

Rockhampton Centres Study

Final Report

Prepared on behalf of:

Rockhampton Regional Council

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1.0 Introduction

1.1 Background

Urban Economics, together with Buckley Vann (hereafter referred to as the Study Team) has been commissioned to prepare a Commercial Centres Study on behalf of Rockhampton Regional Council (RRC). The Commercial Centres Study will provide a regional context in assessing current and future growth within key urban centres, the coast, rural towns and areas, and their relationship with the Rockhampton region as a whole, with a particular view to providing valuable input and recommendations into the region's new Planning Scheme.

The 2008 local government amalgamation reflected not only a "commercial" response to local governance, but also the interplay of urban and regional activities in providing services, employment and economic development opportunities for communities. Planning for centres must recognise this interplay and consider the regional role of employment and service provisioning in planning for the growth of centres, consolidation of activities and evolution of new centres within the regional context of the area.

Essentially, the Commercial Centres Study will function as a platform and background information for the formalisation of a new planning scheme for RRC. Having input to the policies and outcomes for the new Planning Scheme, the Commercial Centres Study informs and has been informed by the Economic Development and Employment, the Population Distribution and Residential Development and Industrial studies. More particularly, the Commercial Centres Study defines the role and mix of centres, including additional centres where needed, additional commercial designations, capacities of centres, cognisant of the anticipated distribution of the population, employment centres and growth opportunities etc.

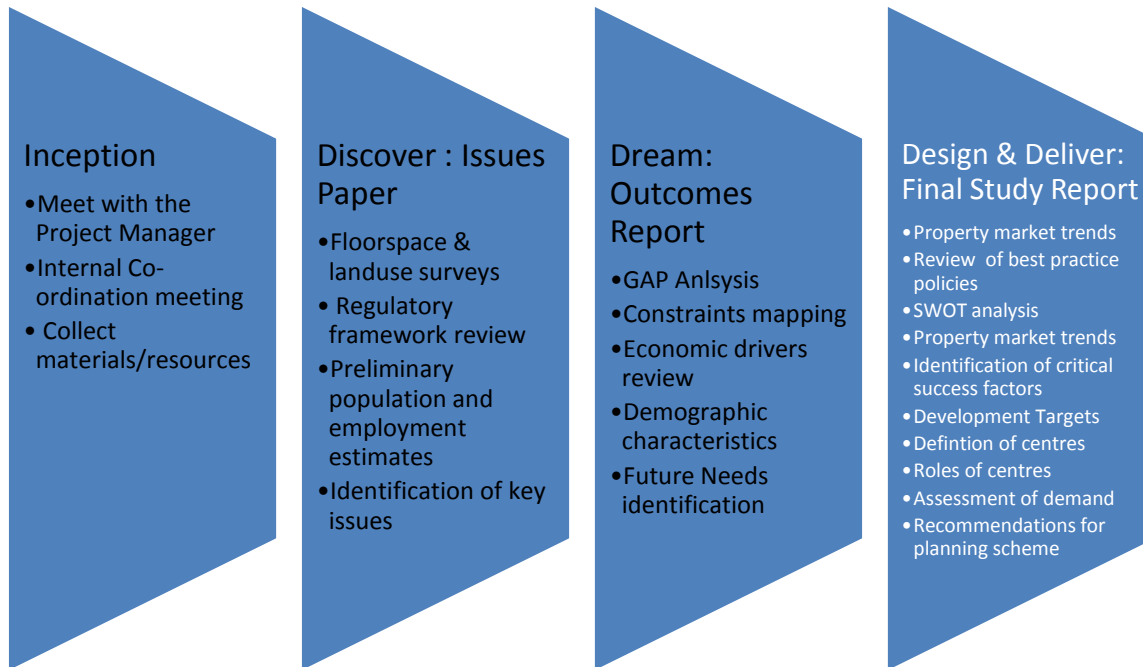
Informing the policies, codes and other outcomes for the new Planning Scheme, the Commercial Centres Study makes specific recommendations for inclusion into the new scheme (such as those relating to land use integration) as well as defining the role and mix of centres (including exploring likely market interest in mixed use development).

The Commercial Centres Study examines the changes in and impacts to the network of centres, the roles and performance of these centres as these changes are and have been absorbed, and examines their contribution to the evolution of a sustainable and effective network of centres.

This Final Report is the last of three Reports to be prepared for the Commercial Centres Study, and provides the guidelines and direction for implementation within the new Planning Scheme for the Rockhampton Regional Council.

1.2 Methodology

In approaching this consultancy, the Study Team has undertaken the following staged methodology, coordinated with the key deliverables outlined within the brief.



The Issues Paper examine the factors influencing the current performance of centres such as the regulatory framework, population growth and employment patterns, with the initial Outputs Report presenting projections of growth in demand for centre activities to inform the recommendations of this Final Report. This Final Report examines underlying demand supply drivers, key trends in commercial centre development, and provides a series of recommendations as to future centre location, expansion of existing centres, role and mix of activities in centres for a co-ordinated hierarchy of centres for RRC.

1.3 Study Area

The boundaries of the RRC are illustrated in FIGURE 1.1 and form the basis for the analysis for the Commercial Centres Study. The RRC is a diverse local authority comprising coastal villages, the large urban centre of Rockhampton, the former mining town of Mount Morgan and a range of rural villages and communities. The RRC functions as a lifestyle and service centre for the broader region, surrounded by regions of significant growth and development, including the mining and resource communities of Isaac and Central Highlands Regional Councils and the LNG/port focus of Gladstone Regional Council.

FIGURE 1.1: Boundaries of RRC



1.4 Abbreviations and Glossary of Terms

- ABS Australian Bureau of Statistics
- FSD Fitzroy Statistical Division
- ERP Estimated Resident Population
- DDS Discount Department Store (eg. Big W, Kmart, Target)
- Department Store (eg. Myer, David Jones, Harris Scarfe)
- RRC Rockhampton Regional Council
- LGA Local Government Area
- CCD Census Collection District
- PIFU Population and Information Forecasting Unit
- MRC Mackay Regional Council
- HES Household Expenditure Survey
- LNG Liquefied Natural Gas
- Variety store eg. Best & Less, Country Target, Sam's Warehouse, Crazy Clark's
- PCA Property Council of Australia

2.0 Planning and Policy Framework

This Chapter examines the policy framework from State, regional and local planning instruments together with policies and strategies that have been formulated that guide and impact upon the development of activity centres within the Rockhampton Regional Council. Particular attention is given to policies and strategies together with economic policies that may advance or constrain the development of retail, residential and commercial activities within centres throughout the Region.

Overarching direction for planning and policy development for the RRC is delivered through the **Central Queensland Regional Plan (Central Queensland Regional Growth Management Framework) 2002**. The Framework seeks to deliver an integrated approach to managing the future growth and development of the Central Queensland region. The CQ Regional Plan delivers a regional vision for Central Queensland, together with a set of strategies and policies to give direction towards this vision. The CQ Regional Plan envisages population growth to be focused around already developed urban areas and that activity centre development would also locate with these areas. Other critical objectives of the CQ Regional Plan, include stemming the losses in human and financial resources and the development of sustainable communities into the future.

In particular, the document outlines a thriving economy as a regional value, and offers a policy framework which seeks to foster the improvement of the local economy and realise its potentials through a number of strategies and actions such as:

- Fostering emerging industries;
- Promoting innovation and adoption of technology;
- Diversifying the economic base;
- Encouraging investment and capital markets;
- Enticing a quality labour market;
- Continuing to develop retail, service and small business sectors; and
- Building upon the strong economic base already in the region (i.e. agriculture, processing, tourism, government departments, mining, exporting).

Overall the document provides strong strategic guidance on the development of the region as a whole, however the document is quite outdated and relies upon outdated data such as population projections. Some policies could be refined further and reflect current needs.

Narrowing the policy and planning framework is the **Rockhampton Region - Towards 2050**. A Strategic Framework, which outlines strategies, inspirational targets and actions for the amalgamated councils of Rockhampton City, Fitzroy Shire, Livingstone Shire and Mt Morgan councils, has been prepared to provide overarching direction for the new regional council. The document specifically identifies the need to plan for a regional population of 250,000 (aspirational). In support of this, a number of aspirational targets, priority initiatives and action plans specifically mention the need for the Council to promote and encourage the following:

- Diversification of the economic base to promote a resilient economy;
- Focus on vibrant centres through the preparation of centre strategies for each main street and CBDs;
- Promote a compact, consolidated urban form that minimises sprawl;
- Promote a knowledge based economy to prepare the region for the post-mining era;
- Reinforce the existing centres of Rockhampton, Yeppoon, Emu Park, Gracemere, Mount Morgan and other smaller centres;
- Encourage innovation in local business through incentives;
- Urban renewal; and
- Allocating land for jobs – anticipated through the collaboration of initiatives to attract new business.

It is therefore clear that the centres study will need to consider the overarching aspirations of the Council as set forth in this document, whilst specifically considering the implications of the document on a long term basis.

Review of the former councils' planning schemes, policies and strategies reveal the differences in approaches to delivering service through the various activity centres.

The following TABLE 2.1 summarises the intentions and objectives of the relevant documents in presenting a discussion as to the potential framework for development of additional centres in the RRC.

<p>State Government Central Queensland Regional Plan 2002 (Central Queensland Growth Management Strategy)</p>	<p>The Central Queensland Regional Plan seeks to promote the vision of the region to become <i>“the most diverse and prosperous region in Australia.”</i> This diversity and prosperity is to be recognised in the anticipated population growth of the Region from around 197,247 persons in 2006 to 231,530 persons in 2021.</p> <p>The Growth Management Strategy recognises the agricultural nature of the Region as the mainstay of the economy, but also outlines a series of economic development strategies around:</p> <ul style="list-style-type: none"> • Existing and Emerging Industries • Innovation and Adoption of Technology • Investment and Capital Markets • Labour Market • Economic and Market Information • Export Development • Food and Fibre Industries • Forestry and Timber • Fisheries • Mining, Mineral Processing/Metal Manufacturing and Chemical Processing • Energy • Manufacturing • Tourism • Retail, Service and Small Business • Defence Industries 	<p>Rockhampton to remain as the largest city in the Region, recognised as providing the highest order goods and services to complement its population base.</p> <p>Tourism development to be promoted and expected in the Coastal Areas of Yeppoon and Emu Park leveraging off the employment, commercial, social, and cultural benefits of Rockhampton.</p>
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Significantly, the Growth Management Study focuses on the rich, natural

resources and agricultural production of the Region. Together with the acknowledgement of population growth, it is also significant that strategies impacting on the activity centres required to support the growth are minimal. The focus around Retail, Service and Small Business services are seen to be best used as support for the ‘drivers’ of the economy being mining, manufacturing, processing and agriculture, together with general service industries with opportunities in transport, warehousing and distribution services. The importance of traditional activity centre functions, however, are somewhat overlooked.

<p>RRC Rockhampton Region Towards 2050</p>	<p>- The Rockhampton Region Towards 2050 strategic framework envisions the desired planning outcomes for the Rockhampton Region over the next 40 years. The opportunity to make projections and plan for the entire region has come about through the amalgamation of the former Rockhampton City, Fitzroy Shire, Livingstone Shire and Mt Morgan councils.</p>	<p>A Centres Strategy is required to foster the development of strong and vibrant centres.</p> <p>The 2050 framework recommends identification of a ‘new town’ by 2018 providing centre support for the growing population.</p>
<p>Rockhampton Planning Scheme (City Plan) 2005</p>	<p>The Rockhampton Planning Scheme presents the Desired Environmental Outcomes (DEO’s) impacting on activity centres including (5) Commercial Centres (including shopping centres) and (6) Commercial Centre Design Outcomes.</p> <p>The plan outlines 38 local areas throughout the city each with specific and intent direction to guide development.</p> <p>A primary focus of the scheme is to reinforce Rockhampton as the ‘Capital of Central Queensland’. Supporting strategies which aid in promoting this include the desire to support key and emerging industries and also reinforcing the role of Rockhampton’s commercial activities through a clearly defined centre hierarchy that promotes the prosperity of the CBD. DEO 5 specifically outlines the centres hierarchy for the former LGA, which includes:</p>	<p>The Centres hierarchy has been translated into 12 area designations prescribed by the scheme. These areas include:</p> <ol style="list-style-type: none"> 1. The Rockhampton Central Business District Commercial Area – Retail Core Precinct, Business Services Precinct, and Mixed Use (City Frame) Precinct; 2. Allenstown District Centre Commercial Precinct (and expansion areas); 3. South Rockhampton Highway Commercial Area;

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- **The Central Business District** (located in South Rockhampton) – incorporating the highest order commercial, administrative, community, cultural, recreational, leisure, entertainment and service activities and destination retailing. Mixed use development including high density residential is also appropriate;
 - **Specialist Sub-regional Retail Centre** (the North Rockhampton centre Commercial Area) – higher order shopping facilities (provided they do not detract from the role and function of the CBD). No commercial activities;
 - **The District Centre** (Allenstown Precinct 1) – major weekly or fortnightly shopping to service South Rockhampton and Gracemere;
 - **Local Shopping/Neighbourhood Centres** (Glenmore, Park Avenue, Wandal, Dean Street, Elphinstone Street and Richardson Road) – cater for day to day needs of the surrounding area. The scheme recognises a possible need for a new centre in the vicinity of Norman Road if an overwhelming need can be demonstrated.
 - **Specialist Centre** (Red Hill Homemakers Centre in Yaamba Road South Commercial Area) – providing showrooms in conjunction with non-retail uses that complement the role of the Specialist Sub-regional Retail Centre provided they do not impact on other centres and their roles. This area is a niche centre.
 - **Highway Business Areas** (Musgrave Street Highway Commercial Area, Yaamba Road South Commercial Area and South Rockhampton Commercial Area) – limited ranges of commercial premises and showrooms and warehouses that do not undermine the role of other centres.
 - **Local Shops/General Stores/Service Stations** (distributed throughout the LGA) – based on historical sites or those which serve a very localised function. These are not intended to be expanded.
4. Wandal Local Shopping Neighbourhood Centre;
 5. Dean Street Local Shopping Neighbourhood Centre;
 6. Musgrave Street Highway Commercial Area;
 7. North Rockhampton Centre Commercial Area;
 8. Elphinstone Street Local Shop Neighbourhood Centre;
 9. Glenmore Local Shopping Neighbourhood Centre
 10. Main Street Local Shopping Neighbourhood Centre;
 11. Richardson Road Local Shopping Neighbourhood Centre; and
 12. Yaamba Road South Commercial Area.
- Core activity centres in the scheme identify the CBD as providing the highest order of centre activity. Based on the above list, key activity areas include:
- a. Central Business District Commercial Area containing retail core, business services and mixed use Precincts
 - b. South Rockhampton Highway Commercial Area
-

The scheme also recognises the need for high density residential and mixed use development to be concentrated into the CBD area to promote active, 24 hour environments.

Interestingly, the scheme also highlights the need to provide low-impact industries in the Central Business District Services and Frame Precincts, which may be based on historic use of these areas for that specific purpose.

In addition to rigidly promoting the use of a hierarchical model based on concentrating commercial uses and the like into the CBD, the scheme also promotes the adaptive re-use of historical buildings for commercial centre development.

In promoting the efficient, compact use of existing centres, supporting strategy 9 of DEO 5 notes that new commercial development should be located in existing centres that have unspent capacity rather than expanding the boundaries of these areas.

The need to promote effective and efficient use of infrastructure is also highlighted by the scheme, in addition to promoting public transport infrastructure in high use commercial centres.

- c. North Rockhampton Centre Commercial Area
- d. Musgrave Street Highway Commercial Area
- e. Yaamba Road South Commercial Area

**Livingstone Shire
Planning Scheme
2005**

The Livingstone Shire Planning Scheme encapsulates an area of some 11,700km² and notes a growth in population at a rate of 2.38% between 1996 and 2001. The estimated population of 27600 persons in 2003 was forecasted to grow to over 41000 persons by 2021. Acknowledgement is made that 70% of the Shire's residents are located in the towns of Yeppoon and Emu Park with the balance of residents in smaller rural settlements including Marlborough, The Caves, Ogmoo, Stanage and Yaamba. The role of Rockhampton City was expected to continue in

Majority of centre activity directed towards 'Yeppoon Central' and Emu Park.

meeting the regional demands for the residents of Livingstone Shire, however the sub-regional importance of Yeppoon was recognised and reflected in the provisions of the scheme.

The scheme includes specific provisions to protect and enhance the role of centres within the former shire. The Desired Environmental Outcomes specifically note that development must provide a benefit to and satisfy an economic demand of residents, provide opportunities to maintain and improve employment, strengthen tourism and preserve the role of Yeppoon as the main business centre and administrative hub in the former LGA.

To advance the desired environmental outcomes, the scheme prescribes two commercial zones, namely the Yeppoon Central Zone and the Business Zone (which encapsulates existing centres that are outside of the latter). The scheme does not prescribe a hierarchy as such, other than ensuring that the primary role of the Yeppoon CBD is preserved and other business uses in alternative areas are of a lower order that primarily service the needs of the immediate community rather than at a regional scale. The framework is such that any type of commercial/business use within these zones are considered consistent and subsequently afford either self or code assessable applications for new uses or development.

Furthermore, additional convenience centres were to be established throughout the Livingstone Shire to support more local level needs.

Retail and Industrial Lands Study – Livingstone Shire

Prepared for the Livingstone Shire Council by MacroPlan in 2007, the Retail and Industrial Lands Study analysed the current and future land uses and requirements in the Shire with regards to retail floorspace. Additionally the likely future demand

Yeppoon to act as a sub-regional centre with retail and commercial capacity to meet the needs of residents to 2011.

Council	for commercial and industrial space in the Shire was examined.	The township of Emu Park as being a secondary activity centre for the Shire
		Opportunities for the Shire based around tourism for retail activities.
		Opportunity to develop bulky goods based commercial activities to meet the demands of the growing population.
Fitzroy Shire Planning Scheme 2005	<p>The Fitzroy Shire Planning Scheme is an effective, straightforward document that reflects the primary needs and concerns of a typical rural shire. The scheme prescribes two zones which have the potential to accommodate commercial and business uses, being the Town Zone (Commercial Precinct) and the Village Zone. In accordance with the DEO's outlined in Part 3 of the scheme, it is envisaged that Gracemere is the primary business centre providing higher order services and a range of community and civic functions with commercial uses in the Village Zone being lower order convenience type uses that complement the intent of the village – to service the needs of the immediate rural community. The scheme prescribes that the villages of Bouldercombe, Bajool, Marmor, Kabra, Stanwell, Westwood, Gogango, Alton Downs and Ridgeland are to provide facilities and services to meet the local needs, and only where appropriate provide some higher order services. Each of these villages are not, however, intended to grow beyond their existing character and scale.</p> <p>Although the scheme establishes a basic hierarchy for centres, the Economic Elements DEO does not specifically include any provisions relating to commercial or business development and protection. The DEO refers primarily to the protection of rural areas and natural resources, whilst also recognising the area's important role</p>	Town Zone defined in Gracemere supported by a network of locally oriented centres catering for basic, localised needs including Bouldercombe, Bajool, Kabra, Gogango, Marmor, Stanwell and Westwood.

in providing high order, regional industry within the Gracemere-Stanwell Zone.

The intent statement for the Town Zone – Commercial Precinct does, however, outline specific strategic guidance on the development of commercial and business uses. It states the need to preserve the precinct for compatible commercial and business uses to provide a wide range of facilities for the Shire. The intent to provide a variety of small scale uses has also been strengthened with the intent outlining a desire to minimise land consumptive uses such as showrooms and low impact industries within this precinct.

Aligning with the strategic intent of the commercial precinct, the level of assessment tables outline commercial and business uses within this precinct as either Self or Code assessable, depending on the size of the tenancy.

Although the high order strategic provisions of the Village Zone recognise a need for villages to provide a mix of land uses and be viable centres that provide convenience services to the immediate community, the assessment provisions still nominate commercial and business uses as Impact Assessable. It is assumed that this is to ensure that the Council has control over the scale and nature of such uses in these areas to preserve the primary role and function of each village.

Mount Morgan Shire Planning Scheme 2005

Mount Morgan Shire encapsulates the smallest of the four amalgamated shires that form the Rockhampton Regional Council. The Mount Morgan Planning Scheme instruments the zoning of the former shire with the primary centre being the town of Mount Morgan. The vast majority of business zones are contained within the boundaries of the township itself, with a wide range of uses including commercial and retail activities prescribed within the Business or Tourism zones. It is however noted that the specificity of the business zone is loosely applied and includes a variety of non-commercial type uses include the Mount Morgan Hospital,

The specificity of the Business zone is loosely applied and includes the Mount Morgan Hospital, educational sites as well as a site designated as a water treatment reserve.

educational sites as well as the water treatment reserve, tip and showgrounds.

The Strategic Framework and DEO's of the scheme clearly articulates that Mount Morgan is to primarily contain all business activity, serving as the main business and community centre of the Shire. In particular, the Strategic Framework prescribes a specific area in which all commercial development is to be contained (similar to a precinct however it is not mapped). The area includes the streets of Pattison, East Gordon, Campion, Dee, Bridge, Bedsor and Carlton Lane. Local strategies supporting the Strategic Framework also outline that the infill of vacant sites within existing business areas is the preferred development option.

The Business Zone intent further specifies that commercial development is to be sensitive to Mount Morgan's historical features and that commercial uses are to support the qualities and values of the existing business centre.

The above overarching strategies have been reflected in the schemes assessment tables, which prescribes commercial uses in the Business and Tourist Activity Zones as Code Assessable. Development of this nature outside of these zones will trigger Impact Assessment and is unlikely to comply with the overarching principles of the scheme.

3.0 Situation Analysis

The purpose of the Situation Analysis is to outline key economic, population and employment characteristics underpinning the growth that has been experienced within the Rockhampton region, and those factors that are likely to influence the demand for, and supply of, commercial activities within the region. In particular, the Situation Analysis examines internal and external factors within Rockhampton's operating environment, including population and demographic characteristics and economic drivers.

3.1 Catchment Area Analysis

3.1.1 Definitions

Catchment Areas are theoretical constructs utilised to examine the potential drawing power of centres. Within a centres hierarchy nesting Catchment Areas reflect the varying roles and scales of centres.

The following Communities of Interest or Study Areas have been utilised to assist in examining the drawing power of centres or the catchment areas that they service, and in estimating potential demand for additional centres and the need for the expansion of existing centres. In defining these areas, the following has been considered:

- The existing mix of centres;
- The geographic distribution of population;
- The location of natural and engineered boundaries which serve to define communities, delineate areas with which residents identify and influence perceptions of convenience and accessibility; and
- The 2006 Australian Bureau of Statistics (ABS) Local Government Area (LGA) and Census Collection District (CCD) boundaries.

Figures found in **Appendix A** illustrate the boundaries of the Study Areas investigated with the following briefly outlining the definition of these areas:

North Rockhampton encompasses the localities of Kawana, Norman Gardens, Park Avenue, Parkhurst Frenchville and Berserker, with a large offer of higher order retail facilities including Stockland Rockhampton and Red Hill Homemaker Centre, as well as centres such as Northside Plaza which cater for weekly and top up shopping needs. This mix of retail and commercial activity in the catchment area is largely influenced by its location along a major traffic route.

South Rockhampton encompasses the CBD and the localities of Allenstown, The Range, Wandal and West Rockhampton, incorporating a variety of smaller convenience centres, the supermarket anchored Allenstown, as well as the administrative focused CBD. Typically, those residing in South Rockhampton do not travel to North Rockhampton for their everyday needs, however, there is clearly a gap in the higher order retail offer on the south side compared to the retail offer in the north, such that residents would travel to North Rockhampton for their higher order goods and services needs.

Yeppoon Comprising the urban community of Yeppoon and the surrounding coastal and residential communities of Taranganba, Pacific Heights, Cooee Bay, Lammermoor etc, this area is currently serviced by retail and commercial facilities within the Yeppoon CBD, the Yeppoon Central and the top-up shopping focused Cedar Park.

Emu Park Focused around the Emu Park and Kinka Beach communities and the establishing seaside communities of Zilzie and Seaspray, centre activities are focused around the older Emu Park village centre, with a range of activities established in Seaspray and proposed throughout Emu Park presenting challenges for planning for the sustainable delivery of retail and commercial floorspace. Residents would travel to Yeppoon for major weekly/fortnightly needs.

Gracemere The township of Gracemere is currently focused around a strip retail and business precinct, however, a retail dominated stand-alone shopping centre is under construction at the entry to the Gracemere township. Residents of Gracemere would currently travel to Rockhampton for their major weekly and fortnightly shopping needs, and higher order retail and service needs.

The township of **Mt Morgan** has been separately defined to reflect the concentration of population within this community. Residents of this area would travel to Rockhampton for their weekly and higher order shopping needs.

Other or Remainder represents the remaining rural, rural residential and village communities of the RRC., including the coastal hinterland, rural residential communities north of Rockhampton, and the rural villages and towns. This is a dispersed Catchment Area, however, the needs of this community are comparable; travelling to higher order centres for their major weekly, fortnightly and higher order needs. There are a range of small, top up facilities in local villages such as The Caves, however, residents would need to travel to access facilities and services to cater for the majority of their retail and commercial needs.

3.1.2 Population Overview

This Section provides an overview of the growth prospects for the RRC in identifying the issues underpinning demand for and supply of commercial centres within the RRC. This is not intended to be a comprehensive analysis of population growth, which is explored in more detail in and the Residential Distribution and Population Study, however, this Section provides a synopsis of the potential underlying demand for additional retail and commercial space.

3.1.2.1 Regional Population Growth and Projections

The following TABLE 3.1 illustrates the growth of the population of the Fitzroy Statistical Division (FSD) between 1981 and 2009, demonstrating a growth of some 61,584 persons resident within the FSD during this period. Growth within the FSD constituted some 3% of the total growth within Queensland.

TABLE 3.1: Fitzroy Historical Growth

Year	Fitzroy	Growth
1981	145,520	-
1986	160,127	14,607
1991	168,375	8,248
1996	178,035	9,660
2001	186,527	8,492
2006	206,204	19,677
2009	207,104	14,510

Source: ABS Cat No. 3218.0

At an average density of 1.9 persons/km² as at June 2009, there were estimated to be 207,104 persons living within the FSD.

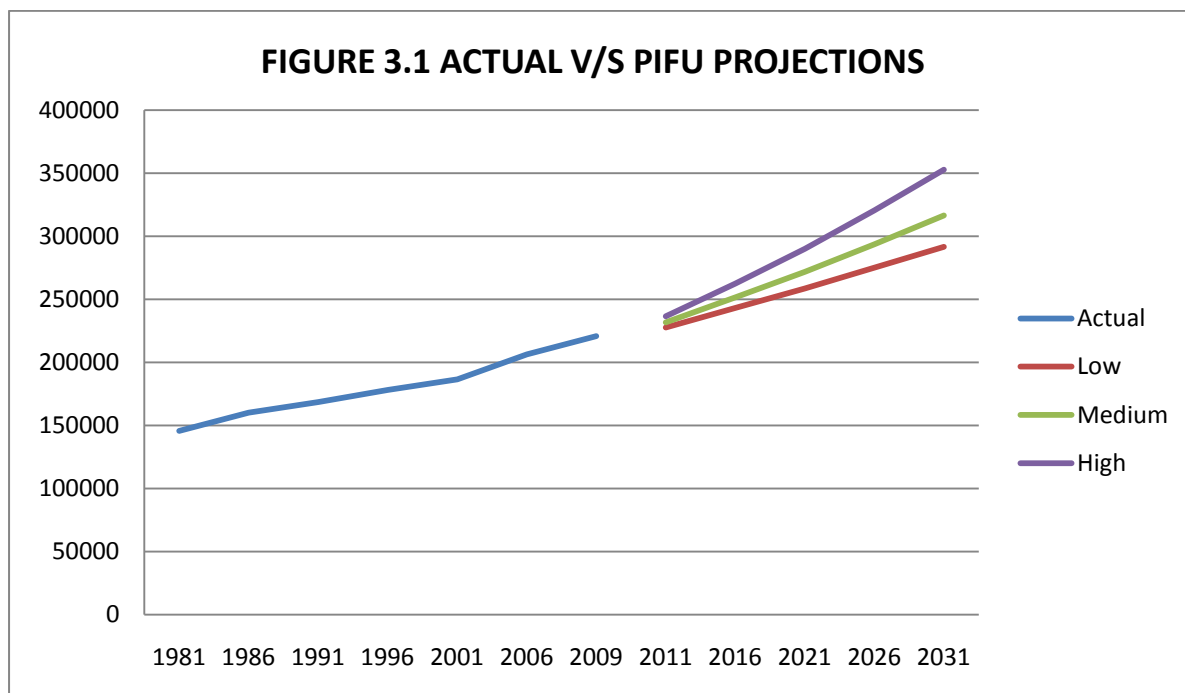
The low, medium and high series (2008) projections prepared by the Department of Infrastructure and Planning's (DIP's) Population and Information Forecasting Unit (PIFU) are provided in the following TABLE 3.2 for the FSD

TABLE 3.2: Fitzroy Population Projections

Year	Low	Medium	High
2011	227,666	231,656	236,502
2016	243,186	251,426	262,398
2021	258,588	271,702	290,023
2026	275,135	293,706	320,467
2031	291,633	316,393	352,657

Source: PIFU

Between 2006 and 2009, population growth rates within the FSD have reflected rates slightly less than those of the Medium Series projections, which is a reflection of the impacts of the slowing economic conditions experienced during 2008/09. As illustrated in the following FIGURE 3.1, actual growth within the FSD reflects growth rates between the low to medium series PIFU projections.



At the medium series projections, by 2031, the population of the FSD is projected to comprise 5% of the total population of Queensland. Housing 4.7% of the State’s population in 2009, the FSD is therefore projected to attract a slightly increasing share of QLD’s population growth. **Population within the FSD is projected to increase by some 109,289 persons between 2009 and 2031 at the medium series projections.**

3.1.2.2 Rockhampton Regional Population Growth and Projections

In June 2009, the RRC was estimated to accommodate 114,105 persons, by far the dominant local authority within the FSD. Between 1981 and 2009, the share of the FSD population within the RRC increased from 51% to 55%, particularly reflective of the strong growth in the former Livingstone Shire and the “Sea Change” attraction of a coastal lifestyle.

The following TABLE 3.3 illustrates the growth of the Rockhampton Regional Council (RRC) population between 1981 and 2009, demonstrating a growth of some 39,995 persons during the period.

TABLE 3.3 Historical Growth

Year	RRC	Growth
1981	74,110	-
1986	83,036	8,926
1991	89,668	6,632
1996	95,797	6,129
2001	98,225	2,428
2006	107,517	9,292
2009	114,105	6,588

Source: ABS Cat No. 3218.0

As at June 2009, the RRC was estimated to comprise a population of 114,105 persons, representing an increase of some 39,995 persons over the 28 year period, or an average of 1,430 persons per annum. At an average density of 6.22 persons/km², the RRC does represent a concentration of residential activity within the FSD. Furthermore, this population growth represented 2% of the total growth within Queensland and 65% of the FSD’s growth for the period. TABLE 3.4 illustrates the RRC’s share of the FSD’s population growth between 1981 and 2009.

TABLE 3.4: RRC Share of FSD Growth

Year	RRC Growth	FSD Growth	RRC % of FSD
1986	8,926	14,607	61%
1991	6,632	8,248	80%
1996	6,129	9,660	63%
2001	2,428	8,492	29%
2006	9,292	19,677	47%
2009	6,588	14,510	45%

Source: ABS Cat No. 3218.0

The share of the FSD growth contained within the RRC has fluctuated over time, as economic activity in surrounding LGA’s has stimulated population growth. The resources sector has attracted residential activity in centres such as Emerald and the strong growth in demand for employment within Gladstone to meet the needs of numerous infrastructure projects, has contributed to recent strong population growth in this centre.

The low, medium and high series (2008) projections prepared by PIFU are provided in the following TABLE 3.5 for the RRC, with more detailed analysis and interpretation provided in the Issues Report.

TABLE 3.5: RRC Population Projections

Year	Low	Medium	High
2011	117,465	119,422	121,293
2016	123,776	127,771	131,714
2021	129,817	136,069	142,343
2026	136,030	144,684	153,483
2031	142,071	153,256	164,745

Source: PIFU

Whilst growth between 2006 and 2011 has reflected growth between the low and high series rates, this study adopts the high series PIFU projections, in providing consistency across all study area programs, projecting an increase of some 50,640 persons from 2009 to 2031.

In comparison, the following TABLE 3.6 summarises the projected populations prepared under the Planning Assumptions Reports for the former local authorities:

TABLE 3.6: PIP Population Projections

PIP Resident Population	2009	2011	2016	2021	2026
Previous LGA of Fitzroy	11,726	13,656	15,500	17,630	19,830
Previous LGA of Livingstone	32,015	36,372	40,894	45,369	49,602
Previous LGA of Rockhampton	64,624	68,033	71,914	74,567	76,673
Previous LGA of Mt Morgan	-	2,518	2,530	2,548	-
TOTAL		120,579	130,838	140,114	

Source: PIP Planning Assumptions Reports

*Population projections for Fitzroy, Livingstone and Rockhampton were only provided to 2026. Population projections for Mt Morgan were only provided to 2021.

By 2021, the population projections with the Planning Assumptions Reports are slightly less than the high series projections prepared by PIFU, although noting that this is influenced by much lower growth rates for Mt Morgan than projected by PIFU.

With the exception of the former Rockhampton City, the 2009 ABS estimated resident populations for the remainder of the former local authorities were considerably higher than the above estimates, highlighting differences in the baseline information.

By 2021, the Planning Assumptions Reports project a growth of 26,009 persons (utilising the 2009 ABS ERP data).

The following TABLE 3.6 illustrates the number of estimated and projected households for the RCC between 2006 and 2031. Households are expected to increase by 65.2% during the period to comprise 69,725 households by 2031, representing a growth of some 27,450 households between 2006 and 2031.

TABLE 3.7: Projected Households for RCC

Year	Households
2006	42,185
2011	47,224
2016	53,540
2021	58,580
2026	63,865
2031	69,725

Source: Urban Economics's Estimates

3.1.2.3 Study Area Population Growth and Projections

The distribution of population by the high series PIFU growth rates has been utilised to prepare population projection for each of the Study Areas. Other considerations include land availability and capacity to absorb growth, building approval activity, employment and economic opportunities.

The following TABLE 3.8 summarises projected growth by Study Area with detached Estimated Resident Population (ERP), household and person per household projections provided in TABLE 3.9 appended to the rear of this Report.

TABLE 3.8: Population Projections by Study Area

Community of Interest	2006	2010	2011	2016	2021	2026	2031
North Rockhampton	43,541	46,050	46,970	50,700	53,900	55,700	56,800
South Rockhampton	19,024	20,880	21,150	22,400	23,000	23,600	24,700
Yeppoon	14,489	16,880	17,740	22,200	25,600	28,800	32,500
Emu Park	3,996	4,910	5,200	6,800	8,100	9,600	11,100
Gracemere	5,993	7,180	7,600	9,500	11,000	12,800	14,100
Mount Morgan	3,153	3,160	3,150	3,200	3,100	3,100	3,100
Other	17,321	17,070	16,820	16,900	17,600	19,900	22,400
RRC Total	107,517	116,130	118,630	131,700	142,300	153,500	164,700

Source: ABS 2006 Census, ABS Building Approval, PIFU High series projections Urban Economics's Estimates

Urban Economics has utilised the ABS 2006 Census and subsequently applied building approval and ABS reported ERP data to June 2009 to estimate number of households as at June 2009, which was then inflated to estimate population as at June 2010. In projecting forward to 2031, Urban Economics applied the PIFU High Series population projections to the RRC overall, examined the likely share for each community, used persons per household and our assessment of where activity is and is likely to be concentrated over time. (Refer to Table 3.9 in Appendix B)

- As at June 2010, it is estimated that there were 46,050 persons living within the North Rockhampton Area. Projections to 2031, applying the high series PIFU growth rates, estimate that North Rockhampton could accommodate a population of 56,800 persons living in 24,190 households.
- The population of South Rockhampton in 2010 was estimated to comprise 20,880 persons, and by 2031 is projected to comprise 24,700 persons living in 11,750 households, comprising significant growth in higher density living.
- The urban and coastal Yeppoon community in 2010 was estimated to comprise 16,880 persons, and by 2031 is projected to comprise 32,500 persons living in 14,240 households.

- The population within the Emu Park community as at June 2010 was estimated to be 4,910 persons, and by 2031 is projected to comprise 11,100 persons living in 5,160 households, allowing for growth of the Seaspray and Great Barrier Reef International Resort communities.
- As at June 2010 7,180 persons were estimated to be living within the Gracemere township and projected to increase to 14,100 persons in 5,410 households by 2031.
- Limited growth in the community of Mt Morgan is projected, with a June 2010 population estimated to be 3,160.
- The remainder of the RRC is projected to grow by 5,330 persons between 2010 and 2031. The majority of the growth is projected post 2021 as “overflow” north and south of the former Rockhampton City bounds.

3.1.3 Key Catchment Area Characteristics

In examining the potential mix of services and activities in centres, the study team has examined the demographic and socioeconomics profile of residents of RRC and the Study Areas.

Rockhampton Regional Council Profile

Derived from the Population Distribution and Residential Study, the following demographic profile of the RRC has been examined:

- The RRC area has a comparable age profile to Queensland as a whole.
- Ageing of the population is evident between 2001 and 2006 and is expected to continue to 2031. By 2031, 22% of the population is expected to be over 65 years of age.
- A comparable household structure to that of Queensland is apparent, but slightly higher proportion of couples with children and couple families without children.
- Higher proportion of separate houses (85.3%)
- Slightly higher unemployment rate than Queensland in June 2010. Mt Morgan has a significantly high unemployment rate (21.4%) and high levels of people needing assistance (8.5%) compared to the Council area (4.2%) and Queensland (4%)
- Slightly lower household and individual incomes compared to Queensland as well as lower rents and housing loan payments.
- Slightly higher proportion of indigenous people (5.2%).

These characteristics suggest a values-based community with a propensity to shop locally, available leisure time and a need for improved access to employment opportunities.

North Rockhampton Community Profile

- The North Rockhampton catchment area encompasses the populated areas north of the Fitzroy River and has the largest population of all catchments in the RRC with more than 46,000 persons as at 2010.
- Statistically, the North Rockhampton catchment has a higher instance of family households than South Rockhampton, comprised primarily of couples and families with children.

- Comparatively, North Rockhampton demonstrated lower unemployment levels and a higher level of female participation in the workforce than South Rockhampton.
- Clerks, administrative and sales workers were the predominant occupational areas according to 2006 ABS data, employing 27.1% of the resident workforce.

This community would have a propensity for goods and services that cater to the needs of families including household establishment items, recreational activities, school supplies and bulk supermarket shopping, as well as time saving services such as convenience retail, takeaway food child care and extended trading hours.

South Rockhampton Community Profile

- The South Rockhampton study area envelopes all of the populated areas of Rockhampton south of the Fitzroy River and comprised some than 20,000 persons.
- The population included a higher proportion of the aged and lone person households than North Rockhampton.
- The study area also demonstrated a higher instance of healthcare and social industry workers comprising 15.8% of the resident workforce, reflecting the preference to live close to work at the Hospital.
- A lower average household income was also apparent within South Rockhampton (\$54,160), compared to North Rockhampton (\$58,260) and Queensland (\$63,570) at 2006 reflective of smaller household sizes and higher incidence of older, retiree aged residents. This community would have a propensity for health and wellbeing services, demand for access to libraries and recreational facilities, smaller baskets of goods and a demand for access to retail facilities close to home.

Yeppoon Community Profile

- The Yeppoon community demonstrates characteristics attributed to its seaside location and lifestyle. Household structures are consistent with those of Queensland on the whole.
- At the time of the Census, the Yeppoon Study Area had a higher level of dwellings comprised of semi-detached row, terrace and townhouses.
- At the 2006 Census, 5.2% of the workforce indicated employment in the mining industry which reflects the mobile nature of fly-in-fly out mine workers that seek the benefits of a seaside community and employment opportunities in the resources sector.
- The Yeppoon catchment area had an average household income of \$58,910 in 2006 which was slightly higher than Rockhampton.

This community would largely commute for employment opportunities and access to higher education. Strong growth rates suggest a propensity for demand for household establishment goods.

Emu Park Community Profile

- The Emu Park catchment area is subsidiary to Yeppoon and shares similar community characteristics.
- Emu Park reflects a lower level of female workforce participation in the workforce, a lower level of average household income and slightly more aged population than the Yeppoon Study Area.
- 2006 ABS data also indicates that the Emu Park catchment has a high proportion of outright home ownership (43.6%) compared to Yeppoon (33.3%) and Queensland (33.1%), reflective of an established community and attraction of this area for Sea changing home owners, purchasing their new home outright.

This retiree aged community would have a higher propensity for wellbeing and healthcare services proximate to home and for top-up shopping for a small basket of goods on a frequent basis.

Gracemere Community Profile

- The Gracemere catchment area to the west of Rockhampton demonstrates characteristics of a town in a growth stage, comprising a high proportion of families with children under 15 (28.5%).
- The average household income of Gracemere according to the 2006 ABS was the highest of all Study Areas within the RRC at \$60,970.
- The Study Area displayed very low levels of post graduate and bachelor degree qualifications (.2% & 5%) compared to Queensland (1.9% & 10%), reflective of a low to semi-skilled blue collar workforce employed in the resources and energy sectors.
- In accommodating the high proportion of families, it is noted that 95% of dwellings were detached houses (Queensland 79.5%), with 41.4% being mortgage committed, reflective of a growth corridor.

This community would have a propensity for demand for goods that cater to the needs of establishing families including furnishings and equipment, school supplies and clothing, sporting goods and auto servicing. The community would have a strong affinity for bulk supermarket shopping and discount department store pricing and product strategies.

Mount Morgan Community Profile

- The Mount Morgan community is the smallest of the main Study Areas and displays significantly different characteristics to other areas within the RRC.
- The community clearly reflected in 2006 a high socio-economic disadvantage, with the most an average household income of only \$34,530 and an unemployment level of 14.8%.
- People aged 60 and over in 2006 comprised 28.5% of the population and as was the case in South Rockhampton, this was reflected in an increase in the proportion of people employed in healthcare and social assistance (18%) compared to Queensland (10.2%)
- The predominant housing type in the Mount Morgan catchment was detached dwellings, with an outright home ownership level of 49.2%.

- Access to welfare services, community assistance organisations, employment agencies and value for money retailing will be relevant for this community.

Other Areas Community Profile

- The “Other” community areas largely comprise of dispersed rural and rural residential communities
- Understandably, agricultural, forestry and fishing was the predominant industry accounting for 15.2% of total workforce.
- The average household income of “Other” according to the 2006 ABS was the second largest of all Study Areas within the RRC at \$60,540.
- Couple only households were predominant (52.9%) and were higher than the Queensland percentage (47.3%).
- Clerks, administrative and sales workers and Managers/Administrators were the predominant occupational areas according to 2006 ABS data, each employing approximately 19% of the resident workforce.

3.1.4 Expenditure Potential

In examining the potential demand for additional goods and services and therefore the quantum, mix and timing of additional retail space, the Study Team has undertaken an analysis of the potential growth in the available pool of retail expenditure or retail expenditure base. The retail expenditure bases has been derived from the 2003/04 ABS Household Expenditure Survey (HES), the latest published expenditure profile which examines average household expenditure. Estimates of the proportion of household expenditure spent at retail facilities have been derived from the HES, with the average annual household retail expenditure for Queensland estimated to be \$26,750 (2010).

The average annual household retail expenditure base estimates for the RRC ranged from approximately \$23,000 to \$26,000 between the community of interest areas, with the exception of Mount Morgan (approx. \$19,900).

Multiplication of the average annual household retail expenditure base by the projected number of households (TABLE 3.9), estimates the potential growth in the total pool of retail expenditure. The level and direction of retail expenditure is typically dependent on the socio-economic characteristics of a region, as well as other factors such as the average size of households and the mix of retail offer in a particular region.

TABLE 3.10 below presents the growth in available retail expenditure for the RRC Study Areas between 2006 and 2031, projecting a growth of some \$600m in additional retail expenditure by residents of the RRC. Not all this expenditure would be contained within the RRC, with other centres such as Mackay and Brisbane attracting a share of this expenditure, however it is demonstrative of the potential capacity for growth within the RRC.

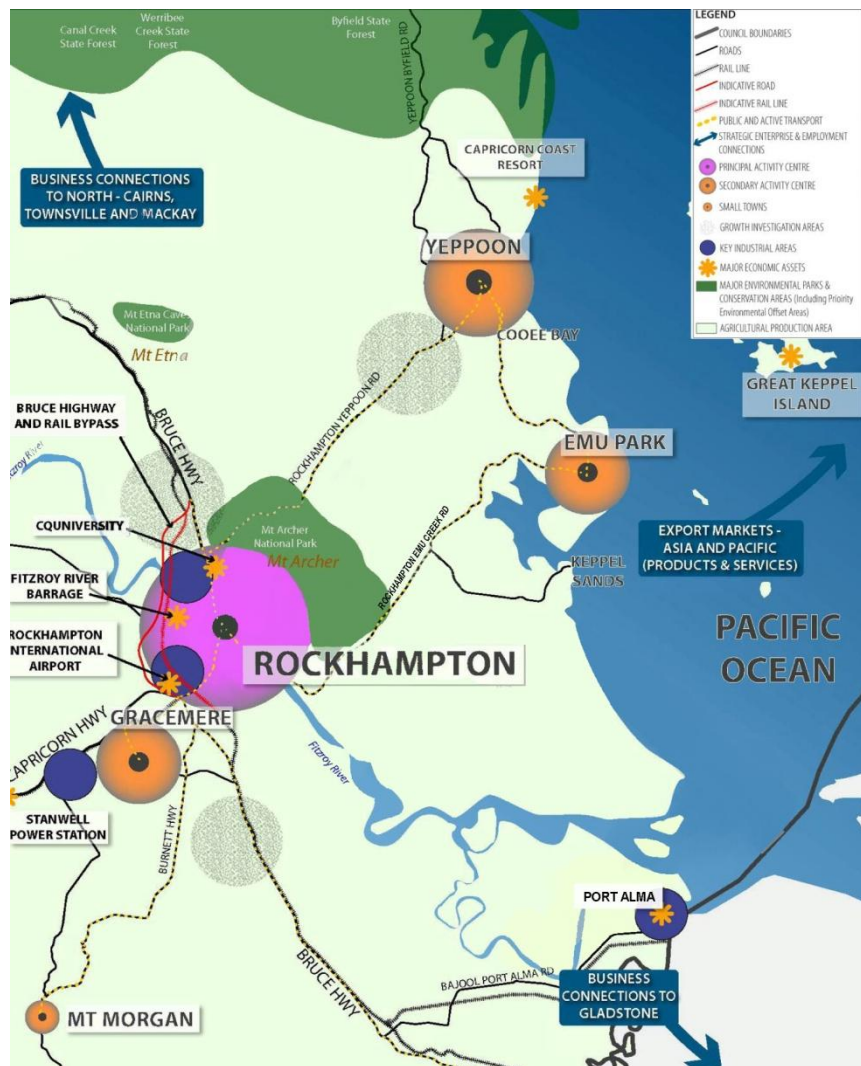
TABLE 3.10: Retail Expenditure 2006 to 2031

Area	2006	2010	2011	2016	2021	2026	2031	2010-2031
	(\$M)	(\$M)	(\$M)	(\$M)	(\$M)	(\$M)	(\$M)	Growth \$M
North Rockham	441.3	470.4	479.8	528.4	566.7	592.2	617.8	147.4
South Rockham	205.9	228	231	250.6	262.9	272.7	288.7	60.7
Yeppoon	151.3	177	186	237.3	275.9	314.4	359.4	182.4
Emu Park	42	52.1	55.2	73.1	87.4	105.4	123.3	71.2
Gracemere	55.8	67.1	71	90.6	106.3	125.9	141.6	74.5
Mount Morgan	28.2	28.5	28.6	28.9	29.2	29.4	29.6	1.1
Other	139	139.1	139.2	141.8	150.3	173.1	201.8	62.7
Total	1063.5	1162.2	1190.8	1350.7	1478.7	1613.1	1762.2	600

Source: ABS HES, Urban Economic's Estimates

3.2 Economic Profile

As illustrated in the following FIGURE 3.2, the RRC is home to a broad mix of economic institutions and employment generators, with the town of Rockhampton centrally located on the Bruce Highway within accessible distances to the Bowen Basin, Galilee Basin and Gladstone economic growth corridors.



Key economic drivers and opportunities presented in the Economic Snapshot for the Rockhampton Region published by the RRC in March 2010, and outlined in the Rockhampton Economic Development and Employment Study prepared by Economic Associates in October 2010 include:

- Labour Force and Participation** – the total estimated resident labour force in the Rockhampton region as at March 2010 was 57,481 people or 2.43% of the Queensland labour force. The labour participation rate of 65% in 2010, was equivalent to Queensland’s current rate. Between June 2004 and March 2010, the RRC labour force grew by 14.84% whilst population grew by 12.34% between June 2004 and June 2010, reflecting continued growth in young and older age groups.

- Between 1996 and 2006, the **unemployment rate** decreased in all regions, but was higher in RRC than in the Mackay, Townsville and Central Highlands Regional Councils, Fitzroy SD and Queensland. The unemployment rate in the Mount Morgan planning area was significantly higher than in the other regions (15.3% in 2006).
- **Employment** - RRC recorded a relatively high proportion of persons employed in blue collar professions compared with Queensland, but a lower proportion than within the Gladstone, Mackay and Central Highlands Regional Councils, which are dominated by resource and energy industries. Within RRC, the incidence of persons employed in semi and unskilled blue collar professions was over 30% in the Mount Morgan planning area. The composition of employment remained relatively stable in Rockhampton Regional Council between 1996 and 2006.
- Within RRC, the Fitzroy and Mount Morgan planning areas recorded a relatively high proportion of persons employed in industrial sectors, with the Fitzroy area also recording a high proportion of persons employed in agriculture and forestry and fishing. The Livingstone area recorded a relatively high proportion of persons employed in the construction, accommodation and food services, and education and training industries, reflective of the tourism orientation of the area.
- **Local Flow on Effects** – Each business in the Rockhampton region has flow-on effects for the business (Value Added), sales (Output), and jobs (Employment) growth. ‘Health care and social assistance’ as well as ‘education and training’ are likely to contribute significant benefits within the region. Advertising or ‘information, media and telecommunications’ is a sector that is likely to contribute benefits in terms of sales of products and services (Output). Other potential industries such as ‘construction’ and ‘arts and recreation’ could also boost effects on output. In RRC, the most significant industries of employment in 2006 were retail trade, health care and social assistance, and education and training. Compared with Queensland, RRC recorded a lower proportion of persons employed in the professional, scientific & technical services and manufacturing industries, demonstrative of the administrative and source rate of Rockhampton.
- **Education** - the proportion of persons with a post-school qualification in Rockhampton Regional Council increased significantly between 1996 and 2006 but was lower than the rate in Central Highlands Regional Council, Fitzroy SD and Queensland. Within Rockhampton Regional Council, the Livingstone planning area recorded the highest incidence of persons with a post-school qualification, indicative of a commuting workforce to employment at CQU and with the city of Rockhampton.
- **Business Productivity** – between 2005 and 2010, the Rockhampton Region’s Business Productivity grew by approximately 8%, a higher rate than Sydney Central, Brisbane City and the wider Fitzroy Region (4.23%). Australia’s resource booms have not brought population increases to the resourced based regions on a whole, although Fitzroy and WA’s Pilbara Kimberley regions bettered the national average population growth rate between 1998 and 2008.

- **Opportunities** – the study team has also investigated opportunities that may present economic drivers for the Rockhampton Region. The Gladstone Pacific Nickel Ltd project based around its mines in Marlborough is one such example of significant investment that is likely to be a key economic driver and potential influence on population growth, particularly for the northern Rockhampton area and the northern corridor stretching along the Bruce Highway.
- Further to this is the recent government approval for various liquified natural gas (LNG) projects that will see significant demand for labour and other investment. While much of the LNG projects are to be funnelled through Gladstone, the flow on effects from the immensity of the undertaking, will likely see the Rockhampton Region leveraging off its key location with respect to the Bowen Basin and Galilee Basin with potential to accommodate workers, businesses and government investment.
- A study on the economic impact of the Rockhampton Airport and development options by Conics in 2009, outlined the value of the Airport to the Region and opportunities for further development. A predominant finding is the capacity of the Airport to handle large aircraft, as a result of the need to support defence aircraft, and the Shoalwater Bay Defense Training Facility. The identified opportunities include the possibility of developing air freight industries and other aeronautical related activities, as well as activity such as short term accommodation, some commercial space, incubators etc.

3.3 Employment Growth

The Employment and Economic Issues Report prepared by Economic Associates estimated by 2031, employment in Rockhampton Regional Council is projected to be 54,686 persons, comprising:

- 4,509 persons in the Fitzroy Planning Area;
- 11,424 persons in the Livingstone Planning Area;
- 579 persons in the Mount Morgan Planning Area; and
- 38,174 persons in the Rockhampton Planning Area.

Growth of 10,816 persons employed in RRC is therefore projected. Within Rockhampton Regional Council, the sectors anticipated to record the most significant increases in employment are:

- Manufacturing (additional 1,470 employed);
- Retail Trade (additional 1,240 employed);
- Health care & social assistance (additional 1,170 employed); and
- Education & training (additional 1,110 employed).

No further analysis of employment projections has been prepared as part of the Commercial Centres Study, with this study reliant on these projections as a guide for future employment and land use provisions.

3.4 Implications for the Commercial Centres Study

In considering the potential implications for the future development and expansion of commercial centres within the RRC, the Study Team considers the following factors are particularly relevant:

- Facilities within the RRC provide an administrative and higher order service role for the broader region, and it is appropriate to examine the regional growth prospects. Growth within the FSD is projected to accommodate an additional 109,000 persons between 2009 and 2031 at the medium series, generating considerable demand for additional employment, retail and service facilities to cater for this population. It is expected that the RRC would continue to provide a higher order service role for this regional population and projections as to the additional retail, commercial and service facilities that should be accommodated within the RRC will be cognisant of this regional role.
- It is noted that the RRC appears to currently be attracting population growth between the low and medium series projections (2008 series). The high series projections have been adopted in providing a framework for ultimate planning. It is projected that the RRC could attract some 50,640 additional residents between 2009 and 2031.
- A difference of almost 23,000 persons within the RRC between the low and high series projections could represent a difference in generated demand of some 60,000m² of retail space.
- An increase in population of some 50,640 persons within the RRC (medium series projections) could potentially support the addition of:
 - 6 to 7 full-line supermarkets
 - 1 DDS
 - up to 100,000m² of additional retail space, 25,000m² of which is likely to be bulky goods space.

However, it is the distribution and composition of this population that will be of significance in the potential mix of additional retail space within the RRC.

- In identifying the potential mix and location of additional retail and commercial facilities, the Commercial Centres Study will need to be cognisant of the distribution of population growth. Should the coastal communities of Yeppoon attract the dominant share of the growth at the expense of the Rockhampton major centre, this will have significant implications for the hierarchy of centres and the subsequent recommended mix and scale of retail and commercial activities.

- Moreover, if a new town is to be developed, the mix of additional retail, service and commercial facilities to cater for the development of a vibrant and accessible community will need to be examined. The Commercial Centres Study has been informed by the Residential and Population Distribution Study as to the potential distribution of growth and timing of a new town ie. If developed, is it to have a satellite city role where residents commute to employment and services within a larger urban centre or is it to develop as a self sufficient centre with a high employment retention rate eg. Yarrabilba in South East Queensland.
- A population of almost 165,000 persons by 2031 is theoretically sufficient to support a full line Department Store, however it is noted that Townsville Council with a 2009 population of 168,402 is only now securing a Myer department store, David Jones having closed down in the CBD several years earlier. This may in part be related to development opportunities in centres to attract a department store rather than insufficient demand for a department store. Townsville is also actively seeking to attract David Jones to return to its CBD.
- Myer is also under construction at Canelands in Mackay, with a 2009 population of the Mackay Regional Council (MRC) estimated to be 116,123 persons, comparable to the ERP of the RRC. It is noted that the urban area of Mackay comprised a slightly more concentrated population base with a 2009 population of 83,680 persons (72% of the total MRC population) compared with the Rockhampton major centre population of 77,017 persons or 67% of the RRC population. However, there appear to be opportunities to support a department store in Rockhampton within the life of the new Planning Scheme; the question will be a supply market acceptance of Rockhampton as a destination for higher order comparison shopping such as a department store and strategies that may be explored in the Planning Scheme to ensure the flexibility to accommodate a department store.
- The additional population could generate demand for approximately 24,000 additional employment opportunities for RRC residents, with the Employment Study projecting growth of 10,816 persons employed in the RRC, suggesting that the RRC would essentially function as a commuting opportunity for residents working in major infrastructure projects in Gladstone, the resources sector of the Bowen and Galilee Basins.

4.0 Centres Network

This Chapter provides an overview of existing centres within the Rockhampton Regional Council, providing a preliminary assessment of the performance of these centres and their capacity to absorb further growth and development. This analysis has been derived on the basis of land use and floorspace surveys, including comparison with historical floorspace data.

4.1 Trends in Centre Development

This Section examines the nature of centres planning policies in planning for and accommodating business, service and employment activities. An overview of key property sector trends influencing centres activity has also been provided.

4.1.1 Trends in Centres Planning Policy

Traditional Central Place Theorems have focused on a central business hub or town centre, supported by a mix of lower order centres to meet varying needs of residents.

Increasing mobilisation of consumers has impacted the role and performance of downtowns and CBD's, and contributed to a more decentralised pattern of economic and commercial activity. Multi-nodal policies for centres are now prominent, recognising that there is a need for the efficient distribution and allocation of resources to meet these varying and evolving needs.

Whilst some multi-nodal policies have called for a network of centres rather than prescribing a hierarchy of centres and subsequent roles, functions, mix of activities, quantum of space etc, this approach does not necessarily provide the commitment and confidence in investment for public and private sector infrastructure.

In saying this, we also consider that centre hierarchies should comprise much more than a central business district surrounded or supported by a series of suburban, car-oriented shopping centres and that centres within the hierarchy should include both retail focused and multi-purpose centres. A well performing centres' hierarchy has the following features:

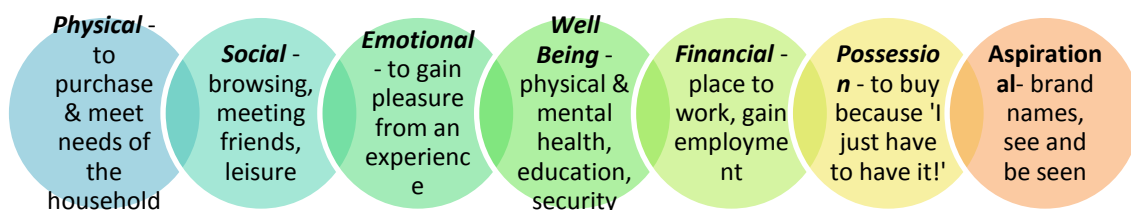
- **Well-defined central business district** – The CBD contains the highest order employment, services, community, entertainment and administrative facilities of the region it serves.
- **Range of centre types** – The centre hierarchy caters to a range of retailing and services needs of residents, workers and visitors.
- **Pedestrian friendly environments** – All centres encourage pedestrian activity, with safe, high quality street-scaping and walkways.
- **Focus for higher density dwellings** – Higher density dwelling forms are located at the fringe of centres or above centre activities.

- **Focus for public transport** – Centres are well serviced and linked by public transport options, minimising the number of private vehicle trips.
- **Centres offer more than retailing** – Larger centres providing a regional or sub-regional function, would provide a greater range of diverse facilities and activities.
- **More than functional** – Centres are a major meeting and entertainment place for residents and visitors.
- **Public spaces** – Public spaces form an integral part of well performing centres.

A commonality of many of the prominent modern centres strategies is therefore the definition of a hierarchy of centres and an intention that centres within this hierarchy offer a diversity of uses and meet a variety of needs. These strategies recognise that centres offer a place of activity and opportunities for people to live, work, play and have access to public transport in a safe and attractive environment. More particularly, it is clear that the development and promotion of successful, vibrant and active centres inherently requires strategic partnerships between levels of government and the private sector, in concert with other strategies such as economic and transport strategies. Additional detailed planning, for example, business improvement districts (BIDs) or masterplanning/structure planning is critical to the implementation process and in fostering centre development or revitalisation.

The SEQ Regional Plan states that *“Transit development in SEQ will be based around frequent high-capacity public transport systems, primarily rail and busway. Regional activity centres are primary locations for the application of transit oriented development principles.”* The interrelationship between transport and centres is also recognised in policies such as the Melbourne 2030 and Greater Vancouver Liveable Centres Strategy, which have a significant focus on transit oriented development with an expectation that all centres will be underpinned by a transport strategy.

Typically, when one thinks about a town or suburban centre, the emotions or memories that it stimulates are paramount to our expectations as to how the centre can meet the community’s diverse array of needs, which can be based on the following:



Consumer behaviour and the role and function of centres are therefore significantly intertwined. The retail industry has changed significantly in recent years in order to encapsulate other needs, desires and emotions of shoppers, however other market sectors have been somewhat slower to respond. Indeed, there are continual challenges to ensure that our CBD's and suburban centres remain relevant to evolving consumer trends and preferences, and in continuing to provide for opportunities to meet a variety of target market needs.

Higher order environments, offer the opportunity to better meet a greater variety of retail and entertainment needs, whereas top-up shopping dominated centres may only really cater for a limited number of community needs. There is an increasing focus on making visits to town or village centres more 'experiential' and capturing a greater share of peoples' leisure time and allowing them to 'linger longer' within an active and vibrant location, and to provide opportunities for employment closer to home.

The traditional main street characteristic of long-established suburban centres has been encroached upon by the development of enclosed shopping centres and malls, with a resultant focus away from street activity, instrumental in many of these revitalisation strategies. However changing patterns in the way people shop and the desire for a more enjoyable shopping experience, have also given rise to a re-emergence of focus on the main street and open air shopping precincts and their role in community life, contributing to the development of a strong "main street" program in Great Britain, focused on strengthening the operation, marketing, function and overall attraction of traditional main street centres. A large number of United States city centres have mirrored this experience.

The main street approach uses the combined eight principles of:

- Comprehensive;
- Incremental;
- Self-help;
- Public/private partnership;
- Identifying and capitalising on existing assets;
- Quality;
- Change; and
- Action-oriented.

This coordinated approach presents a proactive response to creating a dynamic, accessible and visitor-friendly centre, and has been used extensively throughout the United States in seeking to address ailing downtowns and town centres. Again, what is identified most strongly with this approach is the need for coordination, partnerships and management to implement the strategies and actions.

The SEQ Regional Plan also seeks to promote active, main street environments for established and new centres.

The Association of Town Centre Management in the United Kingdom exemplifies the practical approach to the implementation of strategies and actions. The primary role of the Town Centre Manager is to create active partnerships and networks to develop a vibrant and sustainable environment that involves and benefits all of its stakeholders. Specific actions include nurturing investor confidence, improving safety and security for users, creating a competitive edge, communicating the vision, creating an identity and image, and marketing. Funding is generally derived from all stakeholders involved and the share of funding incurred varies between centres, but commonly is determined by the stakeholders themselves. Within the Australian context, Place Management of activity centres has been embraced by some councils through employment of a Place Manager charged with the responsibility of facilitating vibrant centres, however this approach is not widespread within Queensland.

The renewed focus on the local main street as a popular retail destination is underpinned by a desire to feel part of a local community with a village atmosphere with strong opportunities for revitalisation of smaller towns as well as older strip precincts (eg. Gracemere, Wandal etc.). Increasingly, consumers are opting to shop locally, supporting local businesses where people know each other and they can establish relationships. Moreover, the local main street should offer convenience and accessibility for time-poor consumers, who shop more frequently for a smaller number of goods. With a cafe culture now a prominent component of many main streets, these traditional precincts also function as important meeting places integral to creating a community hub.

4.1.2 Retail Influences

4.1.2.1 Types of Shopping Trips

In setting the scene for evaluating the role and performance of centres in the existing hierarchy, the Study Team has briefly examined shopping trips and retail centre types.

There are five main shopping trips undertaken by shoppers. Whilst these trips describe the typical trips undertaken by shoppers, there are undoubtedly some exceptions to these generalisations.

The first and most basic type of trip is a **convenience** or buy-fresh trip for items that are used often (e.g. video hire) or are perishable (e.g. bread, milk, takeaway food) or that have a specific use-life (daily newspaper). Convenience shopping centres target this shopping trip, although the advent of extended trading hours has allowed the larger supermarkets to also gain a small share of this type of trip.

The second type of shopping trip is the **main weekly (or fortnightly) shopping** for groceries and household essentials. This is a regular, habitual and planned trip that is normally made to a centre which includes a full-line supermarket (usually district or sub-regional centres) such as Allensdown Plaze or Northside Plaza. This type of trip is rarely viewed as anything but a chore, a duty, something that has got to be done, and done as easily, cheaply and efficiently as possible. The main motivation for this trip is to satisfy the general needs of households.

Comparison shopping is the third type of shopping trip – normally planned to be enjoyable and may be linked with other activities such as meeting friends, attending the cinema, etc. Clothing and similar discretionary items are usually the target items for this shopping trip. Shoppers expect to be able to visit many stores in order to make a comparison between different goods before purchasing. These types of trips are usually made to the central city, regional centre or the larger sub-regional centres such as Stockland Rockhampton. A wide range and depth of merchandise is needed to satisfy this higher order level of shopping, together with a range of entertainment facilities which help to make the visit an enjoyable day out.

The **special purpose shopping** trip involves shopping for a special item or group of items such as sporting equipment, furniture, auto accessories, do-it-yourself building products and electrical goods. These shopping trips are usually targeted towards bulky goods stores. Home and leisure centres, such as the Red Hill Home Centre, have established in response to this growing phenomenon, as well as a range of category killer stores such as Rebel Sport, Harvey Norman, Toys R Us and Freedom, which specialise in a particular category or department.

Leisure shopping is the fifth type of shopping trip, similar to comparison shopping in that it is planned to be enjoyable and linked with a range of activities, although usually without a specific shopping list of goods in mind. In undertaking leisure trips, shoppers are looking for experiences that cannot be found in traditional centres and that are unique in their nature. People on holiday, with more time on their hands, are more likely to undertake this type of trip. Larger regional centres, factory outlet centres and markets appeal to this shopping trip.

4.1.2.2 Types of Retail Centres

A retail network is comprised of different types of centres which satisfy various needs of consumers. The following is a brief discussion of centres within a retail network based on Urban Economics' standard definitions and does not necessarily relate to Council's centre hierarchy. A discussion of the QPP centre definitions follows in Section 4.2.

A **Local, Convenience or Neighbourhood Centre** is differentiated from the higher order centre in that it does not generally provide sufficient range or depth of merchandise to fully cater for the major weekly or fortnightly household trip. These centres do not include a department store, variety store or discount department store. They normally provide only 1,000m² to 4,000m² of lettable retail space (excluding professional services), have less than 20 specialty stores, and their merchandise mix is highly biased to food items. Smaller centres located on major arterial roads are frequently referred to as convenience centres.

Historically, full-line supermarkets have not tenanted these smaller neighbourhood centres. However, there are many recent examples of full-line supermarkets co-locating with a small number of specialty stores and trading as a neighbourhood centre. Extended shopping hours and the desire by major supermarkets to increase their market share have contributed to this situation.

These centres normally serve between 1,000 and 3,000 households in the Primary Trade Area, depending on their composition, location and competition, and are centrally located within residential areas.

District Centres generally serve a series of neighbourhoods (5,000 to 8,000 households) and provide facilities needed to cater for a major weekly shopping trip. They also serve as neighbourhood centres to the immediate surrounding population. Lettable retail area in district centres normally falls between 5,000m² and 15,000m², but it is the function of the centre, rather than the size, which is critical. Such a centre is often at the focus of the local public transport system and usually incorporates financial and community service-type activities.

The store mix of a district shopping centre generally includes a major supermarket, a full range of food stores and personal services and a variety or discount store (mini major).

Regional and Sub-Regional Centres serve a series of communities and provide mainly comparison and specialty shopping functions. These include a department store and/or a large discount department store and offer a full range of merchandise and services. The larger centres usually provide entertainment facilities, such as cinemas and food courts. About 20,000 or more households are usually required within its sphere of influence in metropolitan areas with a reasonably well structured retail hierarchy, although a lower household threshold is acceptable if the population to be served has special characteristics or is isolated from other shopping opportunities. The differentiation between a regional and a sub-regional centre is again one of function rather than size. Regional centres would need to provide a full-line department store and a full range and depth of merchandise (usually requiring at least 40,000m²). Other centres failing to meet these requirements are generally referred to as sub-regional centres.

Retail Showroom Facilities differ from the traditional retail centres in the size, nature and range of products sold. Therefore, these facilities do not readily fit into the above hierarchy. Retail showroom facilities can be defined to include those bulky goods retailers that cater for home improvement/homeware products, garden centre products and indoor/outdoor entertainment/leisure/recreational products. Retail showroom facilities encompass a broad range of large stores involved in the sale of large goods such as furniture, domestic hardware, floor coverings, household appliances and electrical goods, including computers. Other retailers attracted by the large floor areas, cheaper rents and the type of customers attracted to these centres, include toy and sports retailers, auto accessory outlets, soft furnishings and home improvement specialists.

4.1.2.3 Trends in Retail Development

Retailing is a dynamic and evolving industry, leading and responding to changing consumer preferences and expectations. It is difficult to predict the mix of retailing activities that are likely to be prominent within Rockhampton over the next one to two decades. One only needs to consider the rapid development and evolution of bulky goods retailing as a prominent feature in the retailing market in illustrating the unpredictability of the likely future mix of retailing. However, this evolution in bulky goods retailing and that of factory outlet retailing, has also demonstrated the need for flexibility in centres strategies and planning schemes to accommodate the diverse and evolving nature of retailing. This section presents a discussion of key trends evident within the retail sector and implications for the anticipated scale and mix of retailing and its location in Rockhampton.

- **On-Line Retailing:** Whilst 20 years ago many commentators were predicting the demise of traditional retailing in favour of internet based retailing, the reality is that internet sales approximate 8% of total retail industry revenue in Australia and 13% of revenue in the US. Rather, the internet and on-line retailing offers convenience and accessibility to a broad range of retailers and outlets from which comparisons may be made and the consumer is better informed and better placed to make comparisons and judgements in a timely and efficient manner. On line retailing will become an increasingly important means of marketing for retailers and an information source for consumers, and thus will continue to complement and enhance the “bricks and mortar” retailing experience. Retailers that seek to improve the multi-channel experience for shoppers will maximise their potential in the short to medium term.
- Is it interesting to note the increasing popularity of home delivery of fresh food and groceries, even embraced by Coles and Woolworths, focused on time-poor shoppers and budget conscious shoppers seeking to stick to a shopping list. Value adding (ie meal preparations) product grouping as well as amplified convenience is expected to continue to dominate the supermarket industry.
- **Increasing Specialisation (Category Killers):** The emergence of retailers that focus on providing extensive depth and choice in a small product category ie. stationery, liquor, hardware, is expected to continue for the medium term, with implications for store layout and design, location and the number of stores within the network. For instance, the layouts of large format stores such as Dan Murphy’s, the new Woolworths hardware module, Anaconda etc, whilst servicing a large customer base of sub-regional or regional significance, may not be necessarily conducive to the concentration of higher density activities anticipated within a CBD because of their expansive designs, but are appropriate in frame areas or specialist retail centres.

- **Generational Demands:** Generation Y and Baby Boomers are the two key market segments that will influence the mix and practices of retailing in the medium term. **Generation Y** consumers have been identified as brand savvy, growing up in a period of strong economic prosperity and not only comfortable with, but expecting rapid changes in technology; technology in all its various forms is a part of their life, not just an accessory or complement to it, as is typical of Generation X and particularly Baby Boomer generations. Particular retailing that will appeal to this market segment in the short to medium term includes increasing prominence of retailing aimed at men, including men’s fashion, accessories and stylists. Outlets such as Apple stores, urban and street wear, concept stores with high levels of experiential design and adventure travel, will appeal to this segment.
- **Baby Boomers** will move into retirement age during this projection period, influencing their housing and household styles, recreational and leisure pursuits and times, health and wellbeing needs, purchasing power and purchase patterns. As the nest empties for this “for me” generation, the focus becomes on creating a lifestyle that suits their aspirations, and one would expect that expenditure on “toys” associated with an active lifestyle, downsizing the family home and purchasing new household goods to suit their lifestyle, will become increasingly important. Access to specialist homeware and household goods outlets, a broad range of recreational pursuits and retailers, including camping/boating/hobby stores will become increasingly important to this age group. Leisure based retailing and retailing associated with health, wellbeing of the mind, body and spirit, self actualisation and demonstration that they have “made it” will be important features of the future retail environment.
- **Generation Z** will be the key target markets for future workers and first home buyers in the medium to long term development. Referred to as digital natives and generation media, this group, whilst being the smallest generation of our era, will have the longest life expectancy, be the most formally educated, be effective time managers and maximisers (including experts at multi tasking), technologically literate and socially engaged. This group is likely to continue to pursue educational opportunities and enjoy outlets and retail experiences that stimulate and embrace this orientation (e.g. the emergence of Smiggle, gaming outlets), engage with retailers that are socially and environmentally responsible, and seek a retailing experience that embraces their technological lifestyles; i.e. wireless social venues would be a given right not an expectation, venues for informed socialising, sharing of ideas will be embraced.

- **Factory Outlets** emerging from the United States, originally in e.g. strip centres in Bridge Road Melbourne and Stones Corner Brisbane, brand direct and factory outlet centres were the hotly debated development “darling” of the early to mid 2000’s. What was little understood by the development industry is that these centres require large catchment populations to sustain them, access to both catchment and visitor markets and access from major arterial road networks limiting potential locations and opportunities. As a result, the Australian market quickly reached a saturation point and opportunities for this retailing in its current form are likely to be limited in the short to medium term.
- Newer international entrants to the market are also experimenting with the Australian market. Bulk retailer Costco draws shoppers from a wide area and even interstate as has been the case in its first Melbourne store. Costco is currently exploring QLD options, but is likely to limit to SE QLD in the short to medium term. In contrast, Aldi has rapidly expanded across QLD. Currently no ALDI stores have located within Rockhampton, and the closest store within its network is in Bundaberg. Further to the emerging mix of outlet retailers is Daiso, a Japanese based retailer that draws its philosophy from the popular ¥100 stores of Japan yet to expand into QLD with its strong value focus.
- **Convenience Focus** Increasingly time-poor consumers are demanding quick, convenient access to chore activities such as food and grocery shopping, with shoppers shopping more often for a smaller basket of goods; often effectively shopping by the meal. Supermarkets have responded with store and centre layout designs aimed at amplifying convenience, incorporating meal solutions, extended trading hours, etc.

4.1.3 Commercial Office Market

Key considerations and trends in the commercial office market include:

- **Locational Needs of Business:** A CBD location still offers businesses a profile or level of prestige. Recent market activity within the Rockhampton CBD demonstrates varying levels of needs being catered to. The opportunity to refurbish older ‘Queensland’ style homes that are dotted throughout the precinct into professional offices has been popular. Also the rare level of investment that has been committed to on the corner of East St and Fitzroy St to deliver the ‘Churches’ development comprising 2,570m² of office over 3 levels demonstrates the higher profile tenants that are being targeted. Other locational issues revolve around the heritage nature of some buildings within the CBD limiting the style of building that can be developed. This has been overcome in recent times with the refurbishment of the ex-Post Office building and ex-Headricks building providing additional blue ribbon supply for the CBD.
- **Other Locational Requirements:** In an increasingly tight labour market, the needs and expectations of employees become increasingly significant in the locational decisions of businesses; access to shopping, services, entertainment, dining/takeaway food, and public transport are significant factors in locational decisions.

- **Campus Style Accommodation:** These large floorplate developments that have been exemplified by e.g. Optus and Woolworths in co-locating various divisions of the organisation for operational efficiencies, are typically unsuitable in CBD locations because of their land expansive (and costly) nature.
- **Co-location of Business Activities:** in an effort to streamline business efficiencies, there has been an increasing trend for businesses to co-locate office, warehouse/manufacturing and distribution activities in the one location, generating an increased demand for office space in more traditional industrial precincts. Within the Rockhampton CBD the opportunity exists for this style of development. At present the CBD comprises a mix of land uses including light industrial that could accommodate both the office and other business activity requirements. A likely example could be seen at 92 Bolsover St where a recently purchased older style warehouse is set to include high grade office after refurbishment.
- **Changing Floorplate Sizes:** During The excesses of the 1980's, demand for large impressive space led to a rise in floorspace ratios from 14m² in the 1970's to 20m² per worker in the 1990's. Restructuring, workplace strategies such as hot desking/job sharing, reduced workspace ratios, again sometimes as low as 10m² to 11m² per worker in the Sydney and Brisbane CBD's. We do not expect that these ratios will apply to suburban and regional markets in the short term, however, the mobility of resource base sector workers suggests that lower ratios may be sustained by Rockhampton in the medium to longer term.
- **Market Factors:** At present the Rockhampton office market could be described as balanced with current supply meeting demand. With the addition of projects currently underway it is possible that the CBD may realise an over supply. However, various external factors could play a role in filling this supply.

The resources sector has the potential to drive future demand for office space. The recent go ahead given to the LNG projects around Gladstone is estimated to significantly increase the demand for professional offices that are required to support the activities of the industry. While the majority of this demand may logically locate to Gladstone or Brisbane, the location of Rockhampton relative to other mining centres like the Bowen Basin and Galilee Basin may see an increase in office demand for the CBD.

Demand for office space driven by the decentralisation of government agencies is another factor that may drive development in the medium to long term . We also note that the State Government is a significant tenant in the Brisbane CBD, owning considerable floorspace. As a result, the State Government has not seen the occupancy cost pressures evident in the Sydney CBD, which underpinned significant government decentralisation to, e.g., Parramatta. Until such time as a higher and better opportunity for government owned stock in the Brisbane CBD is realised, government locations to suburban or regional office markets like Rockhampton are likely to be nominal and reflective of local servicing needs.

The potential to develop officespace in Rockhampton to meet the requirements of a government agency however is limited by the need for an increased rent level to make development of this kind viable. A record \$310 per sqm was achieved for part of the ex-Headricks building in the CBD while comparatively ceiling rent prices for the Mackay CBD are around \$385.

4.1.4 Other Key Sector Trends

Key considerations and trends include:

- **Empty Nesters:** A need to downsize after children have left the home, but not seeking traditional retirement village models, has created an ideal target market for inner city apartment living. The population of the Brisbane CBD trebled between 2001 and 2008 as a result of inner city apartment growth. These empty nesters are seeking an active lifestyle with access to a broad range of entertainment and leisure facilities, including dining, theatre/cinema, cycle/walking paths. Storage of “toys” associated with an active lifestyle is significant for this group.
- **Regional Centres:** In the South East Queensland market, the period since 2006 has exhibited strong growth and takeup of multi-storey residential in centres such as Chermside and Upper Mt Gravatt, and some more modest levels of activity in Toowoomba and Ipswich. Critical success factors have included walking distance to major shopping and entertainment facilities, access to public transport and a need for older households to downsize. These facilities appear to be attracting both young professionals and empty nesters.
- **Other Centres:** Rockhampton, Mackay, Bundaberg, Cairns as well as Townsville all have strategies to increase the mix of inner city residential, with varying levels of take-up.

4.2 Centre Roles and Functions

The QPP definitions for centres seek to facilitate a hierarchy of centres comprising:

- Pricipal Activity Centre
- Major Centre
- District Centre
- Local Centre
- Neighbourhood Centre
- Specialist Centres

The Principal Activity Centre is to be the highest order centre for the region, comprising the highest order mix of retail, commercial, administrative and community facilities. This centre is to be supported by a range of lower order centres, providing a mix of activities and facilities to cater for small catchment areas. Specialist centres reflect the significant employment and economic role of facilities such as airports, hospitals and universities.

4.3 Existing RRC Network of Centres

This Section examines the mix of centres that have established within the RRC, based on their geographic distribution. Commentary as to the current mix of facilities, their performance and role has been provided.

The following TABLE 4.1 summarises the quantum of floorspace by major land use and the estimated employment within each of the key geographical areas.

TABLE 4.1: GLA by Community of Interest

Centres	Retail & Services	Office	Hospitality	Education	Health	Government & Service	Vacant	TOTAL	Employment	Building Approvals	Adjusted TOTAL	Adjusted Employment
	SQM	SQM	SQM	SQM	SQM	SQM	SQM	SQM	No.	SQM	SQM	No.
Rockhampton CBD	80,850	59,411	31,715	6,715	1,798	37,429	21,135	239,053	9,134	-	239,053	9,134
South Rockhampton	13,945	3,092	2,138	61	226	-	634	20,096	704	-	20,096	704
North Rockhampton	140,486	13,963	13,188	-	3,856	824	6,201	178,519	5,885	20,840	199,359	6,537
Yeppoon	28,986	3,020	3,654	-	320	282	1,580	37,842	1,262	3,485	41,327	1,371
Emu Park	1,479	243	108	-	-	-	218	2,047	64	3,195	5,242	166
Gracemere	1,890	69	484	-	441	202	87	3,173	108	12,530	15,703	499
Mount Morgan	3,066	-	464	-	256	426	467	4,678	147	-	4,678	147
TOTAL (RRC)	270,702	79,798	51,751	6,776	6,896	39,163	30,321	485,410	17,303	40,050	525,459	18,557

Source: Urban Economics Surveys 2003 and 2010

Whilst it is apparent that the Rockhampton CBD dominates the total commercial distribution and provides a concentration of employment opportunities, it also has a concentration of vacant space. North Rockhampton has a dominant retailing role, focused around Musgrave Street/Yaamba Road.

Rockhampton Central Business District (CBD)

TABLE 4.2: GLA for Rockhampton Central Business District (CBD)

Centres	Retail & Services	Office	Hospitality	Education	Health	Government & Service	Vacant	TOTAL	Employment
	SQM	SQM	SQM	SQM	SQM	SQM	SQM	SQM	No.
CBD	80,850	59,411	31,715	6,715	1,798	37,429	21,135	239,053	9,134

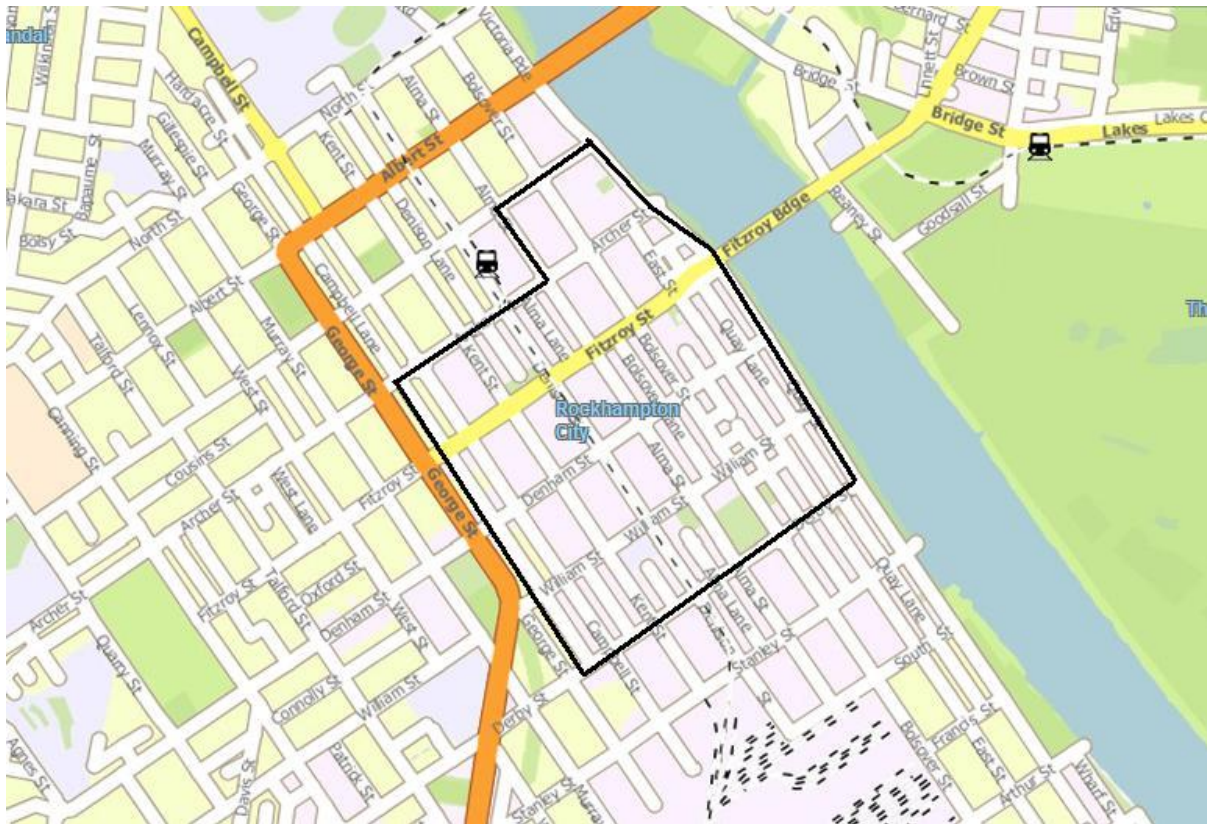
Source: Urban Economics Survey 2003 and 2010

According to the Planning Scheme, Rockhampton’s Central Business District (CBD) core concentration of retail and commercial activities encompasses 27 blocks extending south from the Fitzroy River, and includes large pockets of land designated as “Special Purposes.” The Planning Scheme guidelines have highlighted the following three Central Business Districts:

- 1) Precinct 1 – Commercial Precinct, CBD Retail Core between Fitzroy and Archer Streets, and between Quay and Bolsover Streets.
- 2) Precinct 2 – Commercial Precinct, CBD Business Services Blocks
- 3) Precinct 3 – Mixed Use Precinct on the CBD frame between Alma Lane and Kent Lane.

Throughout the CBD, land zoned “Special Purposes” accommodates a range of facilities including the Court Precinct, Rockhampton City Council, Customs House, and the Rockhampton Special School. Clearly, this centre provides for a particularly broad range of uses and comprises the 14,116m² City Centre Plaza (GLA) and substantial mixed-use development, dispersed over the remaining 26 blocks.

FIGURE 4.1: Rockhampton CBD



This is a very large and expansive area, particularly for a City the size of Rockhampton, with long distances between key components of the CBD. There appear to be opportunities to consolidate the CBD and reduce the core area of the CBD in concentrating activity and creating a real heart for the RRC.

The Rockhampton CBD demonstrated its role as a commercial business and administrative heart. Services included medical facilities, medical institutions, education, child care, counselling, welfare, veterinary surgeries etc. Property and business services including legal, financial planning and accounting services were prominent office users within the CBD. Other important commercial space uses included government administration, education and training facilities as well as health and community services.

The substantial representation of the government sector presents stability for the office property market in the CBD and clearly demonstrates the regional significance of Rockhampton CBD as an administration centre.

An increased representation of restaurants and cafes were noted in the CBD between the 2002 and 2010 surveys. Whilst a cinema complex was not present in the CBD, the Art Gallery, RSL Club and Walter Reid Arts Centre, contribute to enhancing the higher order role of the CBD as a community and entertainment destination.



Retail space in the CBD accounted for approximately 67,355m² within the strip areas and a further 13,495m² of retail space (GLAR) at **City Centre Plaza** (other space is occupied by non-retail uses). A 6,910m² Target (in City Centre Plaza), Stewarts and Crazy Clarks within the primary retail precinct on East Street offered a range of mix of DDS and variety store shopping.

A large portion of the chain stores represented within the CBD were within the City Centre Plaza, which occupies less than 4% of the land area. This figure reflects the difficulties inherent in extended strip retail development, which, without management and planning systems in place, may not be as conducive to the development of coherent precincts. Conversely, shopping centres such as Stockland Rockhampton present an identifiable concentration of retail stores, arranged in a logical fashion and with anchor tenants with strong drawing power to ensure consistent pedestrian traffic.

The CBD offers only one major supermarket (a 3,670m² Coles) located within City Centre Plaza and, only a limited array of fresh food retailing which suggests a gap in the retail offer of the CBD. Those who work within this area are unlikely to consider the CBD as a viable alternative for their major top up or buy-fresh needs. More particularly, in encouraging residential activity in the CBD, consideration of the range of activities that would cater to the needs of local residents such as top-up shopping, takeaway food, cafes will be significant.

The Stewarts store represents a local department store. With the exception of discount department and variety stores, the retail offer within the East Street Precinct featured recreational goods and housewares and appliances as well as clothing and other personal goods. Like many regional town centres, Rockhampton CBD does not incorporate a department store, and retailing has been impacted by the strong growth of retailing in North Rockhampton.

Educational and training services and government offices were also prominent users of space in the Retail Precinct. A range of financial, insurance and stockbroking activities have located in Denham Street between East Street and Quay Street including Westpac, RBS Stock financial, stockbroker and NAB, establishing an important financial and business precinct.

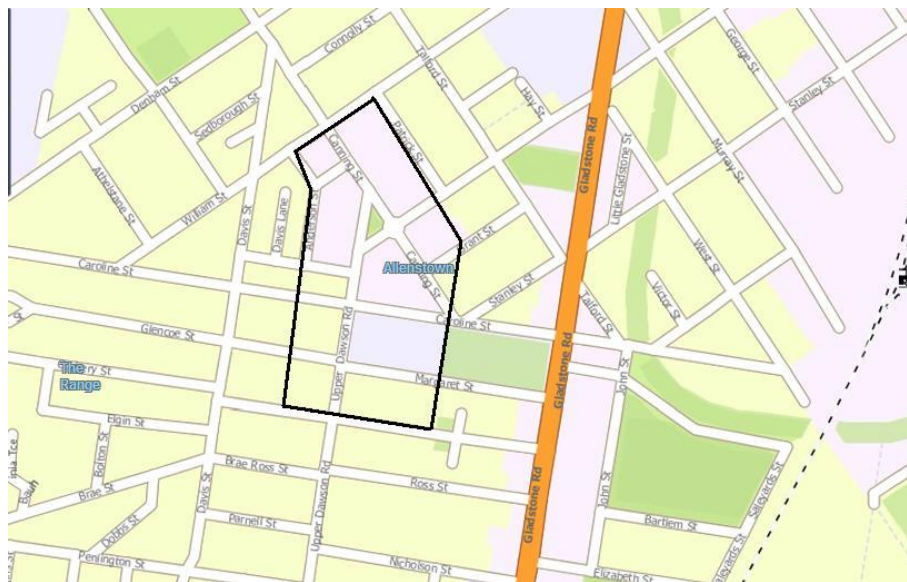
South Rockhampton

TABLE 4.3: GLA for South Rockhampton

Centres	Retail & Services	Office	Hospitality	Education	Health	Government & Service	Vacant	TOTAL	Employment
South Rockhampton	SQM	SQM	SQM	SQM	SQM	SQM	SQM	SQM	No.
Allenstown Plaza	5,354	233	311	0	0	0	65	5,963	195
Allenstown Retail	2,928	1,891	1,248	61	96	0	247	6,471	252
Gladstone Road	3,792	766	291	0	0	0	256	5,104	171
Wandal Local Centre	1,871	202	288	0	130	0	66	2,557	86
TOTAL	13,945	3,092	2,138	61	226	0	634	20,096	704

Source: Urban Economics Estimates

FIGURE 4.2: Allenstown



Allenstown Local Centre comprises the Woolworths anchored and redeveloped Allenstown Plaza and surrounding retail and commercial development. The centre functions as a District Centre from a retail perspective. Other functions include a Neighbourhood Centre. It is internally located within Allenstown and not on any major arterial roads, but fronts Canning Road which is a significant east-west collector road for South Rockhampton communities. **Allenstown Plaza** caters for the major weekly shopping needs of households of southern Rockhampton, including Gracemere. The absorption of additional land to cater for the parking requirements of this busy centre demonstrates the significance of this centre for the local community. Further expansion would require amalgamation of detached housing sites and challenging design solutions with the centre surrounded by 3 roads. A 2,000m² expansion of the centre is proposed and currently at the Information Request stage. The existing Allenstown Plaza comprises some 5,963m² of floorspace, anchored by a 4,121m² Woolworths supermarket. The centre was busy at the time of inspection (2010), with only one small vacancy evident suggesting a strongly performing centre.

A number of development proposals for redevelopment of surrounding lots have been submitted to the RRC in expanding the mix of local service and commercial facilities surrounding this centre. The most significant of which was the redevelopment of the Allenstown Hotel, including the opening of a Dan Murphy's liquorbarn. The mix of activities surrounding Allenstown Plaza, including the primary school reinforces the weekly and fortnightly shopping and service role.

The **Gladstone Road** precinct represents the southern entrance to Rockhampton. It caters largely to motorists and motor-vehicle related retail and services, with isolated office and retail facilities enjoying frontage to this high traffic environment. A large number of motels, service stations, service trades, and vehicle sales yards operate in this area. Retail within this precinct is generally more of a secondary nature. Some lands in this area are flood affected and do have some use and redevelopment issues.

The One 11 Convenience Centre on Gladstone Road is a 1,855m² (approx.) centre incorporating a mix of top-up shopping facilities including a number of chain tenancies such as Night Owl, the Coffee Club, Cold Rock, Wok Me and Pizza Hut. Approximately 256m² of floorspace was vacant at the time of inspection (Oct 2010), with other convenience facilities opposite occupying some 1,747m² of convenience retail space. Other activities included Red Rooster, KFC, McDonalds.

Sam's Warehouse, a 3287m² variety store, is located on the eastern side of Gladstone Road near the intersection of Gladstone Road and Nicholson St. This site is surrounded by vacant land, with a proposed redevelopment to include an IGA supermarket and specialty stores which is still under discussion with Council at the time of this project (end October 2010).

FIGURE 4.3: Wandal



Wandal Local Centre comprises an older style retail strip development focussed around the juncture of Wandal Road and Woodville Street, in Wandal, south-west Rockhampton. This centre has been considerably upgraded and revitalised since inspections in 2002/03, and an increase in vitality and activity within the centre was apparent, including modern eateries. Approximately 2,557m² of floorspace is located in this centre, comprising 1,181m² of retail space, anchored by a Foodworks convenience store.

The Wandal commercial area is adjacent to the Rockhampton showgrounds which are the focal point for exhibitions, speedway events, Beef expo and of course, annual show events. The centre caters for top up shopping and general convenience needs. This area is also the gateway to the residents of Alton Downs and surrounding communities

North Rockhampton

TABLE 4.4: GLA for North Rockhampton

Centres	Retail & Services	Office	Hospitality	Education	Health	Government & Service	Vacant	TOTAL	Employment
	SQM	SQM	SQM	SQM	SQM	SQM	SQM	SQM	No.
North Rockhampton									
Berserker Local Shopping Centre	1,460	259	593	-	-	-	43	2,355	88
Berserker Village Local Centre	186	92	222	-	-	-	1,566	2,066	22
Dean Street	347	-	-	-	-	-	-	347	11
Dean Street Strip	1,328	182	108	-	277	-	-	1,895	63
Frenchville Shopping Centre	1,431	81	512	-	-	-	121	2,145	74
Glenmore IGA Centre	3,618	-	150	-	319	-	-	4,087	129
Glenmore Shopping Centre	539	-	965	-	295	-	275	2,074	72
Koongal Minor Centre	52	-	-	-	-	-	-	52	2
Main Street	853	-	-	-	-	-	327	1,180	27
Musgrave Street Strip	22,923	8,946	2,654	-	1,390	824	1,851	38,587	1,372
Northside Plaza	5,751	474	258	-	-	-	-	6,483	216
Park Avenue Mall	358	200	39	-	-	-	-	597	23
Red Hill Homemaker Centre	22,771	4	-	-	-	-	-	22,775	712
Richardson Rd	2,565	709	637	-	636	-	434	4,980	163
Rockhampton Food Village	1,274	730	1,239	-	-	-	257	3,500	138
Stockland Rockhampton	45,985	2,200	5,238	-	939	-	1,327	55,689	1,832
Yaamba Road	29,046	87	573	-	-	-	-	29,706	941
TOTAL	140,486	13,963	13,188	-	3,856	824	6,201	178,519	5,885
Proposed Parkhurst Shoppingtown	19,100	-	-	-	-	-	-	19,100	597
Approved Frenchville Shopping Centre	1,740	-	-	-	-	-	-	1,740	54
ADJUSTED TOTAL	161,326	13,963	13,188	0	3,856	824	6,201	199,359	6,537

Source: Urban Economics Surveys 2003 2010, Stockland Rockhampton Tenancy Schedule

FIGURE 4.4: Berserker/Musgrave Street



The **Musgrave Street** Local Business Centre incorporating Northside Plaza, comprises the longest retail strip in Rockhampton City, extending along one of North Rockhampton’s major traffic routes, historically functioning as the Highway through the City. The Musgrave Street precinct extends along High Street and Elphinstone Street, encompassing some 48,570m² of retail and commercial floorspace, distributed over an extended area. An overall occupancy rate of 97% was evident in this strip, demonstrating an increasing occupancy rate since 2002/03.

Retail uses predominate in this strip, largely influenced by its location along a major traffic route. Higher proportions of takeaway outlets, motor vehicle retailing and servicing are complemented by a prominent mix of household goods retailing.

Legal and accounting firms, general business services and other technical services were strongly represented in this precinct.

Musgrave Street is also readily accessed by public transport with a high trip frequency major bus route.

The Musgrave Street Strip incorporates a mix of retail, motor vehicle retail and servicing facilities, restaurants, fast food and takeaway outlets, offices including Queensland Health, Department of Housing and a number of employment agencies, and medical facilities, focusing on the exposure and profile of Musgrave Street to passing traffic. Whilst high visibility is a key feature of this Centre, its narrow, elongated structure and generally limited parking facilities, constrain the potential for capitalising on the scale of retail and commercial activity within this precinct, and limit the capacity to encourage pedestrians to walk through the centre. Land ownership is dominated by individual owners/land parcels which is somewhat challenging in creating a legible, cohesive centre.

In particular, facilities in this precinct rely on passing vehicle trade and the opportunity for customers to park proximate to the business. The Musgrave Street centre whilst of comparable scale to the North Rockhampton District Centre, functions as a Local Centre and destination shopping centre.

The extension of strip facilities along High Street and Elphinstone Street ‘blurs’ the definition of the Musgrave Street Node in respect to nodes such as the Berserker/Elphinstone Street Node. In other words, facilities such as the large Mitre 10 may associate more with Musgrave Street type businesses, but its locality is proximate to uses within the defined Berserker/Elphinstone precinct.

Adjacent to Rockhampton Stockland and its main vehicular entrance is a precinct know as the **Rockhampton Food Village** on Aquatic place off High Street in Park Avenue. This centre is adjacent to Rockhampton Commercial Park and the facilities in both centres include a mix of food, office and retail & service. The anchor retail tenant is Retravisio. The centre also includes Channel 10 offices, the head offices of Ray White and Harcourts real estates, a solicitor and food premises of Demedios, Hungry Jacks, Hogs Breath and Lone Star Steakhouse.

There have been several approvals in this area for multiple dwelling units on residential zoned land, particularly along High Street. It is noted however, that these approvals have not yet resulted in residential development, rather they have essentially been speculative for business/service industry activities, demonstrative of continuing supplier demand for expansion of the commercial designation within this area.

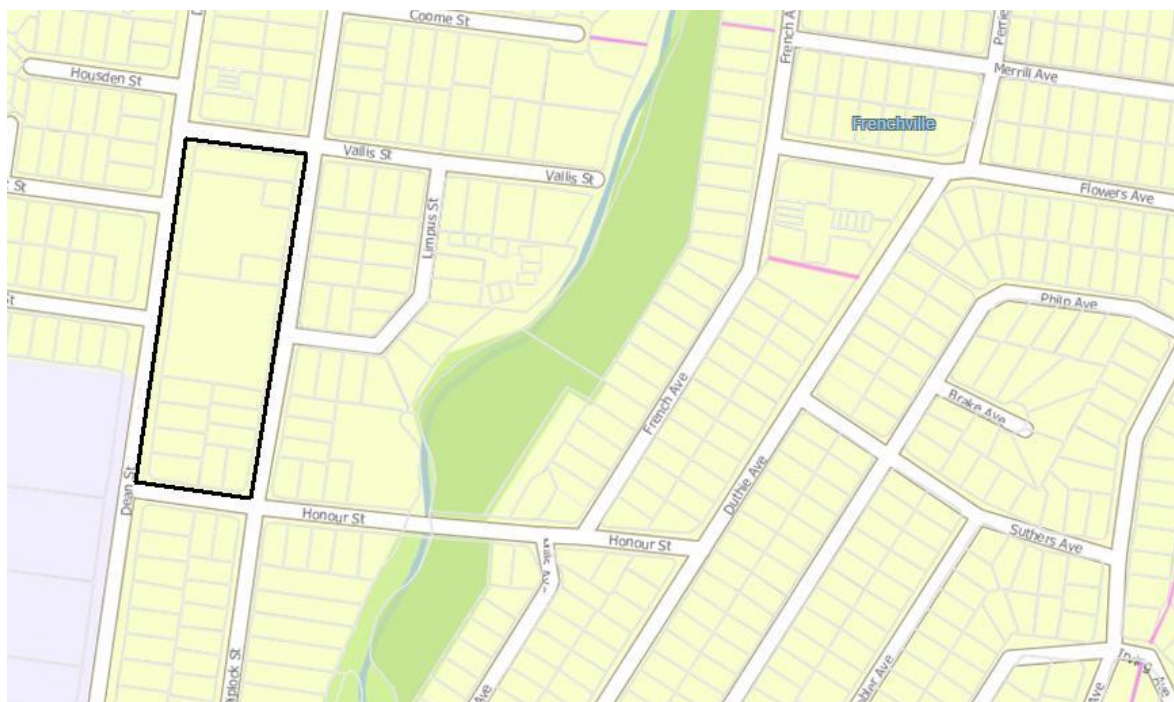
There is low amenity for residential due to Musgrave Street’s high traffic nature as well as poor connectivity and legibility between each of the retail/commercial components. Essentially, there is no defined “core”. Facilitating development could include encouraging active frontages, streetscaping, and medium density residential in surrounding streets within walking distance as well as establishing a high trip frequency public transport route.

Northside Plaza is a 6,483m² neighbourhood shopping centre located at the corner of Musgrave and High Streets. A 4,372m² Woolworths anchors the centre, with the centre focusing on providing for the major weekly shopping needs of residents within the local area, with some 71% of the total floorspace attributed to food (including fresh food, packaged liquor and takeaway stores), although noting that the mix of retailing within the centre had diversified since 2002, with an increase in the household goods stores and the mix of professional services. Only one small vacancy was evident in the centre at the time of inspection, with a total centre occupancy rate of 99%. As at October 2010, this centre is slightly larger than Allenstown in South Rockhampton. Should expansion to Allenstown occur (approx. 2,000m²), the centre would be larger than Northside Plaza.

Berserker

The Berserker Street/Elphinstone Street Minor Centre has developed at the juncture of Berserker and Elphinstone Streets in the south-east of North Rockhampton. An eclectic mix of activities is present, including older style premises, tutoring facilities and some convenience retail. A large butcher is likely to attract trade from an expansive area. A vacant site is currently utilised for off-street parking.

FIGURE 4.5: Frenchville



Dean Street Minor Centre at Frenchville on North Rockhampton’s central north-east, Dean Street accommodates the Frenchville Shopping Centre and strip development, providing a roughly equivalent floorspace area. The Local Business zoned area for this Minor Centre is larger than that designated for the nearby Berserker Village Local Centre. The **Frenchville Shopping Centre** provides a relatively traditional convenience retail offer and provides for the top up shopping needs of the residents of inner north-east North Rockhampton. The **Dean Street retail strip** was comprised of generally larger tenants, including a combination of medical and minimal convenience facilities.

Approximately 1,895m² of space is provided, comprising a medical centre, chemist, physiotherapist, post office, vet, vehicle sales, hair dresser, fashion outlet, chinese restaurant and Berserker Tavern (1,924m²). The centre is in close proximity to schools and a major northside Queensland police station.

Adjacent to the existing facilities, **Frenchville Plaza** is under construction on the former vehicle sales yard fronting Dean Street, Frenchville, to be anchored by a 1,500m² IGA supermarket and to incorporate 4 specialty stores. This centre would complement the existing mix of convenience based retailing in Frenchville, and provide a larger convenience oriented supermarket for top-up shopping and weekly shopping needs.

Koongal Minor Centre. A very small Minor Centre has been designated at Koongal, at the far east of North Rockhampton’s residential area, comprising a general store.

The **Berserker Village Local Centre** is a small centre surrounded by residential development in north-east Rockhampton. The centre has suffered vacancies for many years and is currently being redeveloped as a small strip centre with limited parking. The remainder of the site is being redeveloped as a retirement village.

FIGURE 4.6: Park Avenue



Stockland Rockhampton

Stockland Rockhampton is the combination of the former Rockhampton Shopping Fair constructed in 1985 and the Kmart Plaza, which opened in 1979. Stockland Rockhampton and Kmart Plaza, located off Musgrave Ave in North Rockhampton, together form the largest retail offer for the region with two large supermarkets, two discount department stores, a cinema complex and over 190 specialty stores on completion. The two stage redevelopment process has been completed, and Stockland has also undertaken a redevelopment of the foodcourt. The centre comprises some 57,596m² of floorspace (GLA) and is anchored by a 8,211m² Big W, 5,999m² Kmart, 4,223m² Woolworths, 3,542m² Coles and reported a June 2010 turnover of \$303.8 million. Of the total turnover, retail productivity represented approximately \$6,607/m², 14.3% greater than the Queensland average (\$5,778/m²) for sub-regional type centres as indicated in the PCA Shopping Centre Directory.

Park Avenue

The Park Avenue Local Centre is centrally located on Main Street in the middle of residential development, and away from non-residential traffic routes, suggesting that the centre would have a relatively contained Catchment Area, and would service the day-to-day needs of local residents and workers. The 1,722m² activities centre comprising Park Avenue Mall and Strip on Main Street, is immediately adjacent a Catholic Primary School and within walking distance of the state primary school, generating strong traffic congestion during peak drop off and pick up periods. This is an older precinct, including a standalone Foodworks supermarket, the Park Avenue Mall, comprising a post office, chemist, St. Vincent De Paul, hairdresser, snack bar and credit union and older premises on the northern side of Main Street. A tavern is also located to the west of this centre.

Richardson Road

Comprising an eclectic mix of activities, including light industry activities, the **Richardson Road Local Centre** includes the One Stop Shopping Centre, incorporating traditional convenience facilities such as a convenience supermarket, bakery, liquor store, hair salon and a newsagency. This Local Centre incorporated a number of small premises and centres, each with separate parking entries and limited vehicular or pedestrian connectivity. Almost 5,000m² of space is located in this centre.

Norman Gardens

Business Areas have developed along the Highway through Rockhampton. The exposure to substantial traffic volumes from the southern and northern stretches of this route has attracted a range of tenants including motels, service trades, retail showrooms, convenience retail, fast food, caravan parks, vehicle sales yards and service stations.

Yaamba Road Retail showroom and service facilities have developed in ribbon fashion along Yaamba Road to the north of Stockland Rockhampton, incorporating a mix of showroom, service industry, and other Highway uses such as motels and service stations. Spotlight is located to the north of Moores Creek Road. A concentration of retail showroom and service facilities including Snooze, Autobarn, a convenience centre, Home Hardware, baby goods, tiles, Joyce Mayne, Tradelink, 40 Winks, Bunnings, Betta Electrical and BBQ's Galore, extends from Main Street north to Richardson Road.

This precinct relies on vehicle transport between showrooms, with limited connectivity between facilities in this 1.2km strip that would encourage pedestrian movement for comparison shopping purposes. Showroom facilities are intermixed with other non-retail facilities, representing some opportunity for consolidation of activities within this node.

Red Hill Homemaker Centre is a dedicated homemaker centre on the eastern side of Yaamba Road, also comprising a limited array of convenience retail facilities. The centre includes national chains such as Harvey Norman and the Good Guys, and comprises some 22,771m² of retail space. The centre was fully occupied at the time of inspection. The convenience component was quite busy at the time of inspection, and appears to offer an important convenience shopping and service destination (post office) for surrounding residents and businesses. The carpark of the centre is also utilised as a drop-off facility for nearby schools.

Glenmore Local Centre. At the corner of Farm Street and Yaamba Road, the Glenmore Centre comprises the Glenmore Tavern and Motel, including drive-through bottleshop, McDonald's and Red Rooster. Convenience tenants include Dominoes Pizza, fish and chips, Civic Video, kebabs and a noodle shop. Whilst tenants fronting Yaamba Road are afforded high levels of accessibility and exposure, the remaining tenants are set back and appear to be experiencing trading challenges, particularly with construction activity in the carpark at present. The Glenmore Tavern and Motel fronts Yaamba Road and represents an anchor for this node. Located at the juncture of Yaamba Road and Farm Street, this centre is well located to service the top-up shopping and convenience needs of residents of north-west Rockhampton.

Immediately adjacent to this centre, but with separate access points, is the Supa IGA anchored **Glenmore Plaza**. This centre was fully occupied at the time of inspection and comprised approximately 4,087m² of floorspace including a medical centre, Priceline, Liquorland, bakery, newsagent and Subway, catering for weekly and top-up shopping needs.

Other facilities located in this node, extending North along Yaamba Road, include a Motel, Caltex Service Station, Self Storage and a 5,400m² Amart Furniture store. A Bunnings Hardware store also enjoys the profile afforded by the main road frontage.

Parkhurst

A tavern is currently located on the corner of Boundary Road and Yaamba Road, opposite the Rockhampton Historical Village, and adjacent a motel. A range of business/industry activities are located in Parkhurst stretching north on Yaamba Road, including the standalone DPI centre and conference facility at the corner of Yeppoon Road.

The Caves

The village centre in The Caves comprises a tavern, general store, community hall and garden centre. The Caves State Primary School is also located to the north-west of the centre. This centre provides basic top-up shopping needs for residents of the surrounding rural residential community and residents would travel south to Rockhampton for weekly and higher order needs.

Yeppoon

TABLE 4.5: GLA for Yeppoon

Centres	Retail & Services	Office	Hospitality	Education	Health	Government & Service	Vacant	TOTAL	Employment
	SQM	SQM	SQM	SQM	SQM	SQM	SQM	SQM	No.
Yeppoon									
CBD	10,162	2,048	2,634	0	140	282	1,078	16,344	569
Cedar Park	1,500	78	221	0	180	0	0	1,979	66
Keppel Bay Plaza	4,608	734	137	0	0	0	502	5,981	188
Yeppoon Central	12,716	160	662	0	0	0	0	13,538	438
TOTAL	28,986	3,020	3,654	0	320	282	1,580	37,842	1,262
Approved Shopping Centre	985	0	0	0	0	0	0	985	31
Proposed Keppel Bay Plaza expansion	2,500	0	0	0	0	0	0	2,500	78
ADJUSTED TOTAL	32,471	3,020	3,654	0	320	282	1,580	41,327	1,371

Source: Urban Economics Surveys 2010

There are two major commercial precincts within Yeppoon; the town centre/strip, including the Keppel Bay Plaza and the Yeppoon Central shopping centre, which opened in 2008. A range of smaller convenience centres is also distributed on the coastal strip including Cedar Park.

The **town centre** strip extends along James and Normanby Street from the Esplanade to Keppel Bay Plaza, and provides a mix of tourist oriented retailers, convenience retailers and a range of higher order goods and services such as the library, professional service offices (eg. Solicitors, accountants), financial institutions, and community and administrative services such as Centacare, Centrelink and employment agencies.

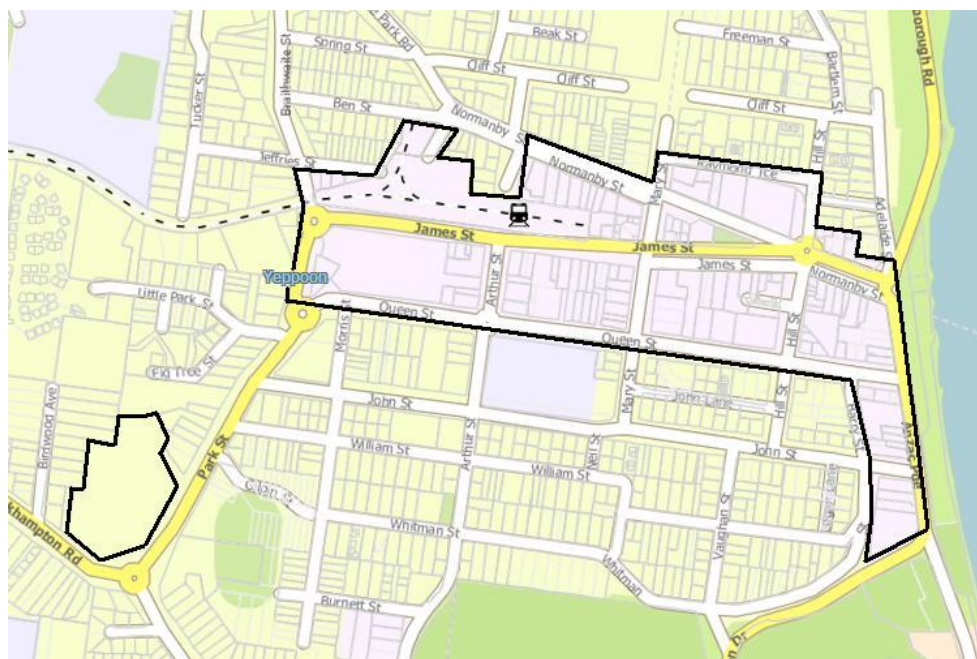
Anchored by a Coles supermarket, **Keppel Bay Plaza** effectively forms an anchor for the western end of the main street, comprising approximately 5,981m² of floorspace, 8% of which was vacant at the time of inspection. It is apparent that this centre has been impacted as a result of the opening of the Yeppoon Central shopping centre, with tenants such as Payless Shoes and Jay Jays relocating to Yeppoon Central. During inspections in 2004 conducted by Urban Economics, there were no vacancies recorded at Keppel Bay Plaza.

Yeppoon Central, located to the south west of the town centre, is anchored by a Big W DDS and a Woolworths supermarket. The 13,538m² centre was fully occupied at the time of inspection, and provides for a higher order comparison shopping trip for the needs of households within the coastal area, reducing the need to travel to Rockhampton for household essentials. This centre is approximately double the size of Northsize Plaza in Rockhampton.

Cedar Park is a convenience oriented local centre located on Cedar Ave, Taranganba and anchored by a Spar supermarket. The 1,979m² centre provides for top-up shopping and service needs, including a gym and medical centre and was fully occupied at the time of inspection.

Matthew Flinders Drive is a business designation that is currently occupied by a limited array of convenience and business uses including brew shop and restaurants. Other sites remain vacant and occupied by older dwelling units, suggesting some capacity for redevelopment and amalgamation of sites for a more prominent convenience centre if required. However, a major convenience centre in this location is likely to impact on and undermine Cedar Park. The Study Team recommends consideration of other uses e.g. mixed use/ residential to consolidate residential activity in this area.

FIGURE 4.7: Yeppoon



Emu Park

TABLE 4.6: GLA for Emu Park

Centres	Retail & Services	Office	Hospitality	Education	Health	Government & Service	Vacant	TOTAL	Employment
Emu Park	SQM	SQM	SQM	SQM	SQM	SQM	SQM	SQM	No.
Emu Park Local Centre	1,479	243	108	-	-	-	218	2,047	64
<i>TOTAL</i>	<i>1,479</i>	<i>243</i>	<i>108</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>218</i>	<i>2,047</i>	<i>64</i>
Approved IGA Shopping Centre	3,075	120	-	-	-	-	-	3,195	102
<i>ADJUSTED TOTAL</i>	<i>4,554</i>	<i>363</i>	<i>108</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>218</i>	<i>5,242</i>	<i>166</i>

Source: Urban Economics Surveys 2003, 2010

Emu Park is a traditional coastal village, providing a mix of top-up shopping facilities to cater for the surrounding resident and tourist populations. Comprising approximately 2,047m² of floorspace, the centre incorporates basic top-up shopping facilities, several real estate agencies and a number of vacant tenants. Overall, vacant space comprised some 11% of total floor area. The centre is opposite the park and has community facilities.

The centre designation in Emu Park is far more extensive than that occupied by centre activities, with a number of lots occupied by detached houses. Whilst affording capacity to expand the centre, there may be challenges in securing and amalgamating sites affordably to warrant redevelopment and expansion of centre activities. The Commercial Centres Study will investigate the opportunities for this centre.

A 2,525m² Supa IGA is under construction within the Emu Park Town Centre, together with 120m² office and 50m² of specialty stores, to be located on the corner of Emu and Hill Streets. This development will improve the array of facilities to cater for the weekly and fortnightly shopping needs of Emu Park and Zilzie residents, reducing the need to travel to Yeppoon to access supermarket shopping.

With the exception of the Supa IGA site, Emu Park contains few large vacant sites within the primary activity area, however multiple sites are located around the commercial activity area and a number of business sites are occupied by detached dwellings, suggesting an opportunity for further amalgamation and redevelopment.

Zilzie The Seaspray Resort includes a range of health and wellbeing facilities particularly targeted at catering to the needs of local residents and resort visitors, including a medical centre, pharmacy and QML as well as the resort’s restaurant. The Seaspray Resort has also lodged an application for a convenience centre, including convenience supermarket, specialty shops, restaurant and office on Svendson Road, Zilzie, in catering to the top-up needs of residents of the immediate surrounding area.

Tourist resort retailing was also proposed within the masterplan for the Great Barrier Reef International Resort, comprising 8000m² tourist retail inclusive of a 1000m² single supermarket. Although the developer mooted plans for a large retail centre, there is concern that there is insufficient catchment to support it as well as concerns that the centre would be at odds with the identity of the resort.

A number of proposals for supermarket anchored developments west of Emu Park have also been mooted, some of which have been the subject of appeals, and demonstrative of developer interest in securing a full line supermarket in Emu Park.

FIGURE 4.8: Emu Park



GRACEMERE

TABLE 4.7: GLA for Gracemere

Centres	Retail & Services	Office	Hospitality	Education	Health	Government & Service	Vacant	TOTAL	Employment
Gracemere	SQM	SQM	SQM	SQM	SQM	SQM	SQM	SQM	No.
Gracemere Local Centre	1,890	69	484	-	441	202	87	3,173	108
<i>TOTAL</i>	<i>1,890</i>	<i>69</i>	<i>484</i>	<i>0</i>	<i>441</i>	<i>202</i>	<i>87</i>	<i>3,173</i>	<i>108</i>
Approved Gracemere Shopping World	12,100	-	-	-	-	-	-	12,100	378
Proposed Convenience Centre	430	-	-	-	-	-	-	430	13
<i>ADJUSTED TOTAL</i>	<i>14,420</i>	<i>69</i>	<i>484</i>	<i>0</i>	<i>441</i>	<i>202</i>	<i>87</i>	<i>15,703</i>	<i>499</i>

Source: Urban Economics Surveys 2010

Gracemere, approximately 10km to the south-west of Rockhampton has been the subject of developer interest for additional retail facilities, with a Woolworths/Big W centre approved, and currently undergoing site works. Comprising approximately 3,170m² of commercial space, the Gracemere town centre is focused on the western side of Lawrie Street. The centre includes a convenience store, and a range of specialty stores including takeaway food, newsagent, hardware.

A 12,100m² centre has been approved at the entry to the Gracemere township, with frontage to the Capricorn Highway. Currently under construction, the Gracemere Shoppingworld is expected to be anchored by a Big W DDS, a Woolworth supermarket and comprise a range of specialty stores. This centre would present an intervening location for Gracemere residents and reduce the need to travel into Rockhampton for their major weekly and higher order shopping and household needs.

A 1,645m² site is currently being marketed for a proposed 430m² convenience centre and a number of sites around the future Shoppingworld and the existing town centre strip are currently being marketed for sale.

FIGURE 4.9: Gracemere



MOUNT MORGAN

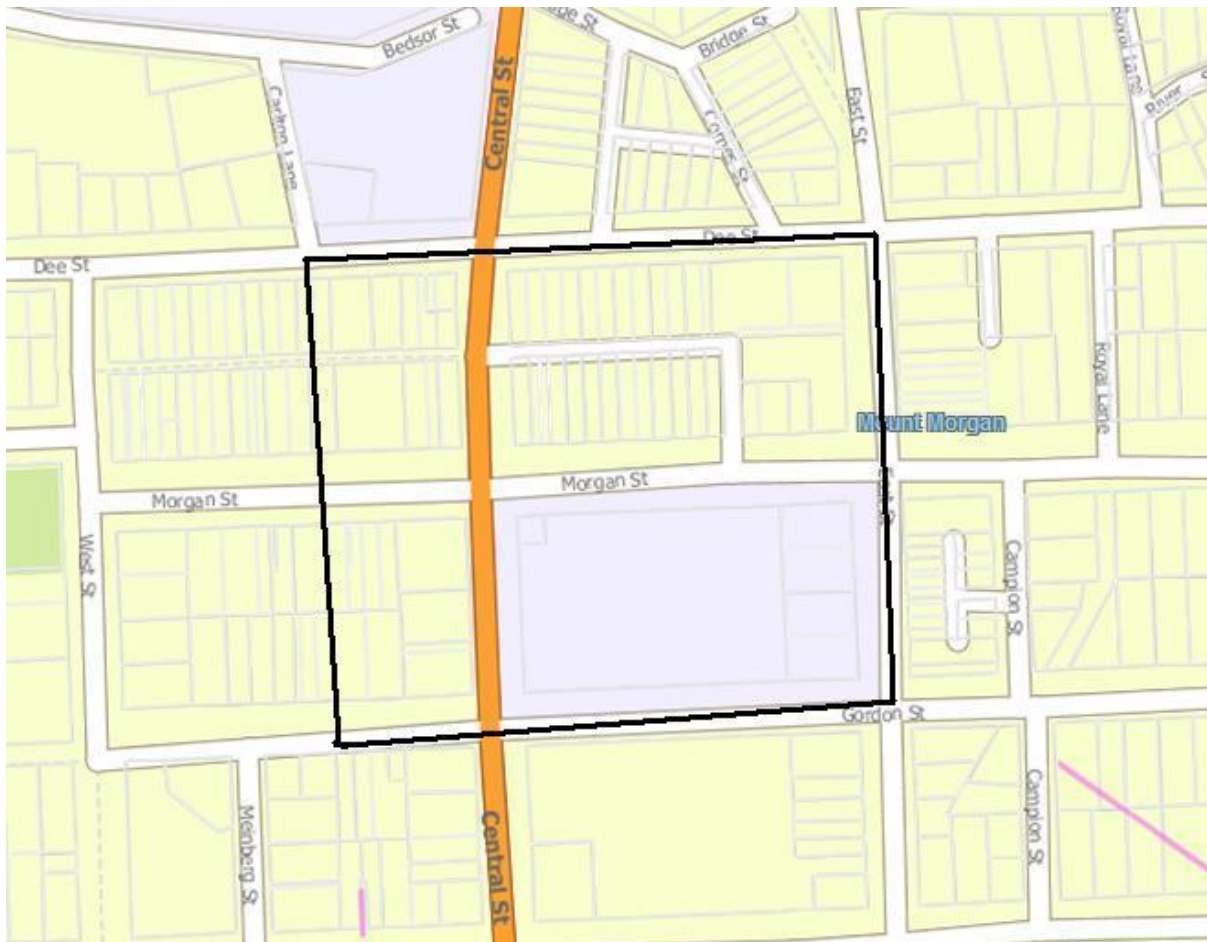
TABLE 4.8: GLA for Mount Morgan

Centres	Retail & Services	Office	Hospitality	Education	Health	Government & Service	Vacant	TOTAL	Employment
Mount Morgan	SQM	SQM	SQM	SQM	SQM	SQM	SQM	SQM	No.
Mount Morgan Local Centre	3,066	0	464	0	256	426	467	4,678	147

Source: Urban Economics Survey 2010

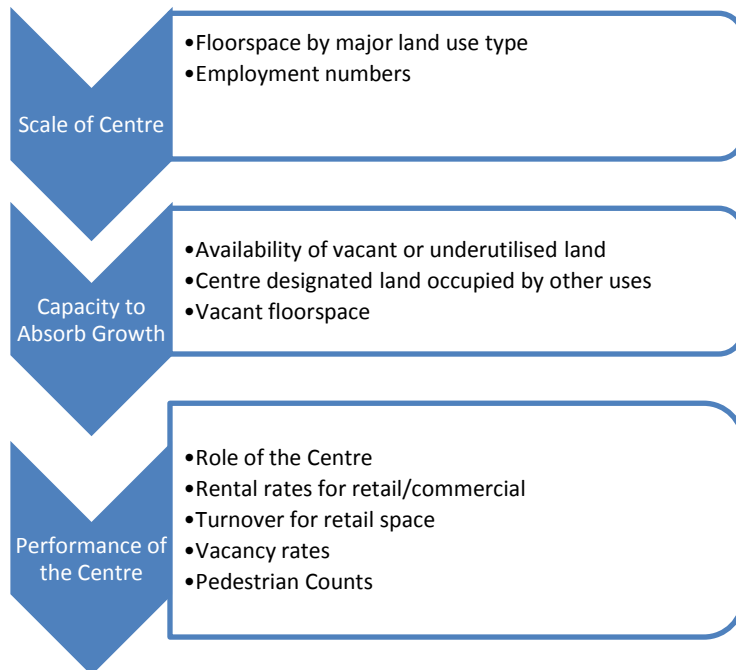
Mount Morgan comprises approximately 4,678m² of commercial floorspace, 10% of which was vacant at the time of inspection, suggesting a somewhat stressed commercial centre environment. The centre provides a range of basic top-up shopping goods eg. Hardware, newsagent, pharmacy as well as employment services and a Retravision store. A number of other uses eg. Hospital and water treatment plant are also located within the business designation, but have not been included in these floorspace estimates.

FIGURE 4.10: Mount Morgan



4.4 Key Performance Indicators

Key Performance Indicators provide a mechanism for monitoring and evaluating the performance and development of centres within the RRC over time. The Study Team has defined the following KPI's for the centres in the RRC area:



It is apparent that Stockland Rockhampton provides the most significant concentration of retail space and employment within the RRC, with the Rockhampton CBD providing the most significant commercial floorspace and employment. Musgrave Street's expansive ribbon development format, together with Stockland Rockhampton concentrates employment and retail floorspace within the RRC.

Similarly, the Yeppoon Central dominates the provision of retail space in Yeppoon, and provision of employment opportunities, with the town centre and Keppel Bay Plaza demonstrating higher vacancy rates, a lower concentration of chain tenancies and a more diverse array of other commercial activities.

The Gracemere and Emu Park townships at present do not provide the range of goods and services that would cater for the weekly or fortnightly shopping and service needs of surrounding residents, with capacity to develop a range of higher order activities within the existing business designations. Both centres are subject to retail development which will enhance the retail offer within these centres.

4.5 Issues for the Commercial Centres Study

- The Rockhampton CBD continues to be impacted by Stockland Rockhampton and its expansions, with the retail role of the CBD secondary to the higher order, comparison shopping role of Stockland Rockhampton.

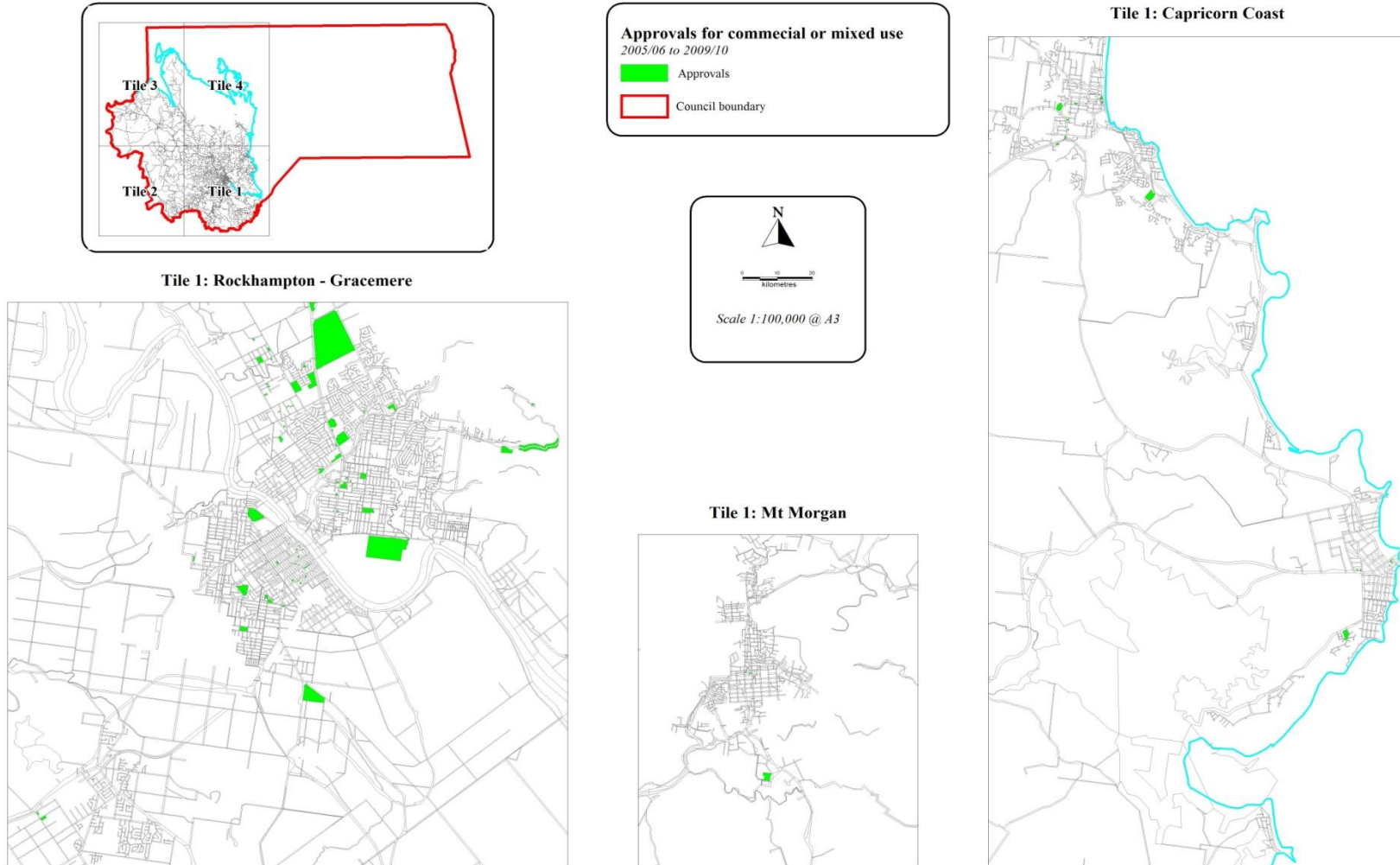
- It is noted that the performance of the Musgrave Street strip appears to have improved, with lower vacancy rates since 2002/03, although noting that some of the prime retail space is now occupied by secondary uses and other non-retail uses.
- The latest published information for Stockland Rockhampton was dated prior to the completion of the extensions and redevelopment. The reported MAT's for Stockland Rockhampton demonstrated a decline of some 6% in turnover between the 2008 and 2009 Property Council of Australia' Shopping Centre Directories, reflecting the slowing in population growth between 2008 and 2009 and more particularly the opening of Yeppoon Central in 2008, which introduced a Woolworths supermarket and Big W DDS to Yeppoon, reducing the need to travel to Rockhampton for the major weekly/fortnightly shopping trip for households essentials.
- Comparable change in turnover analysis for Keppel Bay Plaza and City Centre Plaza was not available, with constant turnovers reported which appear to be at odds with the changes to the retail network. It is noted that there has been a significant increase in the number of vacancies within Keppel Bay Plaza and that there has been relocation of tenants from both Keppel Bay Plaza and the Yeppoon town centre to Yeppoon Central.
- According to the Shopping Centre Directory, Stockland Rockhampton achieved a productivity level of \$6,607/m², which was 14.3% greater than the average for all other classified sub-regional shopping centres within the Directory (\$5,778/m²)
- There are a number of proposals for major new shopping centre developments within the RRC, with a concentration within the urban centre locality of the Rockhampton township. If all developed, they could comprise in excess 50,000m² of retail floorspace, or more than 50% of the projected growth in residential derived demand for retail floorspace to 2031.
- There is almost 100,000m² of commercial and retail floorspace that has developed in ribbon fashion along Musgrave Street/Yaamba Road, including the Red Hill Homemaker Centre, but excluding the Stockland Rockhampton.

5.0 Opportunites and Constraints

5.1 Approved Centre Activities

Key commercial approvals are highlighted on the following FIGURE 5.1, reflecting relatively dispersed commercial approval activity. These approvals have focused on commercial activities, retail, retail showrooms, medical etc; activities that could locate in centres.

FIGURE 5.1



5.2 Regional Centre Changes and Influences

The Rockhampton Region shares a similar identity to numerous other Regional Centres such as Mackay, Gladstone and Emerald in that each have the opportunity to lever off opportunities through the resources sector, agriculture and industrial development. This shared identity allows for the influence of these other centres on the development of Rockhampton.

Mackay is recognised as one of the fastest growing regions in Australia. Evidence of this growth has seen approval of the extension of the Canelands Central shopping centre to include the region's first Myer department store and over 65,000m² of GLA. Further centre expansion to Mackay will see the Mount Pleasant shopping centre in the city's north adding 15,000m² of GLA to become 37,732m². Other notable activity has seen a sprawl of residential development on Mackays northern beaches and in previously smaller towns to the west like Walkerston, Marion and Mirani. Parallels to the Rockhampton Region can be drawn with Mackay in that both have seen dwindling CBD activity and increased population in coastal areas (Yeppoon). The influence of the resources sector on both regions has seen housing affordability reduce and populations in traditionally less active towns increase.

Gladstone has recently received a boost from the news that various LNG projects have been approved and will be a major economic opportunity for the town. Hand in hand with the LNG projects are the operations of the Gladstone Ports Corporation that delivers a significant share of Queensland's resource riches to the world. The industrial strength of the Gladstone Region is also evident in that it boasts the world's largest alumina refinery, Australia's largest cement and aluminium operations and Queensland's largest power station. Unlike Mackay however, Gladstone does not parallel Rockhampton in the provision of higher order retail and commercial activities. This comparative advantage could see Rockhampton leveraging off the needs of the some 30,000 strong Gladstone population.

Emerald is the flagship town of the Central Highlands Region and supports a population of around 15,000 people. The town has established air, road and rail infrastructure and the capability to support the local and some higher order needs of the Region. The town is noted as having a mobile population of resource sector workers that fly in and fly out, a part of which would be drawn from base's within the Rockhampton Region. The higher order needs (outside of what is available in Blackwater township) of Emerald's population would likely also be drawn from Rockhampton. A Big W DDS and Woolworths Supermarket has been approved in Emerald and a number of homemaker facilities such that Emerald residents would have a reduced need to travel to Rockhampton for household and comparison shopping needs.

A modern mining town servicing the nearby open cut coal mines, **Blackwater** is known as the Coal Capital of Queensland with a population of approximately 30,000 (2009). The key service town of the Shire, Blackwater maintains its role as the main business and economic centre, providing higher order services and a range of community and civic functions. The township also has established air, road and rail infrastructure. Similar to Emerald, a portion of the higher order needs of Blackwater's population (outside of those currently present) would likely be drawn from Rockhampton, but access to an improved array of facilities in Emerald may reduce the need to travel to Rockhampton.

According to the Blueprint for Queensland's *LNG Industry* prepared by the Queensland government, there are currently eight LNG projects proposed in Queensland, seven of which are proposed to be located in Gladstone. If all eight of the projects were to proceed, the capital total expenditure would be in excess of \$40 billion. Increasing interest and investment in mineral and energy projects are abundant in Central Queensland and is likely to have a flow on benefits for employment, productivity, population growth, and overall economic growth in the region.

5.3 SWOT Analysis

This Section examines the Strengths, Weaknesses, Opportunities and Threats/Constraints (SWOT) influencing the existing mix of centres within the current network in the RRC. This SWOT highlights the capacities and niche potential of existing centres, seeking to add value to existing centres, consolidate the activity and role of the centres whilst providing direction for the preparation of strategies which will seek to overcome constraints to development, inefficiencies in centre activity or address underperforming centres. Strengths and Weaknesses are those factors internal to the centres and the RRC area, whilst Opportunities and Threats are those factors external to the region and external to centres such as population growth, economic opportunities, policy changes that may influence the potential for centres.

The SWOT analysis was undertaken on the centres as a whole, to identify efficiencies/inefficiencies in the provision of services and facilities, the interconnectedness of the network and any gaps in its provision (TABLE 5.1). The SWOT approach was also applied to each community of interest to highlight issues and opportunities specific to each centre (TABLE 5.1)

TABLE 5.1: SWOT Analysis

Community of Interest	Strengths	Weaknesses	Opportunities	Threats
North Rockhampton	<ul style="list-style-type: none"> ▪ CQ University ▪ Large, modern retail offer including Stockland Rockhampton ▪ Entertainment and Recreational Facilities • Established community services ▪ Population growth ▪ Above average incomes ▪ Function centre/meeting space ▪ Higher order comparison shopping focus 	<ul style="list-style-type: none"> ▪ Detached from South Rockhampton ▪ Limited visitor accommodation ▪ Berserker Hills limits catchment potential ▪ Ribbon development is vehicle dependent ▪ Limited urban design and accessibility Musgrave Street ▪ Limited pedestrianisation between centres ▪ Older strip retailing in local centres ▪ Internally located convenience centres eg. Former Berserker village 	<ul style="list-style-type: none"> ▪ Visitor accommodation ▪ Expansion of new residential areas ▪ Opening of the Parkhurst residential area ▪ New centres in Norman Gardens/Parkhurst to cater for growth areas ▪ Gaps in the retail mix ▪ Improved connectivity for businesses with CQU eg. Training 	<ul style="list-style-type: none"> ▪ New standalone shopping centre in South Rockhampton ▪ Large scale standalone shopping centre in North Rockhampton ▪ New sub-regional centres in eg. Other regional towns ▪ Economic downturn
South Rockhampton	<ul style="list-style-type: none"> ▪ CBD incl. City Centre Plaza ▪ Cultural, Entertainment and Recreational Facilities ▪ Established community services ▪ Airport 	<ul style="list-style-type: none"> ▪ Detached from North Rockhampton ▪ Limited land for further development ▪ Flood prone zone ▪ Heritage buildings ▪ No DDS or 	<ul style="list-style-type: none"> ▪ Airport Hotel ▪ Industry development complimenting Airport ▪ University or TAFE ▪ New shopping centre in the CBD ▪ Department store in the CBD ▪ Higher density 	<ul style="list-style-type: none"> ▪ Ageing population ▪ Commercial development on the Airport site ▪ Flooding ▪ Large scale standalone shopping centre

	<ul style="list-style-type: none"> ▪ Visitor accommodation ▪ Medical facilities i.e. hospital ▪ Services Gracemere community ▪ Highway business has fronted Bruce Highway 	<ul style="list-style-type: none"> ▪ Department Stores ▪ Railway line runs through centre of CBD ▪ Expansive CBD ▪ No clearly defined core of the CBD ▪ Poor connectivity of business area to core of Allenstown ▪ Limited land available within Allenstown, Wandal and CBD to allow for expansion 	<ul style="list-style-type: none"> ▪ residential in CBD and Allenstown ▪ Potential for medium density surrounding Wandal ▪ Expansion of Allenstown 	<ul style="list-style-type: none"> ▪ outside the CBD ▪ Gladstone Rd expands the level of ribbon development similar to Musgrave St ▪ Bruce Highway bypasses Rockhampton
Yeppoon	<ul style="list-style-type: none"> ▪ Tourism ▪ Mixture of commercial and retail offer ▪ Coastal town feel ▪ Yeppoon Central ▪ Services other communities on the Coast ▪ Entertainment and Recreational facilities ▪ wide main street, offers high levels of amenity ▪ on-street parking ▪ high occupancy rates in the town centre 	<ul style="list-style-type: none"> ▪ limited connectivity between main street and Yeppoon Central ▪ long main street ▪ limited land for bulky goods development ▪ bulky goods land in the west of Yeppoon is focused on standalone tenancies not the creation of a bulky goods/homemaker centre ▪ redevelopment of Keppel Bay Plaza/upgrade 	<ul style="list-style-type: none"> ▪ Tourism destination considering proximity to Great Keppel Island ▪ Tourism related employment ▪ Qld rail site for further town centre expansion ▪ Mixed use development in the town centre ▪ Residential and short term accommodation in the town centre ▪ The Strand development will offer an eastern anchor for the Town Centre ▪ New hospital has opportunities for medical or wellbeing precinct ▪ Wellbeing precinct surrounding private hospital 	<ul style="list-style-type: none"> ▪ Development of standalone shopping centre in Hidden Valley ▪ Long distances between town centre and Yeppoon Central undermines capacity for strong commercial heart ▪ Large new centre in Emu Park

	<ul style="list-style-type: none"> vacancies in KBP have capacity to attract new tenants to town underutilised land, and vacant land for further expansion 		<ul style="list-style-type: none"> Residential expansion of Taranganba/Lamer moor Seachange demand driving population growth in the coastal strip 	
Gracemere	<ul style="list-style-type: none"> High population growth High Household Income Approved residential development Proximity to Rockhampton Stanwell power station Town centre that offers a mix of day-to-day goods and services Land surrounding the town centre with capacity to absorb additional commercial uses 	<ul style="list-style-type: none"> High % of mortgaged properties Limited access to specialised services and retail e.g. Furniture Need to travel for higher order goods and services Commuting for employment and continued reliance on Rockhampton for higher order service and administrative needs 	<ul style="list-style-type: none"> Visitor accommodation for fly in fly out travellers Approved sub-regional shopping centre Expansion of residential estates Growth of the Gracemere-Stanwell industry corridor Reduce escape expenditure Opportunities for additional employment in Gracemere 	<ul style="list-style-type: none"> Increasing housing prices Limited connectivity between the approved sub-regional centre and the existing town centre
Mount Morgan	<ul style="list-style-type: none"> Affordable housing and land Historical significance Proximity to Bowen Basin High property 	<ul style="list-style-type: none"> Isolated location Low household income High unemployment rates Old 	<ul style="list-style-type: none"> Increased community services Tourism and recreation Extension of mining activities Proximity to Gladstone and Bowen Basin (LNG) 	<ul style="list-style-type: none"> Ageing population Further isolation with growth in Gracemere declining population

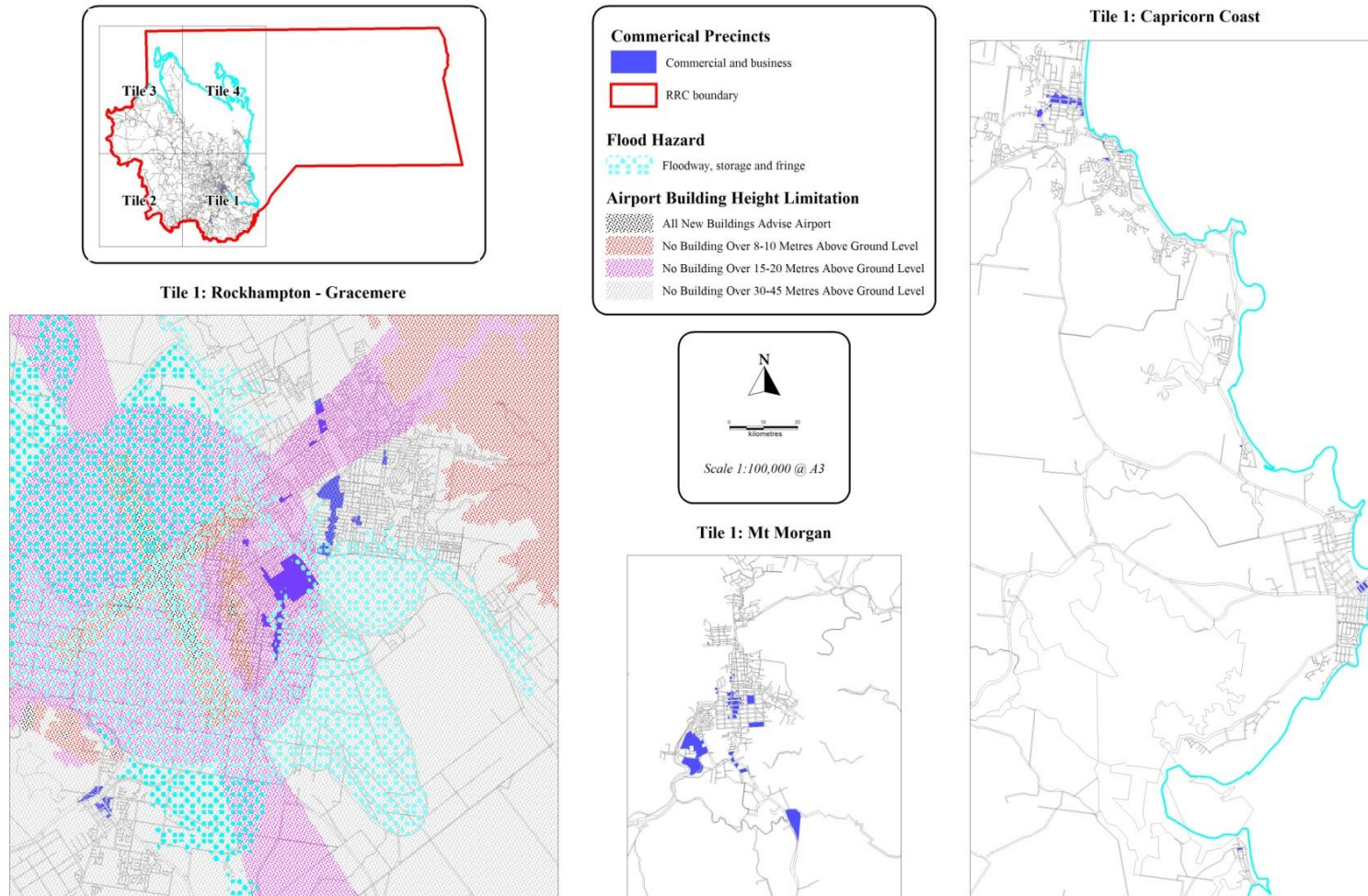
	<ul style="list-style-type: none"> ownership Sufficient convenience retail offer for residents 	<ul style="list-style-type: none"> infrastructure No high order retail Limited community services 	<ul style="list-style-type: none"> projects) Developer releasing affordable housing products 	
Emu Park	<ul style="list-style-type: none"> Coastal village feel Tourist destination High property ownership Retirement Living Private Bus Service to and from Yeppoon Sufficient convenience (necessity) retail offer for residents 	<ul style="list-style-type: none"> Distance from Rockhampton No high order retail Currently no major supermarket for weekly shopping needs 	<ul style="list-style-type: none"> Tourist accommodation, retail and services Tourism related employment Greater mix of retail offer with the opening of the IGA supermarket Approved residential development 	<ul style="list-style-type: none"> Further isolation with growth in Yeppoon Ageing population Premature development of a standalone supermarket based centre may dilute the role of the Emu Park town centre
Other	<ul style="list-style-type: none"> High Income Local convenience facilities within local townships Rural and rural residential lifestyles appealing to families seeking a lifestyle commute 	<ul style="list-style-type: none"> Dispersed residential communities reliant on commuting for services , education retailing. 	<ul style="list-style-type: none"> Mine development in Marlborough Overflow poulation growth from Rockhampton township stimulating demand for affordable, accessible lifestyle environments 	<ul style="list-style-type: none"> Economic and resources downturn
RRC	<ul style="list-style-type: none"> Major highways, transport route Established and growing mining and resources sector Defence 	<ul style="list-style-type: none"> Lacks department store 	<ul style="list-style-type: none"> Department stores as well as other major chains such as - Aldi - Wow! 	<ul style="list-style-type: none"> Growth in Gladstone, Mackay and Emerald etc Downturn in economic conditions Downturn of the resources

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- | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> ▪ Airport capable of handling large aircraft ▪ Strong government sector representation ▪ CQU ▪ Mix of private and public hospitals | <ul style="list-style-type: none"> sector ▪ Opening of Myer in Mackay |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
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The following FIGURE 5.2 illustrates key commercial precincts within the RRC in association with two key constraint layers – flood hazard and airport building height limitations. Other constraint layers were not considered significant for the examination of opportunities and constraints to commercial centre development in RRC.

Centres in North Rockhampton are faced with limited constraints to their continued development and intensification, whilst South Rockhampton centres have more significant flooding and height constraints. In particular, development on Gladstone Road, should be limited to low scale, low intensity development and would not be conducive to significant concentration of activity.

FIGURE 5.2



5.4 Capacity Identification

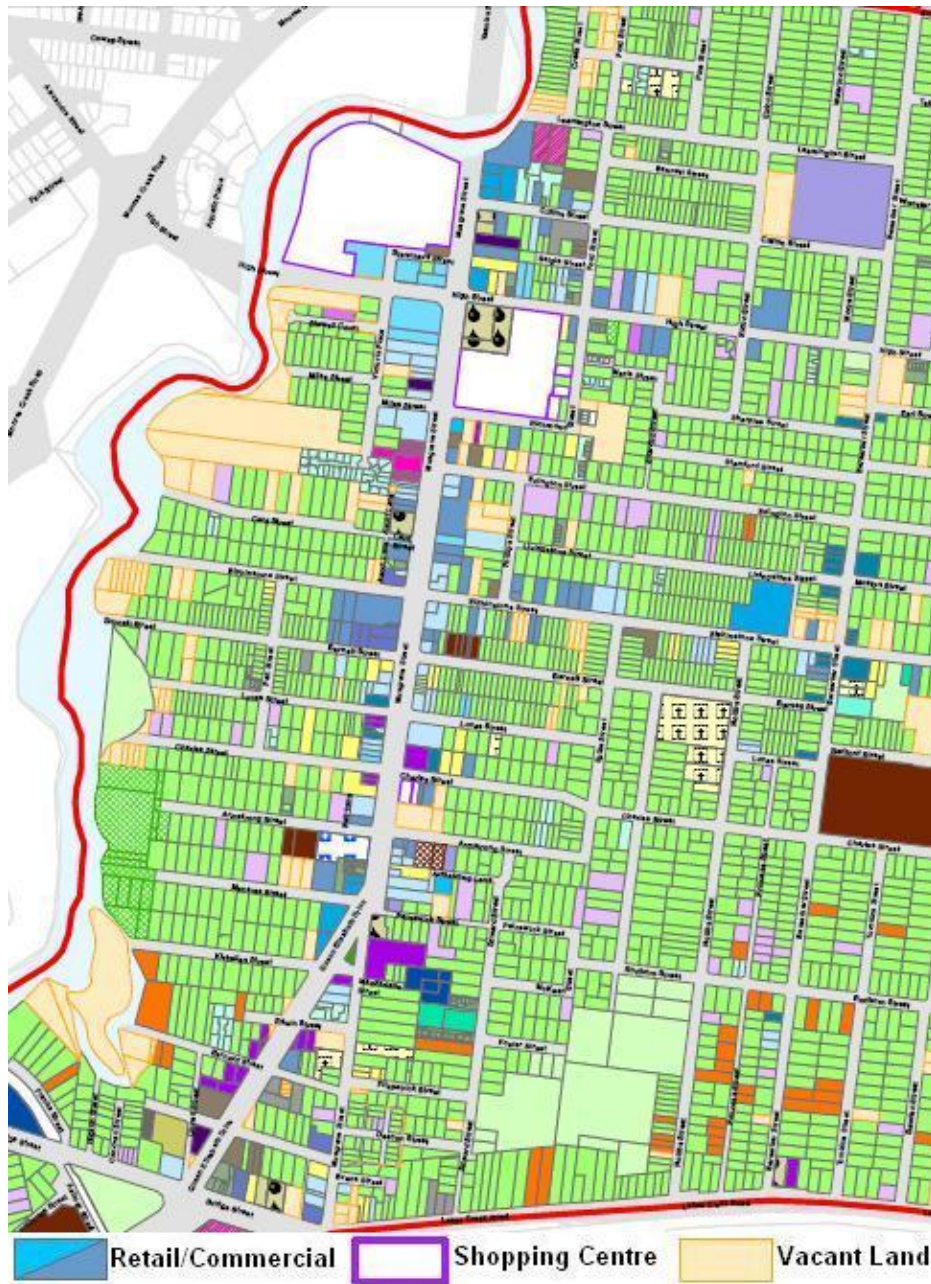
Vacant land and capacity for expansion is varied in the commercial centres. The following outlines capacity to accommodate growth and potential constraints to growth:

The associated maps are drawn from a GHD study conducted in 2009 and are utilised as an indication of general land uses. While some disparity in actual land uses exists, important land uses including shopping centres and commercial localities are highlighted. Vacant sites are noted to include council land and public open space, however, for the purposes of this report only notable vacant sites in and around activity centres have been identified, based on site inspections and desk top analysis. For instance, we have excluded land occupied by transformers or other long term uses.

Musgrave Street and Berserker

- Centre development opportunities along Musgrave St and within Berserker are limited.
- Identified vacant sites around the Musgrave St precinct for the most part do not have frontage to Musgrave St.
- Pressure for redevelopment of residential in “cross” streets for commercial purposes is projected to continue to accentuate the ribbon activity of this precinct.

FIGURE 5.3: Berserker/Musgrave St



Frenchville

- Along Dean Street between Vallis and Honour Streets there are no entirely vacant sites, however some sites are currently under utilised and have capacity for re-development.

FIGURE 5.4: Frenchville



South Rockhampton

- The Rockhampton CBD has a very limited amount of vacant land. Vacant parcels are sparsely distributed and are less than 3,000m².
- Limited opportunity for site amalgamations to create substantial land for a new centre/major new retail area.

FIGURE 5.5: Rockhampton CBD



Allenstown/Gladstone Rd

- The Allenstown area has a very limited amount of vacant land and would require amalgamation of detached dwelling sites for further activity.
- The north of the precinct has less than 5,000m² of total vacant land.
- To the south along Gladstone Road a large site owned by 'Fantastic Property Pty Ltd' is a potential development site and is approximately only 50% utilised by Sam's Warehouse.
- Allenstown Plaza is "landlocked" and likely to experience parking congestion at peak periods. Proposed to expand the centre by some 2,000m², there is some capacity to expand the weekly/fortnightly shopping offer, however, major extensions eg. the addition of land expansive uses such as a second supermarket would require challenging design solutions, including road closures.

FIGURE 5.6: Allenstown



Yeppoon

- Expansion opportunities within the Yeppoon activity centre have increased as a result of the release of the former Queensland Rail site on James Street. Although somewhat narrow, this site presents opportunities to expand the main street offer and consolidate mixed use activities. The site is not considered optional for land expansive uses eg. showrooms.
- Additional vacant sites with the Business and Tourist Precincts are limited, although there is some underutilized land surrounding Keppel Bay Plaza as well as the potential redevelopment of The Strand injecting additional commercial space.
- Sites for development of showroom activities are limited to eg. O'Brien's land, which has had limited takeup and is somewhat constrained as a development option for tenants seeking to lease rather than own their sites.
- Park Street between the main street and Rockhampton Road represents a potential expansion link between Yeppoon Town Centre and Yeppoon Central, with a number of underutilized sites and vacant sites presenting opportunities for further expansion of the town centre. The concern is that this will further elongate an already long town centre and may contribute to a dilution of the perceptions of activity and vitality of the centre.

FIGURE 5.7: Yeppoon



Emu Park/Zilzie

- A number of sites have been amalgamated at the corner of Hill and Emu Streets, with an IGA supermarket and specialty stores currently under construction.
- A number of other sites are designated business but remain occupied by detached homes, indicative of capacity for site amalgamation and redevelopment.
- The developers of Seaspray propose a range of activities to cater for the top-up needs of the Seaspray community, although these would not be conveniently located for the established Emu Park/Kinka Beach communities.

FIGURE 5.8: Emu Park



Mount Morgan

- There are little or no vacant land sites around the Mount Morgan centre that have been identified.

FIGURE 5.9: Mount Morgan



Gracemere

- A large site currently under development and owned by 'Gracemere Shoppingworld Pty Ltd' fronts the Capricorn Hwy and is located at the entry point to the town
- Additional vacant sites are located along Lawrie St, particularly to the east of Lawrie Street and are well situated for potential expansion of the main street/traditional town centre for Gracemere.

FIGURE 5.10: Gracemere



5.5 Gap Analysis

There are a range of activities that have been identified as potential gaps in the market which may need to be accommodated in the centres hierarchy within RRC or other commercial activities that have been on an expansionary phase throughout Queensland:

- Department store
- Aldi
- Factory outlet centre
- Wow Sight and Sound
- Dendy cinemas
- Woolworths hardware store
- Private universities/colleges
- Training/initiation facilities for mining companies
- Shine Lawyers - Personal injury lawyers that are located in other regional centres such as Bundaberg/Mackay/Townsville
- Large legal firms, although most only have a Brisbane office, some with a Gold Coast office
- Large accounting firms eg. PWC – located in Newcastle and Townsville

6.0 Demand Analysis

6.1 Retail Demand

In examining the potential demand for additional retail space, the Study Team has prepared estimates of the additional floorspace that could be generated by residents of the RRC based on the growth of the retail expenditure pool. As outlined in Chapter 3, growth in the available retail expenditure or expenditure pool is due to population growth only and no allowance has been made for growth in the real wealth of the community or for inflation.

TABLE 6.1 below presents the Floorspace demand based on Retail Expenditure (outlined in Chapter 3.0) for the RRC between 2010 and 2031.

TABLE 6.1 Additional Retail Spend and Floorspace Demand from 2006 – 2031

Area	2006-2011		2011-2016		2016-2021		2016-2021		2026-2031		2010-2031		Growth in \$Exp
	\$M	SQM	\$M	SQM	\$M	SQM	\$M	SQM	\$M	SQM	\$M	SQM	
North Rockhampton	38.6	7,713	48.6	9,715	38.3	7,662	25.5	5,108	25.5	5,108	147.4	29,482	31.3%
South Rockhampton	25.1	5,012	19.6	3,926	12.3	2,457	9.8	1,966	16.0	3,194	60.7	12,133	26.6%
Yeppoon	34.7	6,936	51.4	10,275	38.5	7,706	38.5	7,706	45.0	8,990	182.4	36,476	103.0%
Emu Park	13.1	2,628	17.9	3,584	14.3	2,867	17.9	3,584	17.9	3,584	71.2	14,239	136.7%
Gracemere	15.2	3,036	19.6	3,910	15.7	3,140	19.6	3,926	15.7	3,140	74.5	14,902	111.1%
Mount Morgan	0.4	80	0.3	64	0.3	60	0.2	40	0.2	40	1.1	219	3.8%
Other	0.2	47	2.6	527	8.5	1,695	22.8	4,431	28.7	5,735	62.7	12,545	45.1%
Total	<i>127.3</i>	<i>24,451</i>	<i>160.0</i>	<i>32,000</i>	<i>127.9</i>	<i>25,587</i>	<i>134.5</i>	<i>26,891</i>	<i>149.0</i>	<i>29,792</i>	<i>600.0</i>	<i>120,000</i>	<i>52.5%</i>

Source: ABS HES, TABLE 3.9, Urban Economics's Estimates. Slight differences in "\$M" and "SQM" totals due to rounding

The total retail expenditure in the RRC is projected to increase by approximately \$600 million between 2010 and 2031, representing a growth of over 50%. Using the benchmark productivity of approximately \$5000/m², the additional floorspace required for the same period was projected to be approximately 120,000 m².

Additional floorspace demand was projected to be the highest in Yeppoon (approx. 36,000m²) followed by North Rockhampton (approx. 29,000 m²). With the exception of Mount Morgan (approx. 219m²), all other catchment areas generate demand for approximately 12,000 m² to 14,000 m² by 2031.

These floorspace demands are indicative only of the level of additional floorspace that could be demanded by the Study Area communities. For instance, it is recognised that residents typically undertake a range of shopping trips on the way to or from work or school, at higher order centres etc such that not all the projected demand would or indeed should be accommodated within the individual Study Area.

It is also recognised that some of this demand would “escape” to other centres such as Mackay or Brisbane, as residents undertake higher order and comparison shopping in other centres, and that Rockhampton does provide a regional service role, including higher order shopping role for residents throughout the wider FSD and beyond, generating additional demand for floorspace. This study has assumed that these effects will largely balance each other out.

Allowing for some vacant space, which provides a level of equilibrium to facilitate the entry of new tenants, expansion of existing tenants etc, additional retail space of approximately 125,000m² is projected over the period to 2031.

In considering the potential location and mix of additional retail space, the Study Team has examined the following population thresholds:

TABLE 6.2: Indicative Retail Thresholds

Retail Features	Indicative Size	Description	Population Threshold
Department store	10,000	Regional city or town location	150,000-200,000
DDS	6,000-8,000	Metropolitan area	40,000-50,000
		Isolated Regional town	15,000-20,000
Supermarket	3,500	Suburban location	8,000-10,000
Convenience centre	1,500	Residential location	3,000-5,000

This suggests that ultimately in theory, by 2031:

- Gracemere Study Area could support approximately four supermarkets
- Emu Park Study Area could support one supermarket
- There is insufficient demand to support a full-line supermarket in Mt Morgan
- There is potential demand for approximately five to six full line supermarkets in North Rockhampton
- A new sub-regional centre could be supported in North Rockhampton to cater for the growth in the Parkhurst and North Rockhampton population.
- It is unlikely that a DDS could be supported in Emu Park in the medium to long term, unless considerable change to the locational practices of a DDS is evident.

Bulky goods demand includes demand for goods and services that may be purchased at DDS or department stores as well as other traditional retail forms, however, this presents an estimate of the potential growth in demand for land expansive, bulky goods type activities within the RRC. A share of this demand is likely to be supported in Yeppoon to cater for the needs of establishing households, some secondary level space in Gracemere (eg. furniture store, hardware, etc), and some convenience oriented bulky goods in Emu Park (hardware, pool supplies, mower repairs). The remaining space is likely to be concentrated in the Rockhampton urban area, with increasing pressure for facilities on the southern side on Gladstone Road to deliver bulky goods space for residents of the emerging south Rockhampton-Gracemere corridor, as well as space in the northern Rockhampton urban area to cater for the Parkhurst/Norman Gardens growth corridor.

Indicative floorspace estimates for bulky goods space include:

- Rockhampton North 10,000m²
- Rockhampton South 5,000-10,000m²
- Yeppoon 10,000m²-15,000m²
- Gracemere 5,000m²
- Emu Park 2,000m²

Retail showroom type goods (such as those offered at DDS or department stores) in Queensland typically account for approximately 23% of retail expenditure. By 2031 expenditure on retail showroom type goods is projected to represent approximately \$140 million. At average productivity levels for retail showroom outlets, it is estimated that the additional demand for bulky goods would generate demand for approximately 40,000m² of showroom floorspace.

6.2 Commercial and Government Demand

Applying the 2 digit employment projections in the Employment and Economic Issues Report prepared by Economic Associates, we have assumed that the following floorspace demand for Centres in the RRC: Not all the demand for health and wellbeing and educational employment will be directed to centres with employment in schools, hospitals etc typically outside the commercial centres, however, it is recognised that some medical facilities, training services etc do occupy commercial office space, and we have therefore assumed a proportion of this sector demand for employment will be directed to centres.

We have assumed that 100% of the typical commercial office tenants eg. Financial, insurance services will be directed to centres in seeking to consolidate commercial activities in centres.

TABLE 6.3: COMMERCIAL AND GOVERNMENT FLOORSPACE DEMAND

Industry Sector	Employment Increase	Percentage in Centres	m ²	Employment Ratios
Finance insurance	210	100%	4,200	20 m ² pw
Professional, Scientific, technical	348	100%	6,960	20 m ² pw.
Administrative and Support	214	100%	4,280	20 m ² pw
Public admin and Safety	735	100%	14,700	20 m ² pw
Health and Social Services	1,170	40%	18,720	40 m ² pw
Education/Training	1,110	20%	4,440	20 m ² pw
			Total: 68,000	

Source: Economic Associates Employment Estimates; Urban Economics Assessment for Centres

Additional demand may be generated from the mining, agricultural sectors etc, stimulating additional demand for commercial office space in centres.

It is assumed that the majority of this space will be concentrated in the Rockhampton CBD, with a mix of commercial office space to also be accommodated in other centres to accommodate more localised needs.

6.3 Other Services

Other facilities that would complement the role and function and mix of activities in centres include other commercial activities such as quasi retail space (eg. travel agents, real estate, post office, banks and financial institutions), medical centres and health services, gyms, child care centres, recreational facilities.

Higher order centres are expected to incorporate a broad mix of other supporting activities, to create a centre of activity. It is anticipated that community, recreational and other commercial facilities that would potentially complement the retail component by centre type include:

Major Centre	District Centre	Local or Neighbourhood Centre
Regional library	Branch library	Child care centre
TAFE	School	GP/medical centre
Cinemas	Child care centre	Local professional services
Recreational/sporting	Medical centre	Quasi retail
Medical centre	Health services	Community hall
Aged care	Financial institutions	Fitness centre
Hospital	Professional services	Local bus stop
Public transport interchange	Indoor sports centre	Tavern
High density residential	Public transport focus	Service station
Short term accommodation	Service station	Post office
	Tavern	
	Emergency services	

7.0 Planning Scheme Implementation

This section outlines how the existing planning scheme commercial zones provide for the development of centres and recommends a revised approach for the new planning scheme taking into account the Queensland Planning Provisions (QPP). Based on the existing role and nature of each existing centre, this section of the report also identifies a centres hierarchy and the recommended role for each centre under the QPP.

Some specific recommendations for design elements and further planning considerations for the scheme drafters has also been included, with a particular aim of simplifying what is required in the new scheme during the drafting process.

7.1 Centre Outcomes

Three sets of centres terminology has been used throughout this study, including an accurate hierarchy developed by Urban Economics (outlined in section 4.1.2.2), the existing planning scheme centres hierarchy and also the new QPP zones, which will be translated into any future planning scheme for the region. In order to provide clarity around the terminology and assist in making a connection between the terminology used in this report, the current planning schemes and the QPP structure, TABLE 7.1 below categorises each term.

TABLE 7.1

QPP Definition	Urban Economics Definition	Planning Scheme Centres Hierarchy
Principal Centre Zone	Regional and Sub-Regional Activity Centre	<ul style="list-style-type: none"> ▪ Rockhampton Central Business District Commercial Area ▪ North Rockhampton Centre Commercial Area ▪ Yeppoon Central Zone
Major Centre Zone		
District Centre Zone	District Centre	<ul style="list-style-type: none"> ▪ Allenstown Residential Consolidation Area – Allenstown District Centre Commercial Precinct; ▪ Business Zone – Yeppoon Central Site; and ▪ Town Zone (Commercial Precinct) – Gracemere Shopping World.
Local Centre Zone	Local, Convenience or Neighbourhood Centre	<ul style="list-style-type: none"> ▪ Wandal Residential Area – Wandal Local Shopping Neighbourhood Centre; ▪ Frenchville Residential Area – Dean Street Local Shopping / Neighbourhood Centre; ▪ North Rockhampton Residential Consolidation Area – Elphinstone Street Local Shopping / Neighbourhood Centre; ▪ Richardson Road Residential Area – Glenmore Local Shopping / Neighbourhood Centre; ▪ Splitters Creek Residential Area – Main Street Local Shopping / Neighbourhood
Neighbourhood Centre Zone		

		<p>Centre;</p> <ul style="list-style-type: none"> ▪ Splitters Creek Residential Area – Richardson Road Local Shopping / Neighbourhood Centre; ▪ Business Zone (Livingstone Shire Planning Scheme); ▪ Town Zone (Commercial Precinct) (Fitzroy Shire Planning Scheme) ▪ Village Zone (Fitzroy Shire Planning Scheme); ▪ Business Zone (Mt Morgan Shire Planning Scheme).
Specialised	Retail Showroom Facilities	<ul style="list-style-type: none"> ▪ Yaamba Road South Commercial Area; ▪ Musgrave Street and South Rockhampton Highway Commercial Area.

TABLE 7.2 below summarises the existing functions, indicative total floorspace and planning considerations of the existing centres in the Rockhampton region. It is based on the centre definitions devised by Urban Economics:

TABLE 7.2: CENTRES HIERARCHY

Centre ¹	Function	Indicative Floorspace	Additional Floorspace	Additional Centre Activities	Access Considerations	Design Considerations
Regional and Sub-Regional Activity Centre						
Rockhampton Central Business District Commercial Area	The CBD continues to function as the highest order centre for CQ. It will have the broadest range of administrative, civic, commercial, tourism, entertainment facilities in the Rockhampton region. Its retail offer will service residents and visitors, providing leisure/boutique shopping, retailing for CBD workers and convenience retailing for CBD residents and visitors.	Retail: 30,000m ² Commercial: 40,000m ²		<p>Key activities include:</p> <ul style="list-style-type: none"> ▪ Government offices; ▪ High quality, boutique and leisure retail; ▪ Destination retailers (especially department stores); ▪ High rise residential; ▪ Tertiary education campus; ▪ Premium and A-grade office space; ▪ Hotel accommodation; ▪ High rise development along the river (in appropriate locations); and ▪ Active uses, especially restaurants and other footpath uses along the riverbank and key streets (i.e. East Street) 	<ul style="list-style-type: none"> ▪ Improved public transport access required, preferably a high frequency/priority service linked to higher order centres, the university and other key activity nodes throughout the region. PT planning and feasibility study required. ▪ Further car-parking required to improve access to retail and offices. Car parking should be developed in accordance with the current car parking strategy for the CBD. ▪ Improved movement within centre is required – feasibility of a shuttle 	<p>Specific master planning is recommended in order to establish an appropriate urban design regime for the CBD, focussing on:</p> <ul style="list-style-type: none"> ▪ Investigating view corridors and establishing desirable building heights, noting that this is the only centre in which high rise development is anticipated; ▪ Reducing the size of the CBD core; ▪ Linking and integration of identifiable precincts particularly important peripheral nodes currently disconnected from the CBD; ▪ Defining precincts based

¹ [Urban Economics Terminology – see Table 7.1 for clarification.](#)

bus service or similar to be investigated.

- Linking and integration of precincts and key destinations and activity generators; and
- Pedestrian and cycling access and in-centre facilities to be improved.

on use mix and urban design outcomes, including a clear boundary to the CBD;

- Creating active frontages on key streets and the riverbank, and creating a more area-specific set of CPTED² principles;
- Developing built form guidelines to ensure if, for example, high rise development achieves a human scale at street and podium levels;
- Determining appropriate mix of uses within the CBD;
- Streetscaping; and
- Car parking and internal circulation areas

In addition, in the context of the PIP, further detailed investigation is required to establish capacity and augmentation requirements for water supply, sewerage

² [Crime Prevention Through Environmental Design](#)

<p>North Rockhampton Centre Commercial Area</p>	<p>The North Rockhampton Centre Commercial Area functions as a primary destination for high order retail uses servicing the region. The area will not include any further intensification of uses which have the potential to undermine the role of the Rockhampton Central Business District, but rather will play a support role that will encourage the continued strengthening of the CBD's role in the region. Land expansive retail uses and some supporting commercial services will be encouraged within this area, although expansive commercial office space is discouraged.</p>	<p>R: 5,000m² C: 2,000m²</p>	<p>Key activities would include:</p> <ul style="list-style-type: none"> ▪ Discount department stores; ▪ Supermarkets (full-line); ▪ Specialty retail uses; ▪ Medical and allied health facilities; ▪ limited personal services; and ▪ cafes/restaurants. <p>Additional facilities that can be accommodated in the CBD should be discouraged.</p>	<p>Frequent Public Transport connectivity to the CBD is fundamental. Given the central location of the Stockland Rockhampton, there is strong potential for a transit hub within the site itself, including a primary bus interchange.</p> <p>Improved pedestrian connectivity is also required to connect the site to the nearby Musgrave Street Highway Commercial Area and Yaamba Road South Commercial Area.</p> <p>Strengthening connectivity between the stockland Rockhampton, Cinemas and uses in Aquatic Place and between the area and the adjoining Kershaw Gardens is also required.</p> <p>Ensuring there is no worsening of vehicular traffic conditions to Musgrave</p>	<p>and drainage infrastructure within the CBD.</p> <p>General design principles discussed below under the heading "master planning" should apply. Additional Provisions which are specific to this particular area include:</p> <ul style="list-style-type: none"> ▪ Active street frontages to discourage 'big box' retail; ▪ Improved streetscaping to Aquatic Place, Moores Creek Road and Musgrave Street; ▪ Improved CPTED management, particularly within car parking areas; and ▪ Moores Creek enhancement and maintenance.
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<p>Yeppoon Central Zone</p>	<p>The Yeppoon Central Zone functions as the primary centre for communities on the Capricorn Coast, accommodating a broad range of administrative, civic, commercial, tourism, entertainment facilities that do not undermine the principal role of the Rockhampton CBD.</p> <p>Finer grain retail uses and small – medium scale commercial uses will dominate this area, as will tourist oriented centre activities including hotels and motels.</p> <p>The area will also provide higher order destination activities and cater for the weekly</p>	<p>R: 10-15,000m² C: 10,000m²</p>	<p>Key activities would include:</p> <ul style="list-style-type: none"> ▪ High quality, boutique and tourism retail; ▪ Tourist commercial uses; ▪ Mixed use development, particularly in proximity to the foreshore and side streets ▪ Mixed use development on the Qld Rail site; ▪ High rise residential; ▪ Small - Medium scale office space fronting primarily James Street; ▪ Hotel accommodation and other short term accommodation option; ▪ Medium-rise development consistent with community expectations; and ▪ Active uses orientated toward James Street and Anzac Parade. 	<p>Street and Moores Creek Road and on-site circulation and traffic management is a priority.</p> <ul style="list-style-type: none"> ▪ Enhanced pedestrian linkages to the foreshore; ▪ Improved pedestrian connectivity to Keppel Bay Plaza, Yeppoon Central and between James and Normanby Streets; ▪ Traffic management in James Street; ▪ Further car-parking to improve access to retail and offices. Car parking strategy required. ▪ Improved public transport, including a designated transport hub. PT planning and feasibility study required. 	<p>Specific master planning is recommended in order to establish an appropriate urban design regime for the area, focussing on:</p> <ul style="list-style-type: none"> ▪ Investigating view corridors and establishing desirable building heights, noting the previous work done by Allan Chenoweth; ▪ Streetscaping and pedestrian amenity along all streets within the area, particularly James and Normanby Streets; ▪ Determining an appropriate array of uses for the disused Queensland Rail site that will not undermine the role and function of existing activities in the immediate area; ▪ Mechanisms for promoting amalgamation and redevelopment of
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	<p>needs of the Capricorn Coast population, provided the role of the centre does not undermine the role of the Rockhampton CBD.</p>				<p>existing residential uses in 'sidestreets';</p> <ul style="list-style-type: none"> ▪ Managing the preservation of Art Deco character buildings in the eastern part of James Street; ▪ Better integrating Normanby and James Streets.
<p>District Centre</p> <p>Allenstown Residential Consolidation Area – Allenstown District Centre Commercial Precinct</p>	<p>The Allenstown District Centre functions as the primary centre for the southside population of Rockhampton and an alternative destination for residents of Gracemere. It primarily accommodates several anchor stores including Woolworths and Dan Murphy's, whilst also accommodating a limited range of specialty retail stores which complement the centre. The centre will complement the CBD, not undermine its role</p>	<p>R: 5,000m² C: 2,000m²</p>	<p>Key activities include:</p> <ul style="list-style-type: none"> ▪ boutique and small scale retail including full-line supermarket ▪ second convenience oriented or full-line supermarket may be accommodated if need can be demonstrated ▪ medium density mixed use development along Canning Street and upper Dawson Road to complement the adjoining residential area. 	<p>There lies some potential to close Canning Street adjoining the Allenstown Plaza to allow for its expansion. This would, however, require a traffic impact study.</p> <p>Pedestrian movements within the area need to be improved, particularly between the Allenstown Plaza, Allenstown Hotel and strip development along Canning Street.</p> <p>The current road network is complicated by pedestrian movements. There may be</p>	<p>General design principles discussed below under the heading "master planning" should apply. Additional provisions which are specific to this particular area include:</p> <ul style="list-style-type: none"> ▪ Improved active street frontages along Canning Street and Upper Dawson Road; ▪ Improved streetscaping and integration with the existing isolated pocket park between Canning Street and Upper Dawson Road; ▪ Improved amenity where commercial development

	<p>through the development of similar uses.</p> <p>The area includes the Allenstown Plaza and also outwardly orientated retail development along Canning Street and Upper Dawson Road which provides an active street environment whilst also ensuring that adjoining residential development is maintained and preserved especially where displaying important character elements.</p>			<p>potential to simplify the network. A comprehensive traffic study is recommended.</p>	<p>adjoins residential uses.</p> <ul style="list-style-type: none"> ▪ Encouraging limited mixed use development along Canning Street and Upper Dawson Road; ▪ Preserving traditional character and streetscape; ▪ Managing the interface between new centre development and adjoining residential uses; ▪ Increasing height to 3 storeys for mixed use development (in appropriate locations), otherwise limiting to 8.5 metres.
<p>Business Zone – Yeppoon Central Shopping Centre Site</p>	<p>District centre for Yeppoon and the Capricorn Coast, primarily intended to service the weekly needs of residents on the coast. This centre should not, however, undermine the role of the Yeppoon Central</p>	<p>Limited.</p>	<p>It is not envisaged that any further activities over and above those already existing on the site will occur. To this end, it is envisaged that only specialty retail, a supermarket, DDS and fast food premises will occupy the site in the future.</p>	<ul style="list-style-type: none"> ▪ Greater pedestrian linkages to residential development to the west, the Yeppoon Central Zone to the north and light industrial area along Tanby road is required; ▪ Possibility of introducing a public 	<p>Given that no further development is anticipated on the site, minimal design considerations are required. Notwithstanding this, some elements which may require further consideration include:</p> <ul style="list-style-type: none"> ▪ Streetscape treatment along Rockhampton

	<p>Zone, Stockland Rockhampton or Rockhampton CBD, but rather compliment the hierarchy of centres.</p> <p>Further development on this site should not be encouraged.</p>		<p>This centre is primarily to have a retail focus with significant commercial office, entertainment and community facilities to be concentrated in the Yeppoon Central node.</p> <p>This will also assist in ensuring that the nature and role of the Yeppoon Central Zone will be maintained and enhanced.</p>	<p>transport interchange and increasing services to and from the site.</p>	<p>Road and Park Street;</p> <ul style="list-style-type: none"> ▪ Better integration between the site and the Yeppoon Central Zone; ▪ Interface between the site and adjoining residential uses; ▪ Interface with the adjoining creek; ▪ Activating frontages to reduce impacts of big box development; and ▪ Limiting height to 8.5 metres.
<p>Town Zone (Commercial Precinct) – Gracemere Shopping World³.</p>	<p>District Centre servicing Gracemere, Mt Morgan and small outlying villages.</p> <p>This centre should cater for the weekly shopping needs of the immediate area and provide additional specialty retail uses that are commensurate with the needs of the local</p>	<p>R: 10 – 15,000m²</p>	<p>It is not anticipated that any additional uses over and above those consistent in the current Business Zone of the Fitzroy Shire Planning Scheme will be encouraged on the site.</p>		<p>Additional design requirements which should be considered include:</p> <ul style="list-style-type: none"> ▪ Streetscape treatment along McLaughlin Street; ▪ Providing opportunities for active frontage development to reduce potential ‘big box’ impacts; ▪ Integrating the centre with the remainder of

³ [Approved but not yet constructed.](#)

	<p>community. Most importantly, the role and nature of this centre should not undermine that of the Stockland Rockhampton and the Rockhampton CBD, but rather act as a supplementary provider.</p> <p>Further, the role of the centre will complement the convenience and service role of the existing commercial facilities in Gracemere.</p>			<p>commercial uses in Gracemere.</p> <ul style="list-style-type: none"> ▪ Limiting height to single storey.
<p>Parkhurst</p>	<p>Future District Centre servicing Northern Rockhampton/The Caves complementing the North Rockhampton Major Centre.</p>	<p>R: 10-15,000m² C: 2,000m²</p>	<p>Have a retail focus but as a Greenfield Centre should also be encouraged to offer a town centre environment including community facilities.</p>	<ul style="list-style-type: none"> ▪ Improved, high frequency public transport connectivity to Rockhampton CBD, Stockland Rockhampton and the Central Queensland University are desirable, subject to the preparation of a region wide public transport plan. Pedestrian integration with the surrounding area should also be further

encouraged and developed, particularly links between the site and the existing commercial areas of Gracemere.

Local, Convenience or Neighbourhood Centre

Wandal Residential Area – Wandal Local Shopping Neighbourhood Centre

The Wandal centre is a small scale facility that provides day-to-day retail services for the local Wandal community. It is not intended that the scale or function of this centre will change.

R: 500m²
C: 500m²

No additional facilities over and above what already exists or what is anticipated in the current Rockhampton City Plan are envisaged. Small scale retail and commercial services are consistent, as is the tavern. Those uses which support adjoining the Rockhampton Showgrounds are also considered appropriate. The continuation of the small supermarket is also appropriate.

No additional access considerations are warranted, apart from the improvement of pedestrian linkages between the Showgrounds, Rockhampton High School and adjoining residential areas.

Also, a public transport stop along Wandal Road is encouraged.

Additional design considerations for this area include:

- Improving streetscape character;
- Providing opportunities for more active street frontages;
- Providing redevelopment opportunities for existing commercial uses on the northern side of Wandal Road to create a more 'boutique' streetscape;
- Providing better integration between the area and the Rockhampton Showgrounds and Victoria Park tennis complex;
- Retaining small scale uses rather than

					<p>promoting lot amalgamation.</p> <ul style="list-style-type: none"> Promoting small scale mixed use development – retail at ground level and small residential uses above. Limiting heights to 2 storeys.
<p>Frenchville Residential Area – Dean Street Local Shopping / Neighbourhood Centre</p>	<p>Neighbourhood Centre and ultimately a Local Centre for the Frenchville area.</p> <p>Specialty retail and day-to-day services are appropriate provided they support the convenience needs of the community.</p>	<p>R: 500-1,000m² C: 500-1,000m²</p>	<p>Small scale, boutique retail uses, limited medical services, personal services, some restaurants and tavern.</p>	<ul style="list-style-type: none"> Provide strong public transport services to the centre, identified as part of a region-wide transport strategy; Encourage on-site car parking to limit on-street parking along Dean Street, which is currently a safety hazard. 	<p>Additional design considerations include:</p> <ul style="list-style-type: none"> Streetscaping to form a ‘boulevard’ which is consistent with the local character of the area; Activating Dean Street; Increasing centre density, but maintaining single storey development; Ensuring that development does not impact on adjoining residential uses.
<p>North Rockhampton Residential Consolidation Area – Elphinstone Street Local Shopping / Neighbourhood</p>	<p>Centre is niche, providing numerous professional services and some local services from the surrounding Berserker community. It</p>	<p>R: 500-1,000m² C: 500-1,000m²</p>	<p>Small scale retail uses, limited personal and professional services, highway retail and commercial services (small scale) where in proximity</p>	<ul style="list-style-type: none"> Provide a strong network of public transport stops along Musgrave Street, connecting to a possible interchange at Rockhampton Shopping 	<p>Additional design considerations include:</p> <ul style="list-style-type: none"> Enhancing streetscaping in key locations, particularly near the intersection of

<p>Centre</p>	<p>is not intended that the scale or function of this centre will change.</p>		<p>to Musgrave Street.</p>	<p>Fair;</p> <ul style="list-style-type: none"> ▪ Increase pedestrian access and amenity throughout the area. 	<p>Elphinstone and Berserker Streets and Musgrave and Elphinstone Streets;</p> <ul style="list-style-type: none"> ▪ Activating key locations including along Elphinstone Street (near Musgrave Street) and the node around Elphinstone Street and Berserker Street. ▪ Promoting mixed use development in proximity to Musgrave Street, not exceeding 3 storeys where adjoining the North Rockhampton Residential Consolidation Area; and ▪ Ensuring that development does not impact on adjoining residential uses.
<p>Richardson Road Residential Area – Glenmore Local Shopping / Neighbourhood Centre</p>	<p>Centre has increased substantially over the past 3-4 years and now serves a broader community around Glenmore, Kawana, Parkhurst, Glenlee,</p>	<p>R: 500-1,000m² C: 500-1,000m²</p>	<p>Some specialty retail, tavern, fast food outlets, personal services and limited medical services</p>	<ul style="list-style-type: none"> ▪ Access to the Bruce Highway and Farm Street need to be more carefully considered. It is suggested that a traffic impact study be performed; 	<p>General design principles discussed below under the heading “master planning” should apply.</p>

	<p>Glendale, Rockyview and beyond due to the construction of a supermarket.</p> <p>It is anticipated that the centre will consolidate but its scale and function will not change.</p> <p>It will continue to provide local and neighbourhood services.</p>			<ul style="list-style-type: none"> Public transport should be improved, with the possibility of including a transport interchange to support the local community and also Glenmore School; Pedestrian linkages are relatively strong within the area, however there may be an opportunity to increase facilities to residential areas and Glenmore School (i.e. enhance the existing underpass). 	
<p>Splitters Creek Residential Area – Main Street Local Shopping / Neighbourhood Centre</p>	<p>Services a small catchment within Park Avenue. The role of the centre is for day to day, convenience needs and limited personal services. No change in scale or function is anticipated.</p>	-	<p>Predominantly a retail centre, tavern and some personal services.</p>	<p>The railway line dissecting Main Street needs to be considered further with regards to the potential impact of additional activity in Main Street and also St Mary’s school activities.</p>	<p>General design principles discussed below under the heading “master planning” should apply.</p>
<p>Splitters Creek Residential Area – Richardson Road Local Shopping / Neighbourhood Centre</p>	<p>Services a small catchment within the immediate area of Glenmore. Small scale uses dominate the area and are primarily aimed</p>	-	<p>No additional activities are envisaged for this area, over and above the ‘convenience’ role. The medical centre at the western end of the area</p>	<p>The area already includes good access, however further though to reducing on-street carparking impacts is required.</p>	<p>General design principles discussed below under the heading “master planning” should apply.</p>

	<p>at servicing day to day needs. The centre has not expanded nor changed its role over the past decade or longer and no change in scale or function is anticipated in the future.</p>		<p>should continue to operate at its current capacity.</p>	<p>Pedestrian connectivity also needs further consideration, especially to link residential areas to the centre.</p>
<p>Business Zone (Livingstone Shire Planning Scheme)</p>	<p>These areas service very small, localised catchments and often comprise a very small cluster of activities, with the exception of the Emu Park commercial area. Again it is not expected or recommended that the scale or function of these centres change in the foreseeable future.</p> <p>Each area is intended for convenience services only, providing low intensity (generally historic) commercial uses.</p>	<p>R: 5,000m² E Park C: 1,000m²</p>	<p>Full range of commercial and retail uses, Community uses, tavern, office space, medical services and retail and bulky goods showrooms.</p> <p>The Emu Park commercial area should accommodate a range of retail and commercial services, including services to support the supermarket currently under construction</p>	<p>The vast majority of business uses do not impact on the existing road network sufficiently to warrant traffic impact assessment. Strong pedestrian connections are, however, encouraged and should be investigated as part of a region wide pedestrian strategy.</p> <p>The upgrading of the existing road network and car parking in Emu Park may be warranted should mid block areas be taken up, however there is no immediate need for a traffic study.</p> <p>A public Transport interchange within the Emu Park commercial area should</p> <p>General design principles discussed below under the heading “master planning” should apply.</p> <p>In addition, specific recommendations for Emu Park include:</p> <ul style="list-style-type: none"> ▪ Encouraging mid block lot amalgamations through incentives and bonus density provisions; ▪ Encouraging mixed use development within mid block areas; ▪ Preserving the ‘coastal town’ feel or the area through limiting high-rise development and large scale commercial and retail facilities.

<p>Town Zone (Commercial Precinct) (Fitzroy Shire Planning Scheme)</p>	<p>The area services the immediate Gracemere locality. Uses are low scale and intensity and limited to day-to-day convenience services and some personal services. The role of this area is minor in comparison to other commercial areas, with the exception of accommodating a regional office of the Council.</p> <p>This centre should not compromise the role of Gracemere Shopping World.</p>	<p>R: 2,000-5,000m² C: 500-1,000m²</p>	<p>Predominantly a retail centre, tavern and some personal services.</p>	<p>also be investigated through a regional transport strategy.</p> <p>Improved pedestrian connectivity and public transport connecting to Rockhampton is required.</p> <p>Linkages between Gracemere Shopping World and the existing commercial area are also required.</p>	<p>General design principles discussed below under the heading “master planning” should apply.</p>
<p>Village Zone (Fitzroy Shire Planning Scheme)</p>	<p>Some small commercial uses that service the convenience needs of small communities. These areas generally reflect historic uses and are usually confined to a single general store or service station or</p>		<p>Single uses, primarily general stores (retail use), service stations or taverns.</p>	<p>No impacts or further investigations warranted.</p>	<p>Each use should remain ‘as is’, with no additional design principles warranted expect for promoting CPTED should additional development on these sites ever occur.</p>

	<p>tavern.</p> <p>The role and function of these areas should not change in the foreseeable future.</p>				
<p>Business Zone (Mt Morgan Shire Planning Scheme)</p>	<p>This area services the convenience needs of the Mount Morgan community. The area includes a range of small scale retail uses and personal services and a small supermarket. The zone also includes non-commercial uses such as the hospital, sewerage treatment plant, RRC depot, showgrounds and local tip. The scale and function of this area will not change in the foreseeable future.</p>	<p>R: 500m² C: 100m²</p>	<p>Predominantly a retail centre, but also includes community uses, tavern, small office space, medical services.</p>	<p>No impacts or further investigations warranted.</p>	<p>General design principles discussed below under the heading “master planning” should apply.</p> <p>Uses such as the sewerage treatment plant, water reservoir, showgrounds, local tip, hospital and sporting clubs should not be included in any new centre zone.</p> <p>The unique character of the business zone should be protected from incompatible development.</p>
<p>Retail Showroom Facilities</p> <p>Yaamba Road South Commercial Area</p>	<p>This area functions as a major regional attractor due to large scale showrooms and niche services located within the area. The Red Hill</p>	<p>R: 5,000m² C: -</p>	<p>Predominantly bulky goods display and showrooms. Car yards/sales and display should not be taken to form part of this definition, which should be alternatively located within the Highway Commercial</p>	<p>Yaamba Road is a State Controlled Road, therefore access to this road should be limited and consultation with DTMR is required as part of a vehicle</p>	<p>General design principles discussed below under the heading “master planning” should apply.</p> <p>In addition, the following</p>

	<p>Homemaker Centre is the primary attractor for the area and accommodates bulky goods and other uses which are too large for areas such as the CBD and Rockhampton Shopping Fair. Although a major attractor for the region, the area does not undermine the role of any other higher order centre.</p> <p>It is anticipated that the current scale, role and function will be maintained.</p>		<p>Areas.</p>	<p>management strategy for the area.</p> <p>Pedestrian connections need to be upgraded, particularly those linking different sites within the area. A pedestrian link between the Red Hill Homemaker Centre and the adjoining commercial uses to the west.</p> <p>Various public transport stops should be spread throughout the area, especially given that Yaamba Road is the major thoroughfare to CQ University and Rockhampton-Yeppoon Road.</p>	<p>should be considered:</p> <ul style="list-style-type: none"> ▪ Presentation of buildings to Yaamba Road; ▪ Interface between uses on the western side of Yaamba Road and adjoining residential uses; ▪ Building design to ensure future uses reduce building bulk and scale.
<p>Musgrave Street and South Rockhampton Highway Commercial Area.</p>	<p>Centres service the region as a whole due to specialised highway commercial services not found elsewhere in the region.</p> <p>The South Rockhampton Highway Commercial Area generally services</p>	<p>R: 5,000-10,000m² C: 2,000-5,000m²</p>	<p>All highway related activities are envisaged in this area, including bulky goods showrooms, vehicle showrooms and sales and display areas. Large scale warehouse retailers are also consistent as is motels and the like.</p>	<p>All new development needs limit vehicular access to Gladstone Road and Musgrave Street, as these are state controlled roads.</p> <p>Stronger pedestrian linkages are required within these areas. Linkages to residential areas are required, however</p>	<p>General design principles discussed below under the heading “master planning” should apply.</p>

those areas of the region that are south of the Fitzroy River, and the Musgrave Street Highway Commercial Area services catchments north of the river.

these are not as important as in other centres due to the nature of the centre being for destination activities.

Some public transport stops are required, particularly along Musgrave Street. Exact locations should be determined as part of a regional transport strategy.

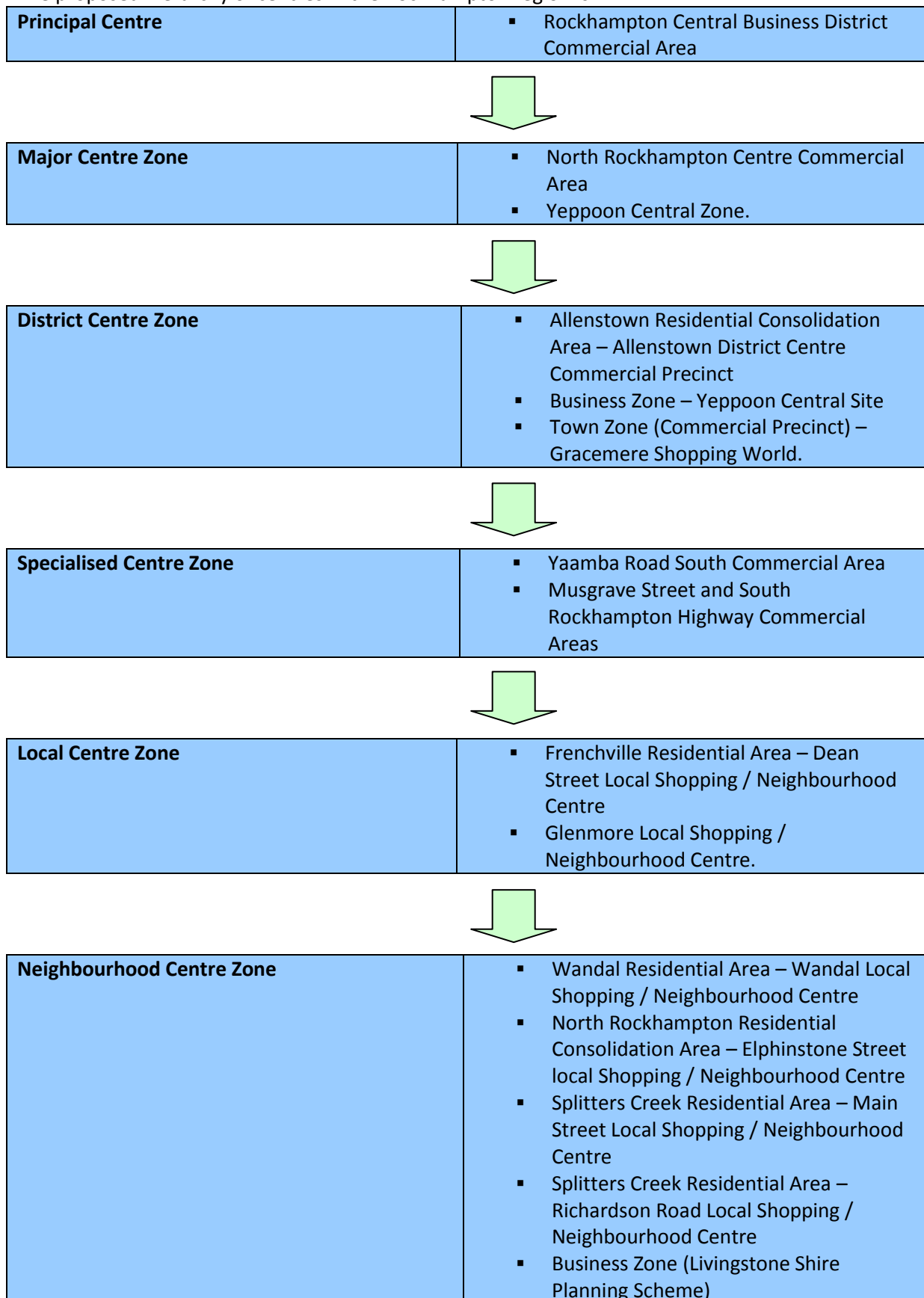
Centres Network

The existing commercial centres do not currently operate as a strict hierarchy on a regional scale, with the dominant existing retail locations being outside of the CBD (Stockland rockhampton) and major employment facilities such as the CQ University, Airport and Rockhampton Base and Mater Hospitals also not within existing centres. The dislocation and increased role of Stockland Rockhampton has had a profound impact on the role and function of the Rockhampton CBD. The findings of this Centres Study proposes:

- a hierarchical/network model that recognises not only the current reality but also the potential for complementary or linked centres; and
- a set of recommendations for how each centre should function and appear.

The recommendations put forth in this section reflect the QPP hierarchical structure and specific needs identified for each centre.

The proposed hierarchy of centres in the Rockhampton region is:



	<ul style="list-style-type: none"> ▪ Town Zone (Commercial Precinct) (Fitzroy Shire Planning Scheme) ▪ Village Zone (Fitzroy Shire Planning Scheme) ▪ Business Zone (Mt Morgan Shire Planning Scheme)
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Specialist Centres including Central Queensland University, the Rockhampton Base Hospital, Yeppoon Hospital, Mater Private Hospital and Rockhampton Airport have also been identified.

Appendix C includes a summary of the QPP Zones, mandatory purpose statements and suggested basis for local government purpose statements for the respective centres. The table also includes commentary on potential points for resolution.

Based on the information collected as part of this study, it is considered that synergies currently occur between the following centres:

- **Rockhampton CBD and CQ University** – The university (located in North Rockhampton on the Bruce Highway) also has (or has had) CBD campuses and administration centres. Given that the CBD is also the main public transport hub, many students also use the irregular buses leaving from the Arcade bus stop on Bolsover Street. Opportunities for additional courses in the CBD, student accommodation etc should be explored.
- **Rockhampton CBD and Yeppoon Central Zone** – Both centres act as the primary administrative centre for their respective former local government area, and include administrative uses and retail centres that include common facilities.
- **Rockhampton Base and Mater Hospitals and Various Centres** – The Rockhampton CBD and numerous other centres (including Rockhampton Shopping Fair, Musgrave Street Highway Commercial Area, Dean Street Local Shopping Centre, Elphinstone Street Local Shopping Centre, Glenmore Local Shopping Centre and Richardson Road Local Shopping Centre) include a variety of medical support services which have a direct relationship to the major hospitals of the region.
- **Musgrave Street and South Rockhampton Highway Commercial Areas** – Both areas include a primary intent to develop uses which depend upon highway related business. The main thoroughfare (the Bruce Highway) is a common attribute to each.
- **Rockhampton CBD and Stockland Rockhampton** – like many regional centres, the CBD does not incorporate the highest order retail facilities, but retains its higher order administrative and community role, supported by a higher order retail desitnation at Stockland Rockhampton. Opportunities to foster the relationship between these centres and building on core strengths can be explored, although the Study Team continues to recommend the development of a department store in the CBD.

In order to provide an effective network of centres throughout the region, it is important to recognise and build upon the existing relationships of centres. Relationships may be further fostered through increasing public transport links and providing a role for each that is unique but fosters interdependence. Synergies may also be strengthened through master planning exercises.

In addition to the above, each identified centre has a distinct character or potential development opportunities that will contribute toward a successful centres hierarchy network. Each centre classification has been discussed in further detail below, particularly highlighting desired outcomes for each centre.

Principal Centre Zone

The Principal Centre Zone will comprise the Rockhampton Central Business District Commercial Area (CBD), as currently identified within the Rockhampton City Plan 2005. As described previously, the CBD is geographically large and contains a diverse range of building forms, including much of the region's built heritage .

It is also the location of the highest-order government, administrative and civic functions for the region and includes a variety of uses including retail, commercial, light industrial, residential, and entertainment uses. Currently the primacy of the CBD as a retailing environment is undermined by the Stockland Rockhampton and, for a number of reasons, needs to re-establish its relationship with residents of the region, reaffirming its position as the heart of Rockhampton. The recent construction of 'The Edge' apartments and the imminent redevelopment of the old Churches site provide positive reinforcement for the CBD and a framework on which to re-inforce its principal centre role in the future.

The CBD has a solid critical mass of office space, although its retail core and business services precincts have experienced few additions to stock, or renewal of existing stock, in the past decade. The planning scheme will need to provide strong encouragement for additions to office stock in both the existing retail core and business services precincts, using a 'risk management' approach to new development . Further office stock, particularly as part of mixed-use developments, is appropriate in the existing retail core precinct. High quality, signature developments should also be encouraged as a means of directing new built form in the CBD as a whole.

The CBD is also considered to be the most appropriate area for a department store, however this may only be achieved through lot amalgamations and proximity to other high-order retail uses. Council may need to provide direction to this process through active project management and facilitation.

The different precincts and land use clusters within the CBD required improved linkages, particularly for pedestrian connectivity between the retail precincts (e.g. East Street and City Centre Plaza) and administrative precincts along Bolsover Street and beyond. Linkages between the riverfront and East Street also need to be improved.

The railway line in Denison Street also acts as a constraint which essentially divides the CBD in two. Particular consideration needs to be given to this constraint, perhaps by reducing the size of the CBD to areas north of the railway line. The actual size of the CBD itself also needs to be further investigated with a view to condensing the core and reviewing building heights and the preservation of character and heritage listed buildings and streetscape more generally.

The large, 'big box' shopping centres in the North Rockhampton Centre Commercial Area are clearly the preferred choice for retailing for the community, as they are air-conditioned and provide the full range of retail and other services in one location. It is very difficult for the CBD to compete with this format. On its own, the opening up of retail areas in the CBD such as East Street is unlikely to lead to the reestablishment of the CBD as the pre-eminent retail node. Therefore a measure of pragmatism is required in planning for its future. While it may be preferable that the CBD is the highest order retail centre, this is not likely to be the case in the short-medium term. Rather, the dominance of the CBD in commercial, community and entertainment functions, when combined with high-end retail in the future, will establish its significance over time. As such it is recommended that planning for retail in the CBD focus on:

- convenience retailing for the CBD's workforce, residents and visitors (both from elsewhere in the region and from further afield);
- leisure/boutique retailing;
- takeaway outlets, restaurants and cafes; and
- entertainment uses such as small-scale cinemas, bars, taverns and nightclubs.

In addition, higher education or training facilities are strongly recommended for the CBD. Although the CQ University has recently removed some presence from the CBD, it is strongly recommended that a second campus for the University of TAFE be encouraged through the new planning scheme although the main campuses have considerable capacity to expand.

It is also recommended that Council's Economic Development branch attempt to encourage a second university in Rockhampton, primarily through leverage off the Base Hospital which attracts large numbers of medical students to the region (on placements), with operators such as Griffith University, James Cook University, University of Queensland and Queensland University of Technology potential targets. The large regional courts district in the CBD also offers opportunities to encourage law schools to the CBD.

In-centre higher density residential development is encouraged, generally within mixed use development. It is intended to contribute to the vibrancy of the centre, support its retail functions and provide significant housing opportunities within a major employment centre. Particular areas such as Quay Street and other areas surrounding the city core should accommodate this growth. Height limits (or minimums) will need to be further investigated through a master planning exercise.

As far as possible, levels of assessment should avoid unnecessary constraints on the establishment of the desired mix of uses. Rather than targeting particular uses, levels of assessment may be based on desired built forms. This may mean that many consistent centre activities are exempt or self assessable, with a Centres self assessable code being used to regulate development.

Major Centre Zone

This zone should include the North Rockhampton Centre Commercial Area and the Yeppoon Central Zone, which are the two highest order centres outside of the Rockhampton CBD.

Stockland Rockhampton is the major attractor within the North Rockhampton Centre Commercial Area, and includes high order retail uses. The site has recently undergone significant expansion and in many ways undermines the role of the CBD. As previously indicated, the community regards this area as the premier retail area of the region, and is likely to continue to do so for the long term.

Any intensification of activities on this site is likely to further compromise the role of the CBD and need must be demonstrated and that the additional facilities can not be accommodated within the CBD or are inappropriate within the CBD. If required, new development in this area should be outwardly focussed, emphasising streetscape improvement and place-making. Further, a significant public transport interchange should be developed in this area.

The Yeppoon Central Zone is the primary centre for the Capricorn Coast, essentially functioning as Yeppoon's CBD, with a mixture of administration, entertainment, retail and commercial uses primarily focussed on James Street. This area has excellent fundamentals to continue to develop as an interesting, unique and high amenity centre, however the low density nature of existing development, and the extent of area, means there is an obvious lack of integration between areas close to Anzac Parade and other areas surrounding the Keppel Bay Plaza.

The Yeppoon Central Zone should promote intensification of uses along James Street, particularly boutique retail and tourist-orientated activities. This activity should be maintained for the full length of James Street, with another major development recommended on the disused Q Rail site to act as a second anchor. Additional streetscaping along James Street is also encouraged. This will aid in promoting activity across the whole zone. It is not recommended that this area be extended to include the Yeppoon Central site as this would further weaken its role and fragment the 'main street' feel.

District Centre Zone

Recommended District Centres include:

- the Allenstown District Centre Commercial Precinct, Business Zone;
- Yeppoon Central Site, and the Town Zone (Commercial Precinct); and
- Gracemere Shopping World .

Each of these are significant centres, each servicing a different but very defined catchment in the region.

Each site includes at least one anchor use (i.e. supermarket) and a variety of specialty retail uses. The Gracemere Shopping World and Yeppoon Central sites are typical 'big box' shopping centres that include little integration with the surrounding area and have little potential to further expand, hence it is recommended that these centres remain 'as is' for the foreseeable future. It is not recommended that the new planning scheme encourage additional development of these sites although large expansive land uses such as big box or bulky goods retailing may be appropriate on these sites.

The Allenstown District Centre Commercial Precinct, on the other hand, should be allowed and facilitated to expand. In particular, it is recommended that the Allenstown Plaza be expanded by possibly closing a portion of Canning Street and providing on the carpark that currently services the Plaza.

Redevelopment of the existing commercial strip along the eastern side of Canning Street is also strongly encouraged, with potential to develop centre activities at ground level and residential uses above. This type of development will, however, need to be sensitive to adjoining residential uses, particularly those which have character values.

Increased pedestrian connectivity, streetscaping and traffic management also needs to be considered, with a specific view to creating a niche, boulevard type area that integrates all commercial areas with the small pocket park in the middle of the centre. There is real potential to build upon the existing setting to create an upper-market centre that incorporates high quality development with the re-use of existing character buildings that have been converted into businesses.

There also lies some ability to expand the centre to accommodate additional growth. Possible areas for expansion may include Derby Street to the east and Upper Dawson Road to the south. These areas should, however, provide a gradation between intensive centre activities to the surrounding residential uses. This may possibly be through encouraging small scale centre activities in existing character houses rather than redevelopment. Additional streetscape treatment such as narrowing the road (through island landscaping and mid-street parking) and pedestrian friendly areas should also be heavily encouraged in this area.

Local Centre Zone

Proposed local centres will include the Dean Street Local Centre and Glenmore Local Shopping Centre due to each including supermarkets that have the ability to service a local catchment. It is acknowledged that the approved Dean Street IGA facility is yet to be constructed, however for the purposes of this study an assumption has been made that the development will occur.

Each centre includes a mix of small scale retail uses and convenience uses that cater for the day-to-day and weekly needs of an immediate community.

The Dean Street facility is slightly different to Glenmore in that it is of a smaller scale and has a linear urban form that follows Dean Street, a major road in North Rockhampton. The area already includes a small convenience store, and the construction of an IGA will provide an anchor at each end of the centre. Areas in between these two anchors should include specialty retail, restaurants and other small scale personal services. It will, however, be important to ensure that the centre does not significantly impact on surrounding residential development. Further, it will be extremely important to ensure that further development of the area manages on-street carparking and access to Dean Street. Streetscaping along Dean Street should also be emphasised, creating a strong sense of place and public realm. Island landscaping along the centre of Dean Street and street trees should be included to create a niche retail area that reflects the upper-market surrounding residential areas.

The Glenmore Local Shopping Centre includes various retail uses and also has a certain degree of reliance on the adjoining Bruce Highway. Significant expansions to this centre have occurred over the past 5 years, with the introduction of a Super IGA supermarket and additional specialty retail. The centre is now at a size that is sufficient to service the needs of the immediate community, however it is not anticipated by this study that the area will continue to expand. Any further development of this area should focus on consolidation, and particularly improve the public realm and streetscaping. Stronger linkages to the surrounding residential areas and Glenmore State School should also be emphasised, with particular attention focused on reducing isolation to the west due to the Bruce Highway.

Neighbourhood Centre Zone

This Zone should include the remainder of centres, being the Wandal Local Shopping Centre, Elphinstone Street Local Shopping Centre, Main Street Local Shopping Centre, Richardson Road Local Shopping Centre, Business Zone (Livingstone Shire Planning Scheme), Town Zone (Commercial Precinct) – Fitzroy Shire Planning Scheme, Village Zone (Fitzroy Shire Planning Scheme) and Business Zone (Mt Morgan Shire Planning Scheme).

Each of these centres are small scale, catering only for convenience and day-to-day needs of the immediate community.

It is recommended that each centre include a higher level of pedestrian connectivity and street frontage activation, including streetscaping improvements.

The Wandal Local Shopping Centre, Main Street Local Shopping Centre, Richardson Road Local Shopping Centre, Village Zone (Fitzroy Shire Planning Scheme), the majority of the Business Zone (Livingstone Shire Planning Scheme) and Business Zone (Mount Morgan Shire Planning Scheme) centres should not be altered in such a way that will result in the role, scale and nature of each respective area being increased. Each of these centres are not anticipated to expand during the life of the new planning scheme and as such the mix of uses and extent of uses permitted in these areas should be limited to those which provide day-to-day services for the immediate catchment which they service. General master planning provisions outlined in Section 7.2 below should apply in all instances. No additional specific requirements are considered necessary.

Comparatively, the Elphinstone Street Local Shopping Centre, Emu Park Business Zone and Town Zone (Commercial Precinct – Fitzroy Shire Planning Scheme) should include more specific guidance to ensure that each area is well defined and encourages centre prosperity.

Elphinstone Street Local Shopping Centre currently has two distinct nodes, being the area closest to Musgrave Street and also the node clustered around the intersection of Elphinstone Street and Berserker Street. Each node should be reinforced to promote the clustering of centre uses to aid in reducing centre fragmentation. It is recommended that the area along Elphinstone Street extending from Musgrave Street to Spike Street should continue to include small scale personal and professional services and niche retail uses, however redevelopment should be of a mixed use nature up to 3 storeys in height. Adaptive re-use of character houses for businesses should also be encouraged, however all car parking should be accommodated on-site to reduce on-street impacts. Development clustered around the intersection of Berserker and Elphinstone Streets should be convenience based uses for day-to-day needs of the immediate community. Built form should be single storey and again include on-site car parking to prevent on-street impacts. Active frontages in close proximity to the intersection are also encouraged, as is a high level of pedestrian connectivity between the eastern and western end of the area (i.e. between Musgrave Street and Berserker Street). Larger scale retail uses and light industry uses such as the existing Mitre 10, Watts Brothers Carpet One and Mechanic are inconsistent with the centre intent and should be discouraged. Further development of these sites should also be discouraged with a view to providing an opportunity for these uses to relocate to Specialist Centre Zones.

The Emu Park Business Zone has been identified through this study as being underutilised, especially within the mid-block areas that dissect the main street. Lot amalgamations and redevelopment for centre activities should be highly encouraged in this area through self assessable and exempt centre activities that are consistent with the character of the area. The adaptive re-use of 'beachside character' houses in the Business Zone should also be encouraged where appropriate, especially for uses such as medical practitioners and other personal and professional services. The extremely wide road reserves in these areas also provide an opportunity for mid-street car parking to be development in conjunction with significant streetscaping (especially landscaping). Significantly increased pedestrian connectivity within these mid-block areas should also be encouraged in the new planning scheme. Importantly, the seaside and sea-village character of the area should not be compromised through the construction of high-rise mixed use developments and large scale retail facilities. Whilst some mixed use development may be appropriate along Hill Street and Emu Street, mid-block areas should only include small scale uses consistent with the needs of the immediate community.

The Town Zone (Commercial Precinct – Fitzroy Shire Planning Scheme) also needs to focus on revitalisation and providing services which support the convenience needs of the immediate community. This area should not be expanded to include the new Gracemere Shopping World site as this would fragment the role of the area. Additional pedestrian linkages should, however, be provided to the Gracemere Shopping World site, and visual linkages such as streetscape treatment should assist with wayfinding.

Specialised Centre Zone

It is recommended that this zone include the Yaamba Road South Commercial Area, Musgrave Street Highway Commercial Area and South Rockhampton Highway Commercial Area.

These areas currently play a very specific role in the existing centres hierarchy for Rockhampton, as they provide opportunities to develop uses such as retail showrooms, sales and display areas for bulky goods and niche uses such as highway commercial development (i.e. vehicle showrooms). These areas have very specific locational needs along the Bruce Highway route through Rockhampton (also known as Gladstone Road and Yaamba Road).

It is recommended that each of these areas include improved pedestrian linkages between sites, however the need to integrate each centre with the surrounding community is not as important as the majority of services are considered to be destination activities that attract the majority of users from other areas in the region. Generally, these areas do not service the day-to-day and convenience needs of the immediate community.

As such, their specific role for accommodating large scale retail uses should be protected. The new planning scheme should include very specific intent statements particularly outlining shopping centres, specialty retail and personal/professional services as inconsistent development that should be located in other centres across the region. Alternatively, showrooms, warehouses and highway related centre activities should be afforded a low level of assessment to encourage development and retention.

Areas of Interest

In addition to the identified centres, this study has also revealed several areas of interest which must be considered as part of the formulation of recommendations for the new planning scheme. It has been identified that the Rockhampton Airport, Parkhurst, Rockhampton Mater and Base Hospitals, Norman Road and West Emu Park also contribute to significant employment and destination activities in the area.

Rockhampton Airport

It was noted that the airport has policy direction (through the existing planning scheme) to accommodate airport related employment activities and includes a large approval for a motel. Significant vacant land holdings provide potential growth options, however constraining overlays such as flooding and airport related constraints (i.e. height and amenity) make it difficult for typical centre activities (i.e. retail, commercial and mixed use) to occupy this area. More importantly, the role of this area needs to be carefully considered to ensure that any new planning scheme provisions do not inadvertently create development opportunities which have the ability to undermine the proposed centres hierarchy for the region. Nevertheless, it seems logical for the peripheral area of the airport to be zoned as a Specialised Centre, catering for airport related activities such as car rental yards, light industrial uses dependent on the airport and some short term accommodation.

Parkhurst

Parkhurst has long been identified as a Greenfield area appropriate for urban expansion in the general Rockhampton Area. The current planning scheme recognises the area as appropriate for development 'post 2015', and Council has since prepared both a structure plan and master plan for the area, investigating possible development opportunities. Further, there has been significant development pressure along William Palfrey Drive, where two large development applications have been in the assessment process for in excess of 3 years.

As such, this study recognises that the Parkhurst area is likely to be developed in the future has potential for an additional centre to support a growth in the north Rockhampton area. Based on potential population forecasts for this area, it is likely that the Parkhurst area will require a District level centre. This study highlights the need for the role and function of the potential centre to be described in the new planning scheme. It is suggested that a centre of this size only be allowed to develop to its full potential once substantial development in this area occurs, and until then the new scheme should clearly articulate that there is no need for this type of centre. A district centre in the order of 10,000-15,000m² of retail and commercial space is recommended, and should be conveniently located to cater for the growth of the Parkhurst community. The design of the centre should incorporate a range of commercial support activities to cater for the Parkhurst industrial area, but the role of these facilities is to complement the higher order Major Activity Centre and Principal Activity Centre. Need for the centre must be demonstrated and that the centre would not impact on the role and performance of other centres within the hierarchy.

Rockhampton Mater and Base Hospitals

As outlined previously, two significant hospitals are located in South Rockhampton, being the Rockhampton Base Hospital and Rockhampton Mater Private Hospital. A small hospital, known as the Hillcrest Private Hospital, also occupies land in close proximity to the Base Hospital. This study notes the significant employment generated by these uses, and also the need to accommodate related services and industries in close proximity, to promote commercial synergies. There may, therefore, be potential to provide small areas of land for a Specialist Centre Zone around these areas, particularly the Base Hospital in encouraging medical and wellbeing activities and a limited array of convenience retail specifically catering to the needs of workers, patients and family. Short term accommodation and high density accommodation is also supported.

This must be balanced, however, the need to preserve character housing occupying land immediately surrounding all hospitals, particularly in proximity to the Mater Hospital and associated streetscapes. Therefore, any additional commercial zoning needs to be sensitive to existing character housing and streetscapes, and promote sensitive building design should redevelopment occur. Ideally, the scheme should promote the adaptive reuse of character dwellings for medical support industries rather than promoting redevelopment.

Land surrounding the Base Hospital is less constrained due to a lack of character housing along Canning Street and North Street and also due to existing commercial development such as the Top Shop and Red Cross fronting these road reserves. There is, however, a height constraint due to airport operation height limitations, requiring specific height limitations in the new scheme.

Any redevelopment for centre activities in this area will need to carefully consider car parking implications and also interface and relationships with adjoining residential uses and need must be demonstrated.

Norman Road

The current Rockhampton City Plan 2005 nominates Norman Road as the principal residential growth area for the city. As a result, this area has been almost fully developed. In response to the increased residential concentration, the scheme (through the intent statement for the Norman Road Residential Area) recognises the potential need for a local shopping centre to service the day to day needs of the area, but not exceeding 2,000m² of GFA. This study also recognises the need for a convenience oriented centre (i.e. a Neighbourhood Centre) to be developed on Norman Road, provided the centre does not compromise the role and function of the proposed centres hierarchy. It is likely that this centre will accommodate convenience oriented retail uses, a convenience supermarket and some personal services, with the catchment area to focus on the Norman Gardens expansion area and the north-east Rockhampton community. This area should not include a significant office space, DDS or any other uses that can be more appropriately located within another higher order centre. A tavern is also unlikely to be appropriate due to amenity impacts, however the scheme may nominate such as use as consistent, subject to demonstrating how the impacts can be mitigated.

West Emu Park

It is noted that Centra has been approved as an industrial precinct for Emu Park and that Peet developments propose a 527 lots residential estate to the north of Rockhampton Emu Park Road. It is likely that a range of retail facilities and other support services could be supported in this area to cater for the needs of workers and residents. It is imperative that these facilities do not impact on the performance and role of the Emu Park town centre and the capacity to consolidate further activity in the Emu Park town centre. Development in this area should coincide with residential activity and need must be demonstrated.

7.2 Policy Responses

The following section of the report outlines the recommended planning policy response to the centres study. These recommendations clearly enunciate how the study can be meaningfully implemented through the new Rockhampton region planning scheme and other mechanisms and initiatives. The following sections also identify where additional investigation will be required to assist in drafting the new scheme provisions for centres.

Master Planning

It would be highly desirable to undertake master planning for the principal and major centres identified above, in order to identify location specific urban design guidance, address accessibility and circulation networks and identify non regulatory programs to enhance centre outcomes. It is also recommended that any proposal for a significant increase in floor space in these centres (of greater than 5000m²) is accompanied by a master plan which demonstrates how the expansion fits within the balance of the centre.

In particular, it is suggested that a master planning exercise be undertaken for the Rockhampton CBD with a specific view to:

- Determining appropriate building heights across the CBD (whether it be through minimum building heights or otherwise);
- Consolidating the CBD core into a smaller, more manageable area;
- Providing specific areas for active street frontages;
- Providing specific recommendations for uses along Quay Street;
- Determining appropriate areas for higher density residential development;
- Determining appropriate areas for a department store;
- Identifying strategic or catalyst sites for attracting new facilities to the CBD
- Developing specific requirements for managing conflict between heritage buildings and high density development;
- Possibly developing additional sub-precincts under the Principal Centre Zone (which the QPP allows for) which outline desired mix of uses;
- Developing a framework for allowing greater flexibility around levels of assessment, particularly allowing consistent uses to be self assessable or exempt;
- Developing a specific Principal Centre self assessable code to reduce the need for development assessment in the CBD.

These particular elements are over and above generic centre design principals outlined below.

Some generic centre design principles which should be addressed in master planning processes (or, in the absence of master planning, form the basis of a centre design code) include:

- Provision for active uses/frontage on key pedestrian circulation streets and major frontages;
- Creation of a predominant built-to-street-frontage form;
- Providing for a human scale at street level;
- Incorporation of climate responsive design; and
- Creating a mix of uses and day time/night time activity.
- Incorporation of CPTED principles;
- Provision of a high level of pedestrian and cyclist accessibility and accessibility by public transport;
- Encouraging pedestrian mobility over vehicle mobility; and
- Ensuring car parking areas and access ways do not dominate major frontages and pedestrian routes.

Public Transport

Accessible, reliable, frequent and high quality public transport is a major contributor to the success of cities. Currently, public transport services in the Rockhampton region are low frequency, poorly patronised and of a comparatively low quality. In order to support future economic growth and development intensity in desirable locations, improved public transport access is required. In particular, improved public transport is crucial to support increased densities in and around the network of centres. The following key public transport requirements have been identified to support the centres study:

- High frequency, high quality rapid transit corridor from the Rockhampton CBD along Musgrave Street and Yaamba Road, providing a connection from the CBD to the Rockhampton Shopping Fair, to CQ University and Yeppoon (James Street). This corridor would service four of the major centres within the region, as well as proposed high density residential development and other nodes along the corridor;
- Public transport loops between:
 - Allentown Plaza, Rockhampton Mater Hospital, Rockhampton Base Hospital, Rockhampton Airport, CBD;
 - CBD, Emu Park Road, Dean Street, Norman Road and CQ University;
 - CBD and Gracemere;
 - CBD, Emu Park, Lammermoor, Rosslyn Bay and Yeppoon; and
 - CBD, Main Street and Parkhurst (once residential density increases).

All routes will utilise existing road networks. As identified previously, many of these centres fulfil discreet and yet complementary roles in the centres network and are major destinations within the region. A high quality public transport connection between these centres would therefore not only service a high demand, but will also provide opportunities for improved economic inter-relationships between these centres;

- Improved public transport service for the Capricorn Coast and Gracemere. Such services need to connect communities to Emu Park, Yeppoon, Gracemere and the CBD. This service will provide important access to retail and employment opportunities where there is currently a reliance on private vehicle travel.
- Specific thought must also be given to bus stop locations and designs, major interchange locations and service frequencies. Those areas of high demand (hospitals, CBD and major centres) should include high frequency services, and key interchange locations should be within the CBD, Rockhampton Shopping Fair, CQ University and James Street (Yeppoon).

It is suggested that a more detailed regional transport strategy be prepared to provide a comprehensive understanding of the requirements for the region.

Although the above recommendations are considered appropriate in the region and good practice for providing a strong network of inter-connected centres, it is acknowledged that public transport implementation within the region may be difficult due to factors such as dispersed residential population, lack of population base and negative stigma attached to public transport. Again it is suggested that these issues be addressed as part of a regional strategy.

Assessment Levels

Within identified centres levels of assessment should avoid unnecessary constraints on the establishment of the desired mix of uses. Rather than targeting particular uses, levels of assessment may be based on threshold floor space levels and desired built form (for example, development over a certain size or height may attract a higher level of scrutiny).

Certain uses in neighbourhood and local centres which are more likely to create conflict with nearby residential uses, such as out of hours operations, hotels, clubs and the like, may warrant a higher level of assessment.

Consistent uses within higher order centres (i.e. Principal, Major and District Centre Zones) should be afforded a low level of assessment (i.e. self assessment) or be exempt to facilitate economic stimulation and revitalisation, particularly in areas such as the CBD. To provide Council with certainty that relaxed levels of assessment will not compromise the achievement of desired outcomes of any new planning scheme, it is suggested that a self assessable code be prepared which provides regulatory provisions which are consistent with Council (and the new planning scheme's) expectations for centre development.

Location of a Department Store

Currently the region does not have a department store. Current planning scheme provisions and thought from Council is to encourage a department store to occupy space within the North Rockhampton Centre Commercial Area, however this is not desired as any department store should be located within the highest order centre (i.e. the Rockhampton CBD). There are two key considerations for a department store in RRC:

1. Attracting a department store to RRC
2. The location for a department store in RRC

Attracting a department store to Rockhampton is essentially a market based decision; Myer states that a population of 150,000-200,000 persons is required to support a Myer department store in a regional city or town location. There are limited mechanisms from a planning scheme perspective that could be added to the new scheme that may raise the relative profile and priority of RRC for the major chain department stores, which are not already inherent with the former Rockhampton City scheme – nomination of the CBD as the highest order centre, recognition of the regional administrative and service role of Rockhampton and the CBD, definition of a hierarchy of centres that supports the higher order role of the CBD etc. However, simply consolidating a RC Planning Scheme which details the size and development direction of the RRC may seek to reorientate the market perception of RRC and its prospects for a department store operator.

A mandate which seeks to secure a department store in the Rockhampton CBD may not necessarily be achievable simply as a planning scheme mechanism. As the Principal Activity Centre, the Study Team supports the premise that a department store should be located within the Rockhampton CBD. The challenge is in securing market interest and providing a developable solution. If RRC is to focus its attentions on attracting a department store to the Rockhampton CBD, it may need to take a vested interest through:

- Identification of strategic sites
- Acquisition of strategic site/s
- Tendering of development opportunities

It is acknowledged that in no other major Queensland regional centre or indeed in South East Queensland has a major department store established in a standalone location. David Jones and Myer prefer locations supported by an expansive mix of specialty stores and in order to maximise their commercial viability, with a preferred practice to lease rather than own sites, particularly since Myer has split from the Coles group. Developers also require a number of specialty stores and mini major tenants to support a department store, suggesting that a planned centre is likely to be the preferred operational location for both the major department store chains and commercial developers, at least for the medium term. Myer and David Jones in Sydney and Melbourne and David Jones in Adelaide and Perth, Harris Scarfe in Adelaide all continue to operate from major standalone CBD locations, as traditional flagship store operations.

It is interesting to note that David Jones has only 2 stores that are located in CBD's of regional centres – Newcastle, which is due to close in 2011 and Wollongong, suggesting that David Jones's continued policy is to focus its attentions on planned centre operations.

Myer has a stronger regional CBD representation including Orange, Dubbo, Wagga Wagga, Bendigo, Ballarat, typically converted Grace Bros locations, with other regional centre locations such as Geelong, located in major planned shopping centres. It is also noted that Myer closed its Grace Bros stores in Tamworth, Nowra and Bathurst as part of its repositioning strategy.

In comparison, both Myer and David Jones in the Brisbane CBD have redeveloped from their more traditional standalone locations to be the anchor of major multi-level enclosed centres. We also note the closure of standalone locations in the Townsville and Tamworth CBD's, both several years ago of the major chain department stores. With Myer opening in both Caneland Mackay and Stockland Townsville – major non-CBD locations despite planning schemes that seek to facilitate the growth of their respective CBD's as the highest order retail and commercial centres, this suggests that there may be pressure to develop a department store at Stockland Rockhampton or that there may indeed be pressure for a new major centre in the RRC region to accommodate a department store based centre.

From a market perspective, it is recognised that Stockland Rockhampton does offer the quality, scale and mix of specialty stores that would be attractive to a major chain department store and indeed that the centre is functioning as a regional shopping centre, with comparison shopping and a limited array of entertainment activities for the regional community it services. However, the site is somewhat constrained for further expansion, and may require eg. decking of parking, additional levels for the centre, with implications for masterplanning, traffic, parking etc.

The Study Team, therefore recommends that if continuing to pursue a department store for the CBD as the preferred solution for RRC, a masterplanning exercise for the CBD is undertaken to identify strategic and opportunistic sites, potentially comprising a major planned shopping centre.

7.3 Key Performance Indicators

The following Key Performance Indicators (KPI's) will assist in the review and measurement of the implementation of the recommended Centres Network Strategy for Townsville.

➤ **Scale of Centres:**

Assess the future size and growth of centres over time in comparison to existing floorspace.

➤ **Mix of activities in Centres:**

Assess the breakdown of these centres in terms of retail, commercial and other activities, as well as chain vs independent activities over time. The breadth of uses, particularly in the Major Activity Centres should be closely monitored with a higher representation of non-retail uses preferred. Conversely an increase in the proportion of retail of the total floorspace of the CBD is preferred.

➤ **Performance of Centres:**

Percentage of vacant floorspace in comparison to total available floorspace over time. Patronage in centres could be measured through counts of pedestrian traffic.

➤ **Capacity to expand:**

Land availability and take-up. For instance, need for additional centres in Emu Park must be examined in the context of the take-up of land within the town centre.

➤ **Economic and Employment growth:**

Assess future jobs growth over time, including absolute growth numbers and the relative proportions of industries of employment

➤ **Key actions for Centre development implemented:**

Including:

- CBD Master-plan update
- CBD Car-parking strategy
- CBD pedestrian and cycling strategy
- Structure Plan for Yeppoon Central
- Infrastructure Capacity Analysis for Key Centres
- Public Transport Strategy

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