taken when put side by side.

These issues are discussed in more detail in Section 7.1.1.

3.10 IMPLICATIONS FOR THE SUSTAINABLE PLANNING ACT 2009

The Sustainable Planning Act 2009 (SPA) prescribes an indicative centre hierarchy that outlines the expectations of the provision of services and the composition of each type of centre. The SPA has prescribed a six level hierarchy for centre types, whereby each individual hierarchical level may or

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[7] The per capita provision of retail floorspace in the Rockhampton Regional Council area is unable to be examined as to date there has been no comprehensive study undertaken examining the retail floorspace throughout the whole Region. It is understood that the Rockhampton Regional Council is preparing to undertake such a study in the near future. Until that is completed any comparisons made would be outdated and based on inadequate information.

may not be included in the future development of a standardised planning scheme.

Whilst the implications for the SPA 2009, and the development of a retail centres hierarchy for the Gladstone Regional Council is discussed in depth in Section 8, a preliminary review of the Gladstone Region's existing centre provision suggests the following retail hierarchy currently exists within the Region.

Principal Centre

The purpose of the principal centre zone is to provide the largest and most diverse mix of uses, across retail, commercial, employment, cultural and residential uses. Gladstone's CBD/Valley precinct is the most analogous existing centre within the Region to this definition.

Major Centre

The purpose of the major centre zoning is to accommodate a wide mix of uses and activities, including higher order retail, community and commercial facilities. The Kin Kora retail precinct, as dominated by Stockland Gladstone, is the Region's major centre. It is the predominant retail centre within the Region and contains a wide range of retail, personal services, banking services, community services and service trades.

District Centre

The district centre zoning allows for a mix of uses and activities within a centre, serving a number of suburbs and localities. Gladstone Central with its burgeoning entertainment precinct is the existing centre which is most equivalent to the defined district centre. There is the potential for the Tannum Sands retail precinct to expand to serve a district centre purpose, however it currently acts as a local centre.

Local Centre Zone

The purpose for a local centre under the SPA 2009 is to provide a range of uses and activities which accommodate local needs such as local shopping and local employment nodes. These centres are most likely to serve a rural and suburban catchment and are usually a short drive or cycle away for the local community.

Currently the following centres within the Gladstone Region act as local centres:

- Boyne Island;
- Agnes Water–1770;
- Calliope; and
- Tannum Sands.

It is anticipated that the approved centres at Kirkwood Road and Boyne Island would also individually provide local centre functions once developed.

Neighbourhood Centre Zone

The purpose for a neighbourhood centre is to provide a small mix of land uses including low scale convenience shopping and local professional offices. These centres support the higher order centres within the Gladstone Region hierarchy and include:

- Toolooa Street precinct;
- Clinton;
- Sun Valley Road;
- Avion Centre;
- Mellefont Street;
- Airport Village; and
- Miriam Vale.

Specialised Centre Zone

A specialised centre zoning is appropriate for a centre or precinct in which the retail, commercial and community facilities provision is heavily weighted to one (or more) uses. The centres usually serve a city or regional scale catchment. Within the Gladstone Region the existing Centro Home Gladstone precinct is a specialised centre providing the Region's premier homemaker and bulky goods facilties.

4 Market Fundamentals

This section outlines the demography of the main catchments served by Gladstone's major retail centres. Selected socio–economic characteristics of the catchment population are outlined based on the 2006 Census conducted by the ABS. Forecasts of residential population and households are also included. Estimates of household retail expenditure potential available now and in future years are also presented. Future growth in retail expenditure is then translated into an estimate of floorspace supportable by this growth.

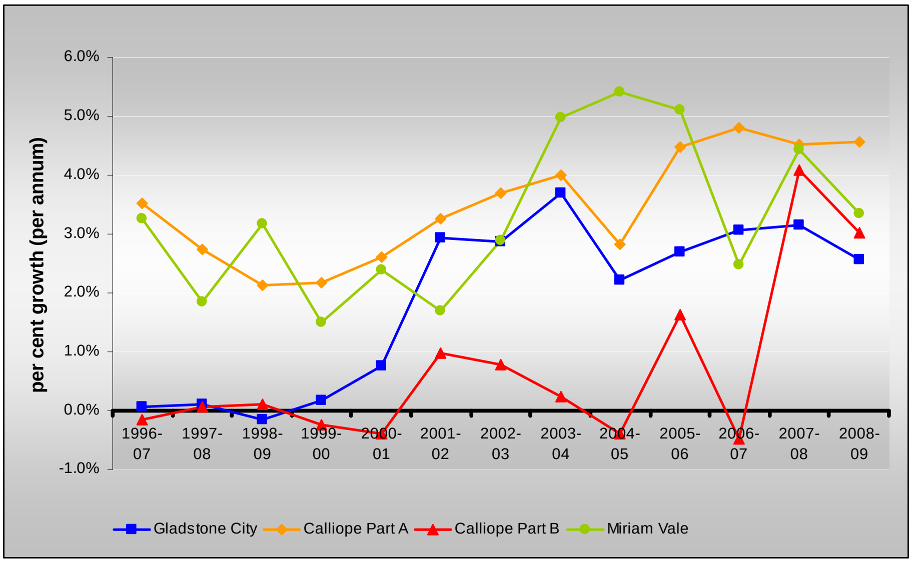
4.1 HISTORIC REGIONAL POPULATION GROWTH

The Gladstone Regional Council was created in March 2008 as an amalgamation of the former local government areas of Gladstone, Calliope and Miriam Vale. The region had an estimated resident population of around 59,644 people at June 2009.

The Gladstone Region has experienced strong growth over the 1996 to 2009 period, increasing by approximately 15,520 persons, reflecting an average annual growth of 2.3% over the thirteen year period. Population growth has been significantly higher in the Statistical Local Areas of Calliope (Part A) at 3.5% per annum (6,040 people) and Miriam Vale at 3.3% per annum (2,062 people), where the populations reached 16,813 persons and 6,037 persons respectively by 2009. Growth has been more moderate in the former Gladstone City where the residential population reached 33,725 persons in 2009 (1.9% per annum) and Calliope (Part B) (with a residential population of only 3,069 persons in 2009) (0.7% per annum) over the same period.

Figure 4.1 and Table 4.1 show a general upward trend in population growth on a per cent basis in each of the Statistical Local Areas between 1996 and 2009.

Figure 4.1: Annual Percent Population Growth by SLA, 1996 – 2009



Source: ABS ERP 1996–2009

Table 4.1: Historical Population Growth, Statistical Local Areas. Gladstone Regional Council, 1996–2009

	Gladstone City	*Calliope Part A*	*Calliope Part B*	*Miriam Vale*	***Total Gladstone Region LGA***
1996	26,574	10,773	2,802	3,975	44,124
1997	26,594	11,153	2,798	4,105	44,650
1998	26,624	11,458	2,800	4,181	45,063
1999	26,583	11,703	2,803	4,314	45,403
2000	26,631	11,957	2,796	4,379	45,763
2001	26,831	12,269	2,785	4,484	46,369
2002	27,617	12,670	2,812	4,560	47,659
2003	28,412	13,137	2,834	4,692	49,075
2004	29,461	13,663	2,841	4,926	50,891
2005	30,114	14,049	2,830	5,193	52,186
2006	30,928	14,679	2,876	5,458	53,941
2007	31,876	15,385	2,862	5,593	55,716
2008	32,881	16,079	2,979	5,841	57,780
2009	33,725	16,813	3,069	6,037	59,644*

**The 2009 ERP for the Gladstone Region is below subsequent population figures used in Table 4.2 and provided to Foresight Partners by the Gladstone Regional Council. However the discrepancy represents less than 300 persons and is therefore immaterial to future demand.*

Source: ABS Regional Population Growth.

4.2 GLADSTONE REGIONAL CATCHMENT DEFINED

The Gladstone Regional LGA has been segmented into six areas based on natural geographic and economic zones, which are considered to be the main local catchment areas. The catchment has been defined by the following six sub–areas:

- **Gladstone City** – comprising the city of Gladstone and the surrounding urban areas of Curtis, Clinton Park, Glen Eden and O'Connell;
- **Boyne Island – Tannum Sands –** also incorporating Wurdong Heights and Benaraby located to the south of Boyne Island and Tannum Sands;
- **Calliope –** also includes the northern towns of Beecher and Burua;
- **Agnes Water – Seventeen Seventy –** the smallest geographic sub–area comprising these two coastal towns;
- **Rural South–East –** encompassing a large geographic area containing the townships of Miriam Vale, Mount Maria and Rodds Bay; and
- **Rural West –** the north–western part of the LGA including the towns of Riverston, Boynedale, Tablelands, Upper Calliope and Creekside.

Figure 4.2 shows the sub–areas defined within Gladstone Regional Catchment.

Figure 4.2: Gladstone Regional Centre Catchments

4.3 POPULATION AND HOUSEHOLDS

Table 4.2 sets out the resident population and households for each of the sub–areas in 2006 and 2009, as well as forecast population and households for 2011 to 2031. Population and household data for each of the six sub–areas were compiled from medium series forecasts commissioned by Gladstone Regional Council and prepared by OESR in 2011.

- In 2006, the Gladstone Region had an estimated 53,960 persons residing in 20,130 private dwellings.
- At 2011, the Gladstone Region had an estimated population of 62,980 people in 23,860 private dwellings.

This increase of around 9,000 persons over the five year period represents an average annual growth of 1,800 persons.

Gladstone City generated around half the increase in the regional population (4,400 persons) between June 2006 and June 2011. Growth was also pronounced in the Boyne Island – Tannum Sands area, which accounted for a further 2,900 persons.

The Queensland Government's Office of Economic and Statistical Research (OESR) 2011 medium series forecasts for the Gladstone Region anticipate its population increasing to:

- 74,500 people by 2016;
- 85,700 people by 2021;
- 98,200 people by 2026; and
- 111,700 people by 2031.

Between 2011 and 2021, the regional population is forecast to grow by 22,700 (36%). Forecast growth in the following ten years (to 2031) is a further 26,000. Therefore, over the twenty year period, the population of the Gladstone Regional Council area is projected to increase by 48,700 people (a 77% increase) between 2011 and 2031.

Most of the forecast population growth over the next twenty years is expected to occur in Gladstone City (24,800) and Boyne Island – Tannum Sands (14,000).

Within the Boyne Island – Tannum Sands area, it is anticipated that residential growth will occur in identifiable pockets rather than as a continuous extension of the existing residential communities. This pattern of development is anticipated as the presence of other land uses, physical features and the ecologically significant land within Boyne Island – Tannum Sands limits the locations for future residential developments. The future development pattern of Boyne Island – Tannum Sands could have an impact on the types and sizes of centres supportable by the residents.

Table 4.2: Estimated Population and Households, Gladstone Region, June 2006 to June 2031 (Revised 2012)

	2006	*Incr p.a.*	*2011*	*Incr p.a.*	*2016*	*Incr p.a.*	*2021*	*Incr p.a.*	*2026*	*Incr p.a.*	*2031*
Gladstone City											
Population	30,928	887	35,365	1,220	41,465	1,142	47,176	1,278	53,565	1,329	60,208
Occ. Dwellings	11,631	374	13,498	515	16,072	500	18,573	571	21,426	610	24,475
Avg h'hold size	2.66		2.62		2.58		2.54		2.50		2.46
Tannum Sands – Boyne Island											
Population	9,526	571	12,383	478	14,775	560	17,577	724	21,198	1,028	26,336
Occ. Dwellings	3,318	209	4,360	176	5,239	208	6,278	270	7,625	383	9,542
Avg h'hold size	2.87		2.84		2.82		2.80		2.78		2.76
Calliope											
Population	5,174	102	5,686	349	7,432	270	8,783	228	9,921	60	10,222
Occ. Dwellings	1,782	40	1,981	125	2,608	101	3,115	86	3,543	27	3,677
Avg h'hold size	2.90		2.87		2.85		2.82		2.80		2.78
Agnes Water – Seventeen Seventy											
Population	3,119	109	3,664	120	4,262	135	4,937	149	5,681	160	6,481
Occ. Dwellings	1,307	59	1,600	61	1,903	72	2,265	80	2,667	90	3,116
Avg h'hold size	2.39		2.29		2.24		2.18		2.13		2.08
Rural South–East											
Population	2,339	82	2,748	90	3,197	101	3,703	112	4,260	120	4,860
Occ. Dwellings	991	44	1,211	46	1,440	56	1,722	63	2,038	71	2,394
Avg h'hold size	2.36		2.27		2.22		2.15		2.09		2.03

	2006	Incr p.a.	2011	Incr p.a.	2016	Incr p.a.	2021	Incr p.a.	2026	Incr p.a.	2031
Rural West											
Population	2,876	52	3,136	38	3,328	30	3,480	14	3,549	7	3,582
Occ. Dwellings	1,083	25	1,211	19	1,305	17	1,392	11	1,449	9	1,493
Avg h'hold size	2.65		2.59		2.55		2.50		2.45		2.40

	2006	*Incr p.a.*	*2011*	*Incr p.a.*	*2016*	*Incr p.a.*	*2021*	*Incr p.a.*	*2026*	*Incr p.a.*	*2031*
Total Gladstone Region											
Population	53,962	1,804	62,982	2,295	74,459	2,239	85,656	2,504	98,174	2,703	111,689
Occ. Dwellings	20,111	750	23,861	941	28,567	956	33,344	1,081	38,748	1,190	44,696
Avg h'hold size	2.68		2.64		2.61		2.57		2.53		2.50
Avg. annual growth Rates		**2006–2011**		**2011–2016**		**2016–2021**		**2021–2026**		**2026–2031**	
Population		3.1%		3.4%		2.8%		2.8%		2.6%	
Households		3.5%		3.7%		3.1%		3.0%		2.9%	

Source: ABS 2006 Census; OESR population forecasts, 2011 medium series and small area forecasts commissioned by GRC from OESR.

Gladstone City Small Area Population Growth

Residential development, and subsequently population growth, will not be evenly distributed throughout the former Gladstone City; it will occur where there is sufficient available land supply to accommodate additional housing.

In 2009 the Queensland Government's Planning Information and Forecasting Unit (PIFU) prepared population projections by small area for the Gladstone Region. It forecast that between 2006 and 2031 the New Auckland–Kirkwood area would increase by the greatest number of residents – an estimated 1,900 additional persons (Table 4.3), with most of this growth forecast to occur between 2006 and 2016.[8]

The PIFU projections also forecast considerable residential population growth within the City/CBD area with 1,560 residents projected to move to the area within the 2006–2031 period. It is forecast that residential growth within this area will be modest until 2016, whereby an increase of 1,300 residents in the City/CBD is expected to occur between 2016 and 2031. This forecast residential increase will occur as a result of an increase in the number of residential apartments within the City/CBD precinct and an increasing demand for higher density residential living.

West Gladstone is forecast to only grow modestly between 2011 and 2031 with less than 15 additional persons within West Gladstone each year. Similarly, the Kin Kora–Sun Valley area is also forecast to experience very modest growth.

Table 4.3: Estimated Population, Gladstone City by Small Area, 2006–2031[8]

Year Ended June	*2006*	*2011*	*2016*	*2021*	*2026*	*2031*
Clinton–Byellee–Callemondah	6,270	6,800	7,150	7,450	7,750	8,000
City/CBD	1,550	1,610	1,790	2,110	2,580	3,110
Kin Kora–Sun Valley	3,690	3,900	4,040	4,160	4,240	4,300
New Auckland–Kirkwood	4,280	5,440	5,720	5,880	6,040	6,180
South Gladstone–Barney Point	5,010	5,350	5,500	5,600	5,650	5,700
Telina–South Trees–Glen Eden–Toolooa	5,110	6,000	6,300	6,350	6,400	6,500
West Gladstone	4,990	5,240	5,340	5,400	5,440	5,500
Total Gladstone City	**30,900**	**34,340**	**35,840**	**36,950**	**38,100**	**39,290**

Source: Planning Information and Forecasting Unit, 2009.

Variations from the PIFU Projections

Council released a discussion document in mid–2010 entitled *Our Place, Our Plan – Towards a new Planning Scheme – A Discussion Document*. The

[8] These forecasts have not yet been updated and reconciled with 2011 forecasts prepared by OESR. Forecast population growth for Gladstone City in Table 4.3 is substantially below the revised figures published by OESR

purpose of the document was to provide an overview of the factors which are a consideration in the preparation of a new planning scheme. The document relies on OESR projections prepared in 2009, however it is understood that Council is concerned about the spatial distribution and timing of some of the small area projections.

The concerns are partially a function of recent events overtaking the projections such as the declaration of Clinton as an Urban Development Area by the Urban Land Development Authority, the announcement of major new industrial projects in the Region, the release of government land to the market and development applications currently being assessed by the Coordinator General as developments of State significance. These areas of concern, as well as future and current land constraints, have the potential to change the forecast population for the Gladstone Region, and subsequently impact upon the demand for retail shops and services.

However, this *Retail and Commercial Strategy* has been developed after consideration of the OESR 2011 Medium series projections only, because they are the officially endorsed projections. Until such time as the residential yields from the potential projects outlined above can be confirmed, the OESR projections are considered the most reliable source of population forecasts.

4.4 GLADSTONE REGIONAL CATCHMENT SOCIO–ECONOMIC CHARACTERISTICS

Socio–economic characteristics provide an indication of the capacity of a population to support retail and other activities. Tables A.1 to A.10 in Appendix A set out detailed characteristics of each component of the catchment area for the Gladstone Region as at the 2006 Census. Table 4.4 summarises this data.

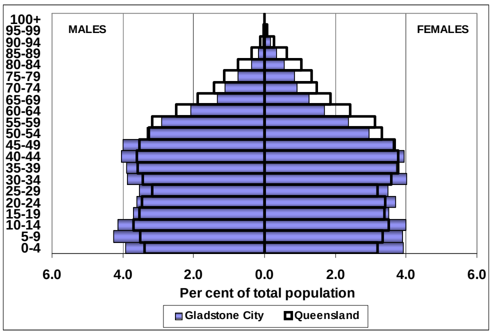
Selected socio–economic characteristics of the Fitzroy Statistical Division (FSD – encompasses the local government areas of Rockhampton, Gladstone, Central Highlands, and the statistical local areas of Banana and Woorabinda) and Queensland are presented for comparison purposes.

Age Distribution

The Gladstone Region has a significantly younger age profile than Queensland which is evidenced by the proportionately higher 0–14 year olds (24.0% versus 20.7%) and the correspondingly lower proportions aged over 65+ (8.5% versus 12.4%).

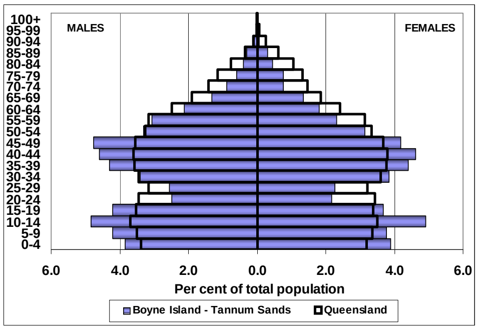
As would be expected, the areas of Gladstone City and Boyne Island – Tannum Sands have the youngest age profile of all areas. Of particular note is the high proportion of traditional family households in Boyne Island – Tannum Sands as reflected by the dominance of children and 35–49 year olds. The lower proportion of young adults (20–29 years) highlights that this group is leaving the area to places such as Gladstone City and further afield offer greater tertiary education and employment opportunities. These differences are further highlighted in the age–sex pyramids (Figures 4.3–4.5).

Figure 4.3: Gladstone City
Age–Sex Profile, 2006



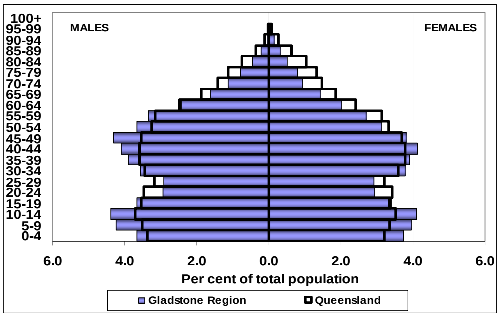
Source:ABS 2006 Census.

Figure 4.4: Boyne Island – Tannum Sands
Age–Sex Profile, 2006



Source: ABS 2006 Census.

Figure 4.5: Gladstone Region
Age–Sex Profile, 2006



Source: ABS 2006 Census.

Family Type

The youthfulness of the Gladstone Region is further reflected in the higher proportion of couples with children households when compared to the State (36.9% versus 31.5%). In particular, the Boyne Island – Tannum Sands and Calliope areas have a significantly higher than average proportion of couple with children households (44.8% and 44.3% respectively). In contrast, the areas of Agnes Water – Seventeen Seventy, Rural South–East and Rural West are characterised by considerably higher than average proportions of couples without children households, which ties in with the older age profile of these areas.

Employment

The top three industries by employment for the Gladstone Region in 2006 were Manufacturing (20.4%), Construction (12.8%) and Retail Trade (10.5%). This is different to Queensland's top industries (by employment) which were Retail trade (12.0%), Health Care and Social Assistance (10.5%) and Manufacturing (10.1%).

At the time of the 2006 Census, unemployment in Gladstone Region at 5.2% was higher than that for Queensland (4.7%). However, labour force participation rates were higher in the Gladstone Region than in Queensland (69.7% versus 66.3%). Participation rates were especially high in Gladstone

City (72.4%) and Boyne Island – Tannum Sands (71.1%). In contrast, in the Rural South Area, this was as low as 52.0%.

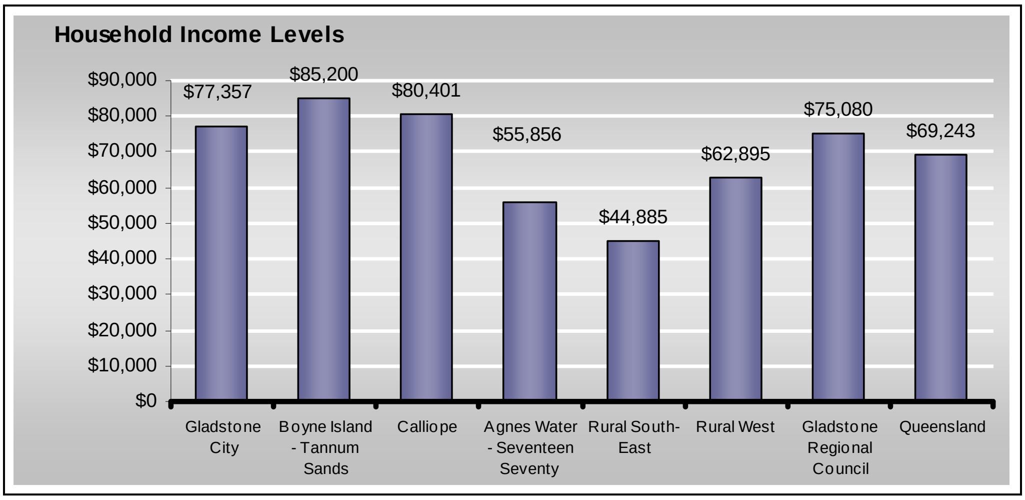
More recent unemployment levels for Gladstone Region as of the March 2010 quarter indicates that unemployment levels have increased from the 2006 level to 5.7%. This level of unemployment is comparable to that of Queensland at 5.6%[9] in the same period.

The proportion of persons in white collar occupations in the Gladstone Region (50.5%) is considerably below the State level (64.9%). It is highest in Agnes Water – Seventeen Seventy (53.9%) and lowest in the Rural West (45.8%) and Calliope areas (47.3%) where Agriculture, Forestry and Fishing, Manufacturing, and Construction are the dominant industries.

Average Household Income

Average household income for the Gladstone Region is estimated at $75,080 per annum (in 2009 dollar values) and is approximately 8% above the State average ($69,243). There are considerable differences in income across the areas. It is highest in Boyne Island – Tannum Sands at $85,200, which coincides with higher labour force participation rates (and lower unemployment levels) reflecting the youthfulness of the area. In contrast, the Rural South–East has the lowest average household income of $44,885, which is tied to the lower workforce participation rates (and higher unemployment levels).

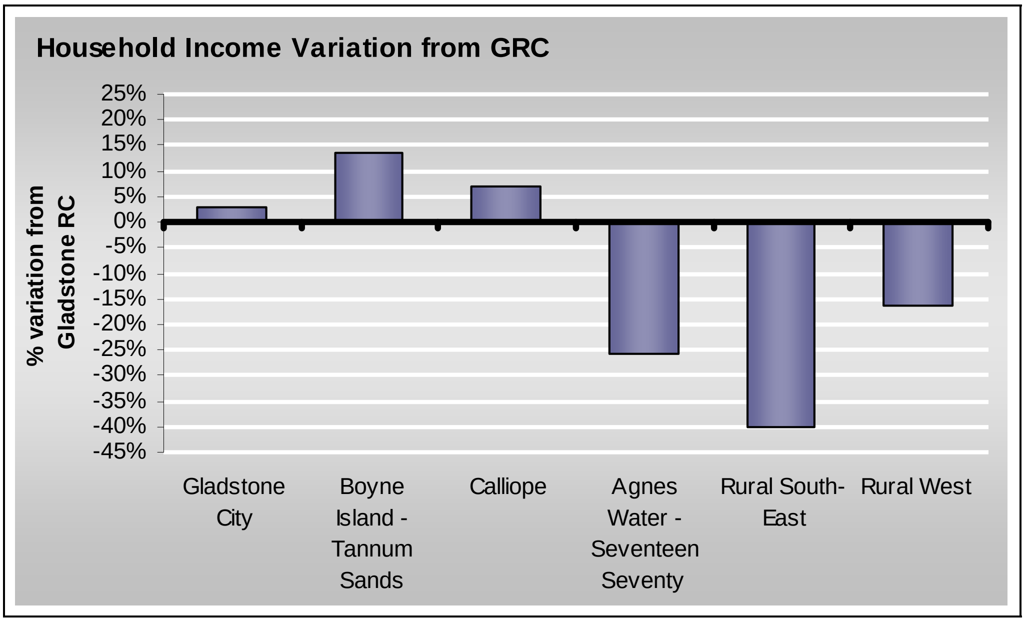
Figure 4.6: Household Income Levels by Area



Source: ABS 2006 Census

[9] Source: *Small Area Labour Markets Australian March Quarter 2010,* Australian Government Department of Employment and Workplace Relations.

Figure 4.7: Household Income Variation from Gladstone Region



Source: ABS 2006 Census

Housing

The majority of housing in Gladstone Region consists of detached dwellings (89.1%) and is comparable to the State level (87.2%). There is however some slight variation in dwelling structure type by area. The Rural West and Calliope areas have the highest shares of detached dwellings (95.2% and 91.3% respectively) and dwelling ownership levels (80.3% and 84.2% respectively). As would be expected, the proportion of attached dwellings (flats/units) is highest in Gladstone City at 10.5% however, dwelling ownership in Gladstone City is considerably below all other areas (65.1%) with the exception of Agnes Water – Seventeen Seventy (64.7%).

Mobility

The level of mobility within Gladstone Region (as indicated by the number of vehicles per household) is above the State average with 60% of households owning more than two vehicles (54% in Queensland). Mobility is especially high in Calliope with almost three–quarters of all households owning two or more vehicles.

Retail Spending Implications

These socio–economic characteristics have the following key implications:

- The Gladstone City, Boyne Island – Tannum Sands and Calliope areas are characterised by young families with higher than average household incomes due to the higher workforce participation rates and number of persons employed by households. This suggests that these areas are likely to have more disposable income for retail and other discretionary goods and services. In these areas, spending is likely to be stronger in homewares, including bulky goods, and apparel. The higher proportion of couples with children also suggests spending on apparel is likely to favour budget and mid–market retailers rather than upscale fashion.

- In the Agnes Water – Seventeen Seventy and Rural South–East Areas, households are likely to have lower levels of retail spending overall. Take home food spending is likely to be higher as a proportion of total household retail spending, with lower levels spent on apparel and meals out–take away food.

It should also be noted that visitors to the Region, including tourists, business visitors and persons travelling through the Region also contribute to the retail expenditure potential. Whilst it is difficult to quantify the full extent of the contributing expenditure, visitor expenditure is less likely to be directed to major homewares and services and more likely to be directed towards meals out and leisure/entertainment activities.

Table 4.4: Summary of Selected Socio–Economic Characteristics, 2006, Gladstone Regional Council

	Gladstone City	*Boyne Island – Tannum Sands*	*Calliope*	*Agnes Water – Seventeen Seventy*	*Rural South–East*	*Rural West*	*Gladstone Regional LGA*	*Fitzroy SD*	*Queensland*
AGE (=100%)									
0–14	24.1	25.4	25.1	23.3	19.3	23.2	24.0	23.1	20.7
15–24	14.5	12.5	10.9	6.6	8.3	8.9	12.9	13.8	13.8
25–44	30.5	30.0	26.7	29.9	21.4	25.4	29.2	28.0	28.2
45–64	22.9	24.7	26.7	33.4	38.4	31.3	25.4	24.1	25.0
65+	7.9	7.3	10.4	6.8	12.5	11.2	8.5	10.9	12.4
FAMILY TYPE (=100%)									
Couples with children	35.8	44.8	44.3	26.9	24.3	34.1	36.9	33.9	31.5
Couples without children	26.9	29.7	31.7	35.9	38.8	36.8	29.5	28.5	28.5
One parent household	11.5	8.5	7.2	8.7	9.6	8.6	10.3	11.0	11.6
Lone person household	21.0	14.9	15.1	23.7	25.2	18.8	19.7	22.4	22.8
Group/other household	4.7	2.1	1.7	4.7	2.2	1.7	3.6	4.2	5.7
Ave. household size (No.)	2.66	2.87	2.90	2.38	2.36	2.66	2.68	2.63	2.60
EMPLOYMENT (%)*									
In labour force	72.4	71.1	68.8	64.5	52.0	63.1	69.7	68.1	66.3
Unemployed	5.2	4.4	3.1	7.0	9.4	4.8	5.2	4.4	4.7
White collar occupations	51.3	50.2	47.3	53.9	50.0	45.8	50.5	55.4	64.9
Persons employed per household (No.)	1.4	1.5	1.4	1.1	0.9	1.2	1.4	1.4	1.3
HOUSEHOLD INCOME (=100%)									
$0–$26,000	17.5	14.8	16.5	29.4	39.0	23.7	19.3	21.3	20.6
$26,001–$52,000	21.6	17.4	20.2	30.9	32.3	27.3	22.2	24.6	27.2
$52,001–$104,000	41.0	42.8	40.9	30.5	23.9	38.5	39.6	35.9	35.6
$104,001 +	19.8	25.0	22.3	9.2	4.7	10.6	19.0	18.2	16.6

	Gladstone City	Boyne Island – Tannum Sands	Calliope	Agnes Water – Seventeen Seventy	Rural South–East	Rural West	Gladstone Regional LGA	Fitzroy SD	Queensland
Average 2006 income (2009 $ vals)	$77,357	$85,200	$80,401	$55,856	$44,885	$62,895	$75,080	$71,864	$69,243
DWELLINGS (%)									
Detached/semi–detached	88.2	89.7	91.3	88.1	87.5	95.2	89.1	90.4	87.2
Flats/units	10.5	5.7	0.5	5.2	1.0	0.4	7.4	6.8	11.2
Caravan/other	1.3	4.6	8.2	6.8	11.5	4.4	3.5	2.9	1.5
Owned/purchasing	65.1	74.0	84.2	64.7	79.3	80.3	70.0	66.7	67.2
MOBILITY (=100%)									
No car	7.4	3.0	3.7	2.7	4.1	3.7	5.7	7.5	8.2
1 car	35.9	33.3	24.0	39.4	38.0	26.5	34.3	35.8	37.8
2 or more cars	56.6	63.8	72.3	57.9	57.9	69.9	60.0	56.7	54.0

** Population aged 15+ Source: ABS 2006 Census*

4.5 RETAIL EXPENDITURE POTENTIAL

4.5.1 Average Household Retail Expenditure

Average retail expenditure levels for Region households were derived using income data from the 2011 Census, the 2009–10 Household Expenditure Survey, and National and State Accounts data on final household consumption published by the Australian Bureau of Statistics (ABS). All data is in 2011 dollar values.

Average household retail expenditures for each sub–area of the Gladstone Region were compiled by four broad retail categories (as previously defined in section 3.1, page 10). It is virtually impossible to define mutually exclusive household expenditures by major store type because of the broad and overlapping range of goods and services offered by retailers. Consequently, estimates of household spending cannot be taken as exclusively available for the support of any one particular retail activity.

Table 4.5 details the average annual household retail expenditure estimated for the Gladstone Regional LGA. Average household expenditure levels for the Rockhampton Regional LGA, Bundaberg LGA, Mackay LGA and Queensland are shown for comparison.

Table 4.5: Average annual household retail expenditure potential, Gladstone Regional Catchment (2011 dollar values)

	Take home food ($)	*Meals out take away ($)*	*Apparel ($)*	*Homewares/ Services ($)*	*Total ($)*
Gladstone City	13,170	4,380	2,730	11,360	31,640
Boyne Island – Tannum Sands	14,870	4,950	3,080	12,820	35,720
Calliope	12,520	3,630	2,180	12,710	31,040
Agnes Water – Seventeen Seventy	10,850	3,150	1,890	11,010	26,900
Rural South–East	10,800	3,130	1,880	10,960	26,770
Rural West	14,820	4,930	3,070	12,780	35,600
Gladstone Regional LGA	13,950	4,640	2,890	12,040	33,520
Rockhampton Regional LGA	11,980	3,480	2,090	12,170	29,720
Bundaberg Regional LGA	10,850	3,150	1,890	11,020	26,910
Mackay Regional LGA	13,580	4,520	2,810	11,720	32,630
Queensland	12,200	3,540	2,130	12,390	30,260

Source: ABS 2009-10 Household Expenditure Survey, State & National Accounts data; Foresight Partners calculations.

The average annual household expenditure on retail goods and services in the Gladstone Region is comparable to that of households in the Mackay Regional LGA. On average, each household in the Gladstone Region spends $33,520 (in 2011 dollar values) on retail goods and services, slightly higher than average expenditure by Mackay Region households. The average annual household expenditure on retail items in Gladstone and Mackay is considerably higher than that of households in Rockhampton and Bundaberg.

The ABS Household Expenditure Survey collects and reports retail spending on a household basis. Per capita estimates have been derived by dividing household expenditure by the average household size for each area. These estimates suggest that each resident of the Gladstone Regional LGA spent an average of over $12,300 on retail goods and services in 2011 (Table 4.6). Per capita retail spending was highest amongst residents of the Rural West and lowest amongst residents of Calliope.

Like average household spending, the per capita spending profile of the Gladstone Region is comparable to that of the Mackay Region ($12,313 per person).

Table 4.6: Average annual per capita retail expenditure potential, Gladstone Regional Catchment (2011 dollar values)

	Per Capita Spend ($)
Gladstone City	12,076
Boyne Island – Tannum Sands	12,577
Calliope	10,815
Agnes Water – Seventeen Seventy	11,747
Rural South–East	11,793
Rural West	13,745
Gladstone Regional LGA	12,369
Rockhampton Regional LGA	11,747
Bundaberg Regional LGA	11,029
Mackay Regional LGA	12,313
Queensland	11,729

Source: Foresight Partners calculations.

In all subsequent analyses in this report Foresight Partners uses a household based expenditure methodology to forecast current and future spending potential as the household is the basic economic unit for which spending data is collected by the ABS.

4.5.2 Growth in Retail Spending Potential

Multiplying the average household expenditures by the number of households in the Gladstone Regional LGA catchment at the June 2011 base year produces an estimate of total retail expenditure potential. Similar calculations for the forecast years to 2031 produce estimates of the pool of expenditure potential available in the future, as shown in Table 4.7.

Retail expenditure potential generated by households in the Gladstone Region catchment is estimated at $763 million at June 2011 (in 2009 dollar values) and is forecast to increase to approximately:

- $936 million by June 2016;
- $1,120 million by June 2021;
- $1,334 million by June 2026; and
- $1,580 million by June 2031.

Over the forecast period of June 2011 to June 2031, total available retail spending is expected to increase by around $818 million, or by about $41 million per annum (constant June 2011 dollar values).

Around one half of this growth, or $429 million, is expected to be generated by household growth in Gladstone City, with a further $221 million (27%) being generated from Boyne Island – Tannum Sands.

No allowance has been made for inflation in forecasting 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 the expenditure estimates to 2031 to reflect assumed real increases accruing in household spending over this period.

Table 4.7: Forecast retail expenditure potential generated Gladstone Regional LGA Catchment households (2011 dollar values), 2011–2031

Year ending June	*Take home food ($ m)*	*Meals out take away ($ m)*	*Apparel ($ m)*	*Homewares/ services ($ m)*	*Total ($ m)*
2011					
Gladstone City	177.77	59.12	36.85	153.34	427.08
Boyne Island – Tannum Sands	64.83	21.58	13.43	55.90	155.74
Calliope	24.80	7.19	4.32	25.18	61.49
Agnes Water – Seventeen Seventy	17.36	5.04	3.02	17.62	43.04
Rural South–East	13.08	3.79	2.28	13.27	32.42
Rural West	17.95	5.97	3.72	15.47	43.11
Total Gladstone Regional LGA	**315.79**	**102.69**	**63.62**	**280.78**	**762.88**
2016					
Gladstone City	217.02	72.18	44.99	187.19	521.38
Boyne Island – Tannum Sands	79.87	26.59	16.54	68.86	191.86
Calliope	33.48	9.71	5.83	33.99	83.01
Agnes Water – Seventeen Seventy	21.17	6.15	3.69	21.48	52.49
Rural South–East	15.95	4.62	2.77	16.18	39.52
Rural West	19.83	6.60	4.11	17.10	47.64
Total Gladstone Regional LGA	**387.32**	**125.85**	**77.93**	**344.80**	**935.90**
2021					
Gladstone City	257.12	85.51	53.30	221.78	617.71
Boyne Island – Tannum Sands	98.13	32.66	20.33	84.60	235.72
Calliope	40.99	11.89	7.14	41.62	101.64
Agnes Water – Seventeen Seventy	25.83	7.50	4.50	26.22	64.05
Rural South–East	19.55	5.67	3.40	19.84	48.46
Rural West	21.68	7.21	4.49	18.69	52.07
Total Gladstone Regional LGA	**463.30**	**150.44**	**93.16**	**412.75**	**1,119.65**
2026					
Gladstone City	304.12	101.13	63.04	262.30	730.59
Boyne Island – Tannum Sands	122.19	40.67	25.32	105.34	293.52
Calliope	47.80	13.86	8.32	48.53	118.51
Agnes Water – Seventeen Seventy	31.19	9.06	5.43	31.65	77.33
Rural South–East	23.72	6.87	4.13	24.07	58.79
Rural West	23.14	7.70	4.79	19.96	55.59
Total Gladstone Regional LGA	**552.16**	**179.29**	**111.03**	**491.85**	**1,334.33**

Year ending June	*Take home food ($ m)*	*Meals out take away ($ m)*	*Apparel ($ m)*	*Homewares/ services ($ m)*	*Total ($ m)*
2031					
Gladstone City	356.16	118.43	73.82	307.19	855.60
Boyne Island – Tannum Sands	156.78	52.19	32.48	135.16	376.61
Calliope	50.86	14.75	8.85	51.64	126.10
Agnes Water – Seventeen Seventy	37.35	10.85	6.51	37.90	92.61
Rural South–East	28.57	8.28	4.97	28.99	70.81
Rural West	24.45	8.13	5.06	21.08	58.72
Total Gladstone Regional LGA	**654.17**	**212.63**	**131.69**	**581.96**	**1,580.45**
Increase 2011–2031	338.38	109.94	68.07	301.18	817.57

Source: Foresight Partners calculations.

5 Stakeholder Consultation

5.1 APPROACH

In accordance with the project brief, stakeholder consultations were held with representatives of major retail stakeholders and selected community and business organisations as recommended by Gladstone Regional Council.[10] The consultation was intended to identify major issues that should be addressed in the new retail strategy and potential solutions. Those consulted represent residents and the general business community, plus the operators of the largest retail centres in the region. They were:

- Gladstone Chamber of Commerce;
- Gladstone Area Promotion and Development Limited;
- Boyne/Tannum Arts Business and Community Association;
- Discovery Coast Tourism and Commerce Inc; and
- Centre Management of:
  - Stockland Gladstone;
  - Gladstone Central Shopping Centre;
  - Centro Gladstone and Centro Home.

Each of the stakeholders was first asked to identify without prompting the key issues that they saw in terms of the provision of retail and commercial facilities, and any deficiencies in provision. Then, if not previously addressed, the interviewer raised specific issues and sought comments.

5.2 KEY ISSUES RAISED BY RESPONDENTS

Overall, there were no single issues identified by a majority of those interviewed, and there appeared to be no issues that were considered urgent or of overriding importance.

The key issues raised were included Sunday trading, the existing retail provision and capture of escape expenditure.

5.2.1 Sunday Trading

Some respondents said that restricted Sunday trading hours were outdated, with two main impacts:

[10] Selected major retailers operating in the Gladstone region were also contacted; however they either declined to participate or did not respond to enquiries. These included representatives of the major Australian supermarket chains and Myer.

- The limited number of shops that are open on Sunday (particularly supermarkets) are overcrowded which significantly reduces ease of access.
- Restricted trading on Sunday contributes to a significant leakage of expenditure, particularly to Rockhampton.

However, others see Sunday trading as having an undesirable social impact, and some commented that it was not a particularly significant issue.

5.2.2 Existing Retail Provision

Some respondents said that the existing Stockland Gladstone shopping centre should expand to offer a much larger selection of higher order retail shops. The major deficiency is in womens' apparel retailers. A highly limited selection of apparel retailers forces many local residents to shop in Rockhampton, resulting in a considerable portion of associated retail spending being directed away from Gladstone retailers. Furthermore, the lack of space has resulted in some retailers having to trade in less preferred locations (such as the CBD) or to defer plans to open a store in Gladstone.

Stockland advises that following the acquisition and rezoning of the park adjacent to its shopping centre, it is investigating options for expansion. However, it advises that Myer would not consider opening a store in Gladstone in the foreseeable future.

It is notable that the stakeholders interviewed had no significant other concerns about retail provision in Gladstone City, although there are specific issues pertaining to regional locations as described below.

5.2.3 Escape Expenditure

Some respondents noted that retail expenditure is escaping from the Gladstone region, particularly to Rockhampton. They see the principal causes as the two other most cited issues (above); that is, comparatively limited retail selection in Gladstone and restricted Sunday trading. However, it is generally recognised that there will always be some escape expenditure to other centres which have bigger markets (such as Rockhampton) and are therefore able to support larger shopping centres with more higher–order retailing.

5.3 COMMENTS ON OTHER ISSUES

The selected stakeholders were also asked to comment on the CBD's role and function, a dining precinct and the provision of bulky goods floorspace throughout the Region.

5.3.1 CBD Role and Function

Goondoon Street is generally perceived as a secondary retail precinct that lacks a clear retail role and function. The main causes nominated as resulting in the CBD's role as a secondary retail precinct are:

- limited retail selection;
- few dining options;
- accessibility constraints due to topography; and
- limited availability of convenient parking.

The stakeholders' suggestions for improvement of the CBD focused mainly on the development of an enhanced dining precinct, preferably with outdoor seating taking advantage of the proximity to the water. A dining precinct would be able to function as a social venue and provide something for young adults. However, only some respondents see the improvement or revitalisation of Goondoon Street as a major issue.

5.3.2 Dining Precinct

Most respondents agreed that while Gladstone has a variety of fast food and takeaway options, it lacks a strong destination dining precinct. As noted above, one potential option for the CBD is to enhance the small dining precinct that has developed to date on Goondoon Street. However, most respondents indicated that while such a precinct would be welcome, there is not a pressing need for it.

5.3.3 Bulky Goods Retail Provision

With the exception of the management of Centro Home Gladstone, none of the interviewed stakeholders had comments regarding bulky goods retailing. They also offered no opinions regarding bulky goods retailers located within the Hanson Road industrial area.

Management of Centro Home Gladstone said that there will be a need in future for additional bulky goods retail space and noted that expansion of the existing centre is the preferred option to consolidate the bulky goods offer. It was also suggested that selected tenants other than bulky goods retailers should be permitted as an impact assessable option.

5.4 LOCAL ISSUES

5.4.1 Boyne Island/Tannum Sands

This is forecast to remain the single fastest growing area within the Gladstone Regional Council, and its population is expected to be sufficient to support a small sub–regional shopping centre in the long term. The Boyne Tannum Arts Business and Community Association advises that residents would like to see more local retail, food and beverage facilities, but this is not perceived to be a major current issue, and it is recognised that growth in retail facilities will depend on market demand. The preferred location for additional retail/commercial facilities is considered to be in the vicinity of Boyne Plaza. However, a proposed mixed use development on a site across from Boyne

Plaza has generated concerns among local residents about density of development and traffic generation.

5.4.2 Agnes Water – Seventeen Seventy

In Agnes Water, the most significant retail/commercial issue is a mismatch between the locations in which additional retail/commercial space is needed and the locations currently zoned for such space. There is an emerging undersupply of space in the Agnes Water commercial core, which has forced some retailers that would be suitable for the core to instead locate on the periphery of the urban area, and has resulted in relatively high land costs and rents for retail space in the commercial core. Conversely, there is a clear excess of land zoned for retail/commercial uses outside the core which is not within a walkable distance of the majority of residents or visitors.

5.5 SUMMARY

None of the stakeholders interviewed identified major issues that they thought should be addressed with regard to the retail provision or retail planning policies within the Gladstone Regional Council area. There were also no suggestions of a need for any significant changes to the existing retail hierarchy or retail network within Gladstone.

In Gladstone City, the two most notable retail issues identified by the respondents were the constraints posed by Sunday trading, and the desire for an expanded Stockland Gladstone. It is understood that permission for centres and larger retailers to trade on Sundays is governed by the Queensland Industrial Relations Commission, and is therefore out of the purview of this document. We are advised that the expansion of the Stockland centre is currently being considered by Stockland and will be subject to market opportunity.

Among the stakeholders interviewed, the most noted retail deficiencies within the Gladstone Regional Council are a CBD retail/commercial precinct that is weak and lacks a clear role and function, and the lack of a significant destination dining precinct. But most of those interviewed indicated that neither issue is of critical importance.

Outside of Gladstone City, the major local issue identified was at Agnes Water, where there is an imbalance in the supply of retail/commercial land between the commercial hub and the commercially zoned areas on the fringe of the community.

The comments of the selected stakeholders that were interviewed indicate that while some issues have emerged, on the whole the existing retail/commercial strategy has to date remained effective and responsive to the changing requirements of the community.

6 Trends in Australian Retailing

Retailing is a dynamic industry, which must respond to, and often anticipate, demographic and social changes in order to compete and survive in a highly competitive environment. This section provides an overview of how the retailing industry in Australia has evolved over the past 20 years, as well as identifying possible future avenues for innovation within the industry. Specific attention is paid to retail trends that may be of significance to regional Queensland, and how centres are becoming places of community and social interaction.

6.1 DRIVERS OF RETAIL CHANGES

Demographic and social trends have had a strong impact on how the form and function of retailing and retail centres has changed over time and it is expected that their influence will continue will the future. Key changes in the demographic structure of households over time, including labour force participation, family structure and ageing, have resulted in changes to shopping behaviours, and subsequently have led to changes in the retail formats.

Information in the following section is compiled from a range of demographic sources including the ABS' Australian Social Trends 2008, Yearbook Australia 2008, and Births Australia 2008 and the Commonwealth Department of Treasury's Intergenerational Report 2010.

6.1.1 Labour Force Participation

How people shop has been greatly influenced by changes in labour force participation patterns. Between 1986 and 2006 the labour force participation rate of Australian females aged over 15 years increased from 48% to 58%. Other changes in labour force participation include:

- full time workers working longer hours;
- increased participation of students in the workforce;
- female labour force participation dipping during the peak child bearing ages of 25 and 44 years;
- an increasing proportion of workers who work on the weekend; and
- more people working at home, either as 'telecommuters' or in home–based businesses.

These labour force participation trends have influenced shopping trends, particularly those for chore food shopping. Increased female workforce participation, combined with household and family duties, has resulted in less time available for food and other shopping, and an increased reliance on just–in–time food shopping. Just–in–time food shopping is characterised by more frequent trips to the shops, but less time spent in the supermarket on each visit.

Supermarket operators and product manufacturers have responded to this shift in shopping style, with the introduction of smaller, easily accessible supermarkets and pre–prepared food products aimed at households with less time on their hands. Supermarket operators have also responded through longer trading hours and the locating of supermarkets on the homeward bound side of the road in major metropolitan areas.

6.1.2 Changing Family Structure

Changes in the structure of Australian families have produced distinct responses from the retail industry, including the resizing of products available and the introduction of products aimed at single and couple households. These changes have been driven by the significant decrease in the proportion of couple families with children, from 50% of all families in 1996 to 46% by 2006, despite no change in the actual number of couple families within children. The prevalence of one–parent families increased slightly from 14% in 1996 to 16% of all families in 2006 and the proportion of couple only families from 35% to 37%.

The increase of couple only families can be attributed to the prevalence of ‘empty nesters’ (couples whose children have left home) and couples who have not yet had children. There has been a recent increase in the fertility rate of Australian women, from 1.92 babies per woman in 2007 to 1.97 babies per woman in 2008, much of which is attributable to older women having children; however it remains to be seen if the overall fertility rate will continue to increase.

The number of single person households is also on the increase, with around two million people aged over 15 years living alone in 2009. The increase of persons living alone is associated with delayed partnering and divorce, as well as an ageing population with women continuing to outlive their husbands. Also, as the number of households increase, with fewer people living within them, there is an associated increase per capita expenditure on household goods.

6.1.3 An Ageing Population

Australia has an ageing population. The Intergenerational Report 2010 predicts that the proportion of working age people is going to fall from approximately five persons aged 15–64 years to support each person aged over 65 years as at 2009 to only 2.7 persons per 65+ year old by 2050. There is already evidence of these forecast dramatic changes, which have been driven by a higher quality and longer lives through medical improvements and a move towards more persons being employed in health service industries.

The ageing of the Australian population will have considerable consequences for retailing and the retail industry. It is expected that as the population ages the design and layout of supermarkets and centres will need to respond to a population which has restricted mobility and poorer eyesight. Changes such as aisle width, parking bay width, lighting, height of shelves and distances to be travelled, as well as the type of stores provided within centres will be needed. Retailers will also need to respond through expansion of product ranges (specifically in the healthcare sector) and through innovations in product choice.

6.1.4 Lifestyle Changes

Over the past 15 years, lifestyle changes, in conjunction with demographic changes, have led to some major shifts in how Australians use shops and shopping centres. These lifestyle changes have also resulted in changes in the society's expectations of centres, and their role in the community.

Increased Demand for Convenience

The busier lifestyle led by many Australian residents has reduced the time available for major food shopping, and as such has increased the need for "convenience" oriented facilities. Shopping centre operators have responded to the demand for increased convenience in a multitude of ways, such as the provision of smaller, more compact centres which offer one–stop shopping facilities. A smaller, more compact centre allows for shoppers to park their car closer to the shops, navigate through the centre quickly and efficiently, and find the shop easily, thereby increasing the level of convenience for shoppers.

The Centre as an Entertainment Destination

Another lifestyle change that has impacted upon the usage of centres has been the increasing reliance on retail centres to act as cultural and entertainment destinations for teens. Retail centres are increasingly being pressed to provide communities with safe, easily accessible destinations for teens to "hang out". There is evidence of this occurring in Gladstone where the preliminary findings of the Gladstone Region Social Infrastructure Strategic Plan identified that there is demand within the community for Stockland Gladstone to provide a food court as a legitimate place for youth to hang out.

Some larger retail centres throughout Australia have responded to community needs through the provision and integration of food courts, cinemas, bowling alleys and other light entertainment venues within a centre.

The Eating Out Lifestyle

Anecdotally there has been an increased occurrence of friends and families meeting at coffee shops or in restaurants, rather than entertaining at home. The trend towards eating–out has been boosted by a climate which encourages al fresco dining. This lifestyle change has created a demand for al fresco dining precincts where people can have dinner at one restaurant and walk to another restaurant for dessert. This has resulted in newer retail centres developing a 'Town Square' style outdoor eating precinct, or specialty dining precincts developing in underutilised retail areas.

Technological Advancements

Advancements in technology have also influenced how people live and shop. Technology has advanced to a point where consumers can complete their own purchase in–store through the self–service checkouts, thereby increasing the convenience to the shopper and reducing the perceived time spent waiting in queues. Shoppers are also using technology to check availability of products on–line. For example, www.ikea.com.au has a function that allows the consumer to check the number of available units of a particular product at their local store prior to visiting the store in order to avoid trips for out of stock items.

Sustainable Living

Over the past ten years there has been an increasing push for sustainable living options in many different aspects of Australian lives. Retailers and manufacturers are responding to the national and international "green" and sustainable living movements through reduced packaging, ethical sourcing of natural resources, and increased efficiencies in store and centre design. These responses have implications for the design and efficacy of shopping centres, however they have yet to have a major impact on the format and function of centres and shops.

6.2 CHANGING RETAIL FORMATS

Retailing is a dynamic and constantly evolving industry. Centre owners and operators, and individual stores, have responded to the demographic and lifestyle changes highlighted above. Centres have evolved from department, discount department store and traditional supermarket anchored centres, to centres targeting niche and emerging markets, such as retail showrooms, factory outlets and leisure/entertainment centres.

6.2.1 Bulky Goods/Retail Showroom Centres

Retail showroom centres, also known as bulky goods centres, power centres and homemaker centres are one of the most successful new retail formats to emerge in the past 20 years. These centres consist of a collection of category killer or big box retailers and are usually characterised by large stores, open air design and minimal fit–out.

Prior to their development, bulky goods retailers often located in or near light industrial areas. These centres and retailers now prefer the same access and visibility characteristics as other major retail centres but can trade successfully in a variety of locations, depending upon their tenancy mix. Their degree of competitiveness with traditional centres has increased over the years as the range of retail showroom type traders has expanded. They now represent major competition to department and discount department stores in particular.

Retail showroom stores are now locating within or adjacent to traditional shopping centres, or establishing showroom centres and retail precincts on sites with high visibility and ample parking. They are converging with 'traditional' retailing in terms of function, locational requirements and even rent paying ability. The traditional land use and land value arguments employed in the bulky goods industry's formative years no longer seem as convincing. Today, the term 'retail showroom' is no longer synonymous with bulky goods. Much of the merchandise sold in retail showrooms is not bulky in nature (e.g. Toyworld, Rebel Sport, Wow Sigh and Sound and Harvey Norman). The line between bulky goods and general retailing has blurred to a point that many Councils no longer differentiate between them (a 'shop is a shop').

The average centre size for Queensland showroom centres is about 14,800 m², with an average shop size of about 870 m², and centres range from around 4,000 m² to more than 30,000 m² (Source: *Queensland Shopping Centre Directory 2010*, Property Council of Australia).

There is one purpose–built retail showroom centre in the Gladstone Region; the 21,791 m^2 Centro Home Gladstone development on Dawson Highway, Clinton which reflects many of the key attributes of a modern retail showroom centre:

- high visibility to passing trade;
- easy access from an arterial road;
- primarily an outdoor environment which allows shoppers to directly access their vehicles after purchasing;
- ample off–street carparking; and
- large floor plates which are designed to display a large range of goods for sale.

6.2.2 Factory Outlet Centres

Factory outlet centres are strongly fashion oriented and generally offer national and international apparel brands selling samples, seconds and discontinued lines. Out of season stock and slow moving items are also sold at factory outlet stores.

Factory outlet centres rely on discount pricing and the cumulative attraction of a large range of apparel (and some homewares) retailers. A factory outlet centre will often cater to a significantly larger catchment than a traditional regional centre, due to the product overlap and the pricing structure.

Similar to the locational requirements of most major retail centres, factory outlet centres generally seek sites with a high level of visibility to passing trade, easy access from an arterial road and ample off–street carparking. A factory outlet centre is more likely to establish in major population and tourist areas as they are dependent on a broad population base to support the retailers.

There are no factory outlet centres in the Gladstone Region and it is unlikely that a purpose built factory outlet centre would be supportable by the Region's population base in the near future. However, the Region could support individual factory outlet stores within some of the existing centres such as the CBD/Valley and the Kin Kora precinct.

6.2.3 Hardware Megastores

The development of the hardware megastore in Queensland has mainly occurred over the past ten years with the introduction of the Bunnings Warehouse, Hardwarehouse and Mitre 10 Mega concepts. These 'big–box' home improvement stores are large, free–standing warehouse style destination stores which offer a range of products and services including specialist advice, delivery and trade staff. These megastores have branched out into product offerings that are complementary to the traditional hardware store products including nursery, outdoor furniture, kitchen and bathroom fixtures, and pool supplies.

The hardware megastore has become a 'category killer' because of its size and product offer which meets most of the needs of the DIY market as well as the needs of trades people. The average hardware megastore in Australia is about 10,000 m^2 and stocks over 45,000 SKUs (Stock Keeping Units).

The major player in the Australian hardware megastore market is Bunnings Warehouse, which has over 175 warehouse stores Australia wide (in addition to its small format hardware stores). Mitre 10 Mega has less than ten warehouse stores Australia wide, with most located in Victoria. In mid–2009 Woolworths announced that it was entering into a joint venture with the United States' second largest hardware retailer Lowes (likely to be called "Masters") to establish a network of at least 150 hardware warehouses within five years in Australia. It is anticipated that the first of its new stores will open in the second half of 2011 in Victoria, and that the each store will be around 13,000 m^2 and will have a similar product range and offer to that of Bunnings.

The one hardware megastore within the Gladstone Region, Bunnings, is located in the Centro Home Gladstone bulky goods complex. Whilst its presence does not preclude the Woolworths hardware venture from establishing in the Gladstone Region, it faces similar challenges to establishment to those identified in the 2005 Retail Study by Economics Associates for a Bunnings Warehouse, including the availability of suitably sized and zoned land within the Region.

6.2.4 Internet Retailing

The everyday use of the internet to make purchases started rising in the late 1990s, and has grown steadily within Australia since then to represent about 3% of total Australian retail spending in 2008–09.[11] However, internet retailing's market penetration within Australia is still significantly below that of the United States at around 7% of its retail sales.

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[11] Source: Speedy, B. The Australian, "False start for retail's online revolution" 26/12/2009.

In spite of its low overall sales penetration, nearly 32% of all retail businesses within Australia receive at least some orders via the internet. However, with internet sales accounting for less than 1% of all sales for 57% of Australian retail businesses in 2007–08 it is evident that internet purchases are not yet a significant generator of business within Australia. Businesses with less than 20 staff are more likely to generate a significant proportion of sales from internet orders than larger retail businesses. [12]

The growth of internet retailing within Australia has been hampered by perceived problems associated with online credit card security, the high cost of delivery of items and the reluctance of mainstream retailers to offer their products for sale online. The introduction of the PayPal program has allowed on–line retailers such as www.amazon.com and www.ebay.com.au to offer a high level of credit card security for their customers, which has led to a very high market penetration of Australian internet based purchases for these businesses.

Whilst only 3% of Australian retail spending in 2008–09 occurred on–line, many shoppers are using the internet to research products and options before making the purchase in store. This is particularly evident in large homewares items such as electronics and in boutique apparel retailers. These retailers use a combination of electronic brochures on their websites, direct email to shoppers and special email offers to selected shoppers to entice consumers into their main store.

As credit card security improves, and as mainstream retailers increase their online presence, it is anticipated that internet based purchases in the retail sector will increase. It is not expected that future on–line sales growth will challenge the retail hierarchy within the Gladstone Region as they will be complement the existing centres and have the potential to offer Gladstone residents access to products that they would not otherwise have.

6.2.5 Recent Market Entrants

Recent market entrants to Australian retailing such as Aldi and Costco are changing the traditional form and function of food shopping.

Aldi Supermarkets

Aldi is a discount supermarket which first established in Australia in 2001. Since then the chain has expanded to over 220 stores throughout eastern Australia, and it expects to add around 25 stores each year. Aldi Australia supermarkets are privately owned and annual turnover results are not published. However within the industry it is estimated that, on average, each Aldi supermarket will turnover around $10 million per annum. The ACCC inquiry into supermarket and grocery prices estimated that as at 2006–07 Aldi

[12] Source: ABS 2009, Business Use of Information Technology, 2007–08 cat. no. 8129.0

accounted for nearly 3% of the national spend on take home food and grocery items.[13]

The average floorspace of an Aldi supermarket is 1,350 m^2 and each store carries approximately 750 stock keeping units (SKUs), which is significantly below that offered by Coles and Woolworths (approximately 25,000 SKUs). Previously Aldi supermarkets preferred to establish in free–standing locations, or as part of a small centre with three to four associated specialty tenancies. However, as Aldi stated in its submission to the ACCC's Supermarket and Grocery Inquiry, it was restricted from entering many established centres because of highly restrictive leasing covenants with the major supermarkets. As the ACCC has since disallowed the application of these restrictive covenants it is anticipated that Aldi will be able to locate in more established centres in the future.

Aldi benefits from significant pricing advantages and strong word of mouth. The majority of products available at Aldi are private label products, with very few items branded products. In the face of rising household costs, particularly rising food and grocery costs, many households have been increasingly purchasing private label products which has significantly benefitted the expansion push of Aldi.

There are no Aldi supermarkets within the Gladstone Region, however given its wide population base, forecast population growth and Aldi's expansion plans it is expected that Aldi will look to establish in Gladstone in the medium to long term once a distribution centre is established in central or northern Queensland. Aldi prefers free–standing sites but has established stores in larger shopping centres in some areas.

Costco

Costco is a US based discount retailer which has recently opened its first Australian store in Melbourne in August 2009. It is part of the membership–based retailing phenomena in the US where patrons are required to have paid an annual membership fee (around $60 for individuals) (or be shopping with a card holding member) before entering the store. Shoppers are unlikely to use this store for their major weekly food shop, however they will often use it to buy particular items in bulk or take advantage of high levels of discounting.

A Costco store is generally very large (at least 10,000 m^2 or more which is equivalent to a department store located in a regional city) and it offers a wide range of products that would not be traditionally associated, including supermarket goods, apparel, home entertainment, jewellery, sports equipment, kitchen appliances and even car and home loans. Costco stocks private label products, alongside a large range of national branded products specific to each country. A Costco store will generally have around 4,000 SKUs across its whole product range.

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[13] Source: Australian Competition & Consumer Commission, Report of the ACCC inquiry into the competitiveness of retail prices for standard groceries, July 2008.

Whilst there is no available turnover data on the Melbourne Costco, it is understood that Costco Australia are targeting an initial turnover of at least $100 million and a catchment of one store per 500,000 people.[14] Because of the threshold population required by a Costco it is highly unlikely that it would establish in the Gladstone Region, or in Rockhampton within the planning period to 2031.

6.3 CENTRES AND COMMUNITY AND SOCIAL INTERACTION GOALS

A retail centre is not only a place to undertake the household's convenience and comparison shopping; it can also be a place of considerable community and social interaction. For a centre to successfully engage with its surrounding community it must appeal to people on a range of different levels and provide a safe and energised environment for all visitors.

The Urban Land Institute undertook a number of studies in the early 2000s exploring ways to successfully revitalise and rebuild shopping strips and centres in the United States.[15] Similar work on shopping centres and community attitudes was undertaken in 2000 for the Property Council of Australia by the Dangar Research Group.[16] These studies identified a number of key elements which, if implemented appropriately, would assist in the development and promotion of centres as places of community and social interaction:

- **Community Identity**. A centre can enhance its role in the community by taking a greater role in reporting district news, issues and events and encouraging greater participations in centres by local schools and ethnic groups. Whilst these services are currently undertaken to some extent by most centres, it is highly unlikely it is a major feature of the centres.
- **Create the Place**. The "place" can be made attractive to visitors through the creation of attractive walkways and continuous streetfront experiences. A variety of urban uses also need to be integrated with the retail shopfronts including a range of different types of housing to ensure that there is activity at all hours.
- **Vitality**. Vitality must be created for a centre to integrate with the community. This can be achieved through requiring active uses at the ground level and integrate office uses with the retail. There should be no "fortress" or blank wall style developments as these discourage continuous movement.

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[14] Source: Sydney Morning Herald, 21/07/2009.

[15] Source: Urban Land Institute, Ten Principles for Reinventing America's Suburban Strips, 2001; Ten Principles for Rebuilding Neighbourhood Retail, 2003.

[16] Source: Dangar Research Group, Shopping Centres: The Changing Face of the Community, 2000.

- **Parking**. For a centre to become a "place" it must have easily accessible, highly visible and safe car parking facilities. On–street parking can be critical in high street precincts, particularly where the success of some retailers relies on highly convenient parking (e.g. cafes and specialty food stores).
- **Produce Markets**. A produce market can add a lifestyle–oriented dimension to a centre and encourage users to visit the centre for longer than they would otherwise. Research by the Dangar Research Group indicates that small one–off stores and events can create a unique personality for a centre, and enhance the level of social interaction within the centre.
- **Clean, Safe, Friendly**. A successful community destination is one which offers a clean, safe and friendly environment which draws visitors to shops and which makes it an enjoyable place to shop. This can be achieved through active security, increased participation by retailers in planning for the centre, reduced levels of vehicular traffic through the centre (for outdoor shopping precincts) and the implementation of holiday and special events which give shoppers another reason to visit the centre.
- **Activate the Centre**. For a centre to become an inclusive place of community and social interaction it should aim to activate the centre at all hours of the day and night. By drawing different customers during different periods of the day the centre (and its retailers) will capture more business, and create a safer environment for all shoppers.
- **Varying the "Lifestage" Focus**. A shopping centre serves a community which includes people of all ages. For a centre to actively engage with a community it must offer something for each lifestage segment and not exclude a market segment. The broad appeal of a centre can be fostered through activities for young children, shops and entertainment for young adults, as well as morning walk activities for older persons. Child care, seniors clubs and dining precincts can also enhance the multi–lifestage focus of a centre.
- **Integrate Civic and Community Uses**. Civic, cultural and community uses should be integrated into a centre so as to increase the number of visitors going to the centre, as well as offering a steady stream of customers from which the neighbouring retailers can build upon. This can be achieved through an emphasis on clubs and classes in the centre, thereby underlining the community role of the centre, and the centre's relevance to the lifestyle of the area.

Above all, for a centre to become a place of community and social interaction it must be prepared to change in response to the changing demands of retailers, local property owners and its shoppers. If it is unable to respond to social and demographic change it is unlikely to become a strong, community–oriented centre.

A combination of these factors, if implemented correctly, has the potential to integrate the community into the centre, and the centre into the everyday lives of the local residents. Appendix B outlines specific guidelines for the Gladstone Region's shopping centre developments to achieve community and social interaction goals.

6.4 SUMMARY AND IMPLICATIONS FOR THE GLADSTONE REGION'S RETAIL HIERARCHY

It is evident that within Australia key demographic and lifestyle changes over the past few decades have driven the retail industry to introduce new products and formats. These changes and innovations are part of the evolving nature of retail, which has to meet the needs of the consumer in order to be effective. Bulky goods are no longer a 'recent' innovation – some are 25 years old. In some locations throughout Australia, these centres are now mature (and some are even in decline). However, within the Gladstone Region, the advent of bulky goods centres is relatively recent and demand for this type of retail product is expected to grow over the forecast period.

Innovation in the Australian retailing industry is continuing to occur with the introduction of Costco (membership style retailing), the expansion of Aldi and the increasing use of the internet to either make purchases or research a product before buying it. Shopping centre operators are continuing to evaluate and respond to the demands of their local communities.

These innovations, and others yet to materialise, will continue to drive Australian retailing over the 20 year forecast period. The nature of change and innovation means that it is difficult to ascertain the timing and characteristics of potential changes with any certainty. In the Gladstone Region change to retailing formats will be driven by strong population growth, demographic and lifestyle changes, including an ageing population.

These factors make planning a comprehensive retail strategy for the future retail needs, locational requirements of centres, size of centres, function and other centre characteristics throughout the Gladstone Region an imprecise endeavour.

7 Future Demand for Retail Facilities in the Gladstone Region

This section examines potential future demand for additional retail infrastructure generated by continuing population and expenditure growth in the Gladstone Region and translates this growth into likely future demand for retail floorspace and centre functions.

7.1 ESTIMATED FUTURE FLOORSPACE DEMAND

Forecasting future demand for additional retail centres and floorspace over a 20 year timeline is necessarily indicative in nature. Two basic methodologies often used to forecast future demand for retail floorspace are presented below; per capita floorspace ratios and expenditure based estimates.

7.1.1 Per Capita and Threshold Based Forecasts

Per Capita Floorspace Forecasts

One method of translating future population growth into demand for additional shops (specifically supermarkets, discount department stores and department stores), is the application of a per capita ratio of the total amount of retail floorspace to the estimated residential population.

As at June 2010 there was a total recorded floorspace of 178,732 m^2 of floorspace within the Region. As none of this floorspace appears to have become available between July 2009 and June 2010 it can be assumed that a similar amount of floorspace was available in June 2009.

Therefore, as at June 2009, it is estimated that there is approximately 2.98 m^2 of retail/commercial floorspace per person (based on a residential population of 59,920 persons). However, this per capita provision includes complementary commercial and professional services floorspace such as travel agents, real estate agents and medical centres. If complementary commercial and professional services are removed from the total, the per capita retail floorspace provision falls to 2.45m^2 per person as at June 2009 (Table 7.1).

When this regional per capita floorspace provision is applied to each of the sub–areas, growth between 2011 and 2031 indicates total regional demand for almost 120,000 m^2 of additional retail floorspace, bringing the Gladstone Region's total required retail floorspace to around 275,000 m^2.

Table 7.1: Forecast Demand for Retail Floorspace, Gladstone Region, Per Capita Analysis, 2011–2031

	2011	*Incr.*	*2016*	*Incr.*	*2021*	*Incr.*	*2026*	*Incr.*	*2031*
Forecast Population									
Gladstone City	35,365	6,100	41,465	5,711	47,176	6,389	53,565	6,643	60,208
Boyne Island – Tannum Sands	12,383	2,392	14,775	2,802	17,577	3,621	21,198	5,138	26,336
Calliope	5,686	1,746	7,432	1,351	8,783	1,138	9,921	301	10,222
Agnes Water – Seventeen Seventy	3,664	598	4,262	675	4,937	744	5,681	800	6,481
Rural South–East	2,748	449	3,197	506	3,703	557	4,260	600	4,860
Rural West	3,136	192	3,328	152	3,480	69	3,549	33	3,582
Total Gladstone Region	**62,982**	**11,477**	**74,459**	**11,197**	**85,656**	**12,518**	**98,174**	**13,515**	**111,689**
Forecast Retail Floorspace									
Gladstone City	86,644	14,945	101,589	13,992	115,581	15,653	131,234	16,275	147,510
Boyne Island – Tannum Sands	30,338	5,860	36,199	6,865	43,064	8,871	51,935	12,588	64,523
Calliope	13,931	4,278	18,208	3,310	21,518	2,788	24,306	737	25,044
Agnes Water – Seventeen Seventy	8,977	1,465	10,442	1,654	12,096	1,823	13,918	1,960	15,878
Rural South–East	6,733	1,100	7,833	1,240	9,072	1,365	10,437	1,470	11,907
Rural West	7,683	470	8,154	372	8,526	169	8,695	81	8,776
Total Gladstone Region	**154,306**	**28,119**	**182,425**	**27,433**	**209,857**	**30,669**	**240,526**	**33,112**	**273,638**
Per Capita Provision	2.45 m^2/ person		2.45 m^2/ person		2.45 m^2/ person		2.45 m^2/ person		2.45 m^2/ person

Source: Foresight Partners estimates.

The last definitive inventory of existing retail floorspace undertaken at the local, State and National Level was the 1991–92 Retail Census carried out by the ABS. At that time it was estimated that Queensland had approximately 2.01m^2 of shopfront retail floorspace per person.[17] No subsequent comprehensive floorspace estimates have been undertaken in Australia or Queensland by the ABS or other government agencies.

As discussed in section 3.3.4, recent studies have suggested a national ‘required’ provision of about 2.1 m^2 of floorspace per person based upon studies in parts of Victoria and NSW.[18,19&20] However, this figure is derived from estimates of per capita retail spending potential converted into equivalent retail floorspace using industry average floorspace productivity levels (sales per square metre), rather than an actual inventory of retail floorspace. Thus, these estimates would be strongly influenced by socio–economic characteristics of the population (especially income), as well as the average productivity levels applied to these estimates. These studies also indicate that the per capita provision is likely to increase over time due to rising incomes and living standards (to 2.35 m^2 by 2031 in the case of NSW).

Per capita retail floorspace benchmarks, although conceptually appealing and easy to calculate, are not particularly useful in determining current or future need and demand for retail floorspace as they are affected by a number of well known issues:

- Per capita figures used for benchmarking are empirically calculated figures and merely reflect the provision at a single point in time and place. It does not indicate whether this represents an undersupply or oversupply of retail facilities. A national per capita metric reflects the full range of retail facilities, including major department stores, which are not present in Gladstone or Rockhampton, and other higher order retail goods and services which gravitate only to the largest centres (e.g. the Sunshine Coast or Brisbane) which could overstate future demand within the region.
- Defining appropriate population boundaries can be extremely difficult because of considerable overlap in retail catchments and shopper mobility. This ‘boundary effect’ is particularly relevant when comparing retail demand generated within sub–regional areas. For example, some of the implied demand for more retail floorspace in the Boyne Island–Tannum Sands area would actually be met by additional retail facilities in Gladstone City, just as some of the implied demand

[17] Source: ABS 1994, Retailing in Queensland 1991–92 cat. no. 8623.3

[18] Source: Department of Sustainability and Environment, 2007 Retail Floorspace Forecasts for Metropolitan Melbourne 2006 to 2030. Essential Economics Pty Ltd.

[19] Source: Department of Planning and Community Development Overview of Retailing in Regional Victoria. Essential Economics Pty Ltd.

[20] Source: Urban Taskforce Australia 2008 Demand for Retailing Floorspace. Hill PDA

for the whole of the Gladstone Region would be met through the provision of additional retail shops and services in Rockhampton and, to a lesser extent, Bundaberg.

- Application of the Region's current estimated 2.45 m² per capita floorspace provision (or even the national per capita estimate) to future population growth assumes that the Gladstone Region's existing retail centres and shops are trading at their capacities. This is clearly not the case, and existing Gladstone Region retailers and centres will seek to absorb a significant portion of the sales potential generated by future population growth.
- The uneven distribution of the population, income and spending power throughout the Gladstone Region reduces the ability for individual areas to support future retail provision at the current indicative Regional level.
- Per capita floorspace measures cannot readily accommodate or anticipate the evolving and innovative nature of retail forms and formats. For example, per capita retail provision forecasts undertaken 20 or 30 years ago would not have accounted for the growth in retail showroom, factory outlet, large hardware store formats and, as such, would have considerably underestimated the per capita floorspace provision for 2010.
- It does not reflect market realities with respect to the range and threshold requirements of various retail and centre uses, or the 'lumpy' nature of their provision.

While per capita measures are of some use at the broadest level of generalisation, they are not particularly suited for long term centres and retail planning, and are not used further in assessing the future demand for retail floorspace and centres in the Gladstone Region.

Population Threshold Forecasts

Another method of translating future growth into the equivalent demand for particular store types is to use current provision of stores per measure of population. This method also has similar drawbacks, including boundary effects, and are also somewhat static, but they do provide an indication of the number and types of anchor or major stores likely to be needed to service future growth.

Benchmark or threshold populations needed to support full line supermarkets (supermarkets generally greater than 2,500 m²) and discount department stores provide an indication of the number of additional 'anchor' retailers implied by projected population growth within the Gladstone region. For example, major full line supermarkets (Coles, Woolworths) seek about 8,000 – 10,000 people within their main trade area; major discount department stores (Kmart, Target, Big W) generally seek threshold populations of 25,000 or more to sustain them (it is higher at 30,000 – 40,000 people where major department stores are also present).[21]

In the past, major department stores (Myer, David Jones) required population thresholds of 100,000 or more (also strongly influenced by the socio–economic characteristics of that population). New, and smaller (10,000 – 12,000m²) Myer stores are now seeking to serve trade area populations of less than half that in some areas.[22]

These anchor retail benchmarks suggest that Gladstone's projected 24,800 population increase between 2011 and 2031 alone could *theoretically* support a further two or three major full line supermarkets and another major discount department store.

These indicative store numbers would be under–stated as they do not account for potential under–provision which might currently exist. For example, the Fitzroy Region does not have a major national department store, although the current combined population of Rockhampton and Gladstone would, in theory, support one or two such stores. This highlights the importance of other factors in the location decisions of these stores, such as population densities and compactness of trade areas (i.e. range and threshold), household incomes, stage of the lifecycle and visitor spending.

Table 7.2 sets out the number of major chain supermarkets (Woolworths, Coles, Bi–Lo and Supa IGA) and discount department stores (Big W, Kmart and Target) operating within the Fitzroy Statistical Division (includes Rockhampton and Gladstone), Mackay Statistical Division (including Mackay, Moranbah and the Whitsundays) and Wide Bay Burnett Statistical Division (including Bundaberg, Gympie, Maryborough and Hervey Bay).

Table 7.2: Population Per Major Store, Statistical Divisions in Central Queensland, June 2009

Statistical Division	*June 2009 Estimated Resident Population*	*Major Supermarkets (no.)*	*Population per Supermarket*	*Discount Department Stores (no.)*	*Population per Discount Department Store*
Fitzroy	220,714	21	10,500	5	44,100
Mackay*	172,735	17	10,200	3	57,600
Wide Bay Burnett	287,425	24	12,000	9	32,000

**Expansion of Caneland Central, Mackay's largest shopping centre started in early 2010 and will include a Myer deparment store and expanded discount department stores.*

Source: Property Council of Australia, ABS.

The use of large Statistical Divisions reduces the 'boundary effect' inherent in per capita or population to store ratio analyses, but masks the often

[21] Foresight Partners (2008) *Park Ridge Major Planning Area Employment and Economic Development Study*. Prepared for Logan City Council.

[22] *'Myer into building mode with 17 new stores planned'*. The Australian. 29 March 2007

considerable variation in income, household characteristics and expenditure potential at the sub–regional level. Nevertheless, it does assist in translating future population growth into the major retail stores likely to ‘anchor’ future new centres (or incorporated as expansions to existing centres).

Supermarkets serve relatively small catchments and their provision will closely follow local growth patterns. These are the main anchor tenants of local or neighbourhood centres, which usually require site areas of 1.5 to 2 hectares.

Discount department stores serve larger catchments as anchor tenants of sub–regional shopping centres.[23] These centres generally require site areas of four or more hectares of land (if built as a greenfield development).

Major department stores are the highest order retail anchor, locate in the largest centres and require extensive population catchments. Therefore, a future major national department store (Myer, David Jones) is only likely to establish in the Rockhampton area, and probably only as part of an extension to an existing centre. The nearest major department store to the Fitzroy Region is Myer at Sunshine Plaza in Maroochydore. The nearest major department store north of the region is Myer in Mackay.

7.1.2 Expenditure Based Forecasts

A household retail expenditure based forecasting methodology enables a better connection to be made between growth in the retail expenditure pool within discrete sub–areas in the Gladstone Region and the magnitude of additional retail floorspace theoretically supportable by increases in expenditure potential over time. Retail industry productivity or performance benchmarks, derived from Urbis’ *Retail Averages* publication, FMRC *Benchmarking* and other sources can be applied to the expenditure increase between 2011 and 2031 to generate ‘order of magnitude’ estimates of additional retail floorspace theoretically supportable.

Between 2011 and 2031 the available retail expenditure potential within the Gladstone Region is forecast to increase by $818 million (in 2011 dollar values), which is an average increase of $41 million per annum (Table 7.3). Around half of this increase ($428 million) will be generated by Gladstone City residents. Conversely, spending by Rural West households is forecast to grow the least with an increase of around $16 million, or less than 2% of the forecast regional growth over the twenty year period.

Based on these sources and Foresight Partners’ in–house data and experience, the following estimates of average productivity levels by general centre type have been used:

- Bulky goods/retail showroom centre – $3,500/m^2;

[23] The average size of Queensland sub–regional centres is about 17,900 m², but they range up to 30,000 m² according to centre definitions in the Property Council of Australia’s *2011 Queensland Shopping Centre Directory*.

- Local convenience centre – $5,250/m^2;
- Major supermarket anchored centre – $8,500/m^2; and
- Discount department store based centre – $6,000/m^2.

However it should be noted that floorspace productivity can vary substantially. Retail centres can trade successfully at productivity levels well below these targets or benchmarks, depending upon their location, tenancy mix, rent structure and other factors, so the actual amount supportable will also vary. Nevertheless, these averages provide a useful benchmark for converting the expected $818 million increase in the Gladstone region's household retail expenditure potential into equivalent retail floor space by broad centre type. This approach assumes this increase is converted to the equivalent of modern, purpose–built shopping centre floorspace when in practice some of it will appear as free–standing stores, stores built as part of mixed–use development and other 'non–centre' formats.

Table 7.3: Forecast Retail Expenditure Growth by Area, 2011–2031

	Take Home Food ($ m)	*Meals out take away ($ m)*	*Apparel ($ m)*	*Homewares/ services ($ m)*	*Total ($ m)*	*Per cent share of increase*
Gladstone City	178.39	59.31	36.97	153.85	428.52	52.41%
Boyne Island – Tannum Sands	91.95	30.61	19.05	79.26	220.87	27.02%
Calliope	26.06	7.56	4.53	26.46	64.61	7.90%
Agnes Water – Seventeen Seventy	19.99	5.81	3.49	20.28	49.57	6.06%
Rural South–East	15.49	4.49	2.69	15.72	38.39	4.70%
Rural West	6.50	2.16	1.34	5.61	15.61	1.91%
Total Growth	**338.38**	**109.94**	**68.07**	**301.18**	**817.57**	**100%**

Source: Foresight Partners estimates.

Foresight Partners' previous investigations and research indicates that approximately 20% of all household retail expenditure is spent on goods typically, but not exclusively, sold in retail showroom/bulky goods type stores. Therefore, for the purposes of an indicative demand analysis it is assumed that at least this proportion of additional forecast retail sales in the Gladstone Region is potentially available to support retail showroom type development.

Indicatively, it has also been determined that a local convenience centre (a small supermarket or convenience anchored centre with a small number of specialty shops) would attract 15% of all retail sales expenditure within the Gladstone Region. This is because of the prevalence of smaller centres located throughout the Region, including in the rural townships scattered throughout the Region.

The ACCC inquiry into the competitiveness of retail prices for standard groceries estimated that approximately 70% of packaged groceries and 50–

60% of fresh groceries are sold in major supermarkets.[24] Given the prevalence of supermarket anchored centres in the Gladstone Region (as they are in most regions of Queensland), we estimate that about 45% of additional future retail sales in the Region will be directed to supermarket anchored centres.

It is anticipated that the remainder of the forecast retail sales potential within the Region will be directed to local convenience and discount department anchored centres and retail showroom type retailers/centres. Table 7.4 sets out the equivalent retail floorspace which is theoretically supportable based on the assumptions and productivity averages outlined above. Whilst only indicative, the forecast distribution by centre type represents an order of magnitude estimate of the scale and nature of retailing which could be theoretically supported by additional household expenditure increases accruing within the Gladstone Region over the next 20 years.

Table 7.4: Theoretically Supportable Floorspace Based on Expenditure Growth Estimates, 2011–2031

	Spending Distribution (%)	*Increase in Retail Spending Potential ($ m)*	*Target Productivity ($/m^2)*	*Equivalent Floorspace (m^2)*
Bulky Goods Centre	15.0	122.64	3,500	35,039
Local Convenience Centre	15.0	122.64	5,250	23,359
Supermarket Based Centre	45.0	367.91	8,500	43,283
Discount Department Store Based Centre	25.0	204.39	6,000	34,065
Total	**100.0**	**817.57**	**–**	**135,746**

Note: Figures are reported in constant 2011 dollar values.

Source: Foresight Partners estimates.

Therefore, based on a forecast increase in the Region's retail spending potential of $818 million between 2011 and 2031, this is sufficient to support around 135,000 m^2 of additional retail floorspace. However, not all of this floorspace will be absorbed within new centres throughout the Region; some will be taken up through the occupation of vacant premises, some will be taken up by the proposed and approved developments (e.g. Garden Lovers Centre redevelopment and expansion, Forest Springs Marketplace) and a portion of the additional demand will continue to flow to Rockhampton, Bundaberg, Brisbane and other destinations. Some of this indicative future demand will also be met by existing retailers and centres through improved sales performance.

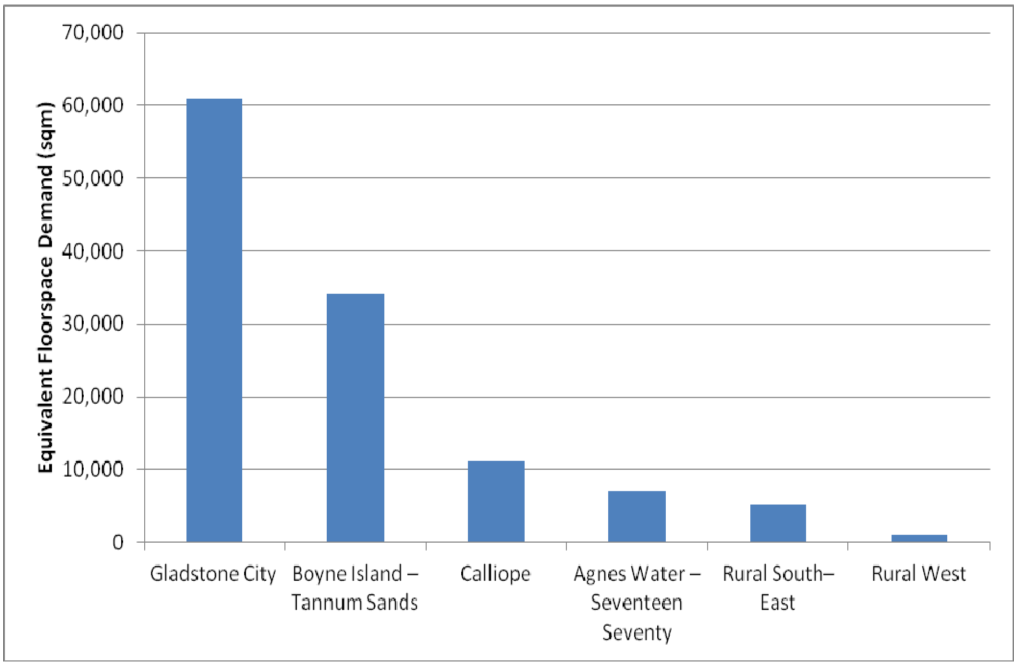
The equivalent floorspace demand indicates that ultimately there is potential for another 35,000 m^2 of retail floorspace dedicated to bulky goods or retail

[24] Source: Australian Competition & Consumer Commission, Report of the ACCC inquiry into the competitiveness of retail prices for standard groceries, July 2008.

showroom facilities. A further 34,000 m^2 of floorspace is potentially supportable in one or two additional discount department store based centres within the Region.

This additional demand for retail floorspace will not be evenly distributed throughout the Region. Households in Gladstone City will continue to generate the single largest share of regional retail spending over the forecast period to 2031, and they are forecast to account for the highest growth in total spending. Boyne Island–Tannum Sands will also support significant additional retail floorspace over the 2011–2031 period (Figure 7.1), with an estimated demand for nearly 34,000 m^2 of floorspace. However not all of this can be developed within the Boyne Island–Tannum Sands precinct as the catchments of existing (and future) retail centres overlap, and some of this demand, especially for higher order goods and services, will be met by Gladstone City and Rockhampton centres.

Figure 7.1: Additional Retail Floorspace Theoretically Supportable by Future Growth, Gladstone Region, 2011–2031



Source: Foresight Partners estimates.

7.1.3 Comparison to Floorspace Demand Forecast in the 2005 Gladstone Retail Study

The 2005 Gladstone Retail Study undertaken by Economics Associates identified that the Study Area could theoretically support an additional 37,450 m^2 of retail floorspace between 2004 and 2021. This is considerably below the forecast supportable floorspace in this study due to a number of factors:

- The time periods examined in the two studies are different. The 2005 Gladstone Retail Study examined forecast growth between 2004 and 2021, which is a 17 year period. This report examines the demand for future floorspace between 2011 and 2031; a 20 year period which finishes ten years after the first study's planning period.

- The Study Area in the 2005 Gladstone Retail Study included the former Gladstone City and Calliope Shire (Part A) areas which included Boyne Island, Tannum Sands and Calliope. This area had an estimated 2006 population of 42,715 persons, and a forecast 2021 population of 60,369 persons. Therefore, over a 15 year forecast period the population was anticipated to grow by 17,654 persons, or less than half the forecast growth over the next 20 years.

  The current study has examined a significantly larger and more populous area, which includes the former Miriam Vale Shire and Calliope Shire (Part B). Further, the 2005 Retail Study relied on PIFU's 2003 population projections which underestimated the 2006 base year population by nearly 3,000 persons (the ABS ERP for this area is 45,600 persons). Subsequently, the residential population at 2021 was underestimated by around 6,800 persons.

- The two projections are presented in different dollar values. The 2005 Retail Study estimates future retail sales in 2004 dollar values whereas the current study estimates future retail sales in 2011 dollar values.

Consequently the estimated theoretical floorspace of the 2005 Gladstone Retail Study and the estimated theoretical floorspace determined by the current study are not directly comparable.

7.2 FACTORS INFLUENCING A FUTURE STRATEGY

It is forecast that an additional 135,000 m^2 of retail floorspace could be theoretically supported by population and expenditure growth within the Gladstone Region between 2011 and 2031. However not all of this will be developed, or should be provided for as there are a range of other influencing factors, such as:

- population growth and distribution;
- escape expenditure to nearby centres; and
- local precinct issues.

These factors will be determinants underpinning a strategic direction for future retail and commercial centres within the Gladstone Region.

7.2.1 Population Growth and Distribution

Future demand for retail floorspace will be across a range of centre types including retail showroom centres, supermarket anchored centres and discount department store anchored centres. Future retail development will be unevenly distributed, with areas experiencing significant residential growth (most notably Gladstone City and Boyne Island – Tannum Sands) expected to have the highest demand for additional floorspace.

The forecast population growth in the Agnes Water – Seventeen Seventy precinct, and anticipated growth in the surrounding area, indicates that consolidation and expansion of these facilities will be warranted, and could ultimately incorporate a major supermarket. This will reduce the need for residents to travel over 1.5 hours to either Gladstone or Bundaberg to undertake major food shopping. However, the timing for its market entry will also depend upon growth in the area's visitor market. Further, if a retail centre is developed outside of the existing Agnes Water town centre, it will contribute to fragmentation of the retail offer in Agnes Water, which could result in significant adverse effects on the retail provision within the town centre.

Gladstone City

Expected growth patterns and the existing retail provision indicate that the major additions to the retail network in Gladstone City should occur in Telina – South Trees – Glen Eden – Tooloola and New Auckland – Kirkwood areas of Gladstone City. The recently completed Forest Springs Marketplace within the New Auckland – Kirkwood area will meet some of the future demand for retail floorspace within that area whilst the zoned parcel of land on Gladstone Benaraby Road is positioned to absorb the demand for retail floorspace from Telina – South Trees – Glen Eden – Tooloola residents.

It is expected that advances in the redevelopment of the CBD as a specialised retail precinct will not occur until there is considerably more higher density residential development on CBD sites. Pending this intensification of residential uses it is unlikely that there will be a high demand for additional retail floorspace within the CBD, especially with its high level of existing vacant and under-utilised shopfront space.

The forecast distribution of population growth within Gladstone City has a considerable impact on the recommended locations for additional retail facilities within the City and the Region. If the distribution of the population growth was to deviate considerably from that forecast by OESR (and used to develop this Strategy), it may result in the undersupply of retail facilities in some areas. This will be addressed however through assessments of the need and demand for proposed retail facilities which accompany applications for a Material Change of Use.

7.2.2 Escape Expenditure

Not all retail expenditure generated by Gladstone area households is spent within the local region. Residents spend retail dollars in Rockhampton, Bundaberg, Brisbane and elsewhere, either as part of multi–purpose or special shopping trips or part of their travel for holiday, business, medical, education or other purposes.

The 2005 Gladstone Retail Study, which undertook a telephone survey of 381 Gladstone and Calliope area residents to explore, among other things, their household shopping patterns, estimated that approximately 20% of fashion and homewares spending from Gladstone households, or around $14 million (in 2004 dollar values) was flowing to centres located outside of Gladstone, including Brisbane. About 11% of Gladstone's fashion and homewares expenditure was spent in Rockhampton and Bundaberg centres. Assuming a similar proportion in 2011, this 11% 'escape' spending represents nearly $38 million in fashion and homewares sales are currently going to Rockhampton and Bundaberg centres.

Since completion of the 2005 Gladstone Retail Study there have been some additions and changes to the retail network within the Gladstone Region which will have helped retain more of this spending locally. The single largest addition was the development of the Centro Home Gladstone complex which includes a 13,000 m^2 Bunnings Warehouse and nearly 9,000 m^2 of bulky goods/retail showroom facilities. This will have helped reduce the amount of homewares spending which would otherwise flow to Rockhampton's centres and retailers.

There have also been considerable changes to the provision of apparel and homewares retailers within Rockhampton City. Rockhampton's major retail centre, Stockland Rockhampton, was amalgamated from two adjoining centres in 2006, and as at June 2010 has nearly doubled in size to a total retail floorspace of nearly 60,000 m^2. It has a considerable apparel and fashion sector which is likely to have retained, or even increased, the level of apparel spending it draws from Gladstone Region residents.

The 2005 Gladstone Retail Study escape expenditure estimate was based on a survey which did not include residents from the former Miriam Vale Shire area. Given their slightly closer proximity to Bundaberg than Gladstone it is expected that a somewhat higher proportion of homewares and fashion spending from these residents would be directed to Bundaberg.

Based on the 2005 survey work, coupled with the investigations of current retail provision and composition, it is estimated that, as at 2011, about 20% of apparel and homewares retailing, and roughly 10% of take home food and meals out spending, is likely to be directed away from Gladstone Region retailers. This represents around $111 million of retail spending potential (or around 15% of all retail spending in 2011). Should this proportion of Gladstone Region's household retail spending continue to 'escape' at 2031, this figure would increase to around $230 million.

7.2.3 Local Precinct Considerations

CBD and The Valley

The future role and function of these two areas are significant considerations for the further development of the Gladstone Region's centre hierarchy. The two precincts are too close together to operate independently of each other, but are too far apart to foster a high level of connectivity between them.

Currently, the CBD retail precinct is a distant second to The Valley as there are few retail shops and services within the CBD. In order for retailing within the CBD to flourish, it will need to differentiate itself from other precincts within the Region. This is likely to be achieved through the strengthening of its dining precinct and the promotion of complementary leisure/entertainment retailing different to that offered by the major national chains elsewhere in the Region.

The Valley has a mix of functions, hosting a local centre, a selection of small scale bulky goods retailers, several medical specialist offices and a variety of commercial premises. While Centro Gladstone is successful with minimal vacancies, much of the surrounding precinct is characterised by low rent, secondary retail and commercial businesses, many of which occupy dated premises. The precinct's 2010 vacancy rate was around 9%, which is exceeded only by that of the CBD among the City's major centres.

The Valley precinct provides a needed venue for an eclectic mix of businesses that would not be suitable or viable in other locations. As such it serves a valuable role and therefore no change is recommended to its existing functions. However, the precinct is physically fragmented and lacks a uniform character. An urban planning solution is needed to improve its presentation, and contribute to creating a more cohesive and vibrant retail/commercial node.

Hanson Road Precinct

The Hanson Road precinct is currently zoned 'Mixed Business' and is intended to be used for light industrial purposes with a small amount of complementary retail shops such as takeaway food shop and convenience store which directly serve the persons employed in the precinct.

A number of light industrial sites within this precinct have developed as bulky goods/retail showrooms. This can place pressure on the industrial uses within the precinct because of traffic movements, parking conflicts, increased land prices outside of the reach of industrial users and the different amenity expected by industrial users, retailers and shoppers.

For these reasons it is undesirable to encourage or allow development of Hanson Road as a recognised bulky goods precinct. The substantial reliance on Hanson Road to provide suitable retail showroom facilities should be reduced through either the development of another bulky goods showroom centre or through the dedication of a strip retail area outside of Hanson Road for bulky goods retailing.

Whilst bulky goods retailers currently trading in Hanson Road cannot be forced to leave the area, the development of a new precinct elsewhere should encourage existing (and future) bulky goods retailers to establish away from the Hanson Road area. The Hanson Road area is best suited for those types of retail showroom/bulky goods retailers whose main business is to supply trades, but also retail to the public, such as carpets, lighting/electrical suppliers and plumbing suppliers.

Gladstone Racecourse

The 2005 Gladstone Retail Study identified that, as at 2005, the preferred site opportunity for a bulky goods centre was the Gladstone Racecourse site along Dawson Highway close to the Stockland Kin Kora centre. It is understood that

Council undertook a feasibility study and that it is highly unlikely that the site will be redeveloped for uses other than its current ones within the short–to–medium term. Therefore the use of the Racecourse site for retail within the life of this study has not been considered.

Boyne Island – Tannum Sands

The future development pattern of retail premises within Boyne Island – Tannum Sands will be strongly influenced by the quality of the existing premises. Boyne Plaza, the oldest retail precinct within Boyne Island – Tannum Sands is of a very poor quality and appears to have had very little refurbishment work in well over ten years. Whilst the retailers within Boyne Plaza maintain their premises to a good standard, the centre itself does not meet modern standards of retailing. However, it is anticipated that the August 2010 preliminary approval for a mixed use centre directly opposite Boyne Plaza could increase the pressure on Boyne Plaza to improve its appearance, and subsequently its appeal to local residents.

The future residential development pattern of Boyne Island – Tannum Sands is a factor in developing a network strategy for this area. Structure planning investigations have identified that existing land uses, ownerships, physical features and the presence of ecologically significant land will result in the development of discrete residential communities rather than a progressive expansion of the existing Boyne Island – Tannum Sands residential communities. Depending on their relative accessibility to the existing retail facilities, it is likely that these communities would need to be serviced by additional retail centres. The centres are most likely to be neighbourhood centres which would meet the day–to–day needs of the local communities.

Further, land limitations will restrict the expansion opportunities within the existing Tannum Sands Local Centre. Council's preliminary approval of a supermarket anchored centre directly across from Boyne Plaza suggests that any higher order retail development is more likely to occur in the Boyne Plaza area rather than Tannum Sands.

Agnes Water – Seventeen Seventy

A significant issue within Agnes Water – Seventeen Seventy is the need to consolidate the provision for retail precincts. Overall, within Agnes Water – Seventeen Seventy there is nearly 100 hectares of land zoned for local business, district business, commercial services or retail showrooms. The considerable majority of Agnes Water's retail shops and services are located within the existing town centre precinct of approximately 4.5 hectares at the intersection of Round Hill Road and Captain Cook Drive.

The remaining commercial land (94 hectares) is predominantly located along a 1.8 kilometre stretch of Round Hill Road at the entrance to Agnes Water. This commercial zoned precinct is located 1.4 kilometres east of the existing town centre precinct. It is estimated that less than eight hectares of this land has been developed for business purposes. Even if a large portion of the zoned land along Round Hill Road were to be developed for commercial premises there would be little of the desired connectivity and walkability with the retail facilities in the town centre, and residents and visitors would be required to drive between shops. This increases the pressure on traffic movements and the road network.

Other key factors which need to be considered in developing the strategic recommendations for the Gladstone Regional Planning Scheme are the approved Coles anchored shopping centre at Captain Cook Drive and Discovery Drive, Agnes Water and the mooted Woolworths anchored shopping centre development near the intersection of Round Hill Road and Bicentennial Drive, Agnes Water. The sites of these two centres are located approximately one kilometre and 1.4 kilometres respectively from the existing town centre precinct. If either or both of these centres are developed, the relatively cohesive existing town centre retail precinct would be significantly dispersed, and there is a strong probability that the existing retail facilities in Agnes Water will be detrimentally affected. It is anticipated that the level of impact on the town centre from the development of even one of these supermarket anchored centres would be likely to result in the closure and obsolescence of some of the existing retail facilities, and the loss of benefits associated with a single, compact, walkable retail precinct.

8 Recommended Retail Strategy

This section sets out the main factors determining the most appropriate and viable retail and commercial strategy for the Gladstone Region, and the resulting recommendations for the retail and commercial components of the revised Gladstone Regional Council Planning Scheme.

8.1 KEY DETERMINING FACTORS

8.1.1 Population Growth and Distribution

Over the 20 year period from 2011 to 2031, the population within the Gladstone Regional Council is forecast to increase by around 48,700. The largest shares of this growth are projected to be in Gladstone City (24,800), Boyne Island – Tannum Sands (around 14,000) and Calliope (around 4,500). The remaining growth of 5,400 persons will be spread over rural areas.

The forecast extent and distribution of growth to 2031 has the following implications:

- Over the forecast period, significant increases will be required to the local centre facilities within Gladstone City and Boyne Island–Tannum Sands. The residential population of Calliope is not forecast to grow by a sufficient number of persons over this period to support more than local centre facilities. However, with a population of 26,000 by 2031, it is likely that Boyne Island–Tannum Sands would warrant some higher order retail facilities.
- Gladstone City will continue to host the largest population within the Region, and it will remain the focus for higher order retail facilities within the Region. However the Region's residents will continue to travel to Rockhampton and elsewhere for some higher order retail shopping.
- Population growth within the Gladstone Region will generate demand for additional specialist retail facilities, local centres serving new residential areas and expansion of existing retail centres. Population growth in Gladstone City over the next 20 years could theoretically support two additional full line supermarkets and associated retailers. However, in view of the recent development of new supermarket-anchored centres at Sun Valley and O'Connell, there is not considered to be a need for an additional supermarket-anchored centre to serve currently designated residential growth areas.

8.1.2 Characteristics of the Existing Retail Network

The assessment of retail infrastructure indicates that the existing retail provision in the Gladstone Region is generally appropriate to the market's requirements in terms of both scale and geographic distribution. Stakeholder interviews identified no significant concerns about the existing retail provision. However, some issues were identified which should be considered in the development of a retail strategy for the Region.

- **Stockland Gladstone's** level of service to the community is compromised by its location on two separate sites, and insufficient size to host the range of higher order retailers (particularly specialty apparel retailers) that can and should be available to a market the size of the Gladstone Region.

  However, in view of the size of the market and the limited selection of potential anchor retailers, another higher order retail centre would not be supportable, and existing alternative retail nodes such as the CBD and Gladstone Central are not significant alternative destinations for comparison shopping. Consequently, Stockland Gladstone lacks significant local competition in higher order retailing. Stockland has advised that it is examining the future development options of the Kin Kora site. It controls 6.3 hectares of land on the western side of the Dawson Highway, and it is expected that redevelopment and expansion of the centre will occur when it becomes commercially viable.

  By 2031, the Gladstone Regional Council area is forecast to have a population of around 112,000. Some 97,000 of these residents are forecast to be in Gladstone City, Boyne Island-Tannum Sands and Calliope, which is around 15,000 more than previously forecast. In view of the lack of alternative higher-order retail centres in the region, the future population of the Gladstone region will likely be sufficient to support a regional shopping centre with at least 50,000 m² of lettable area and potentially including a full line department store. Market size and existing retail provision indicate that the most appropriate and viable way to achieve this is through the further expansion of Stockland Gladstone rather than developing another major centre. Therefore, provision should be made to accommodate the expansion of Stockland Gladstone to a regional centre.

  Myer Stores Limited declined to comment on prospects for a Myer store in Gladstone. Myer Executive Chairman Bill Wavish has previously stated that a Myer store could be located in any centre with a population of more than 40,000.[25] However, industry sources confirm that Myer's priority for new department stores is in markets which have considerably larger catchment area populations than Gladstone, such as Townsville and Mackay. In the near term, a more likely Myer location in the region is Rockhampton, which serves a larger population and would also draw patronage from Gladstone. In view of this and numerous opportunities in larger markets, it is considered unlikely that Myer will consider a Gladstone store in the near future. However, market growth indicates that Gladstone would warrant consideration for

[25] Source: The Australian, March 29, 2007.

a Myer store over the next 20 years as part of an expanded Stockland Gladstone.

- **Boyne Island – Tannum Sands** currently has a sufficient provision of retail floorspace for its catchment population, but the market is considered to be inadequately served because Boyne Plaza is not maintained to a standard that would reasonably be expected by the community. The combination of inadequate quality facilities and the long term need to provide for considerably more retail floorspace to cater to significant market growth argues for designation of additional land for retail and/or commercial use within Boyne Island – Tannum Sands. The recent preliminary approval for a supermarket anchored centre opposite Boyne Plaza will meet much of the future demand for retail floorspace over the forecast period.

  Forecast continuing population growth over the next 20 years will result in a local population that is sufficient to support a District centre, and it is expected to create the need for one or more neighbourhood centres catering to new residential areas.

- **Agnes Water** has three issues that should be addressed to ensure the effectiveness of its future retail provision. The first is a geographical imbalance between supply of and demand for retail floorspace. Our investigations indicate that there is an emerging undersupply of retail floorspace in the Agnes Water town centre precinct, and only around 2.2 hectares of vacant land for commercial development in the town centre. Limited retail supply has effectively pushed some retailers to fringe sites that are better suited to large–scale retail and commercial uses. The second issue is a considerable supply (approximately 87 hectares) of vacant commercially zoned land on the fringe of Agnes Water. In view of market demand and its distance from the residential and tourist nodes of Agnes Water and Seventeen Seventy, it is likely that only a small portion of the commercially zoned land on the fringe of town will be needed for commercial use in the foreseeable future. The third issue is that an approved supermarket–anchored shopping centre is on a site that is well beyond walking distance of the town centre and therefore would establish another distinct retail node within Agnes Water. This compromises the objective of maintaining a healthy and cohesive town centre retail precinct.

8.1.3 Role of the CBD

The CBD has evolved into a specialist precinct focused on government, cultural and business services. Its retail outlets primarily cater to the local workforce and visitors. There is a small selection of comparison retail shops in the precinct, some of which are located in the CBD because suitable alternative locations (such as at Stockland Gladstone) are not available.

The potential of the CBD to be the most significant retail centre in the Region is severely limited by the lack of a substantial resident population in its immediate vicinity, the competitiveness of other centres (most notably

Stockland Gladstone and Gladstone Central) and topography that reduces its desirability as a shopping destination.

The retail assessment and stakeholder interviews have identified an opportunity for the CBD to build on its existing cluster of restaurants to become the Region's first destination dining precinct. The experience of other such precincts indicates that a typical condition of success is a critical mass of at least eight to ten restaurants in close proximity. In the longer term, the best support for a vibrant restaurant and retail precinct is a substantial resident population in its immediate vicinity.

8.1.4 Escape Expenditure

A survey conducted in 2004 by Economic Associates for the 2005 Gladstone Retail Strategy found that about 20% of clothing and major homewares expenditure was undertaken in centres outside of Gladstone. The escape spending was estimated at around 5% of total retail expenditure. With the subsequent development of a dedicated bulky goods retail centre in Gladstone (Centro Home Gladstone) it is estimated that the percentage of expenditure escaping from the Gladstone Region may have slightly declined.

It is considered unlikely that the percentage of retail expenditure escaping from Gladstone will experience a significant further decline in the near future. Due to its much larger market, Rockhampton is expected to continue to host a much larger selection of higher order retail shops and services than Gladstone. At present, its largest centre – Stockland Rockhampton – has around twice as many shops as Stockland Gladstone. Therefore, until a considerably larger major centre is developed in Gladstone, reductions in the share of expenditure escaping from Gladstone are forecast to be modest at best.

However, as noted in Section 8.1.2, over the next 20 years, the Gladstone regional market is forecast to reach sufficient size to support a regional shopping centre with a considerably greater selection in higher order retail shops than is presently available within Gladstone. When that occurs, the current level of escape expenditure from the Gladstone region is forecast to decline significantly.

8.2 CENTRE HIERARCHY DEFINITIONS

The Sustainable Planning Act 2009 (SPA) prescribes an indicative centre hierarchy that outlines the expectations of the provision of services and the composition of each type of centre. The SPA has prescribed a six level hierarchy for centre types which comprises:

- principal centre;
- major centre;
- district centre;
- local centre;

- neighbourhood centre; and
- specialised centre zoning.

The SPA has been developed to ensure consistency amongst planning schemes Queensland wide, and in conjunction with the draft Queensland Planning Provisions presents a cohesive approach to planning scheme development across Queensland. Draft zoning codes have been prepared are attached in Appendix C. The following summarises the recommended hierarchy outlined in the draft zone codes.

Principal Centre

The purpose of the principal centre zone is to provide the largest and most diverse mix of uses, across retail, commercial, employment, cultural and residential uses. It is the major business centre within the Regional Council area and supports and drives the growth of business in the Port, industrial areas, Gladstone State Development Area and Gladstone City.

The principal centre zone is highly accessible, convenient and attractive to visitors and residents, and provides a wide range of administrative, commercial, cultural, mixed use, entertainment and shopping facilities. This zoning maximises public transport accessibility and use and encourages walking and cycling through the precinct.

A key characteristic of the principal centre is the mixed use development pattern incorporating retail, commercial and residential uses within the centre.

Major Centre

The purpose of the major centre zoning is to accommodate a wide mix of uses and activities, including higher order retail, community and commercial facilities. Specifically, the major centre within the Gladstone Region is to function as an important retail centre which provides for the shopping needs of the Gladstone Region. It is the predominant retail centre for the Region and will be highly accessible, convenient and attractive to residents and visitors.

District Centre

The district centre zoning allows for a mix of uses and activities within a centre, serving a number of suburbs and localities. A district centre is to include retail, commercial, administrative services and minor entertainment facilities. A district centre incorporates residential development, short term accommodation and tourist accommodation at an appropriate scale. It acts as a local employment node and is located in areas with strong integration between urban residential areas and the transport network.

The development of a district centre does not compromise the viability of the network of centres.

Local Centre Zone

The purpose for a local centre under the SPA 2009 is to provide a limited range of uses and activities which accommodate local needs such as local shopping and local employment nodes. These centres are most likely to serve a rural and suburban catchment and are usually a short drive or cycle away for the local community.

A local centre may be serviced by public transport routes; however it does not provide regional services as it is to provide convenience services only. Residential development is not the predominant use within the centre.

These centres are developed in support of the other higher order centres in the hierarchy.

Neighbourhood Centre Zone

The purpose for a neighbourhood centre is to provide a small mix of land uses including low scale convenience shopping and local professional offices. Neighbourhood activity centres are within walking distance of many residents and support the immediate community.

Specialised Centre Zone

A specialised centre zoning is appropriate for a centre or precinct in which the retail, commercial and community facilities provision is heavily weighted to one (or more) uses. The centres usually serve a city or regional scale catchment.

Specifically, within the Gladstone Region the specialised centre zoning is to facilitate development of bulky goods facilities in an integrated and coordinated manner. Development within the specialised centre zoning is for a specific mix or type of centre which cannot be accommodated in other precincts.

8.3 RECOMMENDATIONS – GLADSTONE CITY

The following represents the recommended changes to the provision of retail shops and services within the former Gladstone City, as well as the potential for future uses of vacant commercially zoned land.

8.3.1 Recommended Gladstone City Zonings

It is recommended that the existing centres are zoned for the following purposes under SPA 2009:

- CBD/Valley – Principal Centre;
- Stockland Gladstone – Major Centre;
- Gladstone Central – District Centre;
- Toolooa Street – Neighbourhood Centre;

- Clinton – Neighbourhood Centre;
- Sun Valley Road – Neighbourhood Centre;
- Avion Centre – Neighbourhood Centre;
- Mellefont Street – Neighbourhood Centre;
- Emmadale Heights – Neighbourhood Centre;
- Airport Village – Neighbourhood Centre; and
- Centro Home Gladstone – Specialised Centre.

The retail strip to the north of Gladstone Central along the Dawson Highway should also be classified under the Specialised Centre zoning for bulky goods retailing. The recommended classifications of each existing centre are further explained in Appendix C.

8.3.2 New Bulky Goods Centre

There is an emerging need for a second bulky goods retail centre, both to meet demand generated by regional population growth, and to provide an alternative location to the Hanson Road commercial area, which in the absence of alternatives would face additional pressure to host bulky goods retailers.

There is an opportunity to expand the bulky goods development on land in the Bulky Goods Expansion Precinct, located opposite Centro Home Gladstone. It is recommended that provision for up to 40,000 m^2 of retail showroom floorspace is allowed.

8.3.3 Gladstone CBD/Valley

It is recommended that Gladstone's CBD and Valley precincts are designated the Principal Centre for the Region as they have the major businesses which support and drive growth throughout the Region. Given the topography of the CBD area and the established role of Stockland Gladstone as the region's single major centre, it is unlikely that the CBD and Valley will develop into the pre-eminent retailing node for the region. However, there is the potential for the centre to provide a wide range of administrative, commercial, cultural, mixed use, entertainment and shopping facilities.

Within the City Centre precinct, as per Appendix C, it is recommended that:

- A mixed use precinct is developed, including a mixture of business activities, accommodation activities and entertainment activities.
- Development that activates the street frontages along Goondoon Street is encouraged, particularly through a mix of employment uses.
- Mixed use development is targeted along Goondoon Street to encourage the development of residential apartments above the ground floor.

- A dining precinct is encouraged within the Goondoon Street precinct so as to take advantage of proximity to water, enhance the provision of entertainment and community facilities for visitors and residents, extend the daily activity period and provide a high profile sense of place.

Within the Valley precinct it is recommended that:

- The precinct continues to develop as a convenience retail centre which services the surrounding local communities including the local workforce.
- Land consumptive uses such as large–scale retailing are not located within this precinct so as to increase its cohesiveness and walkability.
- Residential dwellings are encouraged to establish within this precinct, within close proximity to the City Centre and convenience retail facilities.

8.3.4 Allocation of Vacant Zoned Lands

There are four precincts within the former Gladstone City which are zoned for Commercial purposes under the Gladstone City Council Planning Scheme; however the sites are currently vacant.

It is recommended that three of these precincts remain zoned for retail and/or commercial purposes. Under SPA 2009, and based on forecast population growth trends and the recommended centre hierarchy, it is recommended that:

- The Kirkwood Road precinct (which now hosts a supermarket anchored centre) be designated as a Local Centre.
- The commercially zoned land on the corner of Gladstone Benaraby Road and Glen Eden Drive, Glen Eden is designated as a Neighbourhood Centre.
- The commercially zoned land on the corner of Breslin Street and Boles Street, West Gladstone is designated as a Neighbourhood Centre.

It is recommended that the QAL owned land on French Street near the QAL Access Road is zoned for purposes other than commercial uses. It is considered highly unlikely that the current owners would develop this site for commercial uses, and given its location close to both the Valley and the Toolooa Street precincts, a retail oriented development on this site could challenge the sustainability of the recommended centre hierarchy.

8.4 RECOMMENDATIONS – CALLIOPE AND MIRIAM VALE SHIRES

8.4.1 Calliope

It is recommended that Calliope's retail and commercial facilities are zoned for Local Centre purposes as Calliope is a discrete community some distance from the Gladstone City urban area. Over the next 20 years, population growth in Calliope will warrant an expanded neighbourhood centre with a larger supermarket, but not a second supermarket-anchored centre.

However, Calliope has the potential to support around three times its current population of about 6,000, which would trigger the need for a second supermarket-anchored centre. In view of the convenience of Calliope to Gladstone, there is considered to be significant potential for higher population growth than currently forecast. It is therefore recommended that provision is made for a future second supermarket anchored centre in Calliope, at a location that meets the following criteria:

- a reasonably level site of three to four hectares;
- located on or close to the Dawson Highway;
- in a distinct location to the existing retail node at Dawson Highway and Drynan Drive to provide a second local retail centre in Calliope;
- located close to major residential growth areas to enhance convenience;
- not located in the area south of Calliope Primary School as it is unlikely to experience strong population growth.

8.4.2 Boyne Island–Tannum Sands

The retail and commercial precincts at Boyne Island and Tannum Sands function as separate Local Centres. Considerable forecast population growth over the 20 year period will generate sufficient demand for one of the two precincts (either Boyne Island or Tannum Sands) to develop, over time and as demand warrants, into a District Centre capable of providing some Major Centre functions.

It is recommended that the Boyne Island retail precinct at the Malpas Street and Hampton Drive intersection be declared a District Centre under the proposed retail centres hierarchy. This centre will function as the principal urban district in the Boyne Island – Tannum Sands area and has the potential to develop as an integrated commercial, high density residential and recreational area. The expansion of the Boyne Island precinct to a District Centre function should occur only when there is sufficient residential population to support the sustainable operation of a larger centre.

It is further recommended that given the anticipated residential development pattern in Boyne Island – Tannum Sands, provision is made for neighbourhood centre level retail facilities to cater to significant new residential areas. The discrete locations of the new residential areas within Boyne Island – Tannum Sands suggests the potential need for a small neighbourhood centre in each new residential area.

The appropriate scale and locations of future neighbourhood retail centres cannot be determined until residential yields and suburb configurations are clarified. However, future neighbourhood centres should meet two basic tests:

- sufficient population within the new local community to support the proposed neighbourhood centre; and
- a location with high levels of accessibility and convenience to the residential community which it is proposed to serve.

The implementation of these guidelines will assist in ensuring that the discrete residential communities in Boyne Island – Tannum Sands will be served adequately, without any significant adverse impacts to the existing and future retail network.[26]

8.4.3 Miriam Vale

It is recommended that the Miriam Vale retail precinct is classified as a Neighbourhood Centre under the Region's centres network strategy. It is further recommended that a small amount of additional neighbourhood centre zoned land is created adjacent to the existing commercial land to allow for a small expansion of the precinct as warranted in the future. This additional zoned land should be made available along Blomfield Street, so that the Miriam Vale centre remains a viable, contiguous, walkable centre. Any rezoning within the township of Miriam Vale is likely to represent in–fill style development.

8.4.4 Agnes Water–Seventeen Seventy

It is recommended that Agnes Water – Seventeen Seventy is classified as a Local Centre within the hierarchy, and that any future development of retail shops and services should occur predominantly in the Agnes Water town centre precinct.

Based on forecast modest population growth and existing retail provision, it is not likely that Agnes Water – Seventeen Seventy could support two viable town centres. Therefore, it is recommended that the existing town centre precinct is expanded and consolidated to meet demand for additional retail floorspace other than large scale bulky goods uses.

The existing Agnes Water Local Centre has approximately 2.2 hectares of vacant Local Business zoned land, including two adjacent parcels totalling 1.5 hectares. Assuming that the two parcels can be amalgamated and site coverage of 30%, a retail centre of up to 4,500 m^2 (including a supermarket of around

[26] As a general rule, a retail centre with up to 1,500 m² of lettable area requires a main trade area population of at least 3,000. A centre with a lettable area of around 5,000 m² that includes a full line supermarket (such as Coles or Woolworths) generally requires a main trade area population of at least 7,500. However, in assessing the need for a new centre, numerous other factors must also be considered including site location, regional accessibility, travel patterns and the characteristics of other retail centres that may serve the local trade area. Therefore, the most appropriate size and timing of retail centres serving new residential areas cannot be specified until clarification of the size, location and basic configuration of the new residential areas that they will serve.

2,500 m^2) could be accommodated on some of the vacant land within the existing Agnes Water Local Centre. A centre of this size is likely to be sufficient to meet the increased demand for retail shops and services from residents and tourists over the forecast period. Further retail facilities within Agnes Water should only be developed when there is sufficient residential demand to support a larger centre.

The imbalance of zoned land within Agnes Water should be addressed. There are approximately 87 hectares of vacant commercial or business zoned land within Agnes Water. This is far more than required to cater to modest population growth over the forecast period to 2031 of 2,800 persons (or 5,300 persons if growth in Rural South East is included). Therefore, it is recommended that the excess commercially zoned land is rezoned for other uses. Provision should be made for a limited amount of space consumptive uses in a mixed business style development outside of the town centre precinct, as these uses are inappropriate within the existing town centre. Preferred locations are on a small portion of the existing commercially zoned land along Round Hill Road either close to the industrial estate, or close to Bicentennial Drive. The remainder of the 87 hectares of vacant land should be rezoned for other uses as identified by Council.

Development of a supermarket–anchored retail centre outside of the existing Agnes Water Local Centre would contribute to fragmentation of the retail node, which would likely compromise the vitality, viability and function of the existing Agnes Water Local Centre. Therefore, development of retail facilities such as supermarkets and other convenience retailers outside of the existing Local Centre precinct is not recommended.

Appendix A Detailed Socio–Economic Characteristics, 2006

Table A.1: Age Characteristics, 2006

Age	Gladstone City (%)	Boyne Island – Tannum Sands (%)	Calliope (%)	Agnes Water – Seventeen Seventy (%)	Rural South East (%)	Rural West (%)	Gladstone Regional Council (%)	Fitzroy SD (%)	Queensland (%)
0–14	24.1	25.4	25.1	23.3	19.3	23.2	24.0	23.1	20.7
15–24	14.5	12.5	10.9	6.6	8.3	8.9	12.9	13.8	13.8
25–34	14.9	12.1	10.7	13.4	7.5	9.4	13.2	13.1	13.4
35–44	15.6	17.9	16.0	16.5	14.0	16.0	16.0	14.9	14.7
45–54	13.9	15.4	15.7	16.6	18.9	16.5	14.9	14.1	13.8
55–64	9.0	9.3	11.0	16.8	19.5	14.8	10.5	10.1	11.2
65–74	4.6	4.3	5.9	5.2	8.9	7.3	5.1	6.1	6.6
75–84	2.5	2.2	3.4	1.3	3.2	2.9	2.6	3.6	4.3
85+	0.8	0.8	1.1	0.4	0.4	1.0	0.8	1.2	1.5
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

** Totals may not add due to rounding.*
Source: ABS Census Tables 2006.

Table A.2: Dwelling Structure, 2006

Structure	Gladstone City (%)	Boyne Island – Tannum Sands (%)	Calliope (%)	Agnes Water – Seventeen Seventy (%)	Rural South East (%)	Rural West (%)	Gladstone Regional Council (%)	Fitzroy SD (%)	Queensland (%)
Separate house	85.5	88.8	91.3	84.3	87.5	93.0	87.0	87.9	79.6
Semi–detached	2.8	0.9	0.0	3.8	0.0	2.2	2.0	2.5	7.6
Flat/unit	10.5	5.7	0.5	5.2	1.0	0.4	7.4	6.8	11.2
Other structure	1.3	4.6	8.2	6.8	11.5	4.4	3.5	2.9	1.5
Total Dwelling Structure*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

** Totals may not add due to rounding.*
Source: ABS Census Tables 2006.

Table A.3: Dwelling Tenure, 2006

Structure	Gladstone City (%)	Boyne Island – Tannum Sands (%)	Calliope (%)	Agnes Water – Seventeen Seventy (%)	Rural South East (%)	Rural West (%)	Gladstone Regional Council (%)	Fitzroy SD (%)	Queensland (%)
Separate house	24.4	27.8	35.4	35.1	49.7	43.4	29.1	32.4	32.5
Semi–detached	40.6	46.2	48.8	29.6	29.6	36.9	40.9	34.3	34.7
Flat/unit	34.6	25.8	15.5	34.3	18.4	18.9	29.5	32.6	31.9
Other structure	0.3	0.2	0.2	1.0	2.3	0.8	0.5	0.8	0.9
Total Dwelling Structure*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

** Totals may not add due to rounding.*
Source: ABS Census Tables 2006.

Table A.4: Average Household Income (2009 dollar values), 2006

Income ($)	Gladstone City (%)	Boyne Island – Tannum Sands (%)	Calliope (%)	Agnes Water – Seventeen Seventy (%)	Rural South East (%)	Rural West (%)	Gladstone Regional Council (%)	Fitzroy SD (%)	Queensland (%)
Negative/Nil income	1.0	1.0	0.9	2.2	2.0	2.7	1.2	1.2	1.2
$1–$149	1.1	1.1	1.3	4.3	4.4	0.9	1.5	1.4	1.3
$150–$249	4.5	3.2	3.9	4.7	8.8	6.0	4.6	5.7	5.0
$250–$349	6.6	5.0	6.0	10.4	9.2	5.4	6.5	7.5	7.6
$350–$499	4.3	4.5	4.5	7.9	14.7	8.7	5.5	5.5	5.5
$500–$649	8.8	7.5	8.4	17.4	17.9	11.3	9.7	10.8	11.9
$650–$799	5.6	4.6	4.5	4.8	6.4	7.0	5.4	6.5	7.3
$800–$999	7.2	5.3	7.3	8.6	8.0	9.0	7.1	7.4	8.0
$1,000–$1,199	11.6	11.2	10.5	13.6	11.8	13.2	11.6	12.2	13.1
$1,200–$1,399	5.5	6.6	6.2	4.1	3.9	6.5	5.6	6.0	6.9
$1,400–$1,699	13.3	12.4	13.6	7.4	4.2	9.7	12.1	9.5	8.7
$1,700–$1,999	10.7	12.6	10.6	5.4	3.9	9.1	10.2	8.2	6.9
$2,000–$2,499	9.1	9.9	10.5	2.7	2.6	6.5	8.5	7.2	6.9
$2,500 –$2,999	6.1	9.5	6.8	3.6	1.6	1.6	6.1	6.3	5.2
$3,000 or more	4.7	5.6	5.1	2.9	0.5	2.5	4.4	4.7	4.4
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Income Not Stated	12.3	14.0	13.8	11.6	12.2	15.8	12.9	13.4	11.4
Average household income (2009 $ values)	$77,357	$85,200	$80,401	$55,856	$44,885	$62,895	$75,080	$71,684	$69,243

** Totals may not add due to rounding.*
Source: ABS Census Tables 2006.

Table A.5: Labour Force Status, 2006

Labour force status	Gladstone City (%)	Boyne Island – Tannum Sands (%)	Calliope (%)	Agnes Water – Seventeen Seventy (%)	Rural South East (%)	Rural West (%)	Gladstone Regional Council (%)	Fitzroy SD (%)	Queensland (%)
In labour force	72.4	71.1	68.8	64.5	52.0	63.1	69.7	68.1	66.3
Not in labour force	27.6	28.9	31.2	35.5	48.0	36.9	30.3	31.9	33.7
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Of those in labour force									
Employed	94.8	95.6	96.9	93.0	90.6	95.2	94.8	95.6	95.3
Unemployed	5.2	4.4	3.1	7.0	9.4	4.8	5.2	4.4	4.7
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Employed – full time	73.6	74.0	72.7	61.1	65.5	74.6	72.9	72.6	69.0
Employed – part time	26.4	26.0	27.3	38.9	34.5	25.4	27.1	27.4	31.0
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Persons employed per household	1.4	1.5	1.4	1.1	0.9	1.2	1.4	1.4	1.3

** Totals may not add due to rounding.*
Source: ABS Census Tables 2006.

Table A.6: Labour Force Status, 2006

Labour force status	Gladstone City (%)	Boyne Island – Tannum Sands (%)	Calliope (%)	Agnes Water – Seventeen Seventy (%)	Rural South East (%)	Rural West (%)	Gladstone Regional Council (%)	Fitzroy SD (%)	Queensland (%)
Managers	8.5	9.6	9.5	14.4	21.1	19.8	10.1	12.2	12.6
Porfessionals	13.5	14.3	9.9	8.7	7.1	7.7	12.6	13.3	17.5
Technicians & trades workers	22.9	23.5	21.9	21.6	15.3	18.5	22.3	18.8	15.6
Community & personal service workers	7.5	6.5	6.0	8.3	7.6	6.6	7.1	8.1	9.3
Clerical & administrative workers	12.6	11.8	13.4	13.9	7.3	8.0	12.1	13.0	15.0
Sales workers	9.3	8.0	8.4	8.6	6.9	3.7	8.6	8.9	10.5
Machinery operators & drivers	12.4	13.9	17.0	6.5	14.9	18.0	13.3	12.1	7.4
Labourers	13.4	12.5	13.9	18.1	19.8	17.7	13.9	13.7	12.1
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Blue collar	48.7	49.8	52.7	46.1	50.0	54.2	49.5	44.6	35.1
White collar	51.3	50.2	47.3	53.9	50.0	45.8	50.5	55.4	64.9
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

** Totals may not add due to rounding.*
Source: ABS Census Tables 2006.

Table A.7: Number of Vehicles per Household, 2006

Vehicles	Gladstone City (%)	Boyne Island – Tannum Sands (%)	Calliope (%)	Agnes Water – Seventeen Seventy (%)	Rural South East (%)	Rural West (%)	Gladstone Regional Council (%)	Fitzroy SD (%)	Queensland (%)
0	7.4	3.0	3.7	2.7	4.1	3.7	5.7	7.5	8.2
1	35.9	33.3	24.0	39.4	38.0	26.5	34.3	35.8	37.8
2	41.0	44.9	44.6	42.3	40.8	36.7	41.8	38.3	37.8
3	11.8	13.6	17.3	9.7	10.8	21.7	12.9	12.5	11.2
4 +	3.9	5.3	10.3	5.9	6.3	11.4	5.3	5.9	5.0
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

** Totals may not add due to rounding.*
Source: ABS Census Tables 2006.

Table A.8: Industry of the Labour Force, 2006

Industry	Gladstone City (%)	Boyne Island – Tannum Sands (%)	Calliope (%)	Agnes Water – Seventeen Seventy (%)	Rural South East (%)	Rural West (%)	Gladstone Regional Council (%)	Fitzroy SD (%)	Queensland (%)
Agriculture, forestry and fishing	0.4	0.5	1.7	2.7	22.9	17.6	2.5	5.5	3.5
Mining	1.3	2.2	3.2	1.3	0.8	2.6	1.7	6.9	1.7
Manufacturing	20.1	27.9	18.4	3.9	10.3	16.9	20.4	11.1	10.1
Elec, Gas & Water Supply	2.9	1.5	2.9	0.8	1.3	1.9	2.4	2.4	1.0
Construction	12.0	13.0	13.9	27.7	10.8	13.2	12.8	9.4	9.3
Wholesale trade	2.8	1.9	3.1	0.4	1.9	3.0	2.5	3.1	4.1
Retail trade	11.2	9.7	10.1	11.2	8.5	7.3	10.5	10.8	12.0
Accomm & food services	6.9	5.8	5.0	13.5	7.3	4.7	6.6	6.9	7.2
Transport, postal and warehousing	8.1	4.1	8.9	6.3	7.2	9.3	7.3	5.9	5.2
Information, media & telecommunications	0.7	0.4	0.2	0.8	0.0	0.0	0.6	0.8	1.5
Finance and insurance	1.4	1.8	1.0	0.8	0.5	0.5	1.3	1.7	2.9
Rental, hiring & real estate services	1.9	2.3	2.0	6.4	2.4	2.0	2.1	1.8	2.1
Professional, scientific & technical services	5.5	5.5	4.8	1.8	3.8	2.1	5.1	3.6	5.8
Aministrative & support services	2.9	2.5	2.0	4.7	1.0	2.0	2.7	2.4	3.1
Public administration & safety	4.3	2.9	6.0	4.9	7.4	4.3	4.3	5.7	6.9
Education & training	7.3	7.9	5.4	6.4	6.0	5.4	7.1	8.6	7.8
Health care & social assistance	6.5	7.0	6.2	3.5	5.3	5.0	6.3	8.9	10.5
Arts & recreation services	0.5	0.5	1.2	1.0	1.1	0.0	0.6	0.6	1.4
Other services	3.4	2.5	4.1	1.8	1.6	2.2	3.1	3.9	3.8
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

** Totals may not add due to rounding.*
Source: ABS Census Tables 2006.

Table A.9: Schooling and Education, 2006

Education	Gladstone City	Boyne Island – Tannum Sands	Calliope	Agnes Water – Seventeen Seventy	Rural South East	Rural West	Gladstone Regional Council	Fitzroy SD	Queensland
	No.	No.	No.	No.	No.	No.	No.	No.	No.
Educational institution attending (% of all persons)									
Pre school	1.6	1.7	1.5	2.3	0.9	1.0	1.6	1.4	1.5
Infant/primary school	10.3	11.4	11.8	10.3	8.1	10.9	10.5	10.1	8.9
Secondary school	6.3	8.6	7.8	3.1	5.9	6.0	6.7	6.6	6.1
TAFE	1.8	1.8	1.7	1.4	0.8	1.1	1.7	1.6	1.7
University/other Tertiary	2.1	1.9	1.6	1.0	0.8	0.7	1.8	2.3	3.5
Other	0.6	0.4	0.5	0.5	0.4	0.3	0.5	0.4	0.6
Proportion of Total Persons	**22.8**	**25.8**	**24.8**	**18.5**	**17.0**	**20.0**	**22.9**	**22.5**	**22.3**
Tertiary qualification gained (% of persons aged 20+)									
Postgraduate Degree	0.9	1.1	0.3	0.9	0.8	0.4	0.9	1.1	2.1
Grad Dip & Assoc Dip	1.1	1.4	0.7	0.8	0.9	0.0	1.0	1.0	1.3
Bachelor Degree	8.2	9.1	4.8	5.5	3.7	3.8	7.4	8.1	10.9
Proportion of Persons Aged 20+	**10.2**	**11.6**	**5.8**	**7.2**	**5.5**	**4.2**	**9.3**	**10.1**	**14.4**
Other qualification gained (% of persons aged 15+)									
Advanced Diploma and Diploma	4.4	5.4	3.3	6.8	4.5	3.7	4.5	4.4	6.6
Certificate	22.8	24.8	23.8	26.5	18.0	18.4	22.8	19.4	17.9
Proportion of Persons Aged 15+	**27.2**	**30.2**	**27.0**	**33.3**	**22.5**	**22.0**	**27.3**	**23.8**	**24.5**

Source: ABS Census Tables 2006.

Table A.10: Birthplace and Language Spoken at Home, 2006

Birthplace/language	Gladstone City	Boyne Island – Tannum Sands	Calliope	Agnes Water – Seventeen Seventy	Rural South East	Rural West	Gladstone Regional Council	Fitzroy SD	Queensland
	No.	No.	No.	No.	No.	No.	No.	No.	No.
Birthplace									
Australia	89.5	85.9	90.8	84.3	86.7	91.2	88.6	91.3	80.8
New Zealand	2.8	3.9	2.6	4.6	2.6	1.5	2.9	2.1	4.1
North America	0.3	0.3	0.3	0.6	0.5	0.2	0.3	0.3	0.5
United Kingdom/Ireland	3.2	4.8	3.5	6.1	5.7	2.7	3.8	2.8	5.5
South Africa	0.4	1.7	0.2	0.2	0.0	0.2	0.6	0.4	0.6
Other Europe	1.0	1.3	1.0	1.5	2.2	1.1	1.2	0.8	2.0
Asia	1.3	0.8	1.0	0.4	0.8	1.1	1.1	1.1	3.1
Other	1.5	1.4	0.6	2.2	1.6	1.9	1.5	1.3	3.3
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Main language spoken at home									
English only	96.9	97.2	98.3	97.4	97.7	96.2	97.1	97.3	91.8
Other	3.1	2.8	1.7	2.6	2.3	3.8	2.9	2.7	8.2
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

** Totals may not add due to rounding.*
Source: ABS Census Tables 2006.

Appendix B Guidelines for Achieving Community and Social Interaction Through Effective Shopping Centre Design

Key objectives

- Ensure where possible, buildings address street and other public spaces, promoting active uses at street level entry, additionally improving safety and promoting the natural surveillance of public space.
- Strengthen or create a recognizable identity, and character that is unique to the contextual setting.
- Enhance the human scale of retail and commercial development, whilst respecting the scale and character of surrounding uses that may include residential neighbourhoods
- Mitigate negative visual impacts arising from the scale bulk and mass inherent to large centres
- Strengthen the pedestrian environment by addressing pedestrian and cycling amenity through maximising convenience, safety and appeal of these modes of travel.
- Improve access to public transport through integration with development particularly with existing restricted retail premises (big box shopping centres).
- Ensure that public spaces are comfortable and engaging for all users
- Allow for needed flexibility to respond to conditions and unique characteristics inherent to commercial and retail development to allow for development configurations
- Promote building designs and practices that are adaptable to multiple uses for extended building lifestyles
- Minimise negative impacts from on-site activities to adjacent uses
- Balance the economic requirements of the development with aesthetic concerns of the community.
- Architecture and site design should contribute to the established design character of the community/neighbourhood.
- Encourage sustainable development through promoting the efficient re-use of existing assets where feasible, prolonging the life cycle of structures, ensuring energy efficiency guidelines, water and resource conservation and appropriate use of material.

Figure B.1: A plaza surrounded by people generating activity such as retail

Source:South Lake Union Design Guidelines

SITE DESIGN

The site design of any shopping centre is one of the most critical aspects of successful developments. Development should consider the broader setting of the development including the existing physical surroundings, the social and economic environment and the area's preferred form and function.

Site Character and Context

Objective: The siting of buildings within the shopping centre development should acknowledge and reinforce the existing desirable spatial and distinct characteristics of the locality.

- Development should promote or enhance a sense of place utilising the existing character or recognisable identity of the area (i.e can be through acknowledging a nearby physical feature or waterway, historic land use or type of vegetation).
- Site design should respond to the topography, vegetation, landscape features and drainage characteristics of the site.
- Site design should respond to the local contextual influences including addressing adjacent land uses. Further elements that should be addressed and coordinated between adjacent sites include;
    - linkages of internal vehicular circulation systems;
    - linkages of pedestrian networks with adjoining sites;
    - linkages and continuations of open space/greenspace networks;
    - perimeter of open space and landscape buffer zones;
    - areas and access of refuse collection; and

- drainage and retention facilities.

- Development should ensure there are no impacts or intrusions on any adjoining residential areas including over-shadowing.

Development Integration and Relationship to Public Realm

Objective: To ensure that shopping centre development provides a strong street definition and high quality pedestrian environment.

- Proposals should follow local development patterns that generally contribute to a unified visual appearance within the local area (i.e geometry of street system, common setbacks, streetscape, open space and view corridors).
- If the existing development pattern does not present an opportunity for a desirable interface, the design proposal should reflect how departure from existing pattern will benefit the community.
- Access and entry points should be easily identifiable and acknowledge the need for visibility from the public realm.
- Ensure development creates an inviting urban environment with a strong visual and pedestrian relationship to the street, promotes social interaction and stimulates business interest and economic activity.
- Where buildings are required to be well set back from the street, a strong pedestrian connection should be provided to the street edge to promote connectivity.
- Encourage development that incorporates public plazas and public spaces that contribute to the overall quality and atmosphere of the public realm and which promotes open and accessible public meeting places for the community to interact.

Parking Facilities

Objective: To provide carparking and loading areas within shopping centres in such a way they do not impact on the visual and user amenity of the area whilst ensuring safety.

- Developments should not exceed parking requirements outlined by the scheme, rather seek opportunities to incorporate features intended to reduce dependence on private motor vehicle travel including promoting accessibility through public and active transport provision. Alternatively, opportunities for shared car parking facilities with adjoining sites should be explored.
- Surface parking areas and other expansive areas of paved surfaces should be broken up by landscape islands to reduce the impact of the parking area.
- Limit the visual impact of car parks by placing them at the side or rear of buildings rather than dominating the streetscape.

- Ensure car parks are adequately lit at night and ensure that lighting does not impact any adjacent residential areas.
- Where possible provide multiple entry and exit points from roads to off-street parking, to reduce congestion.

Public and Active Transport

Objective: Improve and encourage pedestrian and cycling amenity within shopping centres, by maximising the convenience, safety and appeal of these modes of travel.

- Pedestrian paths should be safe, clearly visible, integrated and direct between adjacent development, buildings, parking areas and transport facilities.
- Development should ensure equitable access through ensuring safe and convenient access is provided for people with special mobility requirements including the disabled or those with prams. This can be ensured through appropriate pedestrian guidance devices including tactile indicators, properly graded pedestrian/pram crossings and adequate lighting.
- Where pedestrian paths cross vehicular routes, a change in paving materials, textures and colours should be emphasised to improve visibility, enhance safety and provide aesthetic appeal.
- Bicycle parking should be provided at points that are easily identifiable, visible and convenient to customers whilst not obstructing the flow of pedestrians.

Figure B.2: Provide direct bus access and avoid conflict with vehicles and pedestrians

On-site Amenities and Special Features

Objective: To promote high quality urban design and architectural elements within shopping centres that creates an inclusive and inviting environment, through the public realm.

- Outdoor dining and cafes should be encouraged to activate plazas, edge of open space, building frontages and street frontages.
- Plazas and similar spaces including outdoor dining, needs to consider solar orientation and should provide adequate shading through incorporated landscaping and architectural shading.
- Pedestrian areas should contribute to the quality of public spaces through incorporating the following features or elements:
    - street furnishings including informal seating and rubbish bins;
    - flexibility for special events, vendors or promotions;
    - active edges and adjoining informal and formal dining areas;
    - adequate lighting;
    - public art that engage the senses and builds upon local identity; and
    - landscaping and decorative hardscape areas that are appropriate to the context (microclimate and soil conditions).
- Provide conveniently located, well maintained, accessible and safe public toilets.

Figure B.3: Onsite amenities including rubbish bins, landscaping and bike facilities

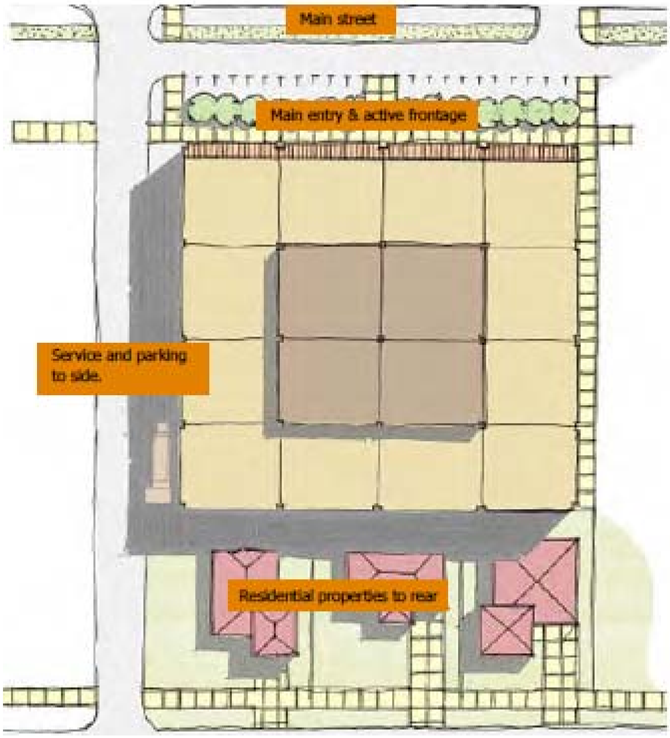
Service, Refuse Collection and Utilities

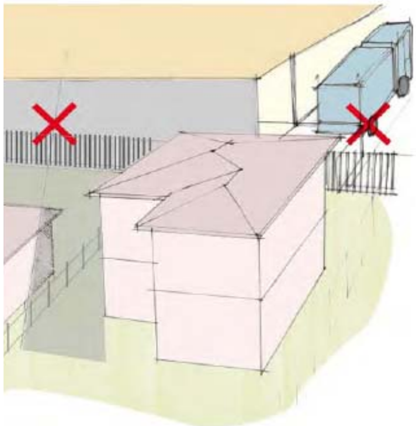
Objective: To ensure service environments required by shopping centre development are designed to address safety as well as visual appearance.

- Service areas, storage areas and refuse enclosures should be clustered together where possible and oriented away from public view and screened from public areas.

- Depending on the scale of the development, trash collection, service and loading areas should be separated from main circulation and parking areas.

Figure B.1: Service, loading and refuse collection areas clustered together and separated from main traffic circulation in addition to not impacting on adjoining uses





Source: Victoria Department of Planning and Community Development, 2007.

ARCHITECTURAL ELEMENTS AND MATERIALS

Shopping centre development should be compatible with or complement the architectural character and siting pattern of adjacent and surrounding development whilst reinforcing a desirable character of the area. The building design elements, details and massing should exhibit form and features identifying with the functions within the shopping centre development whilst not being intrusive or overbearing with adjoining development.

Character and Context

Objective: Shopping centres should place a high value on the existing character of the area and ensure it contributes through design to the character of the community and/or neighbourhood.

- Building design should consider the distinct and unique qualities and character of the surrounding area.
- Development should incorporate design treatments including form, colour and texture that add to variety, moderate the larger scale and provide visual interest from a range of distances.

Figure B.2: Public plazas and courtyards contributing to the overall quality and atmosphere of the public realm

Source: GCCC, Central Southport Master Plan

Scale and Proportion

Objective: To enhance the human scale of shopping centre development and respect the scale and character of residential uses and surrounding uses.

- New shopping centre development should respect the predominant scale of development within the surrounding area and provide a gradual transition to any larger scale masses proposed.
- The design of shopping centres should reduce its apparent bulk by dividing the building into smaller masses or by using the following techniques;
  - variations in roof form and parapet heights;
  - incorporating clearly pronounced recesses and projections;
  - use of projections and subtle changes in texture and colour of wall surfaces;
  - use of ground level arcades and second floor galleries;
  - use of protected and recessed entries; and
  - use of vertical accents or focal points.

Design of Pedestrian Frontages

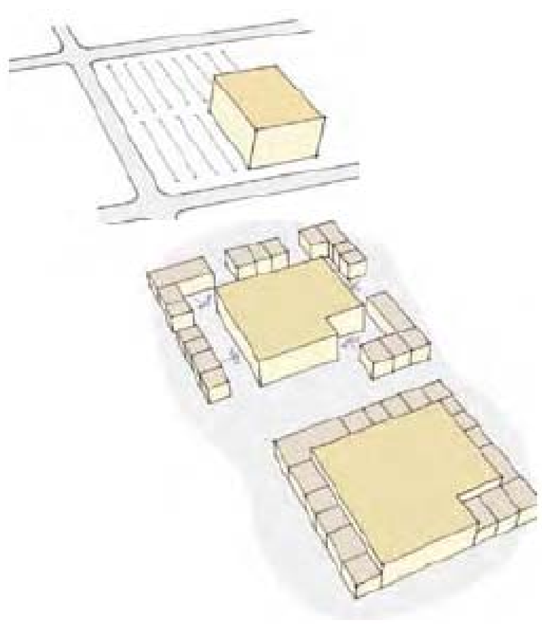
Objective: Shopping centres are is sited and designed with convenient, safe and attractive frontages to encourage human activity on the street.

- Articulate facades and allow for awnings to protect pedestrians from weather and provide visual continuity.
- Building frontages and sides of the shopping centre development oriented towards the street or other public areas should incorporate a

variety of arcades, pedestrian level display windows, storefronts and store entrances.

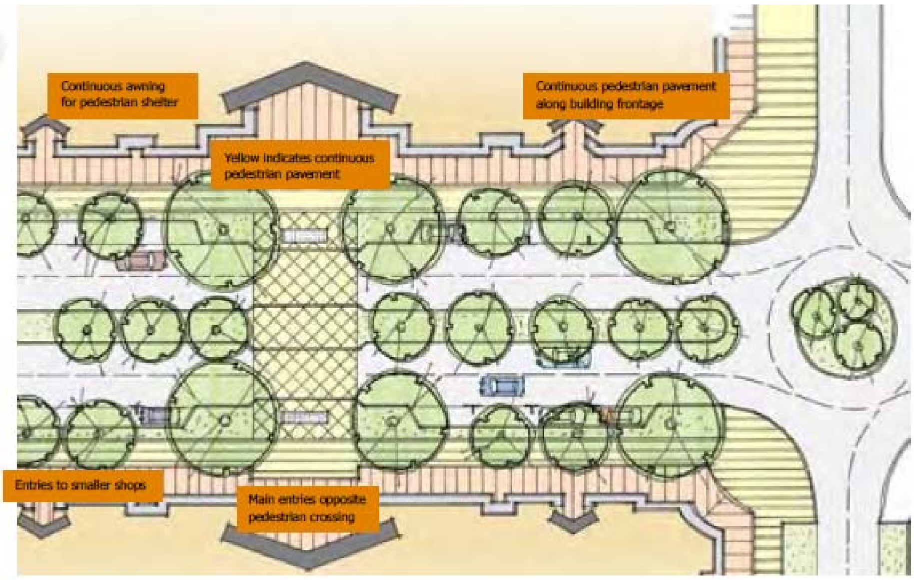
- To activate the street frontage, entrances should be created at regular intervals. Further considerations of the following elements should also be given to enhance the pedestrian experience and visual appearance of building frontages:
    - incorporate two or more entrances along the front of all major user stores (supermarkets, discount and department stores), or if not possible, partially ‘wrapping or capping’ the front of a major user with smaller stores fronting the external environment; and
    - long shopfronts should further incorporate design features including generous landscaped areas, site walls and raised platers, variation in planes, materials and colours. Long continuous walls should be avoided.
- Building frontages should exhibit human scale detail, windows and other openings along ground floor pedestrian areas.
- The street environment on wide arterial roads can be enhanced and managed to make it more hospitable to pedestrians and cyclists through further provision of access points and crossings. Awnings provided around the building facades over pedestrian paths provide further amenity and relief from the weather for pedestrians and cyclists (see Figure B.3).

Figure B.3: Wrapping or capping large retail premises with smaller units can promote active street and attractive streets and avoid large expanses of car parking



Source: Victoria Department of Planning and Community Development, 2007

Figure B:4: Enhancing the pedestrian environment



Source: *Victoria Department of Planning and Community Development, 2007*

- Footpaths should also be wide enough to accommodate for people pushing trolleys or carrying goods

Architectural details, materials and colour

Objective: To ensure shopping centre development presents an attractive and unified urban environment with strong street definition and a high quality pedestrian environment.

- Primary entrances should be prominently and conveniently located and distinguished with facade variation, roof variations, recesses or projections or other integral building forms.
- Building colour should reflect natural or muted earth tones. The use of highly reflective or glossy materials should be limited.
- Screening devices, site walls and enclosed service, loading and refuse areas should be designed to be an integral part of the building architecture.

Figure B.5: Revitalising traditional shopping centre development through adopting the open air approach that activate the edges through cafes, lifestyle retail and entertainment in various forms.

Sustainable design

Objective: Create sustainable shopping centres that are adaptable, optimises site location (or existing structure potential) through sustainable building forms and measures including orientation, energy use and water conservation.

- Optimise the thermal performance of development by incorporating sustainable design solutions including insulation, solar panels and passive ventilation that can provide alternatives to air-conditioning.
- Development should be designed and oriented to maximise use of natural day-light and solar energy for illumination and heating.
- Incorporate initiatives designed to reduce environmental impact including recycling of waste material and water and efficient use of energy and water.
- Design landscapes that make the most of water infiltration and retain water to assist in plant maintenance.

Figure B.6: Chadstone in Victoria shows how the use of natural light can be maximised

STREETSCAPE AMENITIES

Streetscape amenities including landscaping, screen walls, special pavements, street furniture, lighting and signage should be appropriately incorporated into the design of shopping centre developments to help buildings connect to and enhance the streetscape, encouraging active and social street frontages.

Landscaping

Objective: To ensure public and private spaces of shopping centres incorporate high quality landscaping that provides visual and environmental comfort.

- Landscaping should blend with the dominant existing or planned streetscape and character of the area.
- Trees should be used throughout paved areas and along pedestrian paths to provide shade and reduce heat build-up and glare.
- Landscaping should be provided along and against buildings to anchor it to the surrounding environment and to soften the scale of development.
- A landscape buffer should be provided between development and adjoining uses particularly residential areas.
- Use appropriate landscaping treatments including indigenous vegetation that conforms to the environment and may also reduce water demand (i.e tree grates).

Figure B.7: Mount Ommaney Shopping Centre

Source: (Urban Space Design, 2008

Signage / Identification

Objective: To allow signage to inform and advertise whilst not becoming a dominant feature of any shopping centre development.

- Provide way-finding measures including maps and signage in public spaces showing connections, key destination points and location of public facilities.
- All signage should be architecturally integrated with their surroundings in terms of size, shape, colour, texture and lighting so they do not visually compete with the architecture and design of the development.

Lighting

Objective: to ensure lighting contributes towards the safety and appearance of the shopping centre development and streetscape.

- Landscape feature lighting and lighting at pedestrian level is encouraged.
- Light trespass beyond property lines should be controlled by shielding or aiming fixtures away from surrounding residential properties

Crime Prevention Through Environmental Design (CPTED)

Objective: To ensure shopping centre development contributes to an overall sense of community safety through natural surveillance and other CPTED design features that prevent crime.

- Development should ensure a high level of visibility and natural safety along access routes.
- Locate activity generators and seating around open spaces to create positive natural surveillance of a space.
- Ensure development interacts with public transport stops / stations through co-location of active uses that encourage high traffic areas and will create natural surveillance.

Appendix C Draft Zone Codes

Principal Centre Zone	
Purpose **(Mandatory)**	(1) The purpose of the zone is to provide for the largest and most diverse mix of uses and activities. It includes a concentration of high-order retail, commercial, employment, administrative, community, cultural and entertainment activities and other uses, capable of servicing a regional or metropolitan catchment. Principal centre zones are found in the most accessible and connected locations within a town, city or region. Development is well-designed, incorporates public open spaces and is clustered around public transport facilities to promote public transport use, walking and cycling. Residential development is encouraged and may form part of a mixed use or as stand alone development. Where appropriate service industry uses may be located in the zone. (2) The Principal Centre is to function as the Regional Council's major business centre supporting and driving the growth of business in the Port, industrial areas, Gladstone State Development Area and Gladstone City. The Principal Centre Zone will facilitate development of the primary centre for the entire Gladstone Region, providing a wide range of administrative, commercial, cultural, mixed use, entertainment and shopping facilities and services. The Principal Centre Zone will be highly accessible, convenient and attractive to residents and visitors, providing the social and economic focus for the region and its residents through the provision of a diverse and sustainable range of community facilities and accommodation types in appropriate locations. The Principal Centre Zone contains a number of specific precincts including the City Centre Mixed Use Precinct and the Valley Precinct and which each have a different role and function. These are defined below in the Principal Centre Zone code and within Map X.
Suggested Overall Outcomes	The overall outcomes sought are that the Principal Centre Zone ensures that: (a) the widest range and highest order of retail, commercial, tourism, administrative, community, cultural, compatible employment areas and nodes and entertainment activities are provided (b) residential development, short term accommodation and tourist accommodation is provided at an appropriate scale and integrates with and enhances the fabric of the centre (c) development is designed to incorporate sustainable practices including maximising energy efficiency, water conservation and transport use (d) development provides a high level of amenity and is reflective of the surrounding character of the area, through the scale, character and built form of development (e) significant public open space areas including malls, plazas, parks and gardens are provided

	(f) development maximises public transport accessibility and use and encourages walking and cycling (g) development has access to development infrastructure compatible employment areas, nodes and essential services (h) development does not compromise the establishment of a network of centres in the Planning Scheme or in a Regional Plan (i) significant natural features are retained, enhanced and buffered from the impacts of adjacent uses (j) significant historical, architectural, topographic, landscape, scenic, social, recreational and cultural features and associations, as well as natural habitat areas, wildlife corridors, coastal areas, wetlands and waterway corridors are protected and enhanced (k) urban development does not occur on or within erosion prone areas or areas identified as having, or the potential to have, unacceptable risk from coastal hazards (l) an integrated transport system is established (m) conflicts between Strategic Port Land and the Gladstone State Development Area and new development on adjoining lands is minimised to protect the integrity and function of these areas. The overall outcomes sought for the City Centre Mixed Use precinct are to: (a) maintain and reinforce the role of the Precinct as the principal commerce centre for the city and region by ensuring land within the Precinct provides for mixed-use commercial and residential development which incorporates an integrated mix of well-designed residential accommodation, high-order administration, business services, office accommodation, cultural and entertainment, personal services and specialised retailing. (b) revitalise and intensify land use in the City Centre Mixed Use Precinct to rejuvenate the city centre. (c) avoid spill and sprawl of the city's retail and "active" commercial uses by locating these uses on sites with frontage to Goondoon Street only; (d) ensure a high standard of residential amenity and built environment; and (e) prioritise pedestrian activities by providing active uses on the ground floor (Goondoon Street only), shade trees, level areas for outdoor dining, awnings and convenient access to on-site car parking facilities. The overall outcomes sought for the Valley Precinct are to: (a) provide local convenience shopping and small-scale, mixed business to service the inner City population; (b) revitalise the Valley Precinct as a high quality inner-city mixed use and residential area by converting commercial uses to mixed residential and commercial development and residential development; and (c) maintain the existing shopping node located along Tank and Goondoon Streets.

Principal Centre Zone Code	
Performance Outcomes	**Acceptable Solutions**
Land Use	
Commercial	

PO1.1 Development of the Principal Centre Zone provides for a range of administrative, commercial, cultural, entertainment and shopping facilities and services, and promotes mixed use development where above ground floor level.	AS1.1 Development within the Principal Centre Zone comprises the following: • Community care centre • Community use • Dwelling unit • Food and drink outlet • Health care services • Home Based Business • Hotel • Indoor sport and recreation • Major sport, recreation and entertainment facility • Mixed use • Multiple dwelling • Nightclub • Office • Place of worship • Shop where not exceeding 1500m2 in the City Centre Mixed Use Precinct • Shopping centre • Short term accommodation • Theatre • Tourist attraction
PO2.1 Development of the Principal Centre Zone does not provide for industrial uses.	None applicable
Sustainable Design	
PO3.1 Development is designed to incorporate sustainable practices including maximising energy efficiency, water conservation and transport use	None applicable
Open Space	
PO4.1 The open space values of the Principal Centre Zone are maintained by: (a) The Glenlyon open space corridor linking to the Auckland Creek open space network being retained for its landscape, amenity, cultural heritage and ecological values; and (b) Protecting existing open space by providing adequate buffer areas; and (c) Incorporating suitable environmental protection measures.	None applicable
Urban Form	
PO5.1 Development maintains a high degree of cohesion in the urban form of the Principal Centre	None applicable

Zone by: (a) Providing co-ordinated, multi-purpose development where the range of activities, built form, streetscape and car parking are integrated and complementary to, rather than in competition with each other; (b) Providing a design layout that complements and integrates with adjoining sites to create pedestrian linkages and maximise the free movement of people through the city centre; (c) Incorporating pedestrian shelter over the footpath where premises front Goondoon Street in the City Centre Mixed Use Precinct; and (d) Integrating site landscaping with street plantings and other street treatments to provide visual relief and interest where premises front Goondoon Street in the Valley Precinct.	
PO6.1 The scale, character and built form of development contributes to a high standard of amenity, providing shade trees, level areas for outdoor dining, awnings and convenient access to on-site car parking facilities	None applicable
Land Abutting Conservation Areas	
<u>PO7.1 Premises adjacent to coastal wetland communities buffer as identified on the Coastal Overlay Code plans or otherwise found to contain habitat for rare, threatened or endangered species as listed in schedule 5 provide, where appropriate:</u> (a) <u>Open space areas on the site which link corridors of open space between the site and adjoining conservation significant areas; and</u> (b) <u>Landscaping consisting entirely of local native species.</u> <u>*Council to complete based on their policy position on this in the new Scheme.*</u>	None applicable
Site Layout	
PO8.1 Buildings are located and designed so there is no significant loss of amenity to adjacent land and residential premises in regard to overshadowing and overlooking.	AS8.1 Windows or balconies located within 9 metres horizontal distance of an existing adjoining residential building are screened or obscured where they face directly into the private open space or habitable room of an adjoining residential premises; AS8.2 External windows are fitted with screens or awnings to protect them from direct sunlight between the hours of 10:00

	a.m. and 2:00 p.m. on 21 December; and AS8.3 The loss of sunlight to the living rooms of existing adjoining residential premises is less than 3 hours between 9:00 a.m. and 3:00 p.m. on 21 June, or less than 20% longer than the existing situation.
Vehicular Parking	
P9.1 A sufficient number of car parking spaces and service vehicle loading bays are provided to accommodate the amount and type of traffic expected to be generated by the use.	AS9.1 For non-residential uses included as part of Mixed use (where at least 50% of the total floor area is residential), the minimum car parking rate for the non-residential uses shall be 1 car parking space for every 30 m^2 of gross floor area or part thereof; or S9.2 For non-residential uses that do not comply with part (a) above, the minimum number of on-site car parking spaces complies with Schedule X – Parking Rates; and S9.3 When viewed from the principal street frontage, car parking areas and other hardstand account for less than 50% of the site's frontage. *Council to complete based on their policy position on this in the new Scheme.*
Residential Design	
PO10.1 Residential dwelling units are provided with private and communal open space which is private, convenient and has access to direct sunlight.	AS10.1 For development incorporating residential uses a communal open space of not less than 60 m^2 (with a minimum dimension of 5 m) is provided at ground level in at least one continuous area; AS10.2 For ground floor units, private open space of not less than 30 m^2 (with a minimum dimension of 4 m) is located to be conveniently accessible from a living room of that unit; AS10.3 For above-ground units, a balcony having a minimum area of 15 m^2 (with a minimum width of 2.5 m) is located to be conveniently accessible from a living room of that unit. *Council to complete based on their policy position on this in the new Scheme.*
Amenity	
P11.1 For Mixed use, the transmission of noise between commercial, private recreation and residential uses and beyond the site boundaries is	AS11.1 Recreation facilities (i.e. swimming pools, tennis courts) and services (i.e. garbage chutes, compressors, etc.) are located away from the bedrooms of internal

minimised.	or adjacent dwellings; AS12.2 Driveways and parking areas are located away from bedroom windows and of adjacent dwellings, unless acoustically treated.
PO12.1 Design measures in new developments mitigate reverse amenity issues in regards to noise, dust, odours, traffic and other emissions from the adjoining industrial uses, including measures such as: (a) Adjoining suitable buffer distances; (b) Incorporating visual screening (planting of vegetation and fencing) to provide an effective screen and visual outlook; (c) Incorporating noise attenuation in the construction of dwelling units; and (d) Siting sensitive uses away from likely source of dust and odours.	AS12.1 An acoustic study is prepared which demonstrates compliance with <u>Council's Noise Compliance Standards as outlined in PSP X</u> <u>*Council to complete based on their policy position on this in the new Scheme.*</u>
City Centre Mixed Use Precinct	
Land Use	
P13.1 The City Centre Mixed Use Precinct promotes and supports a mixture of development, including business activities, accommodation activities, entertainment activities and recreation activities.	None applicable
P14.1 Development within the City Centre Mixed Use precinct provides for active street frontages along Goondoon Street, promotes a mix of employment opportunities and enhances walking, cycling and public transport use.	None applicable
P15.1 Development provides a built form which is appropriate with the existing and intended character of the area.	AS15.1 Development has a building height not exceeding 26 metres above natural ground level.
PO16.1 Mixed use development along Goondoon Street provides residential development above the ground floor only.	AS16.1 Where part of Mixed Use along Goondoon Street, business uses are located at ground and podium levels below residential. AS17.2. Where part of Mixed Use along Goondoon Street, residential uses are located above podium level.
Public health and safety	
PO17.1Development within the City Centre Mixed	<u>AS17.1 Awnings, street furniture and street</u>

Use Precinct provides for a safe, pedestrian friendly environment that provides adequate shading and which promotes social and business interaction at the ground floor level.	trees are provided in accordance with the guidelines stipulated within Planning Scheme Policy X. *Council to complete based on their policy position on this in the new Scheme.* AS17.2 Development on the ground floor facilitates casual surveillance of the street and includes a range of business and entertainment activities. AS17.3 Development provides a minimum of 65% of the site frontage as windows or glazed doors with openings and a maximum of 35% as a solid façade. AS17.4 Development for Food and drink outlets or other uses which provide dining facilities, provide outdoor dining areas, where not on a slope greater than 1:40. AS17.5 Public areas are illuminated, open to view from the street, and incorporate crime prevention through environmental design (CPTED) principles to ensure safety for the public.
Built Design	
PO18.1 Development achieves a built form which achieves a high level of design and integration with adjoining development, being commensurate with the existing and planned character of the area.	AS18.1The built form of premises complies with the standards contained in Table X below. AS18.2 Blank building facades will not exceed 40 metres along any frontage, without articulation via features such as colonnades, verandahs, awnings, balconies, eaves, recesses, screens, awnings or shutters

Built Form Standard	Maximum Provisions
Residential Density	**Dwelling units/m^2**
Where a Mixed Use development and Residential uses make up a minimum of 30% of the total floor area	No maximum density
Site Cover	**% site cover**
For Mixed use in the precinct	Podium 80%, tower 35%
For all other development	70% where it can be demonstrated that sufficient car parking, landscaping and the like has been provided
Building Height	**Height above natural ground level (metres)**
For sites within the City Centre Mixed Use Precinct	26 metres (maximum podium height 9.6 metres)
Setbacks	**Metres**
From Principal Road Frontage	Podium setback: 0 metres; above podium: 6 metres

Table X – Built Form Standards

Additional Standards	
PO19.1 Favourable consideration may be given to an impact assessable development that exceeds the maximum provisions or fails to meet the minimum provisions, provided that appropriate justification can be demonstrated.	AS19.1 Mixed use development: (a) is located with frontage to Goondoon Street; (b) provides a level and shaded public piazza or plaza (minimum area 20 m^2); (c) includes a public art component to a minimum value of 1% of the project's total construction costs; and (d) minimises overshadowing effects to public spaces and adjacent properties.
Valley Precinct	
Land Use	
PO20.1 the Valley Precinct provides convenience centres servicing the surrounding local communities and provides a high quality mixed use and residential area.	None applicable
Commercial	
PO21.1 Commercial activities fulfil a local neighbourhood shopping role, and do not compete with or detract from the city-wide regional function	AS21.1 Commercial uses are of a style and intensity that provide a local neighbourhood function, which complement commercial uses

of the City's commercial area located in the City Centre Mixed Use Precinct.	in the city centre precinct and which provides a city-wide regional function. AS21.2 Land-consumptive commercial uses (such as outdoor sales, warehouses and service stations) are not located in the precinct.
Residential	
PO22.1 Residential dwelling units are provided with private and communal open space which is private, convenient and is accessible to some direct sunlight.	<u>AS22.1 For development incorporating residential uses a communal open space of not less than 60 m^2 (with a minimum dimension of 5 m) is provided at ground level in at least one continuous area;</u> <u>AS22.2 For ground floor units, private open space of not less than 30 m^2 (with a minimum dimension of 4 m) is located to be conveniently accessible from a living room of that unit;</u> <u>AS22.3 For above-ground units, a balcony having a minimum area of 15 m^2 (with a minimum width of 2.5 m) is located to be conveniently accessible from a living room of that unit.</u> <u>*Council to complete based on their policy position on this in the new Scheme.*</u>
Tank Street	
PO23.1 Tank Street is developed as a leafy boulevard with a high standard of built form in keeping with its "gateway to the city" location, with particular regard to: (a) The inclusion of residential uses on upper floors as part of Mixed use; and (b) Streetscape elements such as shade trees and awnings.	None applicable
Built Form	
PO24.1 Development is of a high standard, visually interesting, contributes to an attractive and leafy streetscape, reflects the predominantly residential precinct within which it is located, and seeks to minimise adverse impacts on adjoining premises in regard to noise, traffic and visual amenity.	AS24.1 The built form complies with Table X "Built Form Standards". AS24.2 No building façade exceeds a horizontal dimension of 15 metres without punctuation by design elements such as colonnades, verandahs, awnings, balconies, eaves, recesses, screens, awnings or shutters. AS24.3 Plant and equipment is enclosed, shielded or acoustically treated so the

	generated noise levels comply with the relevant Australian Standards. AS24.4 Driveways, parking areas and loading bays are located away from the bedrooms of adjacent dwellings, unless acoustically screened and landscaped. AS24.5 Bin refuse and service areas are screened from the view of the street or other public areas. AS24.6 Where adjoining uses are not mutually compatible (i.e. commercial and residential), planting, fencing and other streetscape design treatments provide visual relief and physical separation.

Built Form Standard	Maximum Provisions
Residential Density	**Dwelling units/m^2 site area**
• For sites with areas less than or equal to 1000 m^2 • For sites with area between 1001 m^2 and 2000 m^2 • For sites with area greater than 2000 m^2	1 unit per 190 m^2 1 unit per 140 m^2 1 unit per 90 m^2
Site Cover	**% of site area**
For premises in the Commercial sub-precinct	50%
For premises in the Residential (High Density) sub-precinct	40%
Building Height	**Measured to the building's uppermost projection**
For sites located in the Commercial sub-precinct	10 metres
For sites located in the Residential (higher Density) sub-precinct	16 metres
Setbacks	**From principal road frontage**
For sites located in the Commercial Zone	Zero
For premises in the Residential (Higher Density) Zone	6.0 metres
Minimum Landscape Area	**% of site area**
For residential uses	30%
For mixed use or commercial uses	10%

Vehicular Parking Within the Principal Centre Zone	
PO25.1 In the Principal Centre Zone, car parking spaces and hardstand areas, do not dominate the streetscape, are well shaded, visually attractive and are sufficient in number to accommodate the amount and type of traffic expected to be generated by the use.	AS25.1 When viewed from the principal street frontage, car parking areas and other hardstand areas account for less than 50% of the site's frontage. AS25.2 Where car parking is provided at ground level, such area is landscaped at the rate of at least one advanced shade tree for every eight (8) car parking spaces.

Major centre	
Level	**2**
Purpose (*Mandatory)*	(1) The purpose of the zone is to accommodate a wide mix of uses and activities. It includes key concentrations of higher order retail, commercial, offices, administrative and health services, community, cultural and entertainment facilities and other uses capable of servicing a small or medium sized town or a major urban centre in a metropolitan area. Development is well-designed, incorporates public open spaces and is clustered around public transport facilities to promote public transport, walking and cycling. Residential development is encouraged and may form part of a mixed use or as stand alone development. Where appropriate some industrial uses may be located in the zone. (2) The Gladstone Regional Council purpose is for the Major Centre to function as an important retail centre which provides for the shopping needs of the Gladstone Region. The Major Centre Zone will facilitate development as the predominant retail centre for the entire Gladstone Region, providing a wide range of retail, personal services, banking services, community services and service trades. The Major Centre Zone will be accessible, convenient and attractive to residents and visitors, providing a high level of urban design and streetscape character. The Major Centre Zone is dominated by the Kin Kora shopping centre which straddles the Dawson Highway. <u>The consolidation and integration of this centre via a Highway realignment is desirable, provided that any Highway realignment occurs at grade and does not involve an overpass or the like. *This provision is in existing Scheme – are DTMR still in agreement with this?*</u>
Suggested overall outcomes	The overall outcomes sought for the Major Centre Zone are: (a) a broad range and higher order retail, commercial, administrative, community, cultural, compatible employment areas and nodes and entertainment activities are provided; (b) development is designed to incorporate sustainable practices including maximising energy efficiency, water conservation and transport use; (c) development provides a high level of amenity and is reflective of the surrounding character of the area; (d) public open space areas including malls, plazas, parks and gardens are provided; (e) development maximises public transport accessibility and use and encourages walking and cycling; (f) development has access to development infrastructure compatible employment areas and nodes and essential services; (g) natural features are retained, enhanced and buffered from the impacts of adjacent uses and any unavoidable impacts are minimised; (h) the Major Centre Zone protects the Kin Kora shopping centre as the primary retail centre for shopping by: a. providing some personal services, banking services, community services and limited service trades for the City and the region;

	b. expanding within the Major Centre zone in both a functionally and physically integrated way with the existing Kin Kora centre to: i. enhance the visual quality and character of this important entry to the City; ii. protect nearby residential areas from any adverse impact; iii. maintain the function, capacity and safety of the City's road network; and iv. provide adequate car parking on site to prevent overflow of traffic and parking into residential streets; and c. confining further retail or commercial development along Phillip Street and Dawson Highway to within the existing Major Centre Zone. (i) development within the Major Centre Zone has the ability to accommodate adequate vehicular access and parking while not adversely affecting the efficiency of the road network and improved built form, urban design and streetscape character of the Major Centre Zone; (j) the adjoining landscape and open space values are enhanced as a result of further development in the Major Centre Zone; and (k) the interface between residential areas and non-residential uses, such as the Kin Kora shopping centre and Phillip Street, maintains a high level of residential amenity.

Major Centre Zone Code	
Land Use	
PO1.1 Development of the Major Centre Zone provides for a range of business, entertainment and some recreation activities.	AS1.1 Development within the Major Centre Zone comprises the following: • Car park • Child care centre • Food and drink outlet • Funeral parlour • Garden centre • Health care services • Hotel • Indoor sport and recreation • Market • Office • Service industries (not exceeding $100m^2$) • Shop • Shopping centre • Theatre • Veterinary services
PO2.1 Any development for a Shopping centre must demonstrate that the proposed GFA is applicable and commensurate with the intended scale and function of the Major Centre Zone, taking into account factors such as the catchment size and area and projected growth in the trade population. PO2.2 A report justifying the size and scope of the Shopping centre proposal will be submitted as part	None applicable

of any development application lodged.	
PO3.1 Development is compatible with the scale of surrounding development and contributes to the local streetscape.	AS3.1 Building height does not exceed 9 metres.
Development Plan	
PO4.1 Development within the Major Centre Zone is in accordance with an overall development plan for the subject site and adjoining lands which addresses in particular: (a) traffic arrangement, flow and management; (b) integration of development with a high quality streetscape; (c) applying urban design principles to integrate and manage pedestrian and vehicle movement for development and to adjoining lands; and (d) applying urban design principles to ensure appropriate high quality solutions are integrated with the masterplan for managing the commercial and residential interface. Note: the development is undertaken in accordance with the Master Plans and Plans of Development Planning Scheme Policy	None applicable
Traffic and Access	
PO5.1 Development demonstrates that traffic congestion is not worsened at the intersection of the Dawson Highway and Phillip Street.	None applicable
PO6.1 The route of the Dawson Highway may be altered to reduce or remove regional and other through traffic from ground level between the commercial zoned land either side of the Dawson Highway. Any alteration to the road is to be at ground level (i.e. not an overpass or other above ground structure). Existing Scheme provision – will TMR still accept?	None applicable
PO7.1 Internal pedestrian linkages are provided that cross a minimum of roadways, increase the efficiency of pedestrian movement through the sites and is safe and convenient.	None applicable
Development Considerations	
PO8.1 An overall landscape masterplan is implemented to provide:	None applicable

(a) visual continuity to development; (b) enhancement of the streetscape; (c) 'softening' to the built form of the development; and (d) a pleasant and safe environment for pedestrians.	
Open Space and Recreation	
PO9.1 Development which abuts Open Space or Recreation areas includes comprehensive landscaping with an effective landscaped edge to protect the open space values of these areas.	None applicable
Commercial and Residential Interface	
P10.1 Non residential development abutting any Residential Zone provides suitable landscaping, buffers, building setbacks and fencing to maintain the residential amenity of the adjoining land.	None applicable
Built Form	
PO11.1 Development is of a high standard, visually interesting, contributes to an attractive and leafy streetscape, reflects the precinct within which it is located, and seeks to minimise adverse impacts on adjoining premises in regard to noise, traffic and visual amenity.	AS11.1 No building façade exceeds a horizontal dimension of 15 metres without punctuation by design elements such as colonnades, verandahs, awnings, balconies, eaves, recesses, screens, awnings or shutters. AS11.2 Plant and equipment is enclosed, shielded or acoustically treated so the generated noise levels comply with the relevant Australian Standards. AS11.3 Driveways, parking areas and loading bays are located away from the bedrooms of adjacent dwellings, unless acoustically screened and landscaped. AS11.4 Bin refuse and service areas are screened from the view of the street or other public areas. AS11.5 Where adjoining uses are not mutually compatible (i.e. commercial and residential), planting, fencing and other streetscape design treatments provide visual relief and physical separation.

	<u>*Council to complete based on their policy position on this in the new Scheme.*</u>
Vehicular Parking	
P12.1 In the Major Centre Zone, car parking spaces and hardstand areas do not dominate the streetscape, are well shaded, visually attractive and are sufficient in number to accommodate the amount and type of traffic expected to be generated by the use.	AS12.1 When viewed from the principal street frontage, car parking areas and other hardstand areas account for less than 50% of the site's frontage. AS12.2 Where car parking is provided at ground level, such area is landscaped at the rate of at least one advanced shade tree for every eight (8) car parking spaces.

District Centre Zone	
Level	**2**
Purpose (*Mandatory)*	(1) The purpose of the zone is to accommodate a mix of uses and activities. It includes a concentration of land uses capable of servicing a number of suburbs or localities. Land uses will typically include retail, commercial, offices, administrative and health services, community, minor entertainment facilities and other uses and activities. Development is well-designed, incorporates public open spaces and is clustered around public transport facilities to promote public transport, walking and cycling. Residential development is encouraged and may form part of a mixed use or as stand alone development. Where appropriate some industrial uses may be located in the zone. (2) The Gladstone Regional Council purpose for the District Centre is for a number of district centre precincts to be maintained for the Gladstone Region as follows: (a) Gladstone Central Precinct (Dawson Road) - is consolidated as a precinct servicing the local community. A centre on the corner of Park Street and Dawson Road provides non-retail commercial services and convenience shopping with any expansion or other increase in activity directly related to the ability to accommodate adequate vehicle access and parking, while not adversely affecting the efficiency of the road network and which improves the built form, urban design and streetscape character of the centre; (b) Boyne Island Precinct – the Boyne Island Precinct functions as the principal urban district in the Boyne Island area and as a dormitory to the Principal and Major Centre Zones in the Gladstone Region. It will be expanded in the future to form an integrated commercial, high density residential and recreational area and will become the Boyne Island/Tannum Sands Town Centre, providing a master planned, vibrant

	activity centre based on environmental sustainability principles.
Suggested overall outcomes	The overall outcomes sought for the zone are: (a) a mix of retail, commercial, administrative, community, cultural and entertainment activities which support surrounding smaller centres and residential areas are provided; (b) residential development, short term accommodation and tourist accommodation is provided at an appropriate scale and integrates with and enhances the fabric of the centre; (c) development is designed to incorporate sustainable practices including maximising energy efficiency, water conservation and transport use (d) development provides a high level of amenity and does not compromise the surrounding character of the area; (e) public open space areas including plazas, parks and gardens are provided; (f) development maximises public transport accessibility and use and encourages walking and cycling; (g) development has access to development infrastructure and essential services; (h) development does not compromise the viability of the network of centres; (i) natural features such as creeks, gullies, waterways, wetlands, habitats, vegetation and bushland are retained, enhanced and buffered from the impacts of adjacent uses and any unavoidable impacts are minimised through location, design, operation and management requirements; (j) commercial centres and local employment nodes are located in the District Centre Zone and in locations which exhibit strong integration with the urban residential areas and the transport network; (k) the Gladstone Central Precinct (Dawson Road) is consolidated as a commercial centre servicing the community, including the provision of entertainment, food and drink outlets, retail shopping and other professional and commercial services, health services etc.; (l) the Boyne Island Precinct offers a range of higher order services to a larger trade population and services the needs of the growing population and tourists by providing a mix of land uses such as residential, commercial accommodation, entertainment and commercial indoor recreation.

District Centre Zone Code	
Performance Outcomes	**Acceptable Solutions**
Land Use	
PO1.1 Development of the District Centre Zone provides for a range of business, entertainment and some recreation activities.	AS1.1 Development within the District Centre comprises the following: • Car park • Child care centre • Food and drink outlet • Funeral parlour • Garden centre • Health care services • Hotel • Indoor sport and recreation • Market • Mixed use • Office

	• Shop • Shopping centre • Veterinary services
P2.1 The District Centre Zone, will meet the daily and weekly shopping needs of the surrounding growing population and of tourists by providing the following: (a) a range of small retail and commercial activities; (b) a mix of non-commercial land uses such as residential, commercial accommodation, entertainment and leisure, and commercial indoor recreation; (c) further development retains and does not override the intended role of the Boyne Island centre as a district centre; and (d) the safety and comfort of pedestrians, staff and patrons. PO2.2 Any development for a Shopping centre must demonstrate that the proposed GFA is applicable and commensurate with the intended scale and function of the District Centre Zone, taking into account factors such as the catchment size and area and projected growth in the trade population. PO2.3 A report justifying the size and scope of the Shopping centre proposal will be submitted as part of any development application lodged.	None applicable
PO3.1 Development contains all commercial activities at an appropriate scale within the District Centre Zone so as not to result in the diminution of the commercial role of existing centres.	None applicable
Commercial	
PO4.1 Commercial development is compatible with the scale of surrounding development and contributes to the local streetscape.	AS4.1 Building height does not exceed 9 metres. AS4.2 The built form reflects the overall outcomes for the locality in terms of height, scale and intensity of use.
Residential	
PO5.1 Residential dwelling units are provided with private and communal open space which is private, convenient and is accessible to some direct sunlight.	AS5.1 A communal open space with an area of not less than 60 m^2 (with a minimum dimension of 5 metres) is provided at ground level in at least one continuous area; AS5.2 For ground floor units, private open space or not less than 30 m2 (with a minimum

	dimension of 4 metres) is located conveniently accessible from a living room of that unit; and AS5.3 For above-ground units, a balcony having a minimum area of 15 m2 (with a minimum width of 2.5 metres), is located conveniently accessible from a living room of that unit.
PO6.1 Internal pedestrian linkages are provided that cross a minimum of roadways, increase the efficiency of pedestrian movement through the sites and is safe and convenient.	None applicable
PO7.1 An overall landscape masterplan is implemented to provide: (a) visual continuity to development; (b) enhancement of the streetscape; (c) 'softening' to the built form of the development; and (d) a pleasant and safe environment for pedestrians.	None applicable
Open Space and Recreation	
PO8.1 Development which abuts Open Space includes comprehensive landscaping with an effective landscaped edge to protect the open space values of these areas.	None applicable
Commercial and Residential Interface	
P9.1 Non residential development abutting any Residential Zone provides suitable landscaping, buffers, building setbacks and fencing to maintain the residential amenity of the adjoining land.	None applicable
Built Form	
PO10.1 Development is of a high standard, visually interesting, contributes to an attractive and leafy streetscape, reflects the character of the precinct within which it is located, and seeks to minimise adverse impacts on adjoining premises in regard to noise, traffic and visual amenity.	AS10.1 No building façade exceeds a horizontal dimension of 15 metres without punctuation by design elements such as colonnades, verandahs, awnings, balconies, eaves, recesses, screens, awnings or shutters. AS10.2 Plant and equipment is enclosed, shielded or acoustically treated so the generated noise levels comply with the relevant Australian Standards.

	AS10.3 Driveways, parking areas and loading bays are located away from the bedrooms of adjacent dwellings, unless acoustically screened and landscaped. AS10.4 Bin refuse and service areas are screened from the view of the street or other public areas. AS10.5 Where adjoining uses are not mutually compatible (i.e. commercial and residential), planting, fencing and other streetscape design treatments provide visual relief and physical separation.
PO11.1 The built form of premises is varied and creates a compact, convenient and accessible District Centre, which meets the daily and weekly shopping needs of local residents and tourists.	None applicable
PO12.1 Development retains the District Centre function by offering an appropriate range of higher order services to a larger trade population.	None applicable
PO13.1 Development addresses the street and is situated as close as practical to the road alignment and includes footpath awnings.	None applicable
Expanding the Centre	
PO14.1 Development provides for the expansion of centre facilities which will meet the needs of the growing population.	None applicable
PO15.1 The ultimate extent of services and size of the precincts within the District Centre Zone will be dependent on demonstrating the ability to provide for the weekly and daily needs of urban and rural residents and provide higher order services such as professional services, comparison retailing, civic and administrative functions, cultural, entertainment and leisure facilities.	None applicable
Gladstone Central (Dawson Road) Precinct	
PO16.1 Development of commercial activities along the Dawson Highway is limited to land within the Gladstone Central (Dawson Road) Precinct, providing retailing	None applicable

and convenience services to meet the needs of the population west of Gladstone.	
Boyne Island Precinct	
PO17.1 The Boyne Island Precinct is extended by providing small scale tourist, retail and entertainment and leisure facilities such as restaurants, cafes and bars and mixed use developments which also include visitor or permanent accommodation; and	None applicable
PO18.1 The Boyne Island Precinct restricts growth and does not prejudice the future development of the Tannum Sands Precinct in the Local Centre Zone.	None applicable
PO19.1 Buildings in the Boyne Island Precinct address the street and are situated as close as practical to the road alignment and include footpath awnings.	None applicable
PO20.1 Any application to expand within the Boyne Island Precinct will provide a master plan which demonstrates the provision of an integrated commercial, high density residential and recreational area which will become the Boyne Island/Tannum Sands Town Centre, providing a vibrant activity centre based on environmental sustainability principles.	

Local Centre Zone	
Level	**2**
Purpose (*Mandatory)*	(1) The purpose of the zone is to provide a limited range of land uses and activities to accommodate local needs. It includes local shopping, local employment nodes, commercial, cafes and dining, entertainment, community services and other uses and activities. Local centres may service a rural or suburban catchment and are usually a short drive or cycle away for the local community. Local centres may be serviced by public transport routes. Residential development may be appropriate where it can integrate and enhance the fabric of the activity centre, but it is not the predominant use. (2) The Gladstone Regional Council purpose is for a series of local centres to be developed in support of the other higher order centres in the

	hierarchy. There are four precincts within the Local Centre Zone, including Tannum Sands, Agnes Water-1770, Calliope and Kirkwood Road. The purpose of these precincts are to provide a range of local services and facilities to service each of the local catchments.
Suggested overall outcomes	The overall outcomes sought for the Local Centre Zone are: (a) a range of convenience retail, commercial, community and residential uses are provided which support the local community (b) development is reflective of and responsive to the environmental constraints of the land (c) development is designed to incorporate sustainable practices including maximising energy efficiency, water conservation and transport use (d) development provides a high level of amenity and is reflective of the surrounding character of the area (e) development encourages public transport accessibility and use, walking and cycling (f) development has access to development infrastructure and essential services (g) development does not compromise the viability of the network of centres (h) natural features are retained, enhanced and buffered from the impacts of adjacent uses and any unavoidable impacts are minimised through location, design, operation and management requirements. (i) Commercial activities are located in the Local Centre Zone which are commensurate with the specific role and function of the Precincts within which the use is located. (j) A range of urban services are made available to service the Local Centre Zone. (k) The Tannum Sands Precinct creates a compact, convenient and accessible commercial centre meeting the daily and weekly convenience shopping and business needs of the immediate and surrounding population, which is able to respond to changing shopping trends. (l) The ultimate extent of services and size of the Tannum Sands Precinct will directly relate to servicing the weekly and daily needs of the residents of the local area and will depend on the size of the catchment. (m) The Agnes Water-1770 Precinct provides services to cater for tourists and visitor needs. (n) Commercial development and tourist accommodation occurs within the Calliope Precinct. (o) The Kirkwood Road Precinct provides for an integrated development for a convenience based shopping centre providing limited personal services, banking services, community services, childcare services, medical centre and service trades at the intersection of Kirkwood Road and Dixon Drive.

Local Centre Zone Code	
Performance Outcomes	**Acceptable Solutions**
Land Use	
PO1.1 Development of the Local Centre Zone provides for a range of business, entertainment and some recreation activities.	AS1.1 Development within the Local Centre comprises the following: • Child care centre • Food and drink outlet • Garden centre • Health care services

	• Indoor sport and recreation • Market • Office • Service industries (not exceeding $100m^2$) • Shop • Shopping centre • Short Term Accommodation • Veterinary services
PO2.1 Any development for a Shopping centre must demonstrate that the proposed GFA is applicable and commensurate with the intended scale and function of the Local Centre Zone, taking into account factors such as the catchment size and area and projected growth in the trade population. PO2.2 A report justifying the size and scope of the Shopping centre proposal will be submitted as part of any development application lodged.	
PO3.1 Development is compatible with the scale of surrounding development and contributes to the local streetscape.	AS3.1 Building height does not exceed 9 metres.
PO4.1 Internal pedestrian linkages are provided that cross a minimum of roadways, increase the efficiency of pedestrian movement through the sites and is safe and convenient.	None applicable
PO5.1 An overall landscape masterplan is implemented to provide: (a) visual continuity to development; (b) enhancement of the streetscape; (c) 'softening' to the built form of the development; and (d) a pleasant and safe environment for pedestrians.	None applicable
Commercial and Residential Interface	
PO6.1 Non residential development abutting any Residential Zone provides suitable landscaping, buffers, building setbacks and fencing to maintain the residential amenity of the adjoining land.	None applicable
Built Form	
PO7.1 Development is of a high standard, visually interesting, contributes to an attractive and leafy streetscape, reflects the character of the precinct within which it is located, and seeks to minimise adverse	AS7.1 No building façade exceeds a horizontal dimension of 15 metres without punctuation by design elements such as colonnades, verandahs, awnings, balconies, eaves, recesses, screens, awnings or

impacts on adjoining premises in regard to noise, traffic and visual amenity.	shutters. AS7.2 Plant and equipment is enclosed, shielded or acoustically treated so the generated noise levels comply with the relevant Australian Standards. AS7.3 Driveways, parking areas and loading bays are located away from the bedrooms of adjacent dwellings, unless acoustically screened and landscaped. AS7.4 Bin refuse and service areas are screened from the view of the street or other public areas. AS7.5 Where adjoining uses are not mutually compatible (i.e. commercial and residential), planting, fencing and other streetscape design treatments provide visual relief and physical separation.
Vehicle and Pedestrian Access	
PO8.1 Development ensures that adequate vehicular and pedestrian access is provided	AS8.1 All roads provided are sealed in accordance with Council's development standards contained in PSP X *Council to complete based on their policy position on this in the new Scheme.*
Amenity	
PO9.1 Development is provided with an appropriate level of servicing commensurate with its needs.	None applicable
PO10.1 Materials, finishes and colours do not result in a loss of amenity for surrounding residents	None applicable
PO11.1 Development is located, designed and undertaken so as to avoid the adverse impacts of increased light, dust, odour and traffic (or other physical conditions excluding noise) experienced by occupants of surrounding uses.	None applicable
Sustainable Development	
PO12.1 Development conserves the cultural heritage values of places listed on the Queensland Heritage Register and other	None applicable

sites and structures which are of indigenous and other cultural significance.	
PO13.1 Development involves the protection and management of areas where fauna species are known to occur that are identified as Endangered, Threatened, Vulnerable or Rare under the *Environment Protection and Biodiversity Conservation Act 1999* or the *Nature Conservation Act 1992*.	None applicable
PO14.1 The predominant natural character of the area shall be maintained and enhanced by appropriate urban form.	AS14.1 Buildings do not protrude above any horizon or ridge line when viewed from any place readily accessible to the public.
PO15.1 Development occurs in a sustainable, planned and efficient manner.	None applicable
Tannum Sands Precinct	
PO16.1 Commercial activities are provided in a convenient and readily identifiable commercial centre within the Tannum Sands Precinct and serves the local community as follows: (a) the Tannum Sands Precinct provides a supermarket based shopping centre; a range of personal services; banking and administration; tourism and recreation; residential; cultural and community facilities; and limited service trades; (b) the Tannum Sands Precinct will only be expanded in accordance with <u>an overall master plan*</u> which indicates an integrated centre with similar built scale and a complementary architectural style; * <u>Council to complete based on their policy position on this in the new Scheme.</u>	None applicable
PO17.1 Where additional commercial activities are proposed within the Tannum Sands Precinct, such development is: (a) located on land with and functionally related to adjoining land within the Precinct; and (b) complementary to the functions of designated commercial centres in the locality such that the role of those centres will not be altered.	None applicable
PO18.1 Premises developed for residential or accommodation purposes in the Tannum	AS18.1 Premises used for accommodation purposes will not have a frontage to the

Sands Precinct will ensure that the primary street frontage retains a predominantly commercial character, such that the residential component of any development does not dominate the primary street frontage.	primary street (other than the entrance).
Agnes Water-1770	
PO19.1 The Agnes Water-1770 Precinct develops as a mixed use area for the commercial and accommodation needs of tourists in a high quality built environment.	AS19.1 Catering premises (being cafes and restaurants and Shops) are located within the ground floor of the Agnes Water-1770 Precinct.
PO20.1 Development is sited so that it does not compromise the operations of the existing private airstrip.	AS20.1 Buildings do not exceed 8.5 metres in height within 1 kilometre of the approaches to the existing private airstrip.
Calliope Precinct	
PO21.1 Commercial development in the Calliope Precinct will: (a) consolidate existing business areas situated on Drynan Drive and Morris Avenue, and Stirrat Street and Taragoola Road by occurring on land which is contiguous with existing commercial activities; and (b) present open facades or shop fronts to the principal street frontage.	None applicable
Kirkwood Road Precinct	
PO22.1 Provision is made within the Kirkwood Road Precinct for a centre to be located at the future intersection of Kirkwood Road and Dixon Drive, providing for an integrated development for a convenience based shopping centre of 4000m2 to 6000 m2 GFA, providing limited personal services, banking services, community services, childcare services, medical centre and service trades.	None applicable
PO23.1 Development occurs in accordance with a master plan to accompany a material change of use application to create an efficient and sustainable urban form showing: (i) integrated development on-site in relation to parking, access, landscaping and the like; (ii) integration and connectivity with adjoining land uses; (iii) requirements for infrastructure; (iv) access to community facilities; and	None applicable

(v) access to open space and recreation.	
PO24.1 The provision and layout of infrastructure accords with the objectives and intent of the Kirkwood Road South Structure Plan 2004 Study* *Council to confirm whether this study will be included in the new Scheme.	None applicable

Neighbourhood Centre Zone	
Level	**2**
Purpose (*Mandatory)*	(1) The purpose of the zone is to provide for a small mix of land uses. Typically, it includes low scale convenience shopping, local professional offices, cafes, community services and other uses and activities which support the immediate community. Neighbourhood activity centre zones are located within residential areas and within walking distance of many residents. (2) The Gladstone Regional Council purpose is for a series of neighbourhood centres to be maintained within the Neighbourhood Centre Zone, to support the series of other higher order centres for Gladstone within the hierarchy. These neighbourhood centres are located at: • Toolooa Street (bounded by Toolooa, Off, Coon and Bonar Streets); • Clinton (opposite Centro Home on Dawson Highway); • Emmadale Heights, Emmadale • Gladstone Benaraby Road and Glen Eden Drive, Glen Eden • Breslin Street and Boles Street, West Gladstone • Sun Valley Road (opposite Kin Kora State School); • Avion Centre (corner of Beak and Shaw Streets); • Mellefont Street (corner of Mellefont Street and Dawson Highway); • Airport Village (Hickey Street); and • Miriam Vale (Blomfield Street). COUNCIL TO DETERMINE APPROPRIATE REFERENCES These neighbourhood centres will serve a convenience function for each of their local neighbourhoods and will be small scale in nature, acting as sub-ordinate centres to others within the hierarchy.
Suggested	The overall outcomes sought for the zone are:

overall outcomes	(a) small scale convenience retail, commercial and community uses servicing the local community are provided (b) development is reflective of and responsive to the environmental constraints of the land (c) development is designed to incorporate sustainable practices including maximising energy efficiency, water conservation and transport use (d) development provides a high level of amenity and is reflective of the surrounding character of the area (e) development encourages public transport accessibility and use, walking and cycling (f) development has access to development infrastructure and essential services (g) natural features such as creeks, gullies, waterways, wetlands, habitats, vegetation and bushland are retained, enhanced and buffered from the impacts of adjacent uses and any unavoidable impacts are minimised through location, design, operation and management requirements.

Neighbourhood Centre Zone	
Performance Outcomes	Acceptable Solutions
Land Use	
PO1.1 Development of the Neighbourhood Centre Zone provides for a range of convenience shopping and small scale business activities.	AS1.1 Development within the Neighbourhood Centre Zone comprises the following: • Child care centre • Health care services • Office • Service industries (not exceeding 100m^2) • Shop • Shopping centre • Veterinary services
PO2.1 Any development for a Shopping centre must demonstrate that the proposed GFA is applicable and commensurate with the intended scale and function of the Major Centre Zone, taking into account factors such as the catchment size and area and projected growth in the trade population. PO2.2 A report justifying the size and scope of the Shopping centre proposal will be submitted as part of any development application lodged.	
Built Form	
PO3.1 Development is compatible with the scale of surrounding development and contributes to the local streetscape.	AS3.1 Building height does not exceed 9 metres.
PO4.1 Development within the Neighbourhood Centre Zone addresses: (a) traffic arrangement, flow and management;	None applicable

(b) integration of development with a high quality streetscape; (c) applying urban design principles to integrate and manage pedestrian and vehicle movement for development and to adjoining lands; and (d) applying urban design principles to ensure appropriate high quality solutions are integrated with the masterplan for managing the commercial and residential interface.	
Amenity	
PO5.1 Internal pedestrian linkages are provided that cross a minimum of roadways, increase the efficiency of pedestrian movement through the sites and is safe and convenient.	None applicable
PO6.1 A landscape masterplan is implemented to provide: (a) visual continuity to development; (b) enhancement of the streetscape; (c) 'softening' to the built form of the development; and (d) a pleasant and safe environment for pedestrians; (e) integration of on-site landscaping with street plantings	None applicable
Commercial and Residential Interface	
PO7.1 Non residential development abutting any Residential Zone provides suitable landscaping, buffers, building setbacks and fencing to maintain the residential amenity of the adjoining land.	None applicable
Built Form	
PO8.1 Development is of a high standard, visually interesting, contributes to an attractive and leafy streetscape, reflects the character of the precinct within which it is located, and seeks to minimise adverse impacts on adjoining premises in regard to noise, traffic and visual amenity. PO8.2 The built form of premises provides a high design standard that reflects the overall outcomes for the precinct in terms of height, scale and intensity of use.	AS8.1 No building façade exceeds a horizontal dimension of 15 metres without punctuation by design elements such as colonnades, verandahs, awnings, balconies, eaves, recesses, screens, awnings or shutters. AS8.2 Plant and equipment is enclosed, shielded or acoustically treated so the generated noise levels comply with the relevant Australian Standards.

	AS8.3 Driveways, parking areas and loading bays are located away from the bedrooms of adjacent dwellings, unless acoustically screened and landscaped. AS8.4 Bin refuse and service areas are screened from the view of the street or other public areas. AS8.5 Where adjoining uses are not mutually compatible (i.e. commercial and residential), planting, fencing and other streetscape design treatments provide visual relief and physical separation.

Specialised Centre Zone	
Level	**2**
Purpose (*Mandatory)*	(1) The purpose of the zone is heavily weighted towards one (or more) specialised focus to maintain a mix of uses, as this is the defining characteristic of centres. Specialised centres usually service town, city or regional scale catchments. (2) The specific focus and purpose of this specialised centre is: (a) to maintain the Centro Home Gladstone Precinct as a Specialised centre which provides the Region's premier homemaker/bulky goods, contained within a consolidated Precinct. (b) A further opportunity exists to expand bulky goods development on land in the Bulky Goods Expansion Precinct, located opposite the Centro Home Gladstone Precinct, to allow for an additional centre of up to 40,000m2 of bulky goods. (c) The Dawson Highway Bulky Goods Precinct provides for the commercial and showroom (bulky goods) needs of the local community, taking advantage of its exposure to the Dawson Highway: (d) The Specialised Centre Zone will facilitate development in an integrated and co-ordinated manner and for the purposes of a showroom based centre/s; (e) Development provides appropriate vehicular access, manoeuvring and parking not adversely affecting the efficiency of the transport network, in particular the Dawson Highway. (f) Further development of the Zone is preceded by a masterplan that addresses layout, integration and uses.
Suggested overall outcomes *(optional)*	The overall outcomes sought for the zone are: (a) development provides for specific mix or type of centre activities that can not be accommodated in other centre zones (b) development provides a high level of amenity and is reflective of the surrounding character of the area (c) development is designed to incorporate sustainable practices including

	maximising energy efficiency, water conservation and transport use (d) development encourages public transport accessibility and use, walking and cycling (e) development does not compromise the viability of the network of centres (f) natural features such as creeks, gullies, waterways, wetlands, habitats, vegetation and bushland are retained, enhanced and buffered from the impacts of adjacent uses and any unavoidable impacts are minimised through location, design, operation and management requirements.

Specialised Centre Zone Code	
Performance Outcomes	**Acceptable Solutions**
Land Use	
PO1.1 Development provides for an integrated development of retail focused activities where the range of goods are predominantly of a non convenience nature including hardware, housing, service trades, service industries, showrooms and warehousing, bulky goods, storage and distribution and chandler to the Region.	AS1.1 Development within the Specialised Centre Zone comprises the following: • Garden centre • Hardware and trade supplies • Outdoor sales • Service industries • Showrooms • Warehouse
Development Plan	
PO2.1 Development is in accordance with an overall development plan which provides justification for the range of uses proposed, in addition to measures for managing the process and the effects of development.	None applicable
Parking and Access	
PO3.1 Development functions as an integrated centre, with integrated parking areas, access areas, manoeuvring areas, built form, landscaping, streetscape and advertising devices.	None applicable
PO4.1 Development has a high level of accessibility by the pedestrian network, cycleway network and road network to surrounding zones and sub-areas.	None applicable
Built Form	
PO5.1 Development is compatible with the scale of surrounding development and contributes to the local streetscape.	AS5.1 Building height does not exceed 9 metres.
PO6.1 Development within the Specialised Centre Zone addresses: (e) traffic arrangement, flow and	None applicable

management; (f) integration of development with a high quality streetscape; (g) applying urban design principles to integrate and manage pedestrian and vehicle movement for development and to adjoining lands; and (h) applying urban design principles to ensure appropriate high quality solutions are integrated with the masterplan for managing the commercial and residential interface.	
Amenity	
PO7.1 Development protects the amenity and character of adjacent localities.	None applicable
PO8.1 Development: (a) provides a high level of amenity in relation to built form, landscaping, streetscape and advertising devices; and (b) achieves an active street frontage; and (c) has a built form consistent with the scale and form of development in the zone and sub-areas adjacent to the service centre.	None applicable
PO9.1 Development provides for the protection and enhancement of a high quality streetscape along all roads to which the Precinct has a frontage.	None applicable
PO10.1 Development provides a safe, efficient and legible pedestrian area, parking area and access area.	None applicable
Centro Home Gladstone Precinct and Bulky Goods Expansion Precinct	
PO11.1 Development for an expanded bulky goods centre within the Bulky Goods Expansion Precinct as designated on the western side of Dawson Highway, demonstrates integration with the existing Centro Home Gladstone Precinct, from a traffic and land use management perspective. PO11.2 Any application for expansion of bulky goods development within the Bulky Goods Expansion Precinct will provide a master plan to demonstrate how integration with the Centro Home Gladstone Precinct will be satisfactorily achieved.	None applicable

Dawson Highway Bulky Goods Precinct	
P12.1 The Dawson Highway Bulky Goods Precinct provides for hardware and trade supplies and outdoor sales only.	None applicable