GLADSTONE RETAIL STUDY

FINAL REPORT

Prepared for:

Gladstone City Council

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Summary

Gladstone City Council, as part of its preparation of the Draft Planning Scheme for the City of Gladstone, engaged Economic Associates Pty Ltd and GHD Pty Ltd to undertake a study of the City's retail network with the primary objectives of:

- preparing recommendations, for Council's consideration, regarding the need and desirable locations to accommodate future retail development to service the Gladstone region's current and future population; and
- preparing amendments to Council's draft Town Planning Scheme to give effect to its preferred course of action.

Three major streams of investigations were undertaken as part of the retail study:

- a floor space survey of existing retail floor space within the City, noting its type of use, location, quality and other observable features of its retail stock;
- a telephone survey of 381 Gladstone and Calliope Shire (Part A) households to determine their current use patterns of Gladstone's network of centres, including Rockhampton and other regional centres. This survey also explored residents' general levels of satisfaction with the City's retail provision and additional stores or services they felt were needed; and
- an overview of major retail trends and issues and their implications for the future provision of retail facilities within the City, particularly regarding potential shortfalls in facilities.

GLADSTONE'S RETAIL NETWORK

The floor space survey, undertaken in June 2004, relied on a combination of information provided by centre managers and field estimations to compile a picture of existing facilities:

- 499 retail and related premises were counted, with a total floor area of approximately 106,200 m², of which 83,140 m² was occupied by retail shops, 15,960 m² by professional services and associated commercial activities and 7,115 m² were vacant.
- The City's four major centre areas (CBD, Valley, Kin Kora, Nightowl) provide almost 53,000 m² or 64% of all retail floor space, about 13,000 m² or 81% of all professional service/commercial floor space and about 5,000 m² (70%) of all vacant space.
- The City's six minor centres, including the Hanson Road area, provides about 19,700 m² of retail floor space, with another 10,400 m² scattered in smaller local shopping areas and free-standing locations.

- Gladstone's overall retail vacancy rate is about 6.7%, which suggests the retail network is performing reasonably well. A healthy retail network requires some vacant space (5%-8%) to allow new businesses to enter the market and to enable existing businesses to move to larger or smaller premises in response to changing market conditions.
- Relative to other areas where Economic Associates has similar floor space data (Toowoomba, Ipswich, Hervey Bay), Gladstone's retail vacancy rate is about a percentage point lower.
- Gladstone City has a number of retail developments approved but not constructed, with some dating back five to ten years. Some are under construction, while others are unlikely to be built as approved.

MARKET FUNDAMENTALS

Gladstone City and Calliope Shire (Part A) comprise the retail catchment for most of Gladstone's retail activities, although some residents in adjoining Banana and Miriam Vale Shires would also make use of the City's facilities. Gladstone City was segmented into northern, central and southern areas based upon differing socio-economic characteristics, the road network and census collector district boundaries.

The catchment area's estimated population at June 2004 is 40,408 persons residing in 15,061 households. Over the forecast period to June 2021, it is expected to increase to:

- 42,715 persons in 15,887 households by 2006;
- 47,735 persons in 17,786 households by 2011;
- 53,838 persons in 20,105 households by 2016; and
- 60,369 persons in 22,615 households by 2021.

Over the 17 year period 2004-2021, the catchment area population is expected to grow at about 2.4% per annum, adding almost 20,000 people. Population and household numbers are expected remain stable in the northern and central Gladstone areas, with all growth occurring in the southern Gladstone and Calliope Shire (Part A) areas.

Catchment area households spend, on average, about $20,047 each year on retail goods and services. Average retail spending ranges from $17,760 per annum for northern Gladstone households to $21,160 for southern Gladstone households.

Catchment area households generate an estimated $301.9 million in retail spending potential at June 2004. At constant June 2004 dollar values, the pool of available retail expenditure is forecast to increase to:

- $322.3 million by June 2006;
- $371.5 million by 2011;

- $432.3 million by 2016; and
- $500.3 million by 2021.

The $198.4 million increase in retail spending potential over the 2004-2021 period represents the equivalent theoretic demand for an additional 37,450 m² of retail floor space. This growth in spending would be sufficient to support:

- three or four smaller convenience centres of less than 2,000 m² anchored by independent supermarkets and a small number of specialty shops and services (some of this space will probably be provided in Calliope Shire (Part A);
- one or two centres of around 5,000 m² of retail floor space anchored by major chain supermarkets (factoring in the addition of the recently opened Tannum Central centre);
- one or two retail showroom centres with a combined floor space of 10,000 m² to 15,000 m².

SHOPPER USE AND PERCEPTION OF GLADSTONE'S RETAIL NETWORK

The telephone survey of 381 Gladstone City and Calliope Shire (Part A) households obtained information on centre use, indicative spending at centres outside Gladstone, levels of satisfaction with Gladstone centres and shops and services respondents felt were needed or missing in the City.

Clothing and fashion shopping

- Stockland Kin Kora is where about 70% of households do the majority of their clothing and fashion shopping, with another 11% of households using the Gladstone Valley centre for this type of shopping;
- about 5% of households do the majority of their clothing and apparel shopping in Rockhampton centres;
- almost 6% use Brisbane-south east Queensland centres for this type of shopping;
- In 2004, Gladstone area households spent about $4.5 million or 20% of their household's clothing and fashion budget at centres outside Gladstone (mainly Rockhampton and Brisbane).

Major homewares shopping

- Hanson Road area is the major shopping destination for major homewares (major appliances, home furnishings, etc) with 29% of households using it for the majority of this type of shopping, followed by Stockland Kin Kora (19%) and Gladstone city centre area (12%);
- About 11% of households do the majority of their major homewares shopping in Rockhampton;

- Less than 2% of households use Brisbane-south east Queensland centres for the majority of their major homewares shopping;
- In 2004, Gladstone area households spent about $9 million or 20% of their major homewares shopping budget outside Gladstone, mainly in Rockhampton.

Level of satisfaction

When asked to rate their overall level of satisfaction with Gladstone's city centre and suburban retail centres:

- a clear majority of respondents (82%) are satisfied with Gladstone's suburban shopping centres, with 16% indication dissatisfaction;
- respondents are also reasonably satisfied (71%) with Gladstone's retail showroom and bulky goods retail facilities, with 22% expressing dissatisfaction;
- respondents are much less satisfied with the city centre's retail shops and services (only 45% satisfied) and leisure and entertainment retailing (48%);
- the level of dissatisfaction with the city centre's shops and services is significant (41% of respondents), and a high proportion of respondents (19%) did not use them at all;
- although levels of satisfaction appear high, almost 80% of respondents nominated additional stores and improvements they felt were needed in Gladstone;
- the stores most frequently nominated as missing or needed included Spotlight/linen store, more clothing stores/boutiques, more shoe stores, clothing stores for children/teenage/younger people, Super Amart/furniture and a Sizzler restaurant;
- most frequently nominated service or other facilities were better customer service, more stores for competitive pricing, better parking (especially in the city centre and Gladstone Valley, but also Stockland Kin Kora), better and safer access (mainly at Stockland Kin Kora) and leisure/entertainment facilities for children and teenagers.

MAJOR RETAIL TRENDS AND ISSUES

A range of demographic and retail industry trends are canvassed in this section, with the key points being:

- discount department stores (Kmart, Target, Big W) are getting smaller and discount variety or bargain stores (e.g. The Warehouse, Makro) are getting bigger;

- in the future, department, discount department and discount variety stores are likely to become less definitive and reliable as indicators of intended centre role and function within a network or hierarchy of centres;
- major chain and some independent supermarkets are getting bigger and smaller—bigger as they incorporate more and more specialty shop functions, and smaller as they seek opportunities through in-fill development and in smaller towns;
- change and innovation in retailing and retail formats are on-going processes which will periodically test the definitional, functional and locational aspects of Gladstone's (and all) retail planning strategies. Retail strategies that are too general will be of limited use in guiding the orderly and timely development of future retail facilities; strategies too tightly defined or prescribed risks the fossilisation of the retail industry in terms of innovation, competition and renewal, to the longer term detriment of the community.

RECOMMENDATIONS FOR GLADSTONE'S FUTURE RETAIL NETWORK

The bigger picture trends and issues will influence the form and format of retail development in the future but other, more localised issues, representing both opportunities and constraints, will shape the size, function and location of Gladstone's future centres.

- The location of existing centres, and centres approved but not yet built, will strongly influence the positioning of future centre development;
- some dormant approvals, if built as approved, no longer represent particularly good outcomes for Gladstone;
- future growth, rather than greater retention of escape spending (i.e. to Rockhampton), will be the major source of future demand and determining factor of future centre and retail development opportunities;

New centres will be needed and demanded to service recent and future population growth in Gladstone's retail catchment:

- the recently opened Tannum Central centre in Tannum Sands is catering to some of this demand in Calliope Shire and the addition of a large Supa IGA store at the Night Owl centre will do the same for parts of Gladstone;
- expected growth in the Kirkwood Road South Precinct will require a 4,000–6,000 m² neighbourhood centre anchored by a major supermarket, with the future intersection at Dixon Drive and Kirkwood Road the probable site;
- two or three convenience centres of 500–1,000 m² anchored by convenience stores or small supermarkets will be needed, although the number, size and locations of these smaller centres are more difficult to anticipate. One of these is likely to be in Calliope Shire.

Gladstone lacks a major retail showroom/bulky goods centre and one of 10,000–15,000 m² (or two smaller ones) should be accommodated within Gladstone:

- the racecourse is the preferred site, as it is large and could also accommodate a larger Bunnings (or Mega Mitre 10) store. However, it is still uncertain whether the site can be acquired from the State Government;
- Stockland's Auckland Creek site is the next preferred site, although part of it is affected by the Airport Safety area;
- a second alternative site is the QAL site on French Street, although this site may not be available, or even suitable, for development despite its zoning for retail use;
- the Hanson Road light industrial area will still offer retail showroom/bulky goods traders as a secondary area, but retail and industry traffic will eventually create conflicts.

Gladstone has a relatively large number approved retail developments that have been dormant for a number of years or are unlikely to proceed as originally approved. Council is therefore likely to encounter alternative scenarios and new proposals which might be at odds with the preferred direction outlined in this centre development strategy. Council should require the proponents of contrary proposals and scenarios to demonstrate a high level of community need sufficient to warrant departure from the intended centre sizes, functions and locations outlined in this retail centre development strategy.

REVIEW OF DRAFT PLANNING SCHEME AND SUGGESTED REVISED PROVISIONS

The following conclusions and recommendations have been made regarding the outcomes of the study and review of the draft City of Gladstone Planning Scheme:

- Consideration should be given to swapping the DEOs in Part 3 with the Strategic Framework in Part 1 of the draft Planning Scheme as the Act does not formally recognise the Strategic Framework, but does place highest importance on the DEOs.
- The Strategic Framework and the associated plan should be reviewed to reduce the use of undefined terms and reduce the level of restriction applied to certain centres, which in reality are difficult to enforce.
- The centres strategy should be reviewed given changing retail trends in size and range, blurred edge between retail types and where they can locate. The centres strategy is partly based on a size, use and function approach, which is not necessarily flawed, but could be more flexible in terms of use given the retail trends and the time horizon of the study.

- Definitions in the draft Planning Scheme should be reviewed given the changing retail trends in size and range, blurred edge between retail types and where they can locate as discussed in this study. In particular, consideration should be given to other non-shop use definitions that in time operate as shops (such as retail showrooms). It is recommended however, that retail showrooms be restricted to a specific location being the Racecourse Precinct while Hanson Road not be favoured as a location for new showroom development. Note that other locations may become available given constraints on tenure of the racecourse. In this case, the provisions proposed for the Racecourse Precinct would be transferable subject to site specific matters being included. If retail showrooms are not restricted, then a review of the definitions should occur with the objective that most retail showrooms would fall under the definition of Shop with a very limited definition for showrooms if required at all.

- Definitions in the draft Planning Scheme that are very similar and where there is little difference in tables of assessment and code requirements could be reviewed with a view to reducing the number of definitions.

- Combined with reviewing definitions, other means of triggering a material change of use, such as increasing vehicle traffic, should be considered for inclusion in the Planning Scheme rather than changes in types of use and floor area alone.

- The review of definitions can coincide with a review of the focus of the draft Planning Scheme being less on managing and differentiating between retail uses and focusing more on location and form issues.

- Designation of areas for future commercial growth should be included in particular in recognition of expected growth in the Kirkwood Road South Precinct and potentially the Auckland Creek and Racecourse sites for bulky goods and showroom type development. The recommended amendments to the Planning Scheme are focussed on the Racecourse being the location for a new showroom based centre, however, due to ownership by the State Government, it may not be possible to achieve development of this site. In this event, another location should be identified and the same provisions applied.

1 Introduction

Gladstone City Council is in the process of preparing its *Draft Planning Scheme for the City of Gladstone*. As part of this process, Council has commissioned Economic Associates Pty Ltd, in association with GHD Pty Ltd, to prepare a retail study of Gladstone City.

1.1 OBJECTIVES OF STUDY

Gladstone City Council identified five key study objectives or deliverables as part of the retail study. These included:

- A survey of existing retail floor space within the City, noting its type of use, location, quality and other observable features of its retail stock. This survey included proposed and approved developments for the City.
- A survey of Gladstone area shoppers to determine their current use patterns of Gladstone's network of centres, including Rockhampton and other regional centres. This survey also explored residents' general levels of satisfaction with the City's retail provision and additional stores or services they felt were needed.
- An overview of major retail trends and issues and their implications for the future provision of retail facilities within the City, particularly regarding potential shortfalls in facilities.
- Recommendations for Council's consideration regarding need and desirable locations to accommodate future retail development to service the Gladstone region's population.
- In light of Council's consideration and feedback, prepare amendments to Council's draft Town Planning Scheme to give effect to its preferred course of future action.

The Council's detailed Consultant's Brief is attached at Appendix E of this report.

1.2 METHODOLOGY

A number of tasks were undertaken to meet the five key objectives of the retail study. The study was undertaken in two phases. The first phase consisted of data collection, analysis and formulation of recommendations (the first four deliverables) and involved:

- The conduct of the retail floor space survey during the week of 14-18 June 2004. This involved the estimation of existing retail and associated premises within the City's major and minor centres, including strip centres and free-standing development. Wherever possible, actual floor space data was obtained from the centre owners or managers. Cooperation was excellent, with 38% of all inventoried floor space based upon data provided, rather than field estimation procedures.

- A telephone survey of 381 residents of Gladstone and Calliope Shire (Part A) was undertaken in early June 2004. This survey sought information on where respondent households did their shopping for convenience and comparison shopping, frequency of shopping at various centres for these types of goods, levels of satisfaction with aspects of Gladstone's retail facilities and additional stores and facilities that they thought were missing or needed to improve their shopping experiences. A copy of the questionnaire and detailed tabular results are provided in Appendix C of this report.
- A review and compilation of information and market intelligence on retail trends and formats likely to affect the future provision of retail facilities and formats in Gladstone. This included the incorporation of findings from Economic Associates previous and on-going investigations and monitoring of major trends, discussions with key retailers and retail property owners and managers, local and State agencies and Council's planners. Population growth prospects and current and future levels of retail spending potential were also calculated as part of this deliverable.
- The findings of the above investigations were compiled and assessed in order to recommend to Council the future form and function of the City's retail network, and the centre additions and changes likely to be needed to meet the needs and demands of Gladstone's future populations.
- After Council's review and comment on the these investigations and recommendations, revised recommendations were translated into planning advice to reflect Council's preferred policy directions in terms of location, function and form of its future network of centres.

The following sections present the five study deliverables.

1.3 ACKNOWLEDGMENTS

Economic Associates and GHD wish to acknowledge the assistance of the retailers, centre owners and managers, property developers and local and State government agencies contacted as part of our investigations. We are also grateful for the assistance and contribution of the 381 respondents who participated in the telephone survey of Gladstone and Calliope Shire residents.

2 Gladstone's retail network

This chapter describes the characteristics of Gladstone's retail network, identifying the distribution of retail space by location and use. An Excel database has been developed to provide Council with a record for each individual retail establishment located within Gladstone City. Information contained in the database comprises shop location, type of use, estimated floor space and building quality. The data may be sorted by suburb or shopping centre.

Six specific classifications were used to define the proportional distribution of retail floor space among different uses:

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

The quality of each individual premises was graded using a basic three-tier classification system of 'very good', 'good' or 'poor', based on both the interior and exterior condition of the premises.

In order to minimise inconsistencies in classification procedures, the field team was limited to two members who were responsible for data collection, classification, and data entry.

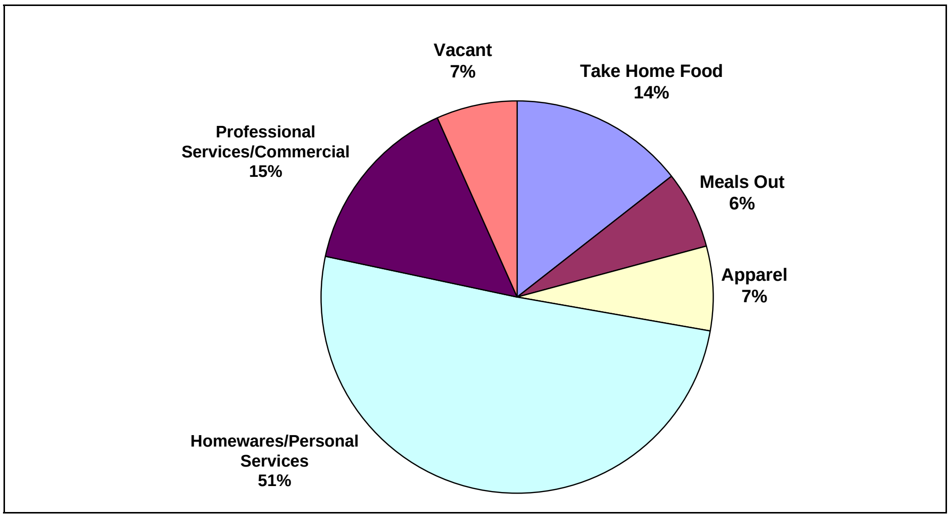
2.1 TOTAL FLOOR SPACE

A total of 499 potential retail premises were counted within the Gladstone City LGA boundary, with a total floor area of approximately 106,213 m², including vacancies, professional services and commercial offices in the immediate vicinity of retail establishments. The overall average shop size is 182 m² (excluding anchor tenants). The majority of buildings are in good condition, while 124 premises are in need of investment, representing 16% of total floor space.

Figure 2.1: Quality of inventoried floor space, Number of premises and per cent of floor space, Gladstone June 2004

About half (50.4%) of the inventoried floor space is occupied by Homewares/Personal Services retailers. Professional Services/Commercial is the second largest use (15%), followed by Take Home Food (14.4%), and Apparel (7.2%). Meals out/Take away represent only 6.3% and vacant space 6.7% of inventoried floor space.

Figure 2.2: Distribution of floor space by retail classification



When vacant space is excluded, the total occupied floor space is 99,098 m² distributed across 445 premises. The exclusion of premises occupied by Professional Services/Commercial operators results in a total occupied retail floor space of 83,138 m², made up of 334 premises.

When interpreting this floor space data, it should be noted how classification decisions were made. Some stores sell multiple commodities, so we have classified each store by its dominant use. For example, discount department stores and similar larger retail stores offer a wide range of goods, including apparel, but are included in the Homewares/Personal Services classification under the dominant use principle. Consequently, the floor space figures for apparel retailing are understated.

Table 2.1: Distribution of floor space by retail classification

	Take Home Food	*Meals Out/ Take Away*	*Apparel*	*Homewares/ Personal Services*	***Total Retail***	*Professional Services/ Commercial*	*Vacant*	***Total***
Floor Area (m²)	15,342	6,642	7,609	53,545	83,138	15,960	7,115	**106,213**
Distribution (%)	14.4	6.3	7.2	50.4	78.3	15.0	6.7	**100.0**
Premises (No.)	42	54	38	200	334	111	54	**499**

Source: Appendix A

The last retail inventory of Gladstone City was conducted in 1991-92 as part of the ABS Retail and Services Census, conducted every 5-6 years between 1948 and 1991-92. Much has changed since the 1991-92 Retail Census. While differing definitions and scope of coverage issues preclude a direct comparison of the 2004 inventory with the earlier Census data, a rough indication of change in floor space can be offered. Total occupied retail floor space in Gladstone City in 1991-92 amounted to 72,300 m². The 2004 data suggests an increase of 10,838 m², or 15%, to 83,138 m².

2.2 GEOGRAPHIC DISTRIBUTION

There are four major retail centres in Gladstone City, including the CBD, the Valley area, Kin Kora and the Nightowl Shopping Centre area. The large or major centres are supported by a network of small convenience centres, strip retail locations and freestanding stores. All centres are shown in Figure 2.3.

The four centres account for about 52,981 m² of retail floor space, or 63.7% of the total for Gladstone City, as shown in Table 2.2. Minor centres, including freestanding bulky goods retailers, account for the remaining 30,157 m² (36%) of Gladstone's retail floor space.

Table 2.2: Geographic distribution of floor space, Gladstone City, June 2004

	Total Retail		Total Occupied*		Total Vacant		Total Gladstone	
Centre/area	*(m²)*	*(%)*	*(m²)*	*(%)*	*(m²)*	*(%)*	*(m²)*	*(%)*
CBD	7,660	9.2	11,660	11.8	1,689	23.7	13,349	12.6
Valley	12,858	15.5	18,684	18.9	1,835	25.8	20,519	19.3
Subtotal	**20,518**	**24.7**	**30,344**	**30.6**	**3,524**	**49.5**	**33,868**	**31.9**
Kin Kora	27,537	33.1	28,918	29.2	164	2.3	29,082	27.4
Nightowl Centre	4,926	5.9	6,699	6.8	1,266	17.8	7,965	7.5
Total major centres	**52,981**	**63.7**	**65,961**	**66.6**	**4,954**	**69.6**	**70,915**	**66.8**
Hanson Road	12,005	14.4	13,085	13.2	–	–	13,085	12.3
Toolooa Street Centre	3,645	4.4	4,072	4.1	534	7.5	4,606	4.3
Clinton	2,039	2.5	2,847	2.9	168	2.4	3,015	2.8
Mellefont Street	1,014	1.2	1,225	1.2	100	1.4	1,325	1.2
Airport Village	434	0.5	434	0.4	434	6.1	868	0.8
Sun Valley Plaza	600	0.7	600	0.6	–	–	600	0.6
Other	10,420	12.5	10,874	11.0	925	13.0	11,799	11.1
Total minor centres & other	**30,157**	**36.3**	**33,137**	**33.4**	**2,161**	**30.4**	**35,298**	**33.2**
Total all centres	**83,138**	**100.0**	**99,098**	**100.0**	**7,115**	**100.0**	**106,213**	**100.0**

**Includes Professional Services and Commercial floor space*

Source:Appendix A

2.2.1 Major centres

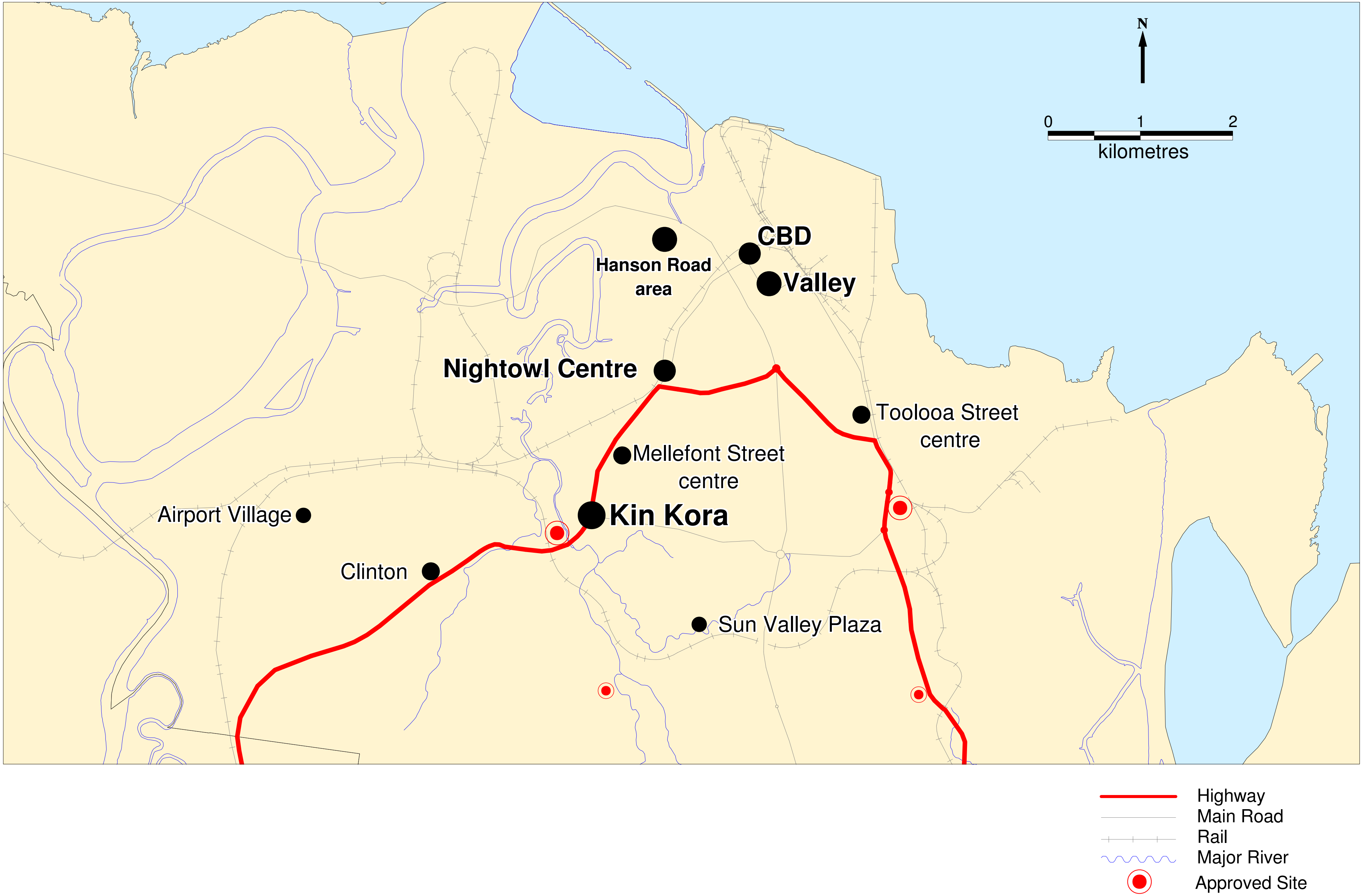
Table 2.3 shows the composition of floor space in the four major centres in Gladstone.

CBD and Valley

For the purpose of this study, the CBD boundaries include the corner of Goondoon Street and Lord Street to the north, Auckland Street to the east, Bramston Street to the south and Central Lane to the west. The Valley boundaries include Bramston Street to the north, Toolooa Street to the east, Eden street to the south and Goondoon Street to the west.

Figure 2.3: Existing and approved Gladstone retail areas

2004



There is a total of 11,660 m² of occupied retail and related floor space in the CBD, distributed across 76 premises. The mall end of Goondoon Street reflects the age of Gladstone City, where the older facades house many small independent operators, interspersed among professional services. Consistent with the traditional function of a city centre, the Gladstone CBD has the highest proportion of space occupied by Professional Services/Commercial businesses of all centres in the City (34.3%). However, there are very few retail chain operators relative to the tenancy mix of CBDs in other major urban centres in Queensland, with Target Country leaving a large void in the CBD after relocating to the Kin Kora Centre.

The proportion of occupied floor space housing operators in the Meals Out/Take Away classification is the highest of all centres at 15.8%, compensating for the second lowest proportion of Take Home Food space in the City (2.6%), after the predominantly industrial Hanson Road area (0.7%).

Despite the age of the CBD, the majority of the buildings still appear to be in reasonable shape, while around 23 of a total 91 premises (when vacancies are included) were deemed to be of poor condition. Most of the vacant space is in good condition, yet the vacancy rate is a relatively high 12.7%. This suggests that vacancy issues in the CBD may be related to tenancy mix, parking or accessibility, rather than simply quality of premises.

The Valley offers a total of 18,684 m² of retail and related floor space in 114 premises. The Valley area includes the Valley Centre, anchored by Woolworths and The Warehouse, the connecting Valley Plaza, and the smaller Palms Shopping Fair across Herbert Street. It also takes in the high concentration of shops along Tank Street, and those dotted throughout the surrounding area on the eastern side of Goondoon Street, between Bramston Street to the north and Eden Street to the south.

The Valley area has a large offering of Homewares and Personal Services (43.4% of occupied floor space), including a Retravision store and The Warehouse, as well as a high proportion of Professional Services/Commercial floor space (31.2%). However, the offering of Apparel is the smallest of all large centres (3.5%).

According to discussions with local retail operators, one symptom of burgeoning retail and related activity in the area is the congestion at the intersection of Herbert and Auckland Streets, which has apparently intensified since the introduction of the Woolworths petrol station.

The Valley has a lower vacancy rate than the CBD at 8.9%. While the majority of buildings in the Valley area are of good quality, around 36 of 127 premises (including vacancies) are in need of attention, all being among the ageing shops that lie beyond the main shopping centres on Goondoon Street.

Kin Kora

Stockland Kin Kora and the Windmill Centre make up the largest shopping destination in Gladstone, comprising 28,918 m² of occupied floor space across

60 premises. Kin Kora is the main source of convenience and comparison shopping in Gladstone, with Homewares and Personal Services representing over 60% of occupied floor space, and 24% of floor space classified as Take Home Food. The area is a hub for major chain operators and specialty shopping, but with few Professional Services/Commercial operators in the area (representing 4.8% of occupied space), and only 1.1% of occupied space classified as Meals Out. There is only a single vacancy in the area, with all premises of good to very good quality.

Big W and Woolworths anchor the eastern part of the centre which also contains all of Stockland Kin Kora's specialty shops. Kmart, Coles and Country Target comprise the western part of the centre. The two parts of the centre are split by the Dawson Highway, although their car parks are linked by an underpass.

Nightowl Shopping Centre area

This area includes the Nightowl Shopping Centre itself and the few surrounding shops on the Dawson Highway to the south of the centre, before Far Street, supporting 32 occupied premises totaling 6,699 m².

There is no traditional anchor tenant at the Nightowl Shopping Centre at this stage, but there are several chain operators, the largest of which include Rivers, Sportspower and Toyworld. Apparel is relatively well represented at over 18% of occupied space (due mostly to the Rivers store), as are Homewares/Personal Services at 30.1% of occupied space.

The vacancy rate is high at 15.9%, most of which space is in very good condition, consistent with the remainder of the Nightowl Shopping Centre. The vacancies may be attributed to the absence of an anchor tenant and construction to the south of the centre. The Nightowl Shopping Centre is currently undergoing expansion to the order of 4,860 m², including the development of a Supa IGA to take on the role as anchor tenant. At this stage, the expected completion date for the centre extension is February 2005. Since the completion of the June 2004 inventory, a Coffee Club has opened, which would reduce the amount and proportion of the centre's vacant space.

Table 2.3: Classification of occupied floor space in large centres, Gladstone June 2004

	Take Home Food		*Meals Out/ Take Away*		*Apparel*		*Homewares/ Personal Services*		***Total Retail***		*Professional Services/ Commercial*		***Total Occupied***
	m²	*%*	*m²*	*%*	*m²*	*%*	*m²*	*%*	***m²***	***%***	*m²*	*%*	***m²***
CBD	302	2.6	1,838	15.8	2,309	19.8	3,211	27.5	**7,660**	**65.7**	4,000	34.3	**11,660**
Valley	2,621	14.0	1,475	7.9	656	3.5	8,106	43.4	**12,858**	**68.8**	5,826	31.2	**18,684**
Subtotal	**2,923**	**9.6**	**3,313**	**10.9**	**2,965**	**9.8**	**11,317**	**37.3**	**20,518**	**67.6**	**9,826**	**32.4**	**30,344**
Kin Kora	6,954	24.0	314	1.1	2,364	8.2	17,905	61.9	**27,537**	**95.2**	1,381	4.8	**28,918**
Nightowl Centre	837	12.5	482	7.2	1,213	18.1	2,394	35.7	**4,926**	**73.5**	1,773	26.5	**6,699**
Total large centres	**10,714**	**16.2**	**4,109**	**6.2**	**6,542**	**9.9**	**31,616**	**47.9**	**52,981**	**80.3**	**12,980**	**19.7**	**65,961**

Source: Appendix A

2.2.2 Minor centres and other retail areas

Toolooa Street Centre area

This area encompasses the Toolooa Street Centre and all shops in the immediate vicinity of the centre, on the block bordered by Toolooa Street, Bonar Street, Off Street and Coon Street. There are approximately 25 occupied premises totaling 4,072 m², dominated by Take Home Food retailing (57.7%), including a Supa IGA. Homewares/Personal Services also feature, representing 33% of occupied space. The vacancy rate is 11.6%, with most of the buildings in the area showing signs of ageing and the centre in general need of a facelift.

Clinton

This area includes the Garden Lover's Plaza and the three clustered strip centres on Ballantine Street, nestled among the car yards that line the Dawson Highway. There is 2,847 m² of occupied floor space distributed across 20 premises. Retailing is dominated by Homewares/Personal Services (39.2%), while Professional Services/Commercial operators also play an important role (26.8%). Conversely, apparel does not feature at all. All of the floor space is of good to very good quality, and there is only one vacant shop in the area.

Other minor centres

There are three other small strip centres worth noting:

Mellefont Street–including the two small strip centres at the Dawson Highway end of Mellefont Street, comprised of nine occupied premises totaling 1,225 m², and a single 100 m² vacancy. Take Home Food and Homewares/Personal Services feature strongly (42% and 32.7% of occupied space respectively). The buildings are showing their age.

Airport Village–The relatively new Airport Village shopping centre is made up of three occupied shops totaling 434 m² and four vacancies totaling another 434 m². Tenants include a small supermarket, a bottle shop and a beautician.

Sun Valley Plaza–made up of four premises totaling 600m². The building is in good condition and all shops are currently occupied, with tenants including Take Home Food retailers and a hairdresser.

Retail clusters and freestanding shops

Excluding shops in the Hanson Road area, discussed in the following section on bulky goods retailing, there is another 10,874 m² of occupied floor space spread across Gladstone City in a total of 58 premises. An overwhelming majority of this floor space is occupied by Homewares/Personal Services (70.6%), while Apparel is represented by only 2.7% and Professional Services/Commercial 4.2%.

Table 2.4: Classification of occupied floor space in minor centres and other areas, Gladstone June 2004

	Take Home Food		*Meals Out/ Take Away*		*Apparel*		*Homewares/ Personal Services*		***Total Retail***		*Professional Services/ Commercial*		***Total Occupied***
	m²	*%*	*m²*	*%*	*m²*	*%*	*m²*	*%*	***m²***	***%***	*m²*	*%*	***m²***
Hanson Road	91	0.7	375	2.9	408	3.1	11,131	85.1	**12,005**	**91.7**	1,080	8.3	**13,085**
Toolooa Street Centre	1,633	40.1	305	7.5	360	8.8	1,347	33.1	**3,645**	**89.5**	427	10.5	**4,072**
Clinton	504	17.7	352	12.4	–	–	1,183	41.6	**2,039**	**71.6**	808	28.4	**2,847**
Mellefont Street	514	42.0	100	8.2	–	–	400	32.7	**1,014**	**82.8**	211	17.2	**1,225**
Airport Village	350	80.6	–	–	–	–	84	19.4	**434**	**100.0**	–	–	**434**
Sun Valley Plaza	495	82.5	–	–	–	–	105	17.5	**600**	**100.0**	–	–	**600**
Other	1,041	9.6	1,401	12.9	299	2.7	7,679	70.6	**10,420**	**95.8**	454	4.2	**10,874**
Total minor centres & other	**4,628**	**14.0**	**2,533**	**7.6**	**1,067**	**3.2**	**21,929**	**66.2**	**30,157**	**91.0**	**2,980**	**9.0**	**33,137**

Source: Appendix A

Quite a few freestanding shops are dotted along Toolooa Street, north of the Toolooa Street Centre but south of Tank Street, while others are sprawled along the Dawson Highway as it runs through West Gladstone. The remaining premises are scattered across the City.

2.3 BULKY GOODS AND ENTERTAINMENT RETAILING

2.3.1 Bulky goods retailing

There are 16 bulky goods/retail showroom type traders in Gladstone City, making up 11,332 m² of retail space and constituting 11.4% of total occupied floor space. The average store size is 708 m², and almost all premises are in good to very good condition.

There is no identifiable homemaker centre in Gladstone City as such, but the Hanson Road area is the main location of showroom/bulky goods activity. Specifically, the Hanson Road area includes shops on and around Hanson Road, limited by Hanson Road-Glenlyon Road to the north, the North Coast railway line to the east, Flinders Street to the south, and Auckland Creek to the west.

There are a total of 44 retail and related premises integrated with light industrial and commercial uses in the Hanson Road area, making up 13,085 m² of floor space. Included in these figures are ten bulky goods retail showrooms making up 6,587 m² of floor space.

Homewares and Personal Services account for over 85% of total retail and related floor space, including big box operators Chandlers, Harvey Norman and Furniture Court. There is also a large hardware component dominated by Bunnings. Only 2.9% of floor space is represented by Meals Out/Take Away food operators to service local workers.

Most of the space in the area is in good condition. No vacancies have been recorded for the Hanson Road area, given that the dominant use in the district is light industry and no vacant space appeared to be purpose-built for retailing.

There does not appear to be vacant land available in the immediate Hanson Road area that is large enough to consolidate bulky goods retailing into a homemaker centre, without the redevelopment of existing premises occupied by industrial or commercial uses. Additionally, traffic conditions in an industrial area are generally not compatible with shopper traffic.

The remaining bulky goods retailers are scattered along the east of the City. Betta Electrical and Wares are located on Toolooa Street, and Retravision and Gladstone Hi-Fi in the Valley. Two large furniture and homeware stores on Soppa Street are situated across from the bowling alley, with most of the surrounding land on Soppa Street currently occupied by light industrial and commercial uses.

There are limited vacant premises in Gladstone with the potential to accommodate bulky goods retailers. A 560 m² former Lifeline store on Off Street and 427 m² former Target Country in the CBD are both currently vacant, but the buildings are in need of investment. Furthermore, the CBD is not a suitable location for most retail showroom type operators.

It is apparent that there is an opportunity to consolidate and improve Gladstone's bulky goods retail sector by introducing a purpose-built retail showroom centre. This would allow some existing retailers to relocate out of the Hanson Road industrial area and reduce potential conflict between shopper and industrial traffic and parking.

2.3.2 Entertainment retailing

Gladstone City has no coherent leisure-entertainment retail precinct as such, with the exception of the restaurants and pubs staggered along the north end of Goondoon Street, reaching towards the waterfront. Even the cinema and bowling alley are built beyond what could be considered walking-distance from one another. In addition, the distance of these entertainment destinations from the main residential areas and main shopping precincts limits accessibility for patrons, particularly given the more limited mobility of the population in Northern Gladstone (see Table 3.2).

There were tentative plans to redevelop the existing cinema and squash courts into a six screen cinema format. It is now understood that the cinema complex will relocate as part of the Night Owl centre expansion. The success of 'after hours' entertainment precincts at Garden City Shopping Centre in Brisbane and Maroochy Plaza on the Sunshine Coast (albeit as part of much larger large shopping centre complexes) exemplify opportunities available for associated food retailing around cinema complexes, notably al fresco style dining. Cinemas, coupled with the recently opened Coffee Club, could create a similar entertainment precinct at the Night Owl centre.

However, the redevelopment of the cinema is only under consideration at this stage, with no firm plans to move ahead. Furthermore, the industrial setting of the current cinema is not conducive to a successful food and entertainment precinct.

2.4 NETWORK PERFORMANCE

2.4.1 Vacant space

Too much vacant retail space is indicative of competitive stress and a mismatch between supply and demand; so is too little vacant space. A 'healthy' retail network needs some level of vacant space to allow new businesses to enter the market and to enable existing businesses to move to larger or smaller shops in response to changing market conditions. Having some locational choice also helps to moderate average rental levels that landlords can charge retailers.

Unfortunately, no reliable benchmarks exist against which one might compare Gladstone's vacancy rate. In the early 1980s, retail analysts often nominated a vacancy factor of 3%–5% of total floor space as an indicator of a retail network roughly in balance with market demand. This is likely to be higher today, simply because of growth in average shop sizes and the rapid growth of retail showroom style developments. At a city or metropolitan level, a vacancy rate of 5%–8% is probably a more realistic 'benchmark' today (although even this range must still be treated as indicative only).

As shown in Table 2.5, there are 54 vacant premises in Gladstone City, constituting 7,115 m² of floor space, or 6.7% of total inventoried floor space. Thirty-six of these vacancies fall among the large centres, equal to 4,954 m² or 7% of total space in large centres. At the aggregate level, this figure appears to be within industry benchmarks. However, when the large centres are considered independent of each other, it is evident that the vacant space is not evenly distributed. The Valley area is the closest to accommodating a healthy vacancy rate at 8.9%, while the CBD is wanting at 12.7%. Kin Kora floorspace is tightly held, with only 0.6%, or a single vacancy in the City's largest retail centre, while the Night Owl area is currently undergoing changes and additions that have already mitigated the 15.9% vacancy rate recorded at June 2004.

The remaining 18 vacant premises are shared across the minor centres and other areas, equal to 2,161 m², or 6.1% of total space in minor centres. Prospects for Airport Village may improve with increased residential development in the area, while investment in the Toolooa Street Centre area may temper the vacancy rate.

Vacancies range in size from 40 m² to 560 m² with an overall average size of 132 m², smaller than the overall average shop size (182 m² when anchor tenants are excluded). The average for vacancies in large centres is 138 m², while the average for vacancies in minor centres and other areas is only 120 m². Most of the vacant space is in good condition with only 19 of the 54 premises appearing in need of investment.

Table 2.5: Vacancies by centre, Gladstone June 2004

	Vacant Space			*Total floor space*
	(No.)	(m²)	(%)	*(m²)*
CBD	15	1,689	12.7	13,349
Valley	13	1,835	8.9	20,519
Subtotal	**28**	**3,524**	**10.4**	**33,868**
Kin Kora	1	164	0.6	29,082
Nightowl Centre	7	1,266	15.9	7,965

	Vacant Space (No.)	(m²)	(%)	*Total floor space (m²)*
Total large centres	**36**	**4,954**	**7.0**	**70,915**
Hanson Road	–	–	–	13,085
Toolooa Street Centre	6	534	11.6	4,606
Clinton	1	168	5.6	3,015
Mellefont Street	1	100	7.5	1,325
Airport Village	4	434	50.0	868
Sun Valley Plaza	–	–	–	600
Other	6	925	7.8	11,799
Total minor centres & other	**18**	**2,161**	**6.1**	**35,298**
Total all centres	**54**	**7,115**	**6.7**	**106,213**

Source: Appendix A

2.4.2 Comparative structure

Economic Associates recently completed floor space investigations in Toowoomba, Ipswich and Hervey Bay which provide a broad, but nevertheless useful comparison of retail composition and structure (Table 2.6). The Ipswich (2004) and Hervey Bay (2003) inventories were undertaken using the same methodology as used for Gladstone. The Toowoomba City inventory (2004) was undertaken by Toowoomba City Council but augmented by Economic Associates and its scope was slightly different.

The amount of occupied retail floor space in each city reflects its local population base and that of its hinterland, its functional role and the contribution of tourism, among other factors. Toowoomba's retail centres serve the whole of the Darling Downs region, while Ipswich City's centres form part of the metropolitan Brisbane retail network. Hervey Bay's retail floor space provision reflects both a larger visitor market and a higher rate of population growth.

Relative to these other areas Gladstone appears to have:

- a notably lower provision of take home food retailing such as supermarkets, butchers, bakeries and delis;
- a lower provision of retail floor space catering to meals out/take away food;
- a provision of apparel retailing significantly higher than either Ipswich or Hervey Bay, but closer to Toowoomba; and
- a higher provision of homewares/services retailing than Toowoomba and Ipswich areas.

In terms of population size and total retail supply, Gladstone is more comparable to Hervey Bay than Toowoomba or Ipswich. Despite the differences in retail function and magnitude of supply, the vacancy factor for all four cities is remarkably similar, suggesting that Gladstone's retail floor space supply-demand is broadly in balance at present.

Table 2.6: Composition of occupied retail floor space by commodity group, Gladstone, Toowoomba, Ipswich and Hervey Bay

	Take Home Food (%)	*Meals Out/Take Away (%)*	*Apparel (%)*	*Homewares/ Personal Services (%)*	*Total retail space* (%)	*(m²)*	*Vacancy factor* (%)*
Gladstone	14.4	6.6	7.1	72.0	100.0	83,138	6.7
Toowoomba	18.5	8.0	9.2	64.4	100.0	358,097	7.6
Ipswich	27.9	8.1	3.9	60.2	100.0	218,345	7.4
Hervey Bay	17.8	7.7	4.7	69.9	100.0	105,054	7.6

**Based on total retail and professional services/commercial floor space*
Source: Economic Associates field estimates May-July 2004; Hervey Bay April 2001

We have not equated the retail supply to a floor space per capita figure for Gladstone or other cities. While conceptually appealing and easy to calculate, per capita floor space measures are of limited value in determining future demand or interpreting such figures as evidence of over or under-supply of retail floor space for a number of reasons.

Firstly, per capita figures such as 1.11 m² or 1.6 m² per capita commonly used by many Local Government Authorities in the 1980s and early 1990s, are determined empirically and simply reflect actual provision at a single point in time. There is no theoretical basis for interpreting the results as representing an under-supply, over-supply or state of equilibrium. Most of the per capita measures used during this time were derived from work carried out in the 1960s on behalf of the National Capital Development Commission in the ACT. All but a few LGA's (notably Perth) have long abandoned the use of per capita floor space measures.

Secondly, per capita floor space measures assume all floor space is equal, so that one square metre of corner shop carries equal weight to a square metre of department store or retail showroom space. These measures also assume that all communities or catchments demand and support retail facilities on an equal basis. They cannot anticipate differing socio-economic characteristics and disposable income levels and their differing abilities to support retail shops and services.

Thirdly, the measure suffers from a 'boundary effect' in that it is very difficult to define an appropriate or discrete population area. This is because of considerable overlap in retail catchments and shopper mobility. Just as Gladstone meets some of the retail demand for retail floor space generated by populations in Calliope, Banana and Miriam Vale Shires, Rockhampton (and even Sunshine Coast and Brisbane retailers) meet some of the floor space demand generated by residents of Gladstone.

Finally, per capita floor space measures are static and cannot reflect the dynamic and innovative nature of retailing. For example, the emergence and growth of relatively recent retail formats, such as food courts, retail showroom centres and other big box retailers (e.g. Bunnings) simply could not be anticipated by per capita measures in use at the time. Any such measures invoked today will suffer the same constraint in looking to the future. Similarly, floor space measures cannot anticipate increasingly common situations where changing socio-economic characteristics of a given area result in an increase disposable household incomes and retail spending potential, yet population numbers remain static or even decline.

2.5 OTHER CENTRES IN THE RETAIL NETWORK

Retail centres in Calliope Shire and Rockhampton also form part of the retail network serving the greater Gladstone-Calliope Shire region.

In Calliope Shire, the largest of these is the Boyne Plaza Shopping Centre in Boyne Island. This 5,487 m² centre is anchored by a 3,089 m² Woolworths supermarket and offers about 21 specialty shops. Additional retail outlets and services are located behind the centre.

The Tannum Sands area also has a neighbourhood shopping area comprising about four separate developments offering over 30 shops, professional services and commercial offices, with only two vacant shops noted. A new centre, Tannum Central, recently opened (September 2004) on a site adjoining the existing Tannum Sands retail area at Hampton Drive and Booth Avenue. This 4,350 m² centre is anchored by a 2,500 m² Coles supermarket.

These two retail areas will provide for the majority of the take home food, meals out/take away and convenience related homewares and services needs of Boyne Island-Tannum Sands residents. However, they will still shop in Gladstone and Rockhampton for much of their apparel and bigger ticket homewares purchases.

The township of Calliope also has a small local centre which provides for residents' basic convenience shopping needs. The Hazelbrook Village Shoppingtown offers about ten shops (one vacant) including a convenience store, bakery, butcher and hairdresser. A few other shops are located in the town centre. Most residents of Calliope township would also rely on Gladstone centres for their major food shopping and both Gladstone and Rockhampton for their homewares shopping.

Rockhampton, in its role as the major service centre to the Capricorn–Central Queensland region, provides the greater range of retail shops and services. It supports three major centres which, until recently, were all owned by Stockland. These include:

- Stockland Rockhampton—a 38,700 m² centre anchored by Big W, Woolworths and Action supermarkets;
- Stockland Rockhampton now incorporates the former Rockhampton Kmart Plaza—an adjoining 15,100 m² centre anchored by Kmart and Coles; and

- Stockland City Centre Plaza—a 14,130 m² centre anchored by Target and Coles, located in Rockhampton's CBD. Stockland sold this centre in 2004 in order to focus on the redevelopment and refurbishment of its Stockland Rockhampton centre.

Although Gladstone and Rockhampton retail centres have in common a number of national and regional retail chain stores, Rockhampton offers a much wider choice of such fashion and homewares retailers. Rockhampton will continue to serve as the major retail and service centre, given its size and central place in the Central Queensland region. Gladstone, however, can be expected to replicate some of the retail chains and formats presently available in Rockhampton, particularly in homewares retailing.

2.6 PROPOSED RETAIL DEVELOPMENT

In addition to the extensions to the Night Owl centre currently under construction noted earlier in this Section, a number of other developments are either approved or proposed for Gladstone. Discussions with Council's Planners and developers indicate that a number of projects are pending, including:

- The proposed Emmadale Heights Convenience Centre at Emmadale and Skyline Drive in the New Auckland area. Approximately five shops totaling 500 m² are approved for this developing residential area. It will cater to just the basic convenience shopping needs of local residents. Its internal location within this residential neighbourhood suggests that its trade catchment will be fairly limited.
- A supermarket based centre of approximately 3,770 m², incorporating a 2,370 m² supermarket was approved for a site on Sun Valley Road, opposite the Kin Kora Primary School. To date only a 600 m² convenience centre has been built. It is understood that an independent supermarket operator is considering a smaller space in the development, but no timing for its development could be ascertained.
- A neighbourhood shopping centre of approximately 1,300 m², service station (290 m²), fast food restaurant (470 m²), medical centre and childcare centre (75 places) has been approved at Glenlyon Road in Glen Eden, near Billabong Park and the Meteors Sportsground. This site appears poorly positioned relative to existing residential areas to support such intensive development in the near future. It is expected that the retail component of the development could be smaller than the amount approved, limited by the future residential growth potential in the vicinity of the site and passing trade.
- Another centre site in Glen Eden, on Glen Eden Drive and Gladstone Benaraby Road has had approval for about ten years. It is understood this site was intended to include about 780 m² of shops and a tavern. We understand the site was sold recently and that the new owners intend to

proceed with the development of the tavern and a small number of retail shops the very near future.

- Council has recently (2004) approved a convenience centre of approximately 1,000 m² at the intersection of Beak and Shaw Streets in New Auckland. This area is poorly served, with access to even basic convenience shopping requiring use of the Dawson Highway to go north to Kin Kora or south to the Clinton Plaza area.
- A convenience centre with a maximum gross floor area of 2,000 m² is approved for a site controlled by Queensland Alumina Ltd on French Street, near the QAL Access Road in South Gladstone. It is understood that this development is unlikely to proceed and the site/surrounding area may be retained by QAL as a buffer area. Alternatively, the site might accommodate a small retail showroom development.
- A site at Glenlyon Road/Hanson Road and Roseberry Street near the city centre has approval for the development of approximately 4,000 m² of retail showroom and other commercial uses dating back almost ten years.
- A large site has been earmarked for potential retail development as part of the Parksville Holdings residential sub-division layout in the Kirkwood area, fronting the future alignment of Kirkwood Road. A tentative site area of about 14 ha has been identified, although details as to the nature of the development or its likely timing have yet to be considered in any detail. We understand, however, that a number of major stores are considering the future potential of this area once the Kirkwood Road connection between the Dawson Highway and Glenlyon Road (around 2006).
- Bunnings is understood to be looking for a larger site to accommodate a larger store module. The racecourse site was one option under consideration but this has not been progressed by the Queensland Government (owners of the site) and Bunnings as at this writing.

Gladstone's largest approved, but yet to be developed retail-commercial site is located immediately south of Stockland Kin Kora and Auckland Creek, fronting the Dawson Highway. The site is owned by Stockland and it has approval to build a large centre of 17,700 m² (gross floor area) which could include a 3,000 m² supermarket, specialty shops, homemaker centre, fast food, professional services and a cinema complex. Part of the site lies within the Airport Safety Area, which would constrain the placement of some uses on the site.

Discussions with Stockland indicate that the development of the site is still under consideration, although it is now unlikely to incorporate a cinema complex and some other aspects of the development. Development of a large retail showroom-homemaker centre on the site is an acknowledged possibility. The ultimate future use of this site is contingent upon the outcome of Stockland's exploration with the Department of Main Roads and Gladstone City Council of a plan to divert the Dawson Highway behind the site and the western (Coles-Kmart) part of the Stockland Kin Kora centre.

It is understood that diversion of the highway would help solve traffic and access issues at the intersection of the Dawson Highway and Philip Street. The amount of traffic at the roundabout and the access points to the centre areas are affecting access to the centres. If the removal of through traffic can be accomplished, Stockland would seek to reconfigure the two parts of the Kin Kora centre in order to improve their performance and reduce shopper inconvenience.

The only other significant retail development in the region is Stockland's 20,000 m² retail showroom centre currently under construction in Rockhampton (Red Hill quarry site). It is expected to open in late 2004.

3 Market Fundamentals

This section defines the main catchment area served by Gladstone retail centres. Socio-economic characteristics of the catchment population are outlined, including forecasts of population and households. Estimates of household retail expenditure potential available now and in future years are also presented. Future growth in retail expenditure is then translated into floor space theoretically supportable by this growth.

3.1 GLADSTONE CATCHMENT

The urban settlement pattern of the central Queensland coast has shaped the catchment for the Gladstone City retail industry, which includes Gladstone City itself as well as the nearby towns in Calliope Shire Part A Statistical Local Area (SLA). Gladstone City has been divided into three parts based on different socio-economic characteristics, the road network and census collector district boundaries. The catchment areas are shown in Figure 3.1.

The total catchment comprises four components:

- **Northern Gladstone–**covering the vicinity west of the Dawson Highway and east of Glenlyon Road, extending north to the coast, and stretching south to the North Coast railway line on the western side and Philip Street on the east. It includes the CBD and Valley and the well established suburbs of Barney Point and South Gladstone.
- **Central Gladstone–**encompassing the suburb of West Gladstone, forming a triangular area bordered by the Dawson Highway to the west, Glenlyon Road to the east, and Philip Street to the south.
- **Southern Gladstone–**including the more recently established and growing areas south of the Gladstone Airport and Philip Street, including the suburbs of Clinton, New Auckland, Kin Kora, Telina, Sun Valley, Toolooa and Glen Eden.
- **Calliope Shire Part A–**over 80% of the population of Calliope Shire is concentrated in the Part A SLA, with easy access to shopping facilities in Gladstone City via the Dawson Highway or Gladstone Benaraby Road.

3.2 POPULATION AND HOUSEHOLDS

3.2.1 Current Population

Table 3.1 contains population and household data for each segment of the Gladstone catchment at the 1996 and 2001 Census. The total trade area experienced overall growth between 1996 and 2001, with the population increasing from 35,332 in 12,618 households to 38,121 in 14,105 households.

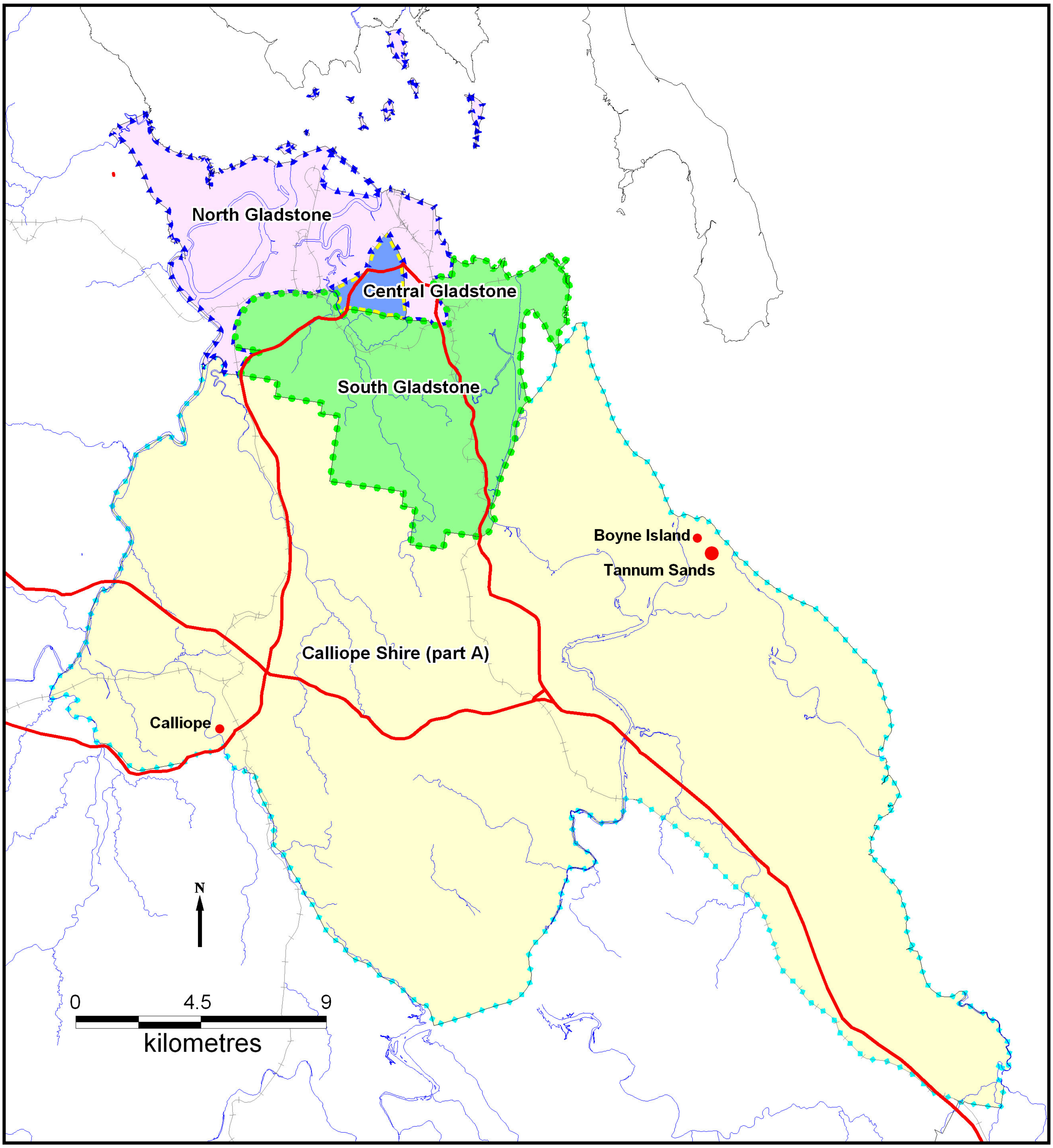


Figure 3.1: Gladstone Retail Catchment Areas

Economic
Associates Pty Ltd

Rail Line
Highway
Major River

All of this growth occurred in Southern Gladstone and Calliope Shire (Part A), with Northern and Central Gladstone experiencing losses of population.

Populations in nearby Banana Shire (12,893 people in 4,920 households at the 2001 Census) and Miriam Vale Shire (4,739 people in 1,973 households) are also likely to make up a small proportion of the market for Gladstone City's retailers, along with those in Calliope Shire (Part B) (2,592 people in 986 households). However, the populations and growth potential within these areas are unlikely to have a significant influence on Gladstone's future retail market prospects or needs. The population in northern Banana Shire is more likely to use Rockhampton City's centres and services; Bundaberg centres and services would provide for some needs of southern Miriam Vale Shire residents.

3.2.2 Forecast population

Future population and household growth within the Gladstone area is likely to be primarily governed by further industrial development and growth of existing industries, particularly within the Gladstone State Development Area. On-going residential development in Southern Gladstone is likely to house the greatest proportion of new residents in the catchment, along with continuing growth in Calliope Shire (Part A). With population ageing and little land available for residential development, both the Central and Northern areas of Gladstone are likely to experience minor net population losses over the forecast period.

Population forecasts prepared by the Queensland Government Planning Information and Forecasting Unit have been used to determine growth at the LGA level to 2021, while information prepared by the 2002Sinclair Knight Mertz *Gladstone Growth Management Initiative Residential Land Study* regarding potential future residential development capacities in Gladstone has been used to estimate the distribution of growth across Northern, Central and Southern Gladstone.

Forecasts of population and households were prepared for the year ending June 2004 to 2021, resulting in:

- 40,408 persons in 15,061 households by 2004;
- 42,715 persons in 15,887 households by 2006;
- 47,735 persons in 17,786 households by 2011;
- 53,838 persons in 20,105 households by 2016; and
- 60,369 persons in 22,615 households by 2021.

Over the 17 year period 2004-2021, the catchment area population is expected to grow at about 2.4% per annum. Although the forecasts in Table 3.1 assure a reasonably steady rate of growth over this period, in reality, it is likely to rise and fall in response to major projects, seasonal shutdowns and other factors.

Table 3.1 Forecast population and households, Gladstone catchment 2001 – 2021

Catchment area	*1996*	*Incr p.a.*	*2001*	*Incr.p.a.*	*2004*	*Inr.p.a.*	*2006*	*Incr p.a.*	*2011*	*Incr p.a.*	*2016*	*Incr p.a.*	*2021*
Northern Gladstone													
Population	7,869	-84	7,448	-17	7,398	-7	7,385	-8	7,345	-7	7,310	-2	7,300
Occupied dwellings	3,335	–	3,334	5	3,350	1	3,351	2	3,359	1	3,362	1	3,365
Persons/dwelling	2.36		2.23		2.21		2.20		2.19		2.17		2.17
Central Gladstone													
Population	3,664	-58	3,373	-31	3,280	-25	3,230	-13	3,165	-7	3,130	-6	3,100
Occupied dwellings	1,286	–	1,284	–	1,286	–	1,286	–	1,287	–	1,288	–	1,290
Persons/dwelling	2.85		2.63		2.55		2.51		2.46		2.43		2.40
Southern Gladstone													
Population	14,213	226	15,342	458	16,715	647	18,009	634	21,178	834	25,348	906	29,880
Occupied dwellings	4,660	116	5,241	181	5,785	205	6,195	229	7,340	293	8,805	323	10,420
Persons/dwelling	3.05		2.93		2.89		2.91		2.89		2.88		2.87
Total Gladstone City													
Population	25,746	83	26,163	410	27,393	616	28,624	613	31,688	820	35,788	898	40,280
Occupied dwellings	9,281	116	9,859	187	10,421	206	10,832	231	11,986	294	13,455	324	15,075
Persons/dwelling	2.77		2.65		2.63		2.64		2.64		2.66		2.67
Calliope Shire Part A													
Population	10,842	223	11,958	352	13,015	538	14,091	391	16,047	401	18,050	408	20,089
Occupied dwellings	3,795	90	4,246	131	4,640	208	5,055	149	5,800	170	6,650	178	7,540
Persons/dwelling	2.86		2.82		2.80		2.79		2.77		2.71		2.66
Total catchment													
Population	36,588	307	38,121	762	40,408	1,154	42,715	1,004	47,735	1221	53,838	1306	60,369
Occupied dwellings	13,076	206	14105	319	15,061	413	15,887	380	17,786	464	20,105	502	22,615
Persons/dwelling	2.80		2.70		2.68		2.69		2.68		2.68		2.67

Source: ABS CDATA2001, Dwelling Unit Approvals (unpublished data), PIFU (2003); Economic Associates estimates.

3.3 GLADSTONE CATCHMENT SOCIO-ECONOMIC CHARACTERISTICS

3.3.1 Key characteristics

Trade area socio-economic characteristics provide an indication of the capacity of a population to support retail and other activities. Tables B1 to B10 in Appendix B set out detailed characteristics of each component of the catchment area for Gladstone City as at the 2001 Census. Table 3.2 summarises this data. 2001 Census data for Rockhampton City, Fitzroy Statistical Division (FSD) and Queensland are included for comparison.

Table 3.2 Summary of selected socio-economic characteristics, 2001

	Northern Gladstone	*Central Gladstone*	*Southern Gladstone*	*Total Gladstone City*	*Calliope Shire Part A*	***Total Gladstone catchment***	*Rockhamp-ton City*	***Fitzroy SD***	*QLD*
AGE (= 100%)									
0–19	26.2	31.4	35.6	32.2	33.1	32.5	30.0	30.9	28.4
20–39	29.1	26.9	31.0	29.8	25.4	28.5	27.7	27.4	28.3
40–59	27.0	26.5	25.9	26.3	28.1	26.9	24.3	26.1	26.5
60 +	17.8	15.2	7.5	11.6	13.4	12.2	17.9	15.5	16.7
EMPLOYMENT(%)*									
In labour force	63.1	65.0	72.3	68.4	63.4	66.9	61.4	63.7	63.1
Unemployed	12.3	10.2	8.1	9.5	6.8	8.7	8.9	7.9	8.2
White collar occupations	55.8	60.4	56.9	57.0	54.3	56.2	66.2	60.6	68.3
Persons employed per household	1.0	1.2	1.4	1.2	1.2	1.2	1.1	1.2	1.2
HOUSEHOLD INCOME (= 100%)									
$0–$26,000	41.7	30.5	20.0	28.5	26.4	27.9	37.9	33.6	33.7
$26,001–$52,000	28.0	29.9	29.0	28.8	28.1	28.6	31.7	29.8	31.2
$52,000 +	30.3	39.6	51.0	42.7	45.5	43.5	30.4	36.6	35.1
Average 2001 income (2004 $ vals)	$44,917	$53,338	$62,333	$55,397	$58,302	$56,245	$46,972	$52,035	$51,396
DWELLINGS (%)									
Detached/semi-det	67.0	90.3	95.6	85.4	89.1	86.5	87.8	87.1	84.6
Flats/units	25.9	9.4	2.9	11.4	3.7	9.2	9.3	7.4	12.2
Caravan/other	7.0	0.3	1.5	3.2	7.2	4.4	2.9	5.5	3.1
Owned/purchasing	52.3	68.7	67.3	62.6	73.2	65.8	64.7	64.9	65.3
MOBILITY (=100%)									
No car	17.4	8.5	4.8	9.5	3.9	7.8	12.6	9.1	9.9
1 car	47.7	43.7	39.5	42.7	41.3	42.3	45.9	42.7	42.7
2 or more cars	34.9	47.8	55.7	47.8	54.8	49.9	41.5	48.2	47.4

**Population aged 15+ Source: Australian Bureau of Statistics 2001 Census; Appendix B*

The key points to emerge from these characteristics are:

Age Profile

The Gladstone catchment is slightly younger than the State as a whole, with around 12.2% of the population aged over sixty compared with 16.7% for Queensland. The newer Southern Gladstone area has a significantly younger age profile than all other areas, with only 7.5% of the population aged over sixty, and over 35% under nineteen. On the other hand, Northern Gladstone has the oldest age profile of all areas, with nearly 17.8% of the population aged over 60 (reflected in the smaller household size in table 3.1) and only 26.2% aged under 19.

Employment and Income

At the time of the 2001 Census, unemployment in Gladstone at 9.5% was higher than at the State level of 8.2%, but so too was labour force participation at 68.4% versus 63.1%. On the other hand, Calliope Sire (Part A) enjoyed the smallest proportion of unemployed of all areas at 6.8%, with a participation rate similar to Queensland as a whole.

Labour force participation in Southern Gladstone was higher than all other areas at 72.3%, while unemployment at 8.1% was just under the State level. While labour force participation in Northern Gladstone was lower than the other areas in the catchment, at 63.1%, unemployment was highest at 12.3%. Even though the participation rate in Northern Gladstone was the same as for Queensland as a whole, unemployment was considerably lower at the State level.

More recent unemployment data was obtained for Gladstone City and Calliope Shire (Part A). As of March 2004, it is estimated that unemployment in Gladstone City as a whole has fallen considerably to 6%, while unemployment in Calliope Shire (Part A) fell to 6.3%.

The average number of people employed per household in the catchment is 1.2, the same as the figure for the FSD and Queensland. Employment per household is above the State average in Southern Gladstone at 1.4, but below the State average in Northern Gladstone at 1.0.

The proportion of people employed in white collar occupations in the Gladstone catchment (56.2%) is over twelve percentage points below the level for the State as a whole (68.3%), ten points below the proportion for Rockhampton City (66.2%), and around four points below the FSD as a whole (60.6%). Only Central Gladstone reaches the 60% mark, while Calliope Part A has the lowest proportion at 54.3%.

However, there are considerable differences in wealth across the catchment. Over 40% of households in Northern Gladstone earn less than $26,000 per year, compared with 30.5% in Central Gladstone, 26.4% in Calliope Part A and 20% in Southern Gladstone. This compares with around 34% for the FSD and Queensland as a whole.

The average household income for the Gladstone catchment of $56,245 is higher than Rockhampton City ($46,972), the FSD ($52,035), and the State as a whole ($51,396). At $62,333, the average household income for Southern Gladstone is considerably higher than all other areas. This may be attributed largely to a higher incidence of labour force participation in the Southern Gladstone area. Average household income in Northern Gladstone is lower than all other areas at $44,917.

Housing and Mobility

The majority of housing in the Gladstone catchment is in the form of detached or semi-detached housing (86.5%), as is the case for Rockhampton City and the FSD, all at around 87%, as well as for Queensland as a whole (84.6%). However, there is variation in structure type within the catchment, with the Northern area incorporating the CBD and the Gladstone City Van Park, as well as the rural setting to the north-west of the City. While over 95% of housing in the Southern Gladstone area and over 90% in Central Gladstone is detached/semi detached, only 67% of housing in the older Northern Gladstone area takes the same form. Conversely, the proportion of flats/units in Northern Gladstone at 25.9% outweighs that in all other areas, while the proportion of caravans and other forms of accommodation at 7% is the same as that for Calliope Shire (Part A).

The proportion of households that own or are purchasing their home in the Gladstone catchment (65.8%) is comparable to Rockhampton City (64.7%), the Fitzroy SD (64.9%), the BSD (66.9%) and the State (65.3%). Calliope Part A has the highest proportion of all areas, at 73.2%, while Northern Gladstone has the lowest proportion at 52.3%.

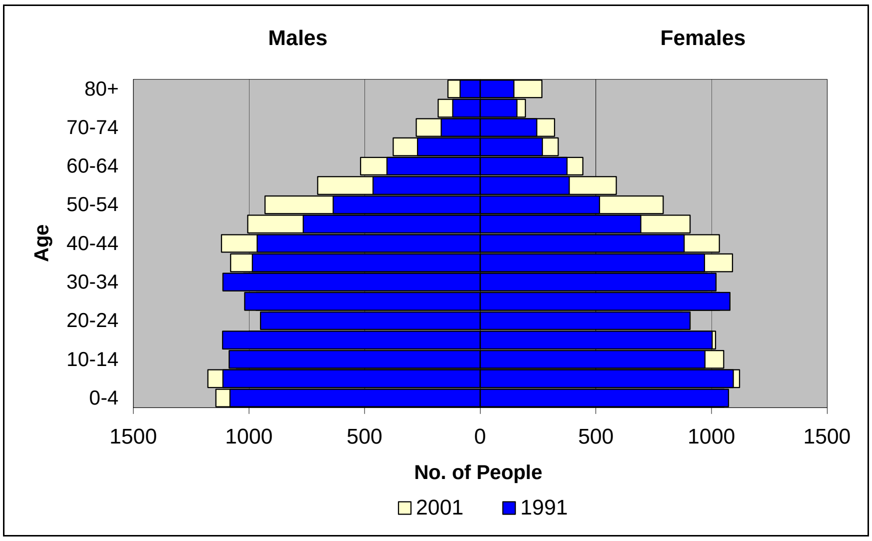
Northern Gladstone is the least mobile of all areas, with 17.4% of residents without a car, compared to 8.5% in Central Gladstone, 4.8% in Southern Gladstone, and only 3.9% in Calliope Shire (Part A). Around 55% of households in Southern Gladstone and Calliope own two or more cars, compared with around 48% in Central Gladstone, the Fitzroy SD and Queensland. The proportion is considerably lower for Northern Gladstone at 34.9%.

3.3.2 Major changes 1991–2001

Some important demographic changes have occurred in the Gladstone catchment over the past decade or so that are likely to have an impact on patterns of retail spending in Gladstone City. It is possible to measure these changes by comparing time series data from the 1991 and 2001 Census.

One of the most important factors effecting spending is age composition. It is evident from Figure 3.2 that Gladstone City is experiencing an overall ageing of the population, with growth occurring in all age groups from 35-40 and above. The industrial heartland of Central Queensland conversely experienced a net loss of young labour force candidates, with a decline in males aged 15-34 and females aged 20-34.

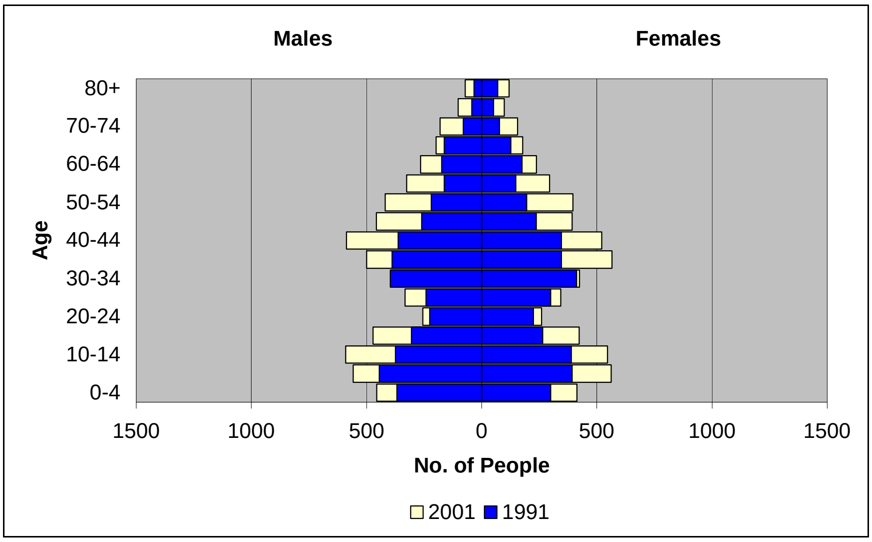
Figure 3.2: Population by age and sex, Gladstone City 1991 and 2001



Source: ABS Census of Population and Housing, 1991, 2001

As shown in Figure 3.3, population growth in Calliope Shire (Part A) has been more evenly distributed across the age groups, adding to what was a relatively small population base to begin with. The only cohort to experience a very minor decline were males aged 30-34, while the fastest growth occured in the 50-59 age group and the 70-79 age group, pointing to an ageing of the small population.

Figure 3.3: Population by age and sex, Calliope Part A 1991 and 2001



Source: ABS Census of Population and Housing, 1991, 2001

While labour force participation has remained much the same in both Gladstone and Calliope Shire (Part A), there has been a marked decrease in unemployment levels in the catchment, with both Gladstone City and Calliope

Shire (Part A) falling by around six percentage points between the 1991 Census and March 2004.

There was no notable change in tenure type in Gladstone or Calliope Shire (Part A) between the 1991 and 2001 Census, but there has been an increase in the proportion of detached/semi detached dwellings, compensating for a decrease in the proportion of caravans and other makeshift accommodation.

Changes in household type in Gladstone and Calliope Part A between the 1991 and 2001 Census generally reflect national trends. An increase in the proportion of lone parent households and couples without children, at the expense of couples with children, is likely to be attributable to a decreasing birth rate and increasing divorce rate, while the increase in the proportion of lone person households points to the ageing of the population.

3.3.3 Implications for retail demand

The demographic profile of the Gladstone catchment has a number of implications for the nature and level of retail demand:

- The relatively high proportion of children and young people in the catchment means high demand for take home food and basic apparel.

  Even though the age profile of the catchment is currently younger than the State average, the ageing of the population will eventually impact on spending patterns, with emphasis on household essentials rather than discretionary goods and services. However, residential development planned for Southern Gladstone is likely to foster growth of families with children in the area, somewhat offsetting the ageing of Gladstone City over the next ten to twenty years.

- The higher than average incomes in the catchment provide for more disposable income for discretionary goods and services, particularly fashion, homewares and entertainment.
- The increasing shift towards the larger detached and semi-detached style homes equates to increased demand for bulky goods and other homewares.

Among the residents in Northern Gladstone, lower than average incomes combined with an older age profile are likely to result in:

- a high propensity to spend in supermarkets and a lower propensity to spend in food specialty stores;
- an orientation of spending in ‘discount’ and ‘budget’ clothing stores rather than in specialty fashion stores;
- a general focus on those stores which offer price advantages rather than those offering range and depth of merchandise range or service.

That is, the shopping focus will be on discount department stores, variety stores and bulky goods/showroom retailers rather than on department stores or specialty stores.

Furthermore, given their limited mobility, residents in Northern Gladstone are likely to be more dependent on retailers in their immediate area. The Valley has responded well to these needs with Woolworths, the Warehouse, and Betta Electrical, as well as discount clothing chains Millers and Rockmans, while the Toolooa Street Centre offers a Supa IGA.

3.4 RETAIL EXPENDITURE POTENTIAL

Average retail expenditure levels for households in the Gladstone catchment were derived using mean household income data from the 2001 Census and the ABS 1998-99 Household Expenditure Survey. Dollar values from both sources were inflated to common June 2004 values using Brisbane Consumer Price Index data.

Average household retail expenditures for each component of the catchment were compiled by the broad retail categories identified in Section 2. Still, it is virtually impossible to define mutually exclusive household expenditures by major store type because of the broad and overlapping range of goods and services offered by retailers. Consequently, estimates of household spending cannot be taken as exclusively available for the support of any one particular retail activity.

Table 3.3 sets out average annual household retail expenditure estimated for the Gladstone catchment. Average household expenditure levels for Rockhampton, the FSD and Queensland are shown for comparison.

Table 3.3 Average household retail expenditure by retail classification, Gladstone catchment, (June 2004 $ values)

Area	*Take home food ($)*	*Meals out take away ($)*	*Apparel ($)*	*Homewares/ services ($)*	*Total ($)*
Northern Gladstone	8,140	2,090	1,120	6,410	17,760
Central Gladstone	8,220	2,510	1,510	7,340	19,580
Southern Gladstone	8,880	2,720	1,630	7,930	21,160
Calliope Part A	8,580	2,620	1,570	7,670	20,440
Total catchment	**8,567**	**2,531**	**1,488**	**7,461**	**20,047**
Rockhampton City	8,360	2,150	1,150	6,580	18,240
Fitzroy SD	8,120	2,480	1,490	7,250	19,340
Queensland	8,070	2,470	1,480	7,210	19,230

Source: ABS 1998-99 Household Expenditure Survey; Economic Associates estimates

Multiplying these average household expenditures by the trade area households at the June 2004 base year produces an estimate of total retail expenditure potential. Similar calculations for the forecast years of 2006, 2011, 2016 and

2021 produce estimates of the pool of expenditure potential available in the future, as shown below in Table 3.4.

Retail expenditure potential generated by households in the Gladstone catchment is estimated at $301.9 million at June 2004.

Household growth within the catchment area should increase total available retail spending to:

- $322.3 million by June 2006;
- $371.5 million by 2011;
- $432.3 million by 2016; and
- $500.3 million by 2021.

Over the forecast period June 2004 to 2021, total available retail spending is expected to increase by around $198.4 million, or by about $11.7 million per annum (constant June 2004 dollar values).

Most of this growth ($117.6 million or 59.3%) is expected to be generated by household growth in Southern Gladstone alone, while Calliope Part A is also likely to be responsible for a substantial proportion of the increase ($72.9 million or 36.8%).

Table 3.4 Retail expenditure potential generated by Gladstone catchment, 2004 - 2021 (June 2004 $ values)

At June	*Take home food ($'000)*	*Meals out take away ($'000)*	*Apparel ($'000)*	*Homewares/ services ($'000)*	*Total ($'000)*
2004					
Northern Gladstone	27,269	7,002	3,752	21,474	59,497
Central Gladstone	10,571	3,228	1,942	9,439	25,180
Southern Gladstone	51,371	15,735	9,430	45,875	122,411
Calliope Part A	39,811	12,157	7,285	35,589	94,842
Total catchment	**129,022**	**38,122**	**22,409**	**112,377**	**301,930**
2006					
Northern Gladstone	27,552	7,074	3,790	21,694	60,110
Central Gladstone	10,676	3,260	1,961	9,534	25,431
Southern Gladstone	55,563	17,018	10,197	49,616	132,394
Calliope Part A	43,807	13,376	8,017	39,161	104,361
Total catchment	**137,598**	**40,728**	**23,965**	**120,005**	**322,296**
2011					
Northern Gladstone	28,316	7,269	3,896	22,294	61,775
Central Gladstone	10,955	3,345	2,013	9,782	26,095
Southern Gladstone	67,491	20,669	12,390	60,269	160,819

At June	*Take home food ($'000)*	*Meals out take away ($'000)*	*Apparel ($'000)*	*Homewares/ services ($'000)*	*Total ($'000)*
Calliope Part A	51,533	15,735	9,431	46,069	122,768
Total catchment	**158,295**	**47,018**	**27,730**	**138,414**	**371,457**
2016					
Northern Gladstone	29,058	7,460	3,997	22,878	63,393
Central Gladstone	11,240	3,433	2,065	10,037	26,775
Southern Gladstone	83,005	25,420	15,241	74,120	197,786
Calliope Part A	60,575	18,500	11,086	54,158	144,319
Total catchment	**183,878**	**54,813**	**32,389**	**161,193**	**432,273**
2021					
Northern Gladstone	29,817	7,655	4,102	23,478	65,052
Central Gladstone	11,542	3,524	2,119	10,307	27,492
Southern Gladstone	100,709	30,843	18,496	89,935	239,983
Calliope Part A	70,416	21,504	12,886	62,959	167,765
Total catchment	**212,484**	**63,526**	**37,603**	**186,679**	**500,292**
Increase 2004–2021	**83,462**	**25,404**	**15,194**	**74,302**	**198,362**

Source: Tables 3.1 and 3.3; Economic Associates estimates

No allowance, however, has been made for inflation in forecasting future retail expenditure, as inflation does not create demand for retail floor space. However, a small increase of 0.5% per annum has been factored into the expenditure estimates for 2006 to 2021 to reflect real increases in household spending over this period.

3.5 FUTURE DEMAND FOR RETAIL FLOOR SPACE

3.5.1 Expenditure based estimates

Forecast growth in population and retail expenditure potential can be translated into theoretically supportable retail floor space in future years. This indicative estimate of future demand for retail floor space can be derived from increase in available retail spending over the 2004 to 2021 period ($198.4 million from Table 3.4) and from retail performance benchmark data for shopping centres.

The latest average performance levels for Australian shopping centres are published in Urbis/JHD's Retail Averages, 2002/2003. This publication covers virtually all department store based centres and most discount department store based centres in Australia, and a small sample of supermarket based centres.

Estimates of average productivity levels of the combined performance of discount department store based centres and supermarket based centres derived from the Retail Averages report are (adjusted to June 2004 values):

- \$8,900/m² for supermarkets, \$5500/m² for specialty shops and \$7,400/m² overall for supermarket based shopping centres;
- \$3,200/m² for discount department stores, \$9,000/m² for supermarkets, \$6,400/m² for specialty shops and \$5,600/m² overall for discount department store based centres.

There are no published average performance levels for smaller convenience centres, retail showroom centres or other specialist centres in Australia. However, retail analysts commonly use target or benchmark productivity levels of about \$3,500–\$4,500/m² for convenience centres and \$2,500-\$3,000/m² for retail showroom centres. It must be recognised, however, that these centres can trade successfully at productivity levels well below these targets, depending upon their tenancy mix, rent structure and other factors.

These averages provide a useful benchmark for converting the expected \$198.4 million increase in Gladstone's household retail expenditure potential into equivalent retail floor space, at least by broad centre type. This approach assumes the whole of this increase is converted to the equivalent of purpose-built shopping centre floor space. About 40% of homewares/services spending (or the equivalent of 15% of total household spending) reflects the potential for future support for retail showroom centre space. This proportion is based upon Economic Associate's previous investigations of spending on goods typically, but not exclusively, sold in retail showroom type stores (e.g. whitegoods, furniture, furnishings and other goods)

Table 3.5 sets out the equivalent retail floor space theoretically supportable by the forecast \$198.4 million increase in expenditure to 2021. The distribution of spending by centre type is indicative only, as not all centre types are represented in Gladstone (e.g. department store based regional centres) and it assumes that this entire amount is spent in Gladstone.

Table 3.5: Theoretically supportable floor space based on future growth by centre type, 2004-2021

Centre type	*Spending distribution (%)*	*Spending increase 2004-2021 (\$'000)*	*Productivity (\$/m²)*	*Equivalent floor space (m²)*
Retail showroom	15.0	29,754	3,000	9,920
Local convenience	15.0	29,754	4,500	6,610
Supermarket based	45.0	89,263	7,400	12,060
Discount dept store based	25.0	49,591	5,600	8,860
Totals	100.0	198,362	5,300	37,450

Source: Economic Associates estimates

Forecast growth in retail spending translates into about 37,000 m² of additional retail floor under these assumptions. The \$198.4 million in retail expenditure potential generated by population growth over the 17 year period to 2021 will not, of course, be reserved solely for the support of future new retail space in Gladstone. Existing retailers will seek to absorb all or most of this increase to improve their performance. Property owners will seek to fill vacant space with retailers capable of tapping this expanding pool of retail expenditure. Developments underway (e.g. Night Owl centre extensions, the new Tannum Central centre) will also absorb part of this growth potential.

Gladstone is unlikely to support a second major discount department store based centre within the forecast period. Consequently, the indicative 8,860 m² of discount department store based centre floor space is likely to be absorbed by other centre types (supermarket, retail showroom) and by Rockhampton centres.

Pre-determination of ‘appropriate’ levels of retail floor space using per capita provisions or floor space maximums and other methods were attempted by numerous local government authorities in the 1980s. Most have abandoned this quantitative approach as unrealistic and unworkable, although notable exceptions exist (e.g. Perth’s Metropolitan Centres policy is based on a detailed quantitative model). The dynamic nature of the retail industry limits the use of theoretically supportable floor space estimates as a quantitative planning tool or as a cap on development.

Nevertheless the indicative estimates in Table 3.5 provide an ‘order of magnitude’ indication of the Gladstone catchment’s ability to support additional retailing to 2021. By centre type, catchment growth would be sufficient to support:

- three or four smaller convenience centres of less than 2,000 m² anchored by independent supermarkets and a small number of specialty shops and services (some of this space will probably be provided in Calliope Shire (Part A);
- one or two centres of around 5,000 m² or retail floor space anchored by major chain supermarkets (factoring in the addition of the recently opened Tannum Central centre);
- one or two retail showroom centres with a combined floor space of 10,000 m² to 15,000 m².

We must stress that the forecasts of theoretically supportable floor space and its potential distribution by centre type can only be indicative of an ‘order of magnitude’, not a minimum or maximum. The diverse and changing nature of retail forms and formats and differing perceptions of market need and opportunity (by Councils, consumers, retailers, developers, investors and other stakeholders) will strongly influence the ultimate size and nature of future retail space and centres.

3.5.2 Population-to-store ratio based estimates

An alternative method of translating future growth into equivalent demand indicators for major supermarket and discount department stores, which are the anchor tenants of most larger centres, is to use current provision of stores per measure of population. This method has the same drawbacks as using per capita floor measures described earlier in section 2.4.2. However, by using large areas (Brisbane–Moreton and Fitzroy Statistical Divisions), at least the boundary effect is reduced, as Brisbane–Moreton incorporates most of south east Queensland and Fitzroy encompasses the majority of populated areas in central Queensland.

Table 3.6 sets out the number of major chain supermarkets (Action, BiLo, Coles and Woolworths) and discount department stores (Big W, Kmart, Target) operating in these statistical divisions, together with their estimated populations at June 2003 as reported by the ABS.

Table 3.6 Population per major store, Brisbane, Moreton and Fitzroy Statistical Divisions, June 2003

Statistical Division	*Population, June 2003*	*Major supermarkets (No)*	*Population per supermarket (rounded)*	*Discount department stores (No)*	*Population per discount dept store (rounded.)*
Brisbane-Moreton	2,507,887	202	12,400	61	41,100
Fitzroy	185,144	16	11,600	5	37,000

Source: ABS; retailer websites; on-line White Pages

The ‘supply’ of major chain supermarkets of one per 11,600 people in the Fitzroy area is higher than the supply in the Brisbane-Moreton Statistical Division of one store per 12,400 people. Under this latter provision, the Fitzroy area population would be ‘over-supplied’ by one major supermarket relative to the Brisbane-Moreton region. Similarly, applying the Brisbane-Moreton discount department store provision level to the Fitzroy region suggests an ‘over-supply’ of about half a store.

Under the current Fitzroy Statistical Division population-to-store ratios, the Gladstone catchment 2004 population of 40,408 would require a theoretical supply of:

- 3.5 major chain supermarkets, suggesting that the five major supermarkets currently serving the catchment represents a state of over-supply by one and a half stores; and
- one discount department store, suggesting an over-supply of one store at present.

The fact that these ‘extra’ stores exist in Gladstone clearly highlights the need for caution in using population ratios for determining future centre and retail provision. Other factors, such as much greater range and variety of retail outlets in south east Queensland competing with major supermarkets and discount department stores, would help support a higher provision of these types of stores in the Fitzroy region.

Applying the current Fitzroy Statistical Division population-to-store ratios to the forecast population in the Gladstone catchment at 2021 suggests that its provision of major supermarkets and discount department stores would not need to increase beyond the existing five supermarkets and two discount department stores currently serving the catchment, assuming future population-to-store ratios remain unchanged, as shown in Table 3.7. However, this simple ratio indicator ignores other factors such as location and the need to provide convenience retail facilities, such as supermarkets, in locations in or near major new residential growth areas, regardless of store ratios.

Table 3.7 Major supermarkets and discount department stores theoretically supportable by Gladstone catchment population at 2021

Catchment	*Population 2021*	*Supermarkets (No.)*	*Discount department stores (No.)*
Gladstone	40,280	3	2
Calliope Shire (Part A)	20,089	2	–
Total Gladstone catchment	60,369	5	2
Fitzroy Statistical Division	201,505	17	5
Population-to-store ratio		11,600	37,000

Source: Queensland's Future Population 2003 Edition, Department of Local Governemnt and Planning; Economic Associates calculations

The population-to-store ratios evident today will not remain constant over the forecast period, nor with the nature of supermarkets and discount department stores (and other retailers) remain unchanged. Nevertheless they, together with the expenditure based approach, provide order of magnitude estimates of future requirements.

The Gladstone catchment will require one or two additional major supermarkets (as indicated by the growth in retail expenditure based estimates of retail demand in section 3.5.1) to provide neighbourhood centres in areas convenient to future populations (e.g. Southern Gladstone). It is doubtful, however, that the need for convenience would extend to justify a third major discount department store in Gladstone within the forecast period. Growth patterns and expenditure increases in Gladstone's catchment do not support another store and, on the population-to-store ratio, the catchment would have to reach over 110,000 people to accommodate a third discount department store.

3.6 CONTRIBUTION OF VISITOR RETAIL EXPENDITURE

Visitors to Gladstone also contribute to the support and demand for retail facilities. Tourism Queensland estimates that domestic visitors spend about one million visitor nights in the Gladstone region (Gladstone City, Calliope and Miriam Vale Shires).

Bureau of Tourism Research retail spending data does not allow estimation of expenditure potential for areas as small as Gladstone. However, it is possible to get an approximation of retail spending potential, assuming Gladstone domestic visitors spend no differently to visitors nationally (they will in practice). Nationally, visitors spend about $48 per visitor night on retail goods and services. At one million visitor nights, this is the equivalent of $48 million per annum spent in the Gladstone region.

Visitor retail expenditure is likely to be more crucial to the support of cafes, restaurants and smaller convenience retailers, especially in the city centre, rather than Gladstone's shopping centres. Retail expenditure available from visitors will rise (and fall) over time, reflecting the vagaries of the travel industry. Opportunities arising out of growth in visitor markets will be easily met by small additions to existing retail areas, or redevelopment of existing space, rather underpinning the establishment of new shopping centres/areas.

4 Shopper use and perception of Gladstone's retail network

The telephone survey of Gladstone City and Calliope Shire (Part A) households provides a good overview of how residents currently use the existing retail centre network. The survey of 381 households (a 2.7% sample) was undertaken in early June 2004 and targeted the person responsible for most their household's shopping. A copy of the questionnaire is attached at Appendix C, together with the detailed tabular results of the survey.

The following sections highlight some of the key points to emerge regarding shopper use of the Gladstone–Rockhampton retail network, level of satisfaction with various aspects of the City's retail facilities and shops or other facilities respondents felt were needed or missing in the City.

4.1 CENTRES USED MOST FREQUENTLY

Gladstone and Calliope make use of a wide range of shopping centres and areas but with varying degrees of frequency. Table 4.1 shows the main centres visited within the past six months and how often respondents shop at those centres:

- Stockland Kin Kora, Gladstone's largest shopping centre, and the Gladstone Valley centre area, the only other Gladstone City centre offering a major, national chain supermarket, are the two most frequently used centres. Just over 96% of all respondents had visited Stockland Kin Kora within the past six months and almost 70% of those respondents shop at Stockland Kin Kora once a week or more often.
- About 85% of all respondents had visited the Gladstone Valley centre, with just over half of those respondents indicating that they shop there a least once a week.
- The Night Owl centre and the Toolooa shopping centre (anchored by an IGA supermarket) are also frequently used by the majority of people who shop at these centres. About 42% of respondents had visited the Toolooa shopping centre, with half indicating that they shop there at least once a week. The centre is anchored by a very popular IGA supermarket, and can trade seven days a week.
- The Gladstone city centre was visited in the past six months by about 55% of all respondents and they visit it less frequently than other Gladstone centres.
- Few Gladstone City respondents make use of the Boyne Island-Tannum Sands centres and the high frequency of use of these centres is due solely to Calliope Shire (Part A) respondent shopping behaviour.

- Rockhampton's suburban centres (e.g. Stockland Rockhampton) were visited by about 39% of all respondents and the majority (almost 75%) visit only once every two months or less frequently.
- Between 10% and 23% of all respondents had visited centres in the Bundaberg, Sunshine Coast and Brisbane-Gold Coast regions within the previous six months. Not surprisingly, the frequency of shopping at these centres is quite low.

Table 4.1 Centres visited in past six months and frequency of visit

	Centres visited in last 6 months		*Approximate frequency of visit*				
Centre	*(No.)*	*(%)*	*One or more times a week (%)*	*Once a fortnight (%)*	*Once a month (%)*	*Once every 2 months (%)*	*Less frequently (%)*
Stockland Kin Kora	366	96.1	69.4	16.4	10.9	1.6	1.6
Gladstone Valley centre	324	85.0	50.8	18.9	19.2	5.6	5.6
Night Owl Centre	245	64.3	36.1	19.3	26.6	10.7	7.3
Gladstone city centre	208	54.6	25.4	21.5	25.4	11.7	16.1
Toolooa shopping centre area	159	41.7	49.5	18.1	18.1	7.5	6.9
Hanson Road area	117	30.7	13.5	10.2	11.0	13.6	51.6
Clinton Plaza area	111	29.1	55.4	8.0	18.8	7.1	10.8
Boyne Plaza	114	29.9	60.1	6.2	12.4	8.8	12.3
Tannum Sands	77	20.2	51.8	13.9	16.5	10.1	7.6
Rockhampton city centre	96	25.2	1.0	3.1	21.9	19.8	54.2
Other Rockhampton centres	148	38.8	1.4	6.1	18.2	21.6	52.7
Bundaberg centres	47	12.3	4.0	6.0	12.0	10.0	68.0
Sunshine Coast centres	39	10.2	2.6	2.6	2.6	5.1	87.2
Brisbane/Gold Coast centres	88	23.1	–	–	2.3	11.4	86.4
(N=381)			*Base is the number visiting each centre in past six months*				

Gladstone Area Telephone Survey, June 2004

4.2 CENTRES USED FOR APPAREL AND HOMEWARES SHOPPING

Clothing and fashion shopping is done at a range of centres, with most (92%) respondents having shopped at several centres in the past six months, including Rockhampton centres and centres in the Sunshine Coast and the Brisbane-Gold Coast area.

Stockland Kin Kora dominates as a clothing and fashion shopping destination, with the Gladstone Valley shopping centre a distant second, as shown in Table

4.2. About 14% of respondents do the majority of this type of shopping at centres outside the Gladstone region, mainly in Rockhampton and in Brisbane-Gold Coast centres.

Table 4.2 Centres used for majority of households' clothing and fashion shopping

Shopping centres/areas (multiple response possible for centres visited in past six months)	*Centres visited in past six months (%)*	*Single centre for majority of apparel shopping (%)*
Stockland Kin Kora	76.9	69.3
Gladstone Valley shopping centre	23.1	10.8
Gladstone city centre	12.1	3.4
Night Owl centre	4.7	–
Boyne Plaza	5.8	2.8
Rockhampton city centre	7.3	1.4
Rockhampton suburban centres	14.4	3.4
Bundaberg centres	5.0	1.4
Sunshine Coast centres	3.4	1.1
Brisbane-Gold Coast centres	11.5	4.5
Other Gladstone/elsewhere	3.9	1.7
None visited	7.6	–
Total	**–**	**100.0**
No. Respondents	(N=381)	(N=352)

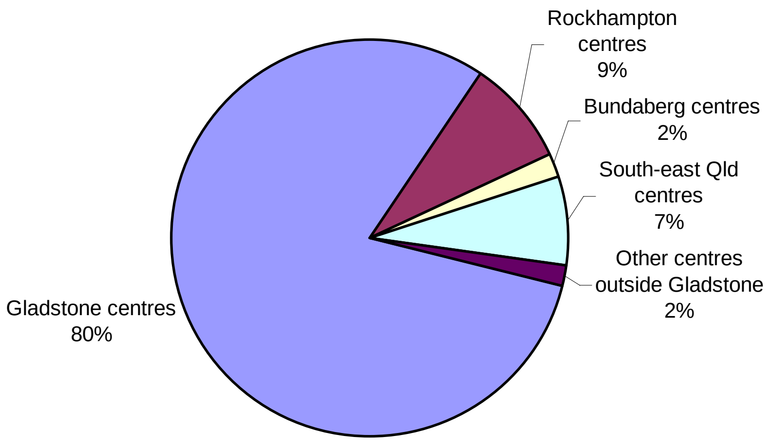
Gladstone Area Telephone Survey, June 2004

The Night Owl centre features as a centre visited for apparel shopping mainly because of the Rivers store. Boyne Plaza appears due to its significant use by Calliope Shire (Part A) respondents, rather than Gladstone respondents.

Respondents were also asked to estimate the distribution of their household's total annual spending on clothing and fashion accessories in Gladstone centres and retailers and in other centres/areas (Figure 4.1).

Respondents estimate that, on average, about 80% of their household's clothing and fashion spending is at Gladstone centres and retailers. Almost 9% is spent at Rockhampton centres and retailers, with just over 7% spent at centres and retailers in south-east Queensland (Sunshine Coast, Brisbane-Gold Coast).

Figure 4.1: Distribution of household clothing and fashion spending by area, Gladstone



4.3 CENTRES USED FOR MAJOR HOMEWARES SHOPPING

Shopping for major appliances, furniture, home furnishings and related homewares is usually done on an infrequent basis and, for big ticket items, shoppers will visit several stores or centres to compare prices and range. In Gladstone, this type of shopping is dominated by the Hanson Road area, where much of Gladstone's bulky goods and retail showrooms are located.

Compared to clothing and fashion shopping, major homewares shopping in Gladstone is more dispersed with respect to where the majority of this shopping occurs. While Hanson Road dominates as the destination for this shopping, Stockland Kin Kora, Gladstone Valley, Gladstone City and the Toolooa Road area are also significant destinations.

Rockhampton's city and suburban centres/retailers are also important destinations. Unlike clothing and fashion shopping, south-east Queensland centres and retailers do not seem to garner the same level of attraction for major homewares shopping for Gladstone area respondents.

Table 4.3 Centres used for majority of households' major homewares shopping

Shopping centres/areas (multiple response possible for centres visited in past six months)	*Centres visited in past six months (%)*	*Single centre for majority of homewares shopping (%)*
Hanson Road area	25.2	29.3
Stockland Kin Kora	15.7	18.7
Gladstone Valley shopping centre	10.2	11.0

Shopping centres/areas (multiple response possible for centres visited in past six months)	*Centres visited in past six months (%)*	*Single centre for majority of homewares shopping (%)*
Gladstone city centre	13.4	12.1
Toolooa Road area	5.5	7.3
Other Gladstone centres/areas	4.8	3.3
Rockhampton city centre	5.5	3.3
Rockhampton suburban centres	8.7	7.3
Bundaberg centres	2.6	2.2
Brisbane-Gold Coast centres	3.4	1.8
Other centres/elsewhere	4.2	3.7
None visited	28.6	–
Total	**–**	**100.0**
No. Respondents	(N=381)	(N=273)

Gladstone Area Telephone Survey, June 2004

As shown in Figure 4.2, respondents estimate that, on average, 80% of their household's major homewares spending is at Gladstone centres and retailers. Rockhampton centres attract 14% of this household spending but south-east Queensland centres attract only 3%.

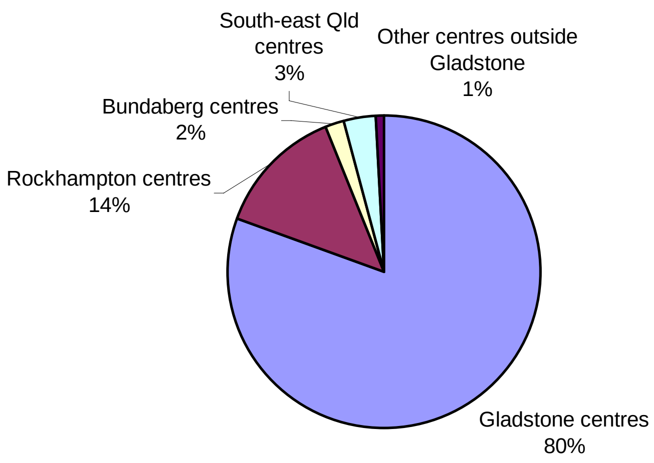


Figure 4.2: Distribution of household major homewares spending by area, Gladstone

On average, Gladstone and Calliope Shire (Part A) households appear to rely upon Gladstone centres and retailers for 80% of their apparel and major homewares. Rockhampton and south-east Queensland centres both attract a significant proportion of household apparel spending, but only Rockhampton attracts a significant proportion of major homewares spending.

4.4 CENTRES USED FOR FOOD AND CONVENIENCE SHOPPING

Food shopping, and shopping for other convenience goods such as chemist, newsagency and other goods purchased frequently and repeatedly, is usually done at the closest acceptable centre to the home (or place of work).

The Stockland Kin Kora centre, with two major chain supermarkets (Coles and Woolworths), dominates as Gladstone's food and convenience retailing destination, with over 58% of respondents indicating that they use it for the majority of their household's food shopping. Gladstone Valley (17% of respondents) and the Toolooa centre (7% of respondents) are the next most intensively used centres.

Again, Boyne Plaza ranks as a major food shopping destination due solely to the intensity of use by Calliope Shire (Part A) respondents. As would be expected, very little food and convenience shopping is done at centres outside Gladstone–Boyne Island area.

Table 4.4 Centres used for majority of households' regular food and convenience shopping

Shopping centres/areas (multiple response possible for centres visited in past three months)	*Centres visited in past three months (%)*	*Single centre for majority of food & convenience shopping (%)*
Stockland Kin Kora	76.9	58.3
Gladstone Valley shopping centre	44.6	17.1
Toolooa centre area	28.3	7.3
Boyne Plaza	19.4	15.0
Night Owl centre	8.9	–
Clinton Plaza area	5.5	–
Gladstone city centre	3.1	–
Other Gladstone area centres	3.9	1.3
Rockhampton city/suburban centres	1.1	–
Bundaberg centres	1.0	0.3
Other areas	3.2	0.8
Total	**–**	**100.0**
No. Respondents	(N=381)	(N=381)

Gladstone Area Telephone Survey, June 2004

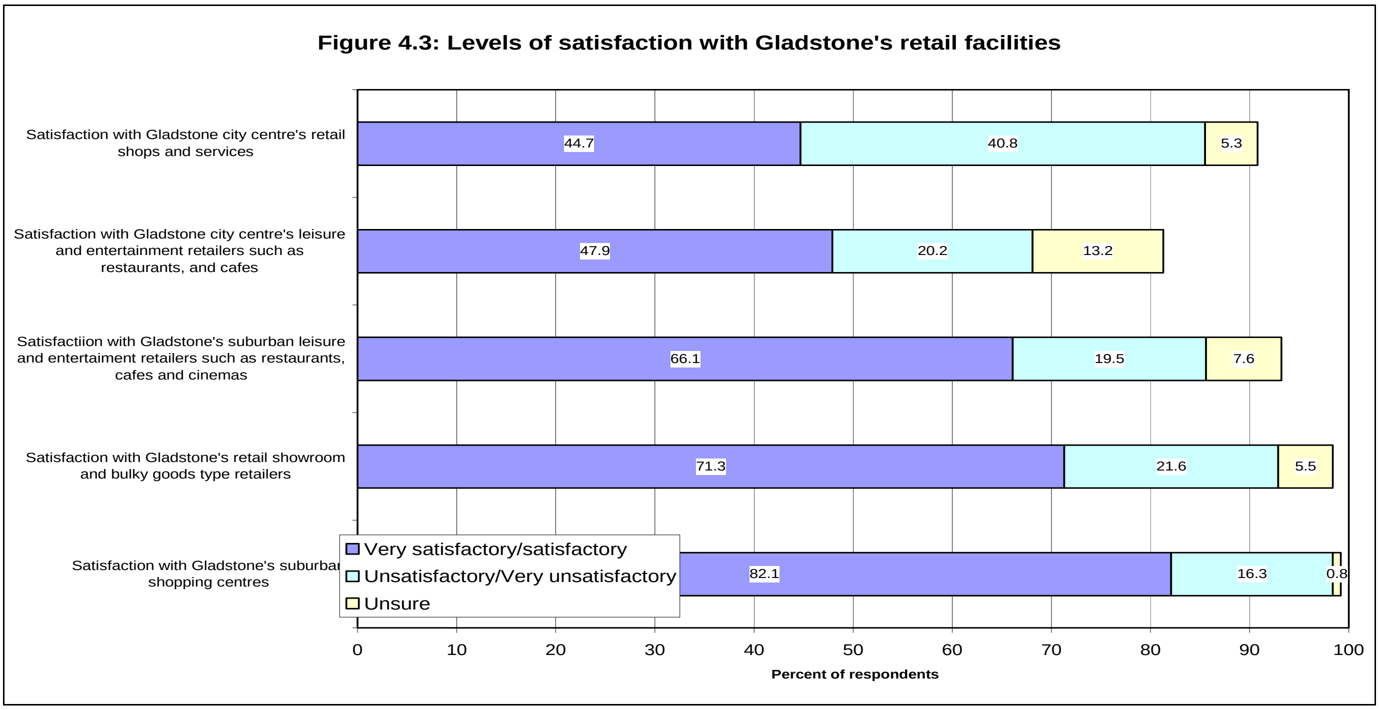
4.5 SATISFACTION WITH GLADSTONE'S RETAIL CENTRES AND FACILITIES

The telephone survey respondents were asked to rate their overall level of satisfaction with Gladstone's suburban and city retail shopping centres, bulky goods/retail showroom retailing, city centre retailing and leisure and entertainment retailing facilities using a scale of:

- very satisfactory;
- satisfactory;
- unsatisfactory;
- very unsatisfactory; and
- unsure.

A 'not applicable' response was also allowed for those who indicated that they did not use these facilities. As shown in Figure 4.3:

- a clear majority of respondents (82%) are satisfied with Gladstone's suburban shopping centres, with 16% indicating dissatisfaction;
- respondents are also reasonably satisfied (71%) with Gladstone's retail showroom and bulky goods retail facilities, with 22% expressing dissatisfaction;
- there is a lesser, but still high level of satisfaction (66%) with suburban leisure and entertainment retailers and cinemas, but with 20% expressing dissatisfaction and another 8% unsure of their view on these facilities;
- respondents are much less satisfied with the city centre's retail shops and services (only 45% satisfied) and leisure and entertainment retailing (48%);
- the level of dissatisfaction with the city centre's shops and services is significant (41% of respondents), and a high proportion of respondents (19%), and especially Calliope Shire (Part A) respondents, made no comment ('not applicable') on the city centre's leisure and entertainment retailers as they did not use them at all.



Respondents were then asked to nominate additional stores and related facilities that they felt are missing or are needed to better serve Gladstone region residents, and what other things they thought could be done to improve Gladstone's retail centres and shopping experiences. Only one in every five respondents thought that no additional stores were needed and only one in four respondents thought nothing needed to be done to improve Gladstone's shopping experiences.

The vast majority of respondents nominated one or more retail stores and related facilities (summarised in Table 4.5), with the most frequently nominated stores or store types being:

- more clothing stores, especially women's clothing (younger/teenage), children's clothing, shoes and boutiques;
- a Spotlight/linen store;
- additional supermarkets;
- a Super Amart furniture/furniture store;
- Sizzlers, more café/coffee shops, take away/eateries and more varied restaurants; and
- hardware store/improved Bunnings store.

Respondents nominated a number of improvements they felt were needed. The single-most frequent nomination (by 25% of all respondents) was for better parking at centres, with particular reference to the Gladstone Valley area, city centre and Kin Kora Mall (the eastern part of the centre). The call for better and safer centre access (almost 9%) of all respondents) refers almost exclusively to the Stockland Kin Kora shopping centre and the roundabout at Philips Street and the Dawson Highway.

A significant proportion of respondents identified a need for better customer service, more stores to ensure competitive pricing (and less expensive shops) and more variety of stores. More and better leisure and entertainment retailing were also identified as a needed improvement, particularly for families and teenagers.

Table 4.5 Additional stores and improvements needed in Gladstone (multiple response possible)

Additional stores and related facilities missing or needed to better serve Gladstone area residents	*Respondents (%)*	*Other things that can be done to improve Gladstone' retail centres and shopping experiences*	*Respondents (%)*
Nothing needed	21.8	Nothing needed	27.0
Apparel		**Shop/centre related**	
More clothing stores/boutiques	13.1	Better customer service	10.0
More shoe shops	8.1	More stores for competitive pricing	10.8
Women's clothing	5.0	Less expensive shops	5.5
Kids//teenage/younger clothes	7.3	More variety	5.5
Homewares		**Food/entertainment**	
Spotlight/linen store	14.2	Better food courts	5.0
Super Amart/furniture store	14.2	Adult leisure/nightlife	4.7
Hardware store/improved Bunnings	6.0	Kids/teenager entertainment	6.5
Department store (Myer, David Jones)	5.0	Family entertainment/restaurants	3.7
More variety of shops	8.7	**General/other**	
Sports shop	3.1	Better parking	25.2
Food		Better/safer centre access	8.9
Sizzlers restaurant	8.7	Extended trading hours	5.0
More varied restaurants	6.3	'One stop shop' centre	2.6
More cafes/coffee shops	5.0	Fix 'out of stock' problems	2.4
More take aways/eateries	3.7	Bigger/more centres needed	2.1
Fruit and veggie shop	3.7	Better public transport	2.1
	(N=381)		**(N=381)**

Gladstone Area Telephone Survey, June 2004

The results shown in Table 4.5 represent the aggregation of comments into short, quantifiable categories. Appendix C also contains a qualitative selection of longer responses and respondent quotes grouped by centre or topic which might assist in interpreting the results in Figure 4.3 and Table 4.5.

4.6 SUMMARY AND IMPLICATIONS FOR THE FUTURE

The findings of the telephone survey suggest that most Gladstone area shoppers are generally satisfied with Gladstone's suburban shopping centres and leisure and entertainment retail facilities. Even so, there is clearly room for improvement in the delivery of retail goods and services by existing shops and centres, as well as a desire to see a greater range and variety of shops enter the market (in both new and existing centres) to cater to perceived deficiencies and to promote price competition and better customer service among traders.

Availability and variety of meals out/takeaway food venues are clearly not meeting shopper expectations and there is a perceived need for more leisure/entertainment retail facilities, especially for the younger/teenager cohort.

There is clearly a significant level of dissatisfaction with the retail and leisure/entertainment facilities in the city centre. Gladstone City Council has recently commissioned a study of the city centre area which addresses, in part, its perceived deficiencies and future role in Gladstone's retail network. Consequently, issues and recommendations concerning the city centre do not form part of the Retail Study other than those concerning its current and future role and interaction within the broader retail network.

Population growth and the concomitant increase in household retail expenditure potential over the forecast period, coupled with evolving and changing retail trends, will have a significant influence on the retail industry's ability to meet the expressed retail deficiencies and improvements. For example, the apparent strong demand for a Spotlight store, a Super Amart store or Sizzlers restaurant may be met in time as the region continues to grow, subject to the corporate goals and location strategies of those particular companies. Gladstone's retail and centre planning should therefore anticipate the accommodation of these potential market entrants in existing centre areas, in future centre sites or in free-standing locations.

However, despite the apparent desire or demand for a major department store (e.g. Myer, David Jones), the market cannot meet this demand because of the high population thresholds needed to support them (there is no major department store between the Sunshine Coast and Cairns). While the role and format of the department store is, and will continue to change, it is doubtful that Gladstone's retail network would need to consider accommodating this type of retailer within the study period.

5 Major retail trends and issues

Innovation is a mainstay of the retail industry. Retailers and retail developers are driven by the need to respond to, and anticipate, customer needs and desires, and by the need to incorporate new technologies. Changing demographic profiles and lifestyles require constant monitoring for often subtle shifts so that retailers can reposition their retail offer, presentation and mode of operation.

Change occurs at both evolutionary and revolutionary levels, affecting the form and function of retailers and retail centres. The rate of change and innovation over the past five to ten years has been particularly testing for local government authorities as new retail formats and activities challenge traditional hierarchical based centres planning policies.

5.1 DEMOGRAPHIC AND SOCIAL CHANGE

Demographic and social trends affect the form and function of retailing and retail centres over time. Changes in the labour force, family structure and ageing in particular are major trends affecting shopper behaviour and retailer responses.

5.1.1 Longer working hours and more women in the labour force

The ABS *Australian Social Trends 2003* reports that the average working week for full-time workers increased from 42 to 44 hours between 1982 and 1994, with 30% of those in full-time employment working over 50 hours per week. Working hours increase considerably for women when unpaid work in the home is taken into account.

While significant social changes over the past few decades have paved the way for an increase in the female labour force participation rate from 37% in 1971 to 55% in 2001, women have retained primary responsibility for household duties, including the household shopping.

Even though much of the employed work for females is in fact part-time, work outside the home in conjunction with other household and family duties leaves less time available for food and other shopping. This has resulted in a major shift towards just-in-time food shopping, with the frequency of trips increasing but the amount of time spent in the supermarket on each occasion decreasing. Food shopping is considered by many as a ‘chore’ and an extension of housework. Supermarket operators have responded by building more stores in smaller, easily accessible centres, with locations on the ‘going home’ side of major arterial roads highly prized.

Work is not the only activity encroaching upon time to shop. People now live busier lives and, as often noted, are increasingly time-poor. There is more to do outside the home, from shuttling children to and from school, sports and other extra-curricular activities, to participating in a wide variety of adult social, sporting, education and special interest activities.

The way in which people work is also changing. More people are working at home, either as ‘telecommuters’ or in home-based businesses. More people are working part-time or casually outside the home, some out of necessity, others by choice. In areas such as Gladstone where shift work is common, the time available to shop, whether for necessities or for discretionary goods and services, is particularly constrained, made more so by restricted trading hours.

Consequences of these work related trends and changes are that people are out and about more often throughout the day and evening than in the past, and they have the mobility to do so. Households with two or more cars now outnumber those with only a single car.

5.1.2 Changing family structure

Australian families are changing in composition due to a combination of age, lifestyle and economic factors. The number of one-parent families increased by 53% between 1986 and 2001, while the number of traditional couple families with children increased by only 3%. The number of couple families with no children living with them has increased by 38%. This increase has occurred across nearly all age groups reflecting, in part, an ageing population, a decline in fertility and an increasing number of couples remaining childless.

Non-family households are also on the increase. Between 1986 and 2001, the number of Australians living alone increased by about 74%. In 2001, persons living alone made up 10% of the Australian population and almost one in four households. About 3.6% of the population lived in group households (e.g. students, other non-related persons) and accounted for 4% of all households in 2001.

Changing family and household structure and composition have been, and will continue to drive changes in food product sizing and packaging, as well as in the ways in which retailers accommodate these groups.

5.1.3 Ageing population and early retirement

The ageing of Australia’s population is well recognised. Better quality of life and advances in medical technology have increased the life expectancy of Australians from 55 years at the start of the twentieth century to 77 years for those born in 1999-2001. The proportion of the population aged over 65 is projected to increase from 12.6% in 2002 to around 19% by 2021 and around 27.1% by 2051 (*ABS Yearbook Australia, 2004*).

The consequence will be a change in the needs and wants of a large portion of consumers. Retailers will need to respond by expanding product ranges, such as healthcare, and innovating in the way existing products are supplied, e.g. providing smaller portions. Forward-thinking retailers in Europe have already opened supermarkets purpose–built for older shoppers, with design specifications such as lower shelves and lighting for sensitive eyes well received by seniors who frequent the stores in Salzburg and Vienna. As a fringe benefit, the stores' wider aisles and bigger parking spaces also happen to appeal to parents with prams.

The trend towards earlier retirement evident between 1971 and 2001 is also changing the composition of consumers. In 1971, three quarters of men aged 60-64 were participating in the labour force. By 2001 this figure had reduced to 50% (ABS Social Trends 2003). However, increasing longevity combined with mounting pressure for self-funded retirement and healthcare may see a reversal of this trend in the near future. As the number of people of retirement age rapidly balloons, retailers will be faced with a large sector of the population with more time on their hands. This may result in more staggered customer service demands as seniors choose to shop at their own leisure, avoiding the after-school and after-work rush.

5.1.4 Rise of performance convenience

A consequence of demographic change and industry innovation has been the disruption of the traditional shopping patterns and preferences of consumers. Shopping is no longer done to a routine schedule, i.e. the traditional Thursday evening and Saturday morning. People have to squeeze it in where they can, and they are increasingly intolerant of retailers and service providers who cannot, or will not, help them to make the most of their time, whether it is buying a loaf of bread, shopping for shoes, or paying a bill.[1]

The concept of retail convenience, particularly in town planning, once meant physical proximity, usually to home. With two income families becoming the norm and where partners might work in quite different locations, the concept of retail convenience is becoming far less location-specific and more performance oriented.

Shoppers want one-stop shopping at locations and hours convenient to them. They want assurance that if they go to a store or centre, there is a high probability that the items they want will be there. They want the convenience of speedy transaction times, whether at a convenience store, supermarket or a department store. These three factors define 'performance convenience'.

Physical proximity or travel times from home or work are still important but are no longer the sole defining characteristics of convenience. Certainties of product availability and minimal transaction times are critical. Retail destinations which provide high levels of performance convenience are those

[1] The discussion in Section 5.1.4, except where indicated, is based mainly upon two sources: the *Canberra Retail Study* (1998) prepared for the ACT Government by BIS Shrapnel, and BIS Shrapnel's *Retail Property Market Forecasts and Strategies 1999 to 2009.* (Mike McCracken of Economic Associates was a contributing author of those reports).

that offer the shortest travel *and* shopping time, and provide the greatest assurance that customers will find what they want when they get there. Customer need and demand for 'performance convenience' suggests that larger centres, such as regional and super regional centres which offer greater assurance of product availability, are best able to meet this demand, provided that travel and transaction times are also acceptable.

A more recent study, *Shopping Centres: The Changing Face of the Community*, (2000, Dangar Research Group/Property Council of Australia) echoes the findings of the earlier BIS Shrapnel work. This study involved a review of existing research and the results of ten focus group discussions held in Sydney, Melbourne and Brisbane.

One of the key trends in retailing identified in that study was the importance of convenience and time:

> *Convenience does not only equate with handy outlet location or long opening hours. It can mean 'no hassle' which, in turn, relates to conservation of that now most precious of all commodities—time. People have become highly intolerant of time wastage through inefficiencies: disorganisation, the toll of overcrowding, mistakes, slack staff response. Time wasted is counted as a relationship and loyalty debit. The reverse is also true; 'respecting my time' adds substantially to satisfaction and helps to cement customer relationships'* (page 20).

This study also highlighted the potential of larger centres to become inconvenient for shoppers:

> *The scope of outlets and services in major centres clearly adds up to a particular kind of convenience. However, a recurring theme in consumer comments (including those of real supporters of centres) was the risk that so much variety and choice would result in* ***inconvenience****, in the sense of centres becoming simply unmanageable in human terms* (page 52).

Shopper inconvenience associated with larger centres (e.g. department store based regional centres) is unlikely to have any relevance to Gladstone's future provision of retail centres, as its regional population base will not support such a centre. However, 'performance convenience', as applied to shopping centres anchored by major supermarkets and smaller centres anchored by convenience stores, will influence the size, number and location of future centres in Gladstone, as well as the future function of some existing centres.

5.2 TRENDS—DEPARTMENT AND DISCOUNT DEPARTMENT STORES

Major department and discount department stores are the anchor tenants of larger centres, such as Stockland Kin Kora. These centres range in size from about 15,000 m² to over 100,000 m² and cater mainly to the comparison shopping needs and wants of consumers. They also cater for convenience shopping needs as well, as these centres invariably include one or more major supermarkets as anchor tenants. Department and discount department stores are changing in size and function as a result of retail innovation and competitive pressure.

5.2.1 Department stores

As traditionally the single largest tenant in most regional shopping centres, innovation and change in department store operations will have a direct and significant influence on the market prospects, form and function of future regional centres. In most centre hierarchical classifications, the presence of a major department store is usually taken as an indicator of a centre's higher, if not highest, function within that hierarchy.

A number of relatively recent retail trends have challenged the traditional role of the department store as a centre's key anchor tenant and have eroded its market position:

- the rise of retail showroom retailing and big box 'category killers' such as Harvey Norman, Toys R Us and Officeworks (see section 5.4.1)';
- competition from discount department stores;
- creation of concept stores and strengthening of specialty chains, and most recently;
- the establishment of large factory outlet centres.

Department stores are evolving and modifying their form and operation in an effort to stay competitive and relevant in a changing marketplace. Both Myer and David Jones have also established a number of concept specialty stores. Myer has established Megamart furniture, whitegoods and homewares stores which, in effect, replace some of the departments within its department stores. For example, the Myer department store at Westfield Carindale does not carry any furniture and whitegoods, while the new David Jones in the same centre carries only a token whitegoods section. Myer also experimented with a number of concept specialty stores such as Myer BIB (Big is Beautiful) and Essentially Me (health and beauty) at the Myer centre in Cairns but most have been short-lived. It also established World 4 Kids to compete with Toys R Us, but that venture proved unsuccessful, with all stores now closed.

David Jones also experimented with specialty stores, such as its Foodchain grocery stores. It originally intended to open about 40 stores but only a few were established in Melbourne and Sydney in 2000 and all have since closed.

The experimentation with specialty and concept stores by Australia's two major department store chains is in response to the growth and success of specialty shops, category killers and big box retailers such as Harvey Norman and Chandlers.

Competitive market conditions and on-going change suggests that department stores will continue to experiment and adapt to survive. This process is likely to lead to more diverse department store sizes and formats, especially in suburban centres. While there is little danger of the major department stores losing their place as one of the major defining element of regional centre functions in the near future, the mere presence of a major chain department store no longer assures that such a centre will indeed function at the regional level.

Neither Gladstone nor Rockhampton are unlikely to support a traditional Myer or David Jones department store within the 2021 forecast period. As these operators must, now more than ever, continually reinvent themselves to stay relevant and competitive, their future presence in the region in some size and format should be recognised as a possibility, rather than a probability.

5.2.2 Discount department stores

Australia's discount department stores are also feeling the pressures of innovation and change within the retail industry. The growth of discount variety stores ranging from a few hundred to a few thousand square metres in size, such as Crazy Clarks, Makro, The Warehouse and numerous other budget stores, have eroded the discount department store's market from below. The same category killers and big box retailers eroding the department store market are also impacting upon discount department stores from above.

Competition, coupled with over-provision in some markets, has compelled discount department store operators to experiment and innovate in recent years. Target converted some of its stores to 'Target Home' and 'Baby Target' modules, with varying degrees of success. Target also introduced Country Target, which are small module stores (some under 1,000 m²) or converted Fosseys stores.

Big W and Kmart have also tested new formats and concept stores. In Queensland, Big W has introduced smaller format stores in Warwick (4,800 m²) and in Maryborough (5,300 m²) and Kingaroy (2,500 m²) to tap into provincial city markets as larger markets become saturated. Discussions with Woolworths suggest that stores as small as the Kingaroy Big W are too small to provide the range and depth of merchandise customers expect from a Big W store and that store modules of about 4,500 m² are probably the minimum acceptable for that banner.

Kmart introduced its 4,100 m² Kmart Garden Supercentre concept store in Queensland (at Windsor in Brisbane) after trialling it in Victoria, but it is not certain whether more of these stores will be established, at least in Queensland.

Discount department stores, like department stores, will continue to respond and change to consumer demand and competitive pressures. This is most likely to include the introduction of smaller format stores (of 4–5,000 m²) which will lower their market threshold to enter smaller markets, and in-store changes to their merchandise mix.

Discount department stores are commonly used as defining elements of many centre hierarchies, usually indicating sub-regional or community/district level retail functions. The discount department store based centre is the highest order centre within Gladstone, and it is likely to remain the dominant centre format within the 2021 forecast period. Store formats and merchandise mix can be expected to change over this period of time, as will the centre sizes they might anchor.

5.2.3 Discount variety stores

Discount variety stores have mushroomed in number and sales over a very short period. Previous Economic Associates' analysis of ABS sales data for 'Cheap variety store and bargain basement industry' (employing more than 20 persons)' found that Queensland had only 65 stores (with sales of $51 million) in 1997. By June 2000, there were 183 stores with sales of $338 million—an almost seven-fold increase in sales.

Store formats for some chains (The Warehouse, Makro) have evolved from a few hundred square metres to stores of 3,000 m² or more in the space of a few years. These chains have improved in status from down market specialty shops to that of anchor tenants in some centres, as well as trading in free-standing sites. Some centres now have two or three discount variety stores as anchor or mini-major tenants.

Considerable controversy surrounds the status of these types of retailers as shops or retail showrooms under various town planning schemes. Some operators were establishing in retail showroom or light industrial areas to take advantage of cheaper land and lower parking provision requirements, arguing that they were more akin to retail showrooms than shops.

Industry stakeholders, such as Westfield and Woolworths, have challenged the 'retail showroom' status of large discount variety store operators (The Warehouse and Makro) in a number Queensland Planning and Environment and NSW Land and Environment court cases[2]. In these cases, the discount variety store operators were found to be shops, rather than retail showroom or bulky goods retailers.

It is Economic Associates' opinion that large discount variety stores are shops and, for retail planning purposes, should be treated as such. These stores resemble scaled down discount department stores and operate in a similar fashion to major supermarkets and discount department stores. The stores are

[2] Westfield Management Ltd v. Pine Rivers Shire Council & The Warehouse Group (Australia) Pty Ltd, unreported (Planning & Environment Court, Britton SC DCJ, 14 November 2003, 1627/2003); Woolworths Ltd v. Caboolture Shire Council & The Warehouse (Australia) Pty Ltd; Woolworths Ltd v. Caboolture Shire Council & Makro Warehouse Pty Ltd, (Planning & Environment Court, Wilson SC DCJ, 7 May 2004, QPEC 015); Warehouse Group (Australia) Pty Ltd v. Woolworths Ltd, (NSWCA 270, 19 November 2003).

self-service, usually with a bank of check-out lanes at the front of the store, and shopping trolleys are provided for shopper convenience. Fittings tend to be basic, but aisles are arranged by merchandise type, as found in other mass merchandise retailers such as supermarkets and discount department stores. Large or bulky items, such as furniture, are typically of the boxed, self-assemble variety. Smaller, non-bulky items, such as food, toys, manchester, homewares and apparel account for the vast majority of individual items carried by these stores, as well as the majority of their floor space.

5.3 RETAIL TRENDS—SUPERMARKET AND CONVENIENCE STORES

Retail competition is not a gentle process, with winners and losers inevitable. This is especially so in the food retailing industry, where channels for food distribution have multiplied in response to customer needs and desires.

5.3.1 New market entrants

Australia's supermarket industry resembles a duopoly, where most of the market is controlled by two large firms. The *ACNielsen Grocery Report 2003* shows that, nationally, 69% of household spending on packaged and fresh groceries (including fruit and vegetables, deli, bakery and meat) in all stores—grocery and other food stores, convenience stores, chemists, mixed business, mass merchandise, etc—is done at Woolworths and Coles/Bi-Lo, as shown in Table 5.1.

Table 5.1: Share of grocery and fresh food trade by retailer, 2003

Stores	*Queensland (%)*	*Australia (%)*
Woolworths	37.6	35.5
Coles	26.3	26.5
Bi-Lo	8.3	7.2
Franklins	–	2.2
Action	3.7	2.3
Aldi	–	1.2
Other	24.1	25.1
Total	100.0	100.0

Source: ACNielsen Grocery Report 2003

FAL's acquisition of a number of Franklins stores for its Action banner has given it almost a 4% share of the Queensland market, and Action has taken an aggressive position with respect to developing new stores. Action is competing directly with Coles/Bi-Lo and Woolworths in terms of large store formats and locations within larger neighbourhood centres, as well as sub-regional and regional centres.

Australia's already highly concentrated supermarket industry would appear destined to become more so as its two major firms, Woolworths and Coles/Bi-Lo further strengthen their market positions as they enter the convenience store market through Shell and Caltex service stations. However, new market entrants should help counter-balance their market dominance.

Aldi

Aldi stores commenced trading in Queensland in June 2004, with several stores currently trading in south-east Queensland and others under construction or in the planning stages. Aldi has already captured just over 3% of the NSW market, where it opened its first stores in 2001, and it is likely to capture a similar share of the south-east Queensland market within its first few years of trading.

Aldi prefers free-standing locations but they also take space in shopping centres (e.g. Westfield Strathpine, Carindale and North Lakes). Although a very successful international supermarket operator, very little is known about their performance at store level. The company is privately owned by the Albrecht brothers and they do not release financial or other information about its operations.

Aldi stores are generally about 1,300 m² in size and carry only about 600–700 stock keeping units (SKUs). They stock mainly house label merchandise and offer a clean but no frills shopping environment where the customer must pack their own orders. Shopping trolleys are coin-operated, with the money refunded when the trolley is returned to the trolley bay. Aldi indicates that it generally seeks catchment thresholds of about 20,000 people.

The supermarket chain will concentrate on establishing a network of stores in the south-east Queensland region before considering expansion in the rest of Queensland. It is reasonable to expect Aldi to establish within the Rockhampton-Gladstone area within the 2021 forecast period.

Value Mart

Value Mart, a new supermarket operation affiliated with Metcash, was launched in 2003, with a proto-type store of about 1,150 m² in the Save City centre at Cannon Hill in eastern Brisbane. A second store of 1,400 m² is under construction in Townsville on a free-standing site near a Makro discount variety store. It is planned to open about ten stores initially, with floor areas ranging from 1,000 m² to 1,500 m².

Value Mart is looking to offer the best aspects of the old discounters in their heyday (Jack the Slasher, Franklins No-Frills) combined with new ideas to attract customers. It is aiming at young, large families and the fortnightly 'big shop', rather than the 'just in time' and top up food shopping trips currently targeted by other operators. It offers brand name merchandise as well as generic or house brand, with many of its products offered in bulk and institutional packs.

The Value Mart operation is too new and untested to speculate on their future network aspirations, their locational criteria or future prospects of entering the Gladstone area market.

Aldi and Value Mart are both aimed at the bulk buy, value end of the food market with a strong emphasis on generic labels. Both cater to niche markets and neither operator caters for the full supermarket shop or the frequent, top up shop.

5.3.2 Major chains

Major supermarket chains have driven much of shopping centre development in Queensland and Australia in recent years as the major operators compete for sites and market share. Australia's major chain supermarkets, Woolworths, Coles/Bi-Lo and Action, have traditionally dominated all larger centres in Australia, with very few independent operators present. The vast majority of neighbourhood and local shopping centres of 4,000 m² or more are also anchored by the majors, except in some provincial cities and towns.

In-fill development

Woolworths and Coles are both seeking 'in-fill' sites in inner and middle ring suburban areas previously deemed too difficult or too small to support their stores. They are establishing smaller (2,000 m²–2,800 m²) store modules on free-standing sites or in centres offering only a few specialty shops.

Coles, Woolworths and Action are also actively seeking new store locations in provincial cities and towns in Queensland. These areas previously were assumed to be below the population or market thresholds and lacking growth prospects required by the major chains. Over the past twenty years, the 'rule of thumb' thresholds for major chain stores have fallen from 15–20,000 to around 10,000 people in major urban areas, and even less in some provincial cities and towns. Among other factors, greater efficiencies achieved through in-store operation and network distribution technologies have helped lower the thresholds for viable operation.

The move by the major chains to in-fill urban areas and locate in provincial towns is putting increasing pressure upon independent supermarket operators and even some convenience stores. Larger independent supermarket operators are fighting back and are now competing directly with the major chains for new sites and expansion opportunities in these areas. For example, IGA, an independent operator, is introducing larger format, 'Supa IGA' stores of 2,500 m² to 4,000 m² to compete head to head with the chain supermarkets. Such a store is proposed for the Night Owl centre extensions currently under construction.

Expanded store size and function

While the major chains have introduced smaller format stores to serve in-fill and niche markets, the trend over the past few decades has been towards bigger stores, with the biggest around 4,500 m². Australian supermarkets appear to be following US trends where the median new store size has reached almost 5,300 m².

Supermarkets have grown bigger as they internalize more and more specialty shop functions. US supermarkets have absorbed cafes, video stores, chemists, newsagents, optometrists, dry cleaning, banking, florist and a range of other goods and services and Australian supermarkets appear to be following this trend.

5.3.3 Convenience store market

The rebadging of Shell convenience stores to Coles Express and Woolworths' tie-in with Caltex effectively puts Coles and Woolworths into the convenience store business, blurring the distinction between convenience stores and service stations. Differences between convenience store and petrol store formats are likely to diminish as each group learns from the other.

Newsagents are also entering the convenience store market. In June 2003, Queensland-based Nextra established a 350 m² concept store at the Royal Brisbane Hospital which combines a newsagency with a convenience store. It has since opened other stores in Brisbane and Nextra plans to open another 80 stores over the next two years.

5.4 RECENT AND EMERGING RETAIL FORMATS

New competition for department and discount department store based centres has come not only from new centre development, but also from new retail formats. The introduction and growth of bulky goods or retail showroom centres is perhaps the most significant new retail format, followed by the more recent introduction of purpose-built factory outlet centres. Non-store retailing, especially over the internet, is also making in-roads into centre sales, albeit not nearly as significant as first thought.

5.4.1 Retail showroom centres and category killers

Retail showroom centres, also known as bulky goods centres, power centres and homemaker centres are one of the most successful new retail formats to emerge in the past fifteen years. These centres consist of a collection of category killer or big box retailers and are usually characterised by large stores, open air design and minimal fit-out. Prior to their development, bulky goods retailers often located in or near light industrial areas.

These centres and retailers now prefer the same access and visibility characteristics as other major retail centres but can trade successfully in a variety of locations, depending upon their tenancy mix. Initially, showroom centres were generally not directly competitive with regional and sub-regional centres, as most of their tenants did not need the customer flow, nor could they afford the rents of such centres. Their degree of competitiveness with traditional centres, while dependent upon the types of traders comprising retail showroom centres, has increased over the years. They now represent major competition to department and discount department stores in particular.

Bulky goods stores are now locating within or adjacent to traditional shopping centres, or establishing showroom centres and retail precincts on sites with high visibility and ample parking. This suggests a convergence with 'traditional' retailing in terms of function, locational requirements and even rent paying ability. The traditional land use and land value arguments employed in the bulky goods industry's formative years no longer seem as convincing.

Initially, showroom style developments were envisaged by many local government authority planning schemes as accommodating bulky goods traders such furniture stores, carpet stores, larger hardware stores, appliance stores and shops associated with home construction and renovation (paint and paper, kitchen-bath tiles). Today, the term 'bulky goods' is no longer synonymous with retail showrooms.

The rapid growth of showroom style centres has also widened the range of goods and services locating in these centres. Many now sell goods that do not qualify as bulky, or even comparison in nature. Stores such as Harvey Norman also carry a high proportion of non-bulky merchandise typically sold in department, discount department and specialty stores. Some of the category killers occupying showroom centres (and free-standing locations), such as 'mega' toy stores (Toys R Us), sporting goods stores (Rebel Sports), video stores and stationery stores (Officeworks) compete directly with their smaller counterparts in traditional centres.

Retail showroom centres now feature cafes and fast food restaurants, discount variety stores and other retailers that are in no way associated with bulky goods. Demand growth for showroom or bulky goods centre retailing is strong, from both consumers and retailers, and its development phase still has further to run. For example, BIS Shrapnel's *Bulky Goods Property 2003-2008* report indicates that, nationally, this retail sector grew by almost 10% during 2003, with floor space increasing by about two million square metres between 1999 and 2003.

Retail showroom centres in Queensland range in size from a few thousand square metres to more than 25,000 m². The 15 retail showroom centres listed in the Property Council of Australia's *Queensland Shopping Centre Directory 2004*, represent over 211,000 m² of floor space, with an average centre size of about 14,100 m² and an average of about 17 shops per centre. Average shop size is about 820 m².

The retail showroom centre format is not represented in Gladstone and at least one such centre is likely to be supportable now or in the near future.

5.4.2 Factory outlet/brand direct centres

Factory outlet or brand direct retailing is not new in Australia, but has, until recently, consisted of fragmented development, with outlets scattered widely. Some areas have coalesced into identifiable and vibrant factory outlet shopping areas such as Stones Corner in Brisbane, Bridge Street in Richmond (Melbourne) and Surrey Hills in Sydney.

Purpose-built factory outlet/brand direct centres in the US now exceed major regional and super-regional centres in size and performance, with 70,000 m² to 200,000 m² centres being built. They incorporate large entertainment/leisure areas (cinemas, restaurants) as well as a wide range of name brand fashion and homewares at discount prices.

The 50,000 m² Harbour Town shopping centre on the Gold Coast is Australia's first and largest purpose-built factory outlet/brand direct centre based on the US concept. The centre differs from its US counterpart in that it incorporates a supermarket and a selection of convenience retailers. It is, in effect, a hybrid of a neighbourhood centre, cinema complex and a factory outlet/brand direct centre serving a very large catchment. ING Real Estate–Lewis Land Group, the owners of Harbour Town, have since opened similar factory outlet centres in Adelaide and Perth.

Factory outlet centres are also known as off-price, brand direct or value centres. Factory outlet stores and centres are strongly fashion oriented and typically include one or more of the following characteristics:

- closeouts—first quality goods unsold by the manufacturer or retailer at the end of a season and not intended for further production;
- irregulars—imperfect or damaged goods which have failed the factory's quality inspections;
- overruns—first quality goods that the manufacturer is unable to sell through normal retail outlets;
- store labels—some well-known, upscale and other clothing manufacturers produce less expensive brand lines to sell exclusively through factory outlet stores.

Factory outlet centres can also include clearance stores for larger retailers such as department stores. Slow moving items, out of season stock, shopworn and damaged merchandise from a chain's retail stores are disposed of through outlet centre stores.

Factory outlet stores can include contemporary merchandise offered in traditional retail stores, as well as end of season goods or overruns. Some manufacturers use factory outlet stores to offer their full range of products in a single store. Traditional retailers (e.g. department stores and specialty shops), which they may also supply, generally stock only part of a manufacturer's range of goods.

Factory outlet centres generally rely on discount pricing and the cumulative attraction of similar operators, rather than anchor tenants, to draw customers from a very large catchment. Larger factory outlet centres such as Harbour Town on the Gold Coast, can offer the equivalent fashion range, in terms of number of specialty shops and total floor area devoted to apparel, of regional or even major regional shopping centres. They compete directly with these traditional centres for the household's clothing and, to a much lesser extent, homewares expenditure.

They lack major anchor tenants yet people are willing to travel considerable distances to shop at a major factory outlet centre and they typically draw customers from larger catchments, albeit on a less frequent basis, than major regional and even super regional shopping centres.

It is doubtful that these large centres could survive outside major population and tourist areas and their relevance to the future provision of retail facilities in Gladstone would be virtually negligible. Several factory outlet and clearance shops may eventually locate in Gladstone, but they are most likely to occupy existing space in relatively small numbers, rather than establish as a separate centre.

Factory outlet retailers and centres have also generated controversy as to their nature and location for some Local Government Authorities, and have been the subject of a number of court cases. Some proponents of factory outlet centres have argued (unsuccessfully) that factory outlet retailers are similar to retail showroom centres or bulky goods retailers and should be permitted to locate in areas designated for these types of retailers[3] .

It is our opinion that any future factory outlet and clearance stores or centres proposed for Gladstone should be treated no differently to traditional retail shops and centres in Gladstone.

5.4.3 Leisure retailing and lifestyle centres

Leisure and lifestyle centres are a relatively recent retail format and are somewhat fluid in their composition, size and function. The term 'lifestyle centre' first appeared in the early 1990s in the US, but the concept has only taken off there in the past five years. Purpose-built lifestyle centres have yet to establish in Australia although developers here are exploring its prospects, especially as a potential redevelopment and re-use of older centres that have lost, or are about to lose, their anchor tenants.

The International Council of Shopping Centers defines a lifestyle centre as usually ranging between 15,000 m² and 50,000 m², including a minimum of 5,000 m² of national specialty store chains, offering an open air 'Main Street'

[3] Longhurst & Anor v. Austexx Developments P/L & Anor, (QCA 576, 24 December 2003); Westfield Management Pty Limited & Anor v. Gazcorp Pty Limited & (2) Ors, (NSWLEC 7, 16 January 2004).

ambiance and upmarket presentation, and generally locating near affluent residential areas. The retail composition of these centres varies considerably, but they usually serve as multi-purpose leisure-entertainment centres offering upmarket chain specialty fashion, homewares, books and music stores and one or more restaurants. They may also include a cinema complex and a gymnasium.

Gladstone is not a likely candidate for a purpose-built lifestyle centre as its population base is too small. The incorporation of a cinema complex in the Night Owl centre, together with the new Coffee Club, could form the nucleus of a smaller scale leisure-entertainment centre over time.

The city centre, on the other hand, fulfils at least part of the function of leisure-lifestyle centre with its restaurants and pubs. The strengthening of this function is probably the one area of retailing where city centre can foster an advantage over its suburban competitors over the longer term.

5.4.4 Non-store retailing

The future impact of non-store retailing, mainly internet retailing, upon retailing and retail centres is still uncertain. Internet retailing was predicted by some as the 'beginning of the end' of (at least some) bricks and mortar retailers. Web-based retailers, with their low start up costs and massive market reach without physical stores, were heralded by some as the new category killers and would successfully challenge established retailers and centres. Predicting internet retail sales has become a cottage industry, whose products are wildly differing estimates of future sales on the internet.

The collapse of 'dot.com' retailers in the US, UK and Australia subdued much of the market enthusiasm for pure web-based retailers. Concerns about on-line credit card security, the high cost of delivery and the logistics of returning damaged or defective merchandise have greatly limited the potential of internet retailing to date. Traditional retailers and 'old technology' catalogue retailers currently account for almost two-thirds of internet retail sales and their dominance is expected to increase even further.

Technological advances will overcome some of these obstacles but it is doubtful that internet retailing will pose a threat to bricks and mortar retailing and shopping centres over the next five to ten years. Humans are naturally gregarious creatures and shopping is a major social activity.

Internet or other forms of non-store retailing, therefore, are most unlikely to have discernable impacts or influence upon Gladstone's retail network or its future provision of retail facilities.

5.5 SUMMARY AND IMPLICATIONS FOR GLADSTONE'S FUTURE RETAIL NETWORK

5.5.1 Discount department and discount variety store based centres

Recent and continuing changes and innovations in the

size, form and function of department stores and discount department stores, coupled with the growth of specialist, big box and category killer stores have significant implications with respect to centre hierarchy or functional designations. The mere presence of a department and/or discount department store is no longer an assurance that a centre will function at the assigned level within a hierarchy traditionally associated with such uses.

As the three national discount department store operators create smaller store modules and the budget operators move up to larger store formats, there seems likely a convergence at around the 3,500 m² to 4,500 m² for these budget discount department stores/variety stores, especially in non-metropolitan cities and towns. As discount variety stores grow larger in size, it will become increasingly more difficult to differentiate them from smaller, traditional discount department stores with respect to centre planning policy. The Warehouse and Makro are already serving as anchor tenants (in association with major supermarkets) in larger shopping centres. For example, in June 2004 Forest Lake Village in Brisbane doubled in size to 15,000 m² by adding a 3,300 m² The Warehouse, plus a Crazy Clark's discount variety store and more specialty shops. Previously, the centre's sole anchor tenant was a 3,690 m² Woolworths.

In the future, department, discount department and discount variety stores are likely to become less definitive and reliable as indicators of intended centre role and function within a network or hierarchy of centres.

5.5.2 Food and convenience based centres

Changes and innovation at the supermarket and convenience store end of the retail spectrum have some implications for retail and centre planning. Larger supermarkets incorporating more specialty functions will make it more difficult for traditional specialty shops such as greengrocers, butchers, delicatessens and, in future, bottle shops, newsagents and chemists, to survive in neighbourhood and convenience level centres.

Ironically, as the supermarket grows larger and more efficient in the delivery of convenience goods and services, the size of neighbourhood or convenience level centre it might support could shrink. Larger supermarkets are, in effect, increasingly functioning as neighbourhood centres.

Ultimately, this could lead to more free-standing supermarkets, or supermarkets with only a few ancillary specialty shops and services. Alternatively, the nature of ancillary specialty uses could change, with more restaurants and non-retail uses replacing traditional specialty tenants in neighbourhood centres. Smaller neighbourhood centres of 3,500 m² to 4,500 m² anchored by major supermarkets and large independent supermarkets but with limited specialty shops are already becoming more common in Queensland. The new Coles Central centre in Tannum Sands is an example.

The Gladstone region is expected to require additional major supermarkets to meet the needs of the population over the 2021 forecast period. Should the trend towards internalising specialty shop functions (e.g. chemist, bottle shop, newsagency) continue, these newer supermarkets may not support the traditional range of convenience specialty shops currently associated with supermarket and convenience store centres, especially when/if restrictions on retail trading hours are abolished. Free-standing supermarkets and centres offering combinations of retail and non-retail functions which might challenge the traditional notion of convenience centre retailing could become more common.

5.5.3 Comment

Change and innovation among department stores, discount department stores, supermarkets and convenience retailers, and the introduction of new and evolving retail centre formats is not a process with an end. It is on-going and incremental, with occasional bursts of innovation and diffusion. The increasing size and efficiency of supermarkets has been an incremental change occurring over a long period of time, affecting the size and composition of neighbourhood centres. Innovations such as food courts and cinemas in shopping centres, category killers and retail showroom centres, and factory outlet/brand direct centres appear relatively suddenly and, if successful, proliferate rapidly until a market is saturated, at least temporarily.

Change and innovation in retailing and retail formats are certain to continue, although their timing and nature cannot be anticipated with certainty. Innovative development, whether in response to new/resurrected planning concepts such as new urbanism or smart growth, demographic shifts or to a developer's 'gut feel' for a market will continue to emerge. These will periodically test the definitional, functional and locational aspects of any retail planning strategy. One that is too general will be of limited use in guiding the orderly and timely development of future retail facilities; one that is too tightly defined or prescribed risks the fossilisation of the retail industry in terms of innovation, competition and renewal, to the longer term detriment of the community.

6 Recommendations for Gladstone's future retail network

This section sets out our final recommendations. They reflect Council's review, comment and discussion of preliminary recommendations presented as part of the fourth study deliverable, the outcome of our investigations at the local and industry or bigger picture level, as well as issues specific to Gladstone's retail and commercial environment.

6.1 ISSUES SHAPING THE RECOMMENDATIONS

The bigger picture trends and issues described in Section 5 will influence the form and format of retail development in the future, but other more localised issues, representing both opportunities and constraints, will shape the size, function and location of Gladstone's future centres.

6.1.1 Existing approvals and designated commercial land

The location of existing centres will strongly influence the positioning of future development, as will the location of approved sites.

The largest of these is the Stockland Auckland Creek site near the airport. This approval, at 17,700 m², represents almost half the floor space 'theoretically supportable' over the 2004-2021 period. However, it is uncertain whether this development would proceed as originally approved. Stockland can be expected to pursue some type of retail development on the site, with a possible linking with the Kmart-Coles part of its Kin Kora centre.

Development of this site would further strengthen Stockland's control of Gladstone's retail market. While not a monopoly, such concentration of market control can be problematic. However, a similar situation in Rockhampton, where Stockland controlled all three of that city's discount department store based centres, appears not to have had any discernable negative impact on the competitive environment, and Stockland eventually sold one of the three centres to concentrate on the integration of its two adjoining centres. A similar scenario may play out in Gladstone.

From a retail location perspective, development of the Auckland Creek site as approved is not a particularly good outcome for Gladstone. Adding a third supermarket and specialty shops would only further add to the fragmentation of Kin Kora's shopping facilities and exacerbate an already difficult traffic situation. The site, if it is to be developed for retail uses at all, would be better used to accommodate a retail showroom centre and/or a large hardware store. This type of retailing has a different shopping profile marked by fewer shopping trips and a strong weekend focus (especially where Sunday trading is allowed for all retailers). It would add a different dimension to the Kin Kora retail area, rather than concentrate 'more of the same' in one locality.

Another site designated for commercial uses under the draft Scheme is the Queensland Alumina Ltd site on French Street. QAL owns two of the three lots comprising this 8.4 ha area. The future of the site is uncertain and, as indicated earlier in Section 2.6, may be retained by QAL as a buffer. Its successful operation as a convenience centre as originally approved would be doubtful given its location and proximity to the Toolooa Street centre area.

If it is to be used for retail purposes at all, it is better suited to retail showroom type activities as location is less of an issue as people generally make special trips to shop at these stores or centres.

6.1.2 Role of CBD

In larger Australian cities the CBD has generally managed to retain its primacy in the hierarchy of centres serving an area by offering the greatest concentration of retail specialty shops and services. Gladstone's CBD has lost a number of retailers over the years, with the relocation of Country Target to Kin Kora one of the largest and more recent departures.

The draft Planning Scheme envisages the re-development and rejuvenation of the CBD focusing on its role as the region's principle centre of administration, business services, office accommodation and cultural and entertainment activities. Its retail role is envisaged as one concentrating on leisure and entertainment (e.g. cafes, restaurants, pubs), more specialised fashion and personal services.

Traditional centre hierarchical systems of classification do not sit well with Gladstone's network of centres. The CBD's location at the 'top end' of the city's urban area means that it has little immediate population catchment to the north, east or west. Almost all CBD-bound shoppers must bypass one or more centres to reach it.

The CBD, as envisaged in the draft Planning Scheme, must re-invent itself as the city's leisure and entertainment (food and drink) destination, offering complementary specialty shopping capable of enticing people to travel past intervening centres. Its role will be more of a specialist centre than that of a traditional CBD, regional, sub-regional or district type centre.

The Kin Kora retail area is clearly at the pinnacle of the centre hierarchy and it will retain this role over the forecast period and beyond.

6.1.3 Need for additional new centres

New centres, such as the Coles-anchored Tannum Central centre, and expansion of existing centres, such as the addition of a large Supa IGA supermarket and specialty shops to the Night Owl centre, further development of the Sun Valley centre and the future Billabong centre in Glen Eden will absorb a good part of the demand for additional retail facilities generated by recent and near future growth.

Future growth over the medium to longer term, especially in the southern part of the city (i.e. the Central and Kirkwood Road South Precincts in the draft Planning Scheme) will require additional retail facilities to provide for the needs of local residents. A centre anchored by a major chain supermarket or a large independent supermarket will be needed in this area within the next several years. Such a centre is likely to range in size from 4,000 m² to 6,000 m².

Two or three smaller centres anchored by convenience stores and a small number of specialty shops similar in size to the existing Sun Valley Plaza or Airport Village Plaza (500–900 m²) will be needed. The proposed Emmadale Heights Convenience Centre (500 m²), Billabong centre and the Glen Eden Drive tavern and shops development (780 m²) will meet part of this demand.

No new centres anchored by a major discount department store are likely to be supportable within the forecast period. The only additional major centre developments likely to be needed are one or two retail showroom based centres.

6.1.4 Retention of escape spending as a source of demand

The telephone survey findings suggest that Gladstone catchment households spend about 20% of their clothing and fashion and major homewares budget in centres outside Gladstone. At 2004, this represents about $14 million or under 5% of total retail expenditure potential ($301.9 million)[4].

About 9% of the household clothing and fashion budget is spent in Rockhampton centres and another 2% in Bundaberg centres. For major homewares purchases, about 14% of the household homewares budget is spent in Rockhampton and about 2% in Bundaberg. At 2004, Rockhampton and Bundaberg centres would be attracting around $10 million in sales from Gladstone area residents for these two commodity groups. The remaining $4 million would be going elsewhere and mainly to centres in the south-east Queensland region.

More than $10 million would be ‘escaping’ to Rockhampton (and Bundaberg) if other commodity groups are considered, including some take home food, meals out/takeaway as well as other homewares/services spending. However, major homewares and fashion spending is the most likely to be retained through an improved offering of fashion retailers and major homewares retailers (i.e. retail showrooms/bulky goods) in Gladstone. Spending in other categories is probably more difficult to re-capture. For example, if a Gladstone shopper does some of her/his take home food shopping in Rockhampton, it is

[4] This $14m estimate comprises $9m, calculated as 20% of $45m, which is 40% of total homewares/services spending representing the major homewares component ($112.4m x 40% or $45m) plus $4.5m of all apparel spending (20% of $22.4m) from Table 3.4.

likely to be due to reasons other than dissatisfaction or lack of choice in Gladstone.

Assuming the whole of the $10 million could be retained, it would support the equivalent of about 3,000 m². Retention of escape spending, therefore, is unlikely to be a major source of future floor space demand in Gladstone.

6.1.5 Other considerations

Congestion

The Valley area and Kin Kora are the largest and most successful of Gladstone's centres based on our observations and discussions with centre management and major retailers. A consequence of this success is congestion, whether real or perceived. In the case of the Valley area, it would appear that congestion is due to largely to the popularity of the Valley Centre's Woolworths supermarket and The Warehouse, and the concentration of retail specialty shops and services around this centre.

While the Kin Kora area is also a popular centre, congestion appears more related to external traffic factors, i.e. the roundabout at the Dawson Highway-Philips Street. This congestion and difficulty of access appears to have especially affected the performance of the Kmart-Coles part of the Kin Kora centre, although its lack of specialty shops and separation from the more successful eastern part of the centre are probably the greater factors.

The extension of the Night Owl centre should alleviate some of the apparent congestion in the Valley area as a proportion of shoppers will find the centre and its proposed Supa IGA supermarket more convenient and offering an improved level of 'performance convenience'. It is unlikely to reduce congestion at Kin Kora, however.

Needs of specific retailers

Not all retailers can be accommodated in designated centres, nor can future centres anticipate the size or location needs of all retailers. Bunnings is the most topical example, as the firm is currently seeking a site large enough to accommodate its preferred store module (Stockland's Auckland Creek site and the QAL site both appear large enough for Bunnings, but they cannot be forced to sell to, or accommodate, Bunnings). In the future, Aldi might be another retailer which might be accommodated outside a designated centre if all potential sites/centre opportunities can be shown to be unavailable or demonstrably unsuitable.

Some flexibility in the Planning Scheme is necessary to accommodate specialist type retailers with specific site requirements which may not be met within existing centre areas, either through centre re-development or site expansion. They should be treated by Council on a case-by-case basis.

6.2 NEW CENTRES

We recommend that Council make provision for one additional supermarket based neighbourhood centre in the Southern Gladstone area and two or three smaller convenience centres likely to be needed within the forecast period, although this could depend upon which of the currently approved small centres eventuate. One or two retail showroom/bulky goods centres, depending on site availability and size of development are also recommended.

6.2.1 Neighbourhood and smaller convenience centres

Potential residential growth in the Central and Kirkwood Road Precincts and nearby residential areas in the draft Planning Scheme is expected to be sufficient to support another major supermarket based centre. The supermarket is likely to be in the order of 2,500 m² to 3,500 m², with total retail centre sizes ranging from 4,000 m² to 6,000 m² of lettable area. Other uses are likely to cluster around the centres, such as childcare, service station (depending upon location), library and other community service facilities.

Major supermarket based neighbourhood centre

Parksville Holdings has undertaken preliminary development planning for land it holds in the central and eastern parts of the Kirkwood Road South Precinct. Preliminary plans show a 14 ha site set aside for shopping centre uses and approximately 4.1 ha set aside for unspecified ‘special’ uses opposite the centre site.

Such a large site could accommodate a virtual ‘town centre’ scale of development which, in our opinion, is neither desirable nor viable. It is twice the size of the Stockland Kin Kora centre site area. Such a large centre development, if there were any demand for it, would be better located on a major arterial road and preferably at the intersection of major roads, such as Kirkwood Road and the Dawson Highway or Glenlyon Road. It would need to draw its customers from the whole of the Gladstone catchment area to deep within the Kirkwood Road South residential area to survive.

We believe the Parksville Holdings site is suitable for a neighbourhood level shopping centre anchored by a major supermarket and it is the preferred site for this centre. Other ancillary uses may develop as part of the centre, but no other major retailers should be accommodated (e.g. retail showrooms or large, Bunnings-style hardware stores). A small scale discount variety store of a few hundred square metres might be appropriate, but not the large scale The Warehouse or Makro stores (e.g. 2,000 m² plus).

This centre would serve the residents of the eastern and central parts of Kirkwood Road South Precinct and parts of the Central, Southern and Urban Expansion Precincts depicted in the draft Planning Scheme. It would also draw some of its trade from the rural residential areas in the southern part of the Gladstone Frame Locality. Its location internal to the Kirkwood Road South

Precinct implies that passing trade drawn from outside this area will be minimal.

The timing of this centre will depend upon the rate of growth in the Kirkwood Road South Precinct. Significant residential development will need to be in place on both sides of Kirkwood Road before the centre could trade viably, and we would expect that this could take several more years of development before sufficient numbers of households are in place.

Convenience centres

Two or three convenience centres anchored by convenience stores or small supermarkets will be needed over the forecast period, but it is difficult to nominate a firm number or total floor space, or their likely locations.

Future convenience centres can be of two basic locational types which will influence their size and function. Centres located internally within residential areas, away from the major arterial roads, such as the proposed Emmadale Heights Convenience Centre, are likely to be small (500 m² or less). They do not have access to passing trade drawn from a busy road. They rely on residents in their immediate micro-market areas for the majority of their business. They provide only for local convenience needs and their tenancy mix tends to be limited to tenancies such as a small convenience store, take away, small newsagency or sub-agency, hairdresser and perhaps a small greengrocer. They are busy mainly in the early morning, and late afternoon-early evening (commuters, parents collecting school children) but tend to close by about 7pm as there is nobody about.

Convenience centres positioned on major arterial roads, or at intersections of major suburban roads have access to greater passing trade throughout the day and evening. Centres in these types of locations can support a greater variety of shops and services, tend to be larger (500 m² to 1,000 m² or more) and they can trade longer hours.

Future convenience centres proposals should be evaluated by Council with these locational criteria in mind to assist in matching centre sizes and functions with prospective sites and localities.

The most likely area for one of these future convenience centres is in the western part of the Kirkwood Road South Precinct, either at the intersection of Kirkwood Road and Dawson Highway or at the intersection of Kirkwood Road and Harvey Street. The Dawson Highway intersection would normally be considered a prime site for a small convenience centre but the area is constrained by a major infrastructure corridor and unlikely to accommodate such a development. The future intersection of Harvey Street and Kirkwood Road is the next probable site.

Both the neighbourhood and convenience centre developments would need to demonstrate, in a retail needs or economic impact assessment report, that sufficient growth has occurred, or will occur within one or two years of proposed centre openings, to allow them to trade viably and with minimal acceptable levels of impact upon existing centres.

One of the future convenience centres likely to be needed to meet future demand within Gladstone's catchment could be located in Calliope Shire. Future retail development within the Calliope Shire (Part A) should be monitored and taken into account when assessing future proposals within Gladstone City's boundaries.

6.2.2 Retail showroom/bulky goods centres

The retailers typically comprising retail showroom/bulky goods centres are destination retailers and shoppers will seek them out. Consequently, these centres are not as sensitive to locational factors as neighbourhood or other traditional shopping centres, although they can and do seek the same locational advantages, such as major arterial road sites, easy access and high visibility.

Some of the potential tenants for a future retail showroom centre development are likely to include existing showroom type retailers currently located in the Hanson Road industrial area, but it will also encourage retailers not represented in the Gladstone market to establish a presence.

Preferred sites

The preferred site for a future retail showroom/bulky goods centre is the racecourse site west of the Dawson Highway. It is a large (about 25 ha), highly visible and accessible site, and more than capable of accommodating a 10,000 m² to 15,000 m² centre, as well as a large format hardware store such as Bunnings or Mega Mitre 10. The site does not appear to have the level of constraint evident in the Stockland Auckland Creek site or the QAL site. It is still uncertain that the site can be acquired from the State Government for redevelopment and Council should seek to assist in any future negotiations between the Government and private industry to bring this prime site to a higher and better use.

Should the racecourse site remain unavailable, the second preferred site is the Stockland Auckland Creek site (approximately 7.7 ha). This site can also accommodate a large retail showroom centre, although part of it is constrained by the Airport Safety Area. Its future development, however, is uncertain given Stockland's first priority is to improve the performance of Kin Kora by re-routing the Dawson Highway behind the Kmart-Coles and linking it with both the Big W-Woolworths part of the centre and the Auckland Creek site.

There is no particular timing or size limitation on the development of a retail showroom centre, other than what the Stockland site can comfortably accommodate under Council's parking and landscaping requirements for retail showroom type development, and in light of constraints posed by its proximity to the airport.

Our second alternative site is the Queensland Alumina Ltd land on French Street. It is of similar size to the Stockland site if all of the site were capable of redevelopment. However, as noted earlier, this site may not actually be available, or even suitable, for development.

Only one large centre (e.g. 10,000–15,000 m²) is likely to be viable in Gladstone (excluding a large tenancy such as Bunnings). Its development (on any of the three sites) will not completely absorb market demand and additional individual showrooms/bulky goods retailers could still be accommodated in the Hanson Road area. However, we do not recommend a large showroom centre development for this area as shopper traffic and parking would cause conflict with the industrial uses. The Hanson Road area will still continue to support bulky goods retailers, but as a secondary destination, or an area specialising in a particular retail area, e.g. building supplies for trades and the do-it-yourself market.

Other sites may be identified for a major retail showroom development, especially if none of the three sites nominated are available. We cannot nominate a specific alternative site, but suitable sites are likely to have frontage and visibility to the Dawson Highway, Glenlyon Road or Gladstone Benaraby Road, preferably in the growing Southern Gladstone catchment.

6.3 EXISTING CENTRES

We do not envisage any of Gladstone’s existing centres growing in size other than through minor extensions, or changing their functions to any significant degree. There will be inevitable changes in uses in some centres and redevelopment required in others:

- The Valley area is intended to remain as essentially a large neighbourhood shopping centre, as envisaged in the draft Planning Scheme. It will require some redevelopment and investment to remain relevant to its market over the forecast period but not to the extent that it adds additional major anchor tenancies that will substantially increase its function or catchment. In dealing with potential future redevelopment of this somewhat sprawling area, Council may need to consider preparation of a detailed master plan to address problems of congestion (real or perceived) and guide changes in use to protect the intended revitalisation and retail-commercial functions of the CBD.
- Once the Night Owl centre extensions are completed, this centre area should be at its ultimate size and function. No further expansion of this retail-commercial centre area is warranted as there is little growth in the northern and central Gladstone catchments to sustain it.
- Toolooa Street centre and the Supa IGA is a popular and successful food shopping destination which enjoys a trading hours advantage over the major supermarkets and centres. This centre is in need of investment and redevelopment if it is to remain relevant to its market, especially if (when) restrictions on trading hours are removed. Its role as a neighbourhood

centre would not change, but the feasibility of any redevelopment will most likely require a modest expansion of its lettable area (rental base). Council's tenure records show the centre land is in two parcels with different owners, and that Council owns the southern part fronting Coon Street, which is designated Open Space but partly used for parking. Council's land might be used to assist in the future redevelopment and refurbishment of this centre.

- The Stockland Kin Kora centre could be the exception, should it succeed in rerouting the Dawson Highway and integrating the two halves of the centre. This would no doubt involve significant redevelopment and an increase in lettable area, although it may not incorporate any major new anchor tenants.

6.4 COMMENT

The future retail centre strategy outlined here is based upon our interpretation of industry trends, market growth and the possible goals and actions of retail industry stakeholders (as revealed in discussions and in existing approvals). In an industry where innovation and change is one of the key driving forces, any retail strategy, even with the force of planning instruments behind it, is but a guide to the future and not an absolute certainty. Centre owners and retailers, whether local people or national players, have their own priorities and goals which are in constant motion and do not always coincide with those of Council or the community at large.

Gladstone has a relatively large number approved retail developments that have been dormant for a number of years or are unlikely to proceed as originally approved. Council is therefore likely to encounter alternative scenarios and new proposals which might be at odds with the preferred direction outlined in this centre development strategy. Council should require the proponents of contrary proposals and scenarios to demonstrate a high level of community need sufficient to warrant departure from the intended centre sizes, functions and locations outlined in this retail centre development strategy.

7 Review of the Draft Planning Scheme and Suggested Revised Provisions

7.1 INTRODUCTION

This section of the study investigates the relationship between the findings of the study and the relationship to the draft City of Gladstone Planning Scheme - current draft 2004 (the 'draft Planning Scheme'). The remit of the study is to analyse the findings of the study and to review the draft Planning Scheme and suggest means by which identified issues may be addressed. Of particular interest is the understanding of current land zoned for retail use and future land and location requirements.

From a general form and centres hierarchy point of view, Gladstone City has a very site-specific situation created by:

- the major links in the transport network being limited to routes from the south and south west of the City;
- the City's retail focus is at Kin Kora while the other key centre functions are located in the CBD/Valley area;
- Kin Kora is located at a relatively constrained suburban site within the City's urban frame and faces traffic congestion issue at peak times.

These factors require careful consideration of the City's retail and centre network so that the economic development and sustainability of the City's retail network can be maintained through the study period to 2021.

The draft Planning Scheme and in particular the centres strategy, is very likely to be reviewed, amended or otherwise change over the time of the study period. The comments in this chapter must be taken in the context of the 2021 horizon and not all are intended to be resolved immediately or within the planning period of the draft Planning Scheme.

Gladstone City Council has commissioned a separate study into the CBD/Valley area that in part addresses retail activity specifically in those areas. The study is also understood to include consideration of a number of issues affecting non-retail matters, such as traffic, development form and land use mix. Council has indicated that this study is not required to deal in detail with Planning Scheme issues and retail issues of the CBD/Valley area.

This study is focussed on retail activity in the City, however, from a town planning point of view, the role of retail activity plays a major role in centres as places of focus for community activity. These other activities include meeting places, provision of community services, dwelling places, short-term accommodation, recreation and entertainment. Some comments in this chapter relate retail functions to the broader context of other functions that centres perform.

7.2 IMPACTS ON RETAIL DEVELOPMENT BY RETAIL AND CENTRE DEVELOPMENT TRENDS

7.2.1 Overview

Section 5 of the study discusses a range of retail trends and issues that are affecting the economic function and physical form of retail activities. Apart from the impact these trends and issues have on physical and economic aspects of the City, these also have a regulatory impact, which is the focus of this chapter. The Planning Scheme provides the regulatory basis for development and as such should have capacity to manage new forms of retail and centre development as they emerge within the planning period of the Planning Scheme.

The general observation is that the draft Planning Scheme includes localities, zones and definitions for several types and scale of retail development differentiated by types of goods sold. While the draft Planning Scheme does make some distinctions in the general hierarchy of centres (Division 2 – Strategic Framework, Commercial Centres), the hierarchy is not fixed and does provide some flexibility to respond to changing retail trends. However, the spatial distribution of land in the City for retail activities significantly controls the location and scale of retail development.

In addition to the spatial limitations of zoned land, the trends described below have also blurred the edges of commercial use definitions and challenges the Planning Scheme to respond. Within the 2021 time horizon and from a regulatory point of view, retail activity is becoming less differentiated thereby allowing the opportunity to consolidate the Planning Scheme definitions, zones and precincts.

The nature of these trends is discussed in other sections of this study. In summary the trends are:

- increased rate of change of new retail forms and market players;
- increased variability in size and type of retail activities;
- expansion and specialisation of uses/services/functions;
- rise of mixed use centres.

The following trends are also part of the above list, but are discussed in more depth relevant to town planning issues

Retail showroom centres

By way of example, the bulky goods and retail showroom retailers of the City are generally dispersed with the Hanson Road area being the only concentration of these uses. The Hanson Road area has traditionally been a light industry and warehousing area with some affiliation to the nearby port and major industry activities while Hanson Road is also the main traffic route between the City and the industrial areas northwest of the City. There are several retailers located in the area that would be regarded as 'Showroom' type uses and sell direct to the public. Typical issues associated with allowing showroom development in industrial areas includes:

- loss of industrial land for smaller scale industrial activities;
- loss of employment locations for industrial production;
- increasing potential traffic conflict between the general public (as patrons of the retailer) and industrial traffic;
- conflict between industrial traffic manoeuvring on streets that become congested with overflow parking from increasingly busy retail activities; and
- conflicting expectations between industry, retailers and the public regarding amenity values in the locality.

Bunnings is understood to be investigating a new site outside the Hanson Road area as the current site does not readily suit future needs, is not suitable for the standard Bunnings floor plate and is not located conveniently for where the future development of the City is heading (i.e. to the south in the vicinity of the proposed Kirkwood Road) and future development in Calliope Shire.

The Planning Scheme currently accommodates a range of retail activities that are different to a 'Shop'. The trends of change in size, expansion of function/services and the specialty centres becoming general centres erodes the need for a diverse range of commercial and retail use definitions.

Catchment Size and Location Requirements

Gladstone City includes several retail functions that play a key centre role in the Gladstone/Calliope region. As such, these retail activities, principally located at Kin Kora, the CBD/Valley and Hanson Road, have catchments extending well beyond the City boundary. While not appropriate for all of the major retail types, the specific location criteria of regional catchment level uses is not dependant on a City centre location or sub-regional centre location, however, the attractiveness of the specific location will have an impact on the performance of the activity.

For example, cinemas could feasibly be located anywhere in the City and have a catchment that extends well beyond the City. The current location of cinemas at Manning Street, however, illustrates that while the catchment is larger than the City, the actual location does not perform as efficiently as a location attached to an existing centre with better parking and complementary activities such as restaurants and cafes. It is understood that cinemas are part of the redevelopment being undertaken at the Night Owl centre at Dawson Highway/Park Street.

Section 6 indicates that there is a supportable requirement for several centres within the 2021 timeframe of the study. The 'homemaker'/bulky goods centre being an example of a retail activity that will have a catchment beyond the City and could be located at any reasonable location, with site area and highway location likely to be the main location criteria.

7.3 CRITIQUE OF RETAIL COMPONENTS OF THE OF THE DRAFT PLANNING SCHEME

The draft Planning Scheme manages retail development through various levels from the broad to the specific. In summary these are:

- the Strategic Framework (maps and specifically the Commercial Centres Strategy in Part 1 Division 2 Section 1.4);
- Desired Environmental Outcomes (specifically for Economic Development in Part 3 Section 3.1(3)(b));
- Localities, Zones and Precincts with associated Locality Codes, general provisions, overall outcomes and specific outcomes (the Commercial zone is included in most of the 6 Localities in Parts 4 to 9 and several Localities have centre precincts, such as the Kin Kora Precinct in the Suburban Locality Code in Part 7 Division 10);
- the Business Class and certain individual land use definitions (the Dictionary at Schedule 1); and
- codes for development of a stated purpose or type (Part 11 Divisions 2 to 18).

These elements of the Planning Scheme are discussed and critiqued on their effectiveness in the following subsections.

7.3.1 The Strategic Framework

Role of the Strategic Framework

Part 1 Division 2 and the Strategic Framework Plan are a non-statutory component of the draft Planning Scheme and the Commercial Centres Strategy in Part 1 Division 2 Section 1.4 specifically addresses retail development, amongst other commercial matters. The Strategic Framework is a summary of the draft Planning Scheme approach that facilitates the achievement of the DEOs.

While not diminishing the value of a Strategic Framework, it is questionable as to where this element of the draft Planning Scheme is located. Given that the Integrated Planning Act places highest importance on the DEOs, the Strategic Framework is not formally recognised by the Act as a necessary component of a Planning Scheme and that the Strategic Framework reflects the DEOs, it seems logical that the DEOs should be located before the Strategic Framework is discussed.

Approach of the Strategic Framework

Section 1.4 (2) of the Strategic Framework includes a strategic element for Commercial Centres and is linked to the Strategic Framework Plan by representations in light blue. The location of centres is consistent with the DEO for economic development (see 7.3.2 below) in that a network of centres is nominated. The strategy is articulated as:

'To reinforce the regional and City-wide importance of an integrated network of sustainable business centres in the City'

This strategy is generally sound, however, adds little to the DEO discussed in 7.3.2 following. The strategy also describes the centre network as 'integrated' however this is not defined or discussed in terms of what constitutes an integrated network. The term does not add significant value to that of other components of the draft Planning Scheme that provide detail on identifying a network of centres.

The strategy also describes the objective for locating commercial activity in designated centres (paragraph (i)) and also to small non-designated centres (paragraph (ii)). The key centres of the City are identified (the Central City, Kin Kora, The Valley, Toolooa, Dawson Road and Hanson Road). While not strict, the strategy does establish linkages between size and form equalling function. Were the linkage between size, form and function be made stronger, regulatory difficulties and enforcement issues can rise. This is particularly the case with larger scale retail functions that have catchments beyond the City, thereby having fewer local site constraints and eroding the network of size equalling function that is often the approach of planning for centres. Trends in retail development show that the size and function of most retailers is increasing, decreasing, expanding and contracting, all of which does not lend itself easily to a strict hierarchy of sizes and functions being directly related. The less restrictive approach taken by the Commercial Centres Strategy to size and function being related is supported.

Use of Undefined Terms

The strategy uses certain terms that are not defined such as 'higher order' and 'small scale'. It is not clear if these terms refer to physical size, infrastructure demand and/or catchment area. A large retail centre is a complex place with many functions displaying diverse catchments and infrastructure needs not necessarily related to the size of the development. For example, a regional centre will have retail functions such as department stores or discount department stores that will have a catchment of 100,000 people or more and, in the case of Gladstone, this population extends well into the hinterland of Calliope Shire and other local government areas. Nested within this same centre, there will be other retail functions that service a very local based catchment, such as fast food outlets, newsagents and small grocery stores. By saying a centre will only include 'higher order' commercial functions potentially skews the other roles and functions a centre performs

A retail space that may commence life as a low intensity retail type (e.g. high unit price with regional catchment) can be replaced with higher intensity retail uses (e.g. low unit price local catchment) without the need for building work and not triggering a material change of use under the draft Planning Scheme. Likewise, a busy small scale retail use may attract much higher visitor numbers than a much larger (genuine) bulky goods store. Given that much retail space is leased, it becomes extremely difficult for the Planning Scheme to enforce the scale and order of uses that tenant retail space, particularly where no or minor building work takes place.

The description of each centre displays the difficulty of requiring certain order or scale of retail uses. For example, the Dawson Road centre is described as providing non-retail commercial services and convenience shopping. Neither of these terms are defined elsewhere in the draft Planning Scheme and it is difficult to enforce were a tenancy at the centre to change to a retail use without building work. The location of the Coffee Club demonstrates this difficulty. This use is not a typical ‘non-retail commercial use’ nor is it typical of ‘convenience shopping’, yet (anecdotally) it is observed that people think the café is a good use for the site and has added to the City.

Hanson Road as a Retail Centre

The Strategic Framework and Plan also identifies Hanson Road as a location for direct selling to the public of various goods in the showroom/warehouse format. As a general observation, allowing the expansion of direct to the public retailers in light industrial areas leads to the industrial uses relocating, taking their employment, production and economic spin-off effects elsewhere. There are several reasons for the shift out by industrial uses:

- land prices can rise as a result of increased retail activity;
- traffic movement conflicts between industrial and retail traffic;
- parking conflicts between industrial (service, supply and employee) and retail traffic;
- different amenity expectations by industrial users, retailers and retail customers; and
- the trend for bulky goods retailers to expand their products to smaller goods and goods attracting more regular visits from customers.

The types of so-called ‘bulky goods’ retailers take advantage of lower rents/land prices to locate in the light industry areas, but otherwise do not require the infrastructure or location characteristics of light industry. The location constraints for light industry are more significant and more subject to adverse public reaction when new sites are identified. Given that alternative sites can be identified that are equally or better suited for showroom/bulky goods retailers, Hanson Road is not a suitable location for further retail growth and should be allowed to remain as an industrial location providing employment, production capacity and services to the City and industry.

7.3.2 Desired Environmental Outcomes

The DEO for Economic Development in Part 3 Section 3.1(3)(b) of the draft Planning Scheme) is the key DEO for retail activity and relevant to this study. Given the issues identified in 7.3.1 above, there is potential for amendments being made to the DEO. The DEO covers the full range of economic development outcomes for the City and retail activity is specifically identified in point (iii) as:

'The reinstatement of a viable central business district and a network of commercial centres which respond to and satisfy the shopping, commercial, administrative, entertainment and leisure needs of the City and regional population.'

As a general outcome for the City, this aspect of the DEO is suitable and allows sufficient breadth to accommodate the current and future retail needs, trends and issues discussed in this study. There a re two key components of this outcome:

1. Reinstatement of the CBD, which is being addressed in detail by a separate study that is likely to be incorporated in part or in full to the draft Planning Scheme; and
2. A network of centres, which clearly indicates the desire for nodes/locations rather than ad-hoc and opportunistic development thereby reinforcing the idea of a 'centre' as being the desired means of providing retail opportunities to the private sector and retail functions to the community.

Other elements of the draft Planning Scheme provide the detail that facilitates the achievement of this outcome, particularly the preference for retail functions to be delivered through centres.

7.3.3 Localities, Zones and Precincts with Associated Locality Codes

The draft Planning Scheme divides the City into localities, which are further divided into precincts. Each locality includes specific provisions for commercial zoned land. The following discussion focuses on the primary commercial centres and how each is addressed through the draft Planning Scheme.

Hanson Road Precinct, City Locality

The overall outcomes stated for the Hanson Road precinct seek to further encourage a mixed industry and business area, providing for showroom, warehouse and bulky goods activities. The outcomes also state a focus on transport oriented activities, which could provide a conflict with showroom, and bulky goods developments bringing more retail focused traffic into the area.

The specific outcome relevant to the Hanson Road precinct reflects the commercial strategy included in the Strategy Framework.

Kin Kora Precinct, Suburban Locality

The specific outcomes stated for the Kin Kora Precinct are general in nature and do not comprehensively reflect the specific locational characteristics of the commercial centre and the range of non-commercial uses in the precinct. The precinct also does not provide for future expansion beyond the bounds of existing zoned land.

The specific outcomes stated for the precinct could be reviewed to better reflect the specific characteristics and commercial development outcomes sought for the precinct.

The precinct also does not reflect the existing approval for commercial development at the Auckland Creek site. As stated in section 2 of this report, this area is considered to be appropriate for bulky goods activities and may relieve the pressure for further expansion of commercial activities in the Hanson Road precinct.

Kirkwood Road South Precinct, Suburban Locality

The Kirkwood Road South Precinct specific outcome for commercial developments specifies a maximum of 500 m^2, servicing local residents needs. Based on the outcomes of this report it is clear that a future centre will be required in this area within the 2021 planning time frame. This development is likely to occur within the timeframe of the draft Planning Scheme and it is appropriate to identify the potential for a commercial development in the order of 4,000 – 6,000 m^2 anchored by a major supermarket within the precinct.

7.3.4 The business class and other land use definitions

Part 14 Schedule 1 of the draft Planning Scheme contains use and administrative definitions, some of which are discussed in this section. The draft Planning Scheme focuses on the commencement of a use and does not readily capture uses as they may evolve. The draft Planning Scheme does not readily accommodate this, despite it clearly being a change in the intensity of activity on site and therefore a Material Change of Use. The following provides a brief discussion of specific land use definitions.

Showroom and Shop

The retail trends discussed in sections 4 and 7.2 of this report show that while a retail type may commence as a bulky goods activity, these often expand their range of goods to less bulky items and occasionally trade in goods more like shops. Many established retail showroom chains have moved in this direction as they compete with each other as well as competing for new markets with other retail types. In Table 14.1 of Division 14 Vehicle Parking Rates showrooms have a parking rate approximately half that of shops, however, these activities are increasingly becoming (both in goods, operation and appearance) shops.

There is an opportunity to make the shop definition include retail showroom or to make the retail showroom definition more specific or limit the opportunities for such uses in the zone maps.

Warehouse, Industrial Premises and Shop

Similar to the issue with retail showrooms becoming more like shops, there is the same capacity for warehouses and industrial premises to operate more like shops. The definition includes the opportunity for retail functions at a minor and incidental level; however, minor and incidental are not defined. While the actual size of the retail component may be a fraction of the site area, the market may be strongly attracted to the warehouse or industrial premise due to price. The outcome is an increase in traffic, inadequate parking and non-industry traffic moving through industrial areas.

The retail component of warehouse and industrial premises should be more tightly defined. Within the 2021 timeframe, it is likely that this issue will emerge as non-retail businesses grow.

Office (Business) and Commercial Premises (Business)

While not a retail activities as such, offices and commercial premises do, however, play a major role in centres and are often part of the mix in centres with some being considered retail activities by virtue of the services provided and their location in centres.

The draft Planning Scheme makes a distinction between office and commercial premises, but the tables of assessment and parking provisions have no variation between the definitions. Consideration should be given to amalgamating the definitions and making any variations through precinct

7.3.5 Codes for development of a stated purpose or type

The draft Planning Scheme includes a Commercial Code (Part 11 Division 2) which applies to all commercial development.

The term commercial is defined to include a range of activities, however does not include a commercial premises, which is included in the business class of defined uses. This may be an oversight during scheme drafting.

The overall outcome for the code supports the outcomes of each locality and precinct discussed above. However, it may be appropriate to consider inclusion of more than one code relevant to commercial development, to enable a more detailed consideration of the variations between specific retail and commercial activities.

7.4 OTHER ISSUES AFFECTING RETAIL DEVELOPMENT AND THE PLANNING SCHEME

There are a range of other development and planning related issues that have been identified that affect retail development and the draft Planning Scheme. These are summarised in the following subsections.

7.4.1 Triggers for IDAS applications

The draft Planning Scheme focuses on use and changes (increases) in floor area as the key trigger for determining a Material Change of Use. The definition for Material Change of Use in the Integrated planning Act includes the situation where the ‘intensity’ of a use changes (usually an increase), but does not specify that the change in intensity is only measured by floor area. Parking rates in the draft Planning Scheme are exclusively linked to rates determined by floor area. Within the definitions of each commercial use, there is no identified capacity for the draft Planning Scheme to trigger an IDAS application where ‘popularity’ of a particular retailer increases the intensity of use, thereby falling within the broad range of ‘material change of use’ as defined in the Integrated Planning Act.

To illustrate this point, when ‘Showrooms’ or other non-shop uses operate more like a ‘Shop’, there is usually a noted increase in traffic intensity, but no increase in floor space. The draft Planning Scheme does not have the capacity to trigger a material change of use where a non-shop use begins generating higher traffic levels than expected for that use. Particularly where the use can demonstrate that its retail component is still minor in terms of floor area, the trigger for a material change of use does not extend to traffic generation.

7.4.2 Spatial distribution of the Commercial Zone and other Retail Zones

The centres strategy of the Planning Scheme is mostly based on the existing centres and on size equalling hierarchy and function. The centres strategy also focuses on consolidation and minimal expansion of existing centres and does not identify any sites for new centres, with the exception of a small centre within Kirkwood Road South Precinct.

The assessment of this study is that there is opportunity for additional retail locations within the 2021 time horizon, particularly in relation to the Kirkwood Road South precinct. The draft Planning Scheme does not provide for a major centre in this area.

It is also noted that many of the freestanding shops in the City are not within any centre or other retail/commercial zone. This approach is an extension of the centre strategy that limits centre growth to existing centres and decreases opportunity for new centres to emerge in locations Council does not support. Within the 2021 timeframe, however, certain of these locations may be future locations for centres, particularly those in residential zones that front major roads or are on the intersections of higher order roads.

7.4.3 Distribution of new growth and new retail functions

The current policy framework is one of containment to existing centres. There is no larger centre zone land located in areas where the City is growing, the current highest growth area of the City being in the south. Within the time horizon of the study up to 2021, the southern parts of the City should double in population with northern and central parts of the City expected to have marginal population declines (as described on Table 3.1 of section 3).

7.4.4 Relationship of specific retail uses to location and form

The draft Planning Scheme manages retail development by use, location and form. As discussed in sections 7.2 and 7.3, the specific use aspect of retail development is increasingly difficult to differentiate and regulate for. There may be reduced value in continuing a policy of increasing/expanding the range of particular retail/commercial uses defined in the draft Planning Scheme (as discussed in 7.3.4 above). Given the draft Planning Scheme is not readily able to manage development where no physical changes occurs (i.e. there is a change of tenant), the approach of directly linking size, form and function is difficult to enforce. Market forces will largely determine the success or otherwise of a particular retailer, their location policy and the form they elect to take. Regulating the retail types and specifying certain types for different orders of centres is likely to be behind the pace of new retail forms, changes in catchments and changes to existing retial types.

Alternatively, the draft Planning Scheme is a very effective vehicle for managing the location, physical form and shape of retail development. In terms of location, the current policy is in principle for:

1. larger sized development contained to existing centres identified by Locality, Zone and Precinct with Codes regulating most physical aspects of these developments;
2. local/smaller sized development located within residential/urban areas, again with codes regulating the physical aspects of these developments; and
3. new centres being located where new development is occurring (south and south west parts of the City around the proposed Kirkwood Road link) as required.

Within the time horizon of the study, locations for new centres should be considered, particularly in the new developing areas of the City that are going to be contiguous with future urban and rural residential development in Calliope Shires.

In addition, no matter what retail use is operating and in whatever location, the Planning Scheme can effectively manage the physical form and relationship of the centre in its local context. The Locality, Precinct, Zone, Overlay and specific use Codes of the draft Planning Scheme provide a strong tool for managing this aspect of centre development.

7.5 SUGGESTED AMENDMENTS TO THE DRAFT PLANNING SCHEME

The following subsections describe a range of possible amendments suggested as means of addressing the issues discussed in this study, specifically sections 7.2 to 7.4 of this report. Given the time horizon for the study out to 2021, it is not critical that all of these amendments be considered for the current draft Planning Scheme and can be addressed in time as the direction and preferences for future development clarify. Significant population growth will occur with the study timeframe and the retail sector is subject to the dynamic of change, both of which will require reconsideration of the Planning Scheme provisions in the future.

For instance, there are two key ‘pressure’ points as far as the immediate retail future of the City is concerned. Kin Kora is the retail centre of the City and is facing traffic congestion issues, in part created by the split nature of the centre. A third development approval on the south west side of Auckland Creek could accommodate around half of the future theoretically supportable retail floor space for the City, but is not considered an ideal location and would probably exacerbate the congestion, access and efficiency of the Kin Kora retail area. This pressure point should be addressed with relative urgency.

The other pressure point that could be addressed in the short term is the location of bulky goods/retail showrooms in a location closer to the developing residential areas and away from industrial uses around Hanson Road.

Strategies and possible provisions of the draft Planning Scheme are included in this subsection as suggestions for specific means of addressing these more urgent pressure points.

Specific details of the amendments to the draft Planning Scheme are found in Appendix D.

7.5.1 The Strategic Framework

The Integrated Planning Act does not require or formally recognise the role or regulatory power of the Strategic Framework Strategy or Plan. As the Strategic Framework reflects the DEOs, consideration should be given to placing the Strategic Framework component of the draft Planning Scheme after the DEOs. Alternatively, consideration may be given to integrating the content of the Strategic Framework into the DEOs and the Overall and/or Specific Outcomes for Localities and Precincts.

The Commercial Centres Strategy in Part 1 Division 2 Section 1.4 should be reviewed considering the following matters:

- use of the term ‘integrated’ to describe the centres network, it is not clear what this specifically means or what measures can be applied to determine the degree of centres being integrated;
- the less restrictive approach taken by the Commercial Centres Strategy to size and function being related is supported, temptation to directly link

retail size, form and function is not recommended given the retail trends discussed in this study;

- review the use of terms such as 'higher order' and 'small scale' with the possibility of removing them or including definitions;
- the ranges of retail activities discussed in each centre location should be reviewed as these are not defined elsewhere in the draft Planning Scheme and are very likely to be difficult to enforce, such as limiting Dawson Road to non-retail commercial services and convenience shopping only; and
- an alternative location to Hanson Road for showrooms, bulky goods or other direct to public selling is recommended, the preferred site opportunity identified being the racecourse adjacent to Kin Kora and the cemetery on the Dawson Highway.

7.5.2 Desired Environmental Outcomes

The DEO for Economic Development in Part 3 Section 3.1(3)(b) is suited to providing sufficient breadth to accommodate current and future retail growth and trends. The DEO provides two key outcomes being reinstatement of CBD as a viable central business district and the preference for centres providing commercial functions, rather than strip, isolated or other ad-hoc approaches to retail development. The DEO could be amended to accommodate the elements of the Strategic Framework and therefore give the framework regulatory weight.

7.5.3 Localities, zones and precincts with associated locality codes

The localities and precincts included in the draft Planning Scheme will require a review for consistency to reflect any overall changes within the strategy. The specific outcomes for Hanson Road, Kin Kora and Kirkwood Road South Precincts need reviewing to better reflect the outcomes of this study.

7.5.4 The business class and other land use definitions

The draft Planning Scheme uses a number of terms to describe retail and commercial function which are not defined within the scheme. These terms should either be defined for clarity or removed from the draft Planning Scheme. If these terms are to be defined they could be included as defined terms for the DEO's only, rather than including within the use definitions.

7.5.5 Triggers for IDAS applications

The draft Planning Scheme relies on use and increases in floor area as triggers for a material change of use. Consideration should be given to other triggers for material change of use, particularly increases in vehicle traffic. This could potentially be achieved through the addition of specific outcomes and probable solutions in the relevant codes relating to increase in demand on infrastructure and in particular increase demand for car parking.

An approach of limiting the range of retail definitions in the Planning Scheme will also assist in that more uses will fall within fewer definitions where a more uniform parking rate will apply, thereby avoiding the situation of uses that are operating as a Shop, but have fallen within other definitions where a lesser parking rate applies.

7.5.6 Spatial distribution of the commercial zone

The draft Planning Scheme does not provide for retail expansion outside existing zoned Commercial land. It is recommended that provision be made for a future neighbourhood shopping centre in the Kirkwood Road South Precinct. This centre should be located along a major arterial and is considered to be most appropriately located at the intersection of Kirkwood Road and Dixon Drive. This location takes account of potential future need for a smaller convenience centre to be located to service future growth in the western part of the precinct.

The spatial distribution of the commercial zone also fails to reflect the existing approval at the Auckland Creek site or the potential for bulky goods and showroom development at the racecourse site.

While the proposed amendments to the Planning Scheme make the location of a showroom based centre at the racecourse, there are potential issues with the availability of this location. The land is owned by the State Government and the use for a racecourse may continue for an undetermined timeframe. Should development of the racecourse not proceed, another location should be identified. The provisions as described in the amendments would remain the same, except for the name of the location.

7.5.7 Relationship of specific retail uses to location and form

The draft Planning Scheme has elements for the Strategic Framework that suggest a linkage between size, location, form and specific retail functions, however, the strategy is relatively flexible. Other subsections of this section discuss changes to the draft Planning Scheme that reinforce the strengths of the draft Planning Scheme (i.e. regulating physical form and shape) while limiting the regulation of specific retail types to certain orders of centre.

APPENDIX A

Detailed Retail Floor Space Data

Gladstone City Retail Floor Space Summaries - June 2004

Distribution of Floor Space:			*Number of Records*	*Average Shop Size*
Total	**106,213**	**100.0%**	**499**	**213**
1.Take Home Food	15,342	14.4%	42	365
2.Meals Out	6,642	6.3%	54	123
3.Apparel	7,609	7.2%	39	195
4.Homewares/Personal Services	53,545	50.4%	199	269
5.Professional Services/Commercial	15,960	15.0%	111	144
6.Vacant	7,115	6.7%	54	132
Occupied Retail	**83,138**	**78.3%**	**334**	**249**
Total Occupied	**99,098**	**93.3%**	445	**223**

CBD			*Number of Records*	*Average Shop Size*
Total	**13,349**	**100.0%**	**91**	**147**
1.Take Home Food	302	2.3%	3	101
2.Meals Out	1,838	13.8%	10	184
3.Apparel	2,309	17.3%	10	231
4.Homewares/Personal Services	3,211	24.1%	23	140
5.Professional Services/Commercial	4,000	30.0%	30	133
6.Vacant	1,689	12.7%	15	113
Occupied Retail	**7,660**	**57.4%**	**46**	**167**
Total Occupied	**11,660**		**76**	

Valley			*Number of Records*	*Average Shop Size*
Total	**20,519**	**100.0%**	**127**	**162**
1.Take Home Food	2,621	12.8%	5	524
2.Meals Out	1,475	7.2%	12	123
3.Apparel	656	3.2%	6	109
4.Homewares/Personal Services	8,106	39.5%	49	165
5.Professional Services/Commercial	5,826	28.4%	42	139
6.Vacant	1,835	8.9%	13	141
Occupied Retail	**12,858**	**62.7%**	**72**	**179**
Total Occupied	**18,684**		**114**	

Kin Kora			*Number of Records*	*Average Shop Size*
Total	**29,082**	**100.0%**	**61**	**477**
1.Take Home Food	6,954	23.9%	7	993
2.Meals Out	314	1.1%	4	79
3.Apparel	2,364	8.1%	14	169
4.Homewares/Personal Services	17,905	61.6%	21	853
5.Professional Services/Commercial	1,381	4.7%	14	99
6.Vacant	164	0.6%	1	164
Occupied Retail	**27,537**	**94.7%**	**46**	**599**
Total Occupied	**28,918**		**60**	

Nightowl Centre			*Number of Records*	*Average Shop Size*
Total	**7,965**	**100.0%**	**39**	**204**
1.Take Home Food	837	10.5%	5	167
2.Meals Out	482	6.1%	6	80
3.Apparel	1,213	15.2%	4	303
4.Homewares/Personal Services	2,394	30.1%	11	218
5.Professional Services/Commercial	1,773	22.3%	6	296
6.Vacant	1,266	15.9%	7	181
Occupied Retail	**4,926**	**61.8%**	**26**	**189**
Total Occupied	**6,699**		**32**	

Hanson Road			*Number of Records*	*Average Shop Size*
Total	**13,085**	**100.0%**	**44**	**297**
1.Take Home Food	91	0.7%	1	91
2.Meals Out	375	2.9%	3	125
3.Apparel	408	3.1%	2	204
4.Homewares/Personal Services	11,131	85.1%	35	318
5.Professional Services/Commercial	1,080	8.3%	3	360
6.Vacant	0	0.0%	0	#DIV/0!
Occupied Retail	**12,005**	**91.7%**	**41**	**293**
Total Occupied	**13,085**		**44**	

Toolooa Street Centre			*Number of Records*	*Average Shop Size*
Total	**4,606**	**100.0%**	**31**	**149**
1.Take Home Food	1,633	35.5%	3	544
2.Meals Out	305	6.6%	3	102
3.Apparel	360	7.8%	2	180
4.Homewares/Personal Services	1,347	29.2%	13	104
5.Professional Services/Commercial	427	9.3%	4	107
6.Vacant	534	11.6%	6	89
Occupied Retail	**3,645**	**79.1%**	**21**	**174**
Total Occupied	**4,072**		**25**	

Clinton			*Number of Records*	*Average Shop Size*
Total	**3,015**	**100.0%**	**21**	**144**
1.Take Home Food	504	16.7%	3	168
2.Meals Out	352	11.7%	4	88
3.Apparel	0	0.0%	0	#DIV/0!
4.Homewares/Personal Services	1,183	39.2%	7	169
5.Professional Services/Commercial	808	26.8%	6	135
6.Vacant	168	5.6%	1	168
Occupied Retail	**2,039**	**67.6%**	**14**	**146**
Total Occupied	**2,847**		**20**	

Mellefont St			Number of Records	Average Shop Size
Total	**1,325**	**100.0%**	**10**	**133**
1.Take Home Food	514	38.8%	2	257
2.Meals Out	100	7.5%	1	100
3.Apparel	0	0.0%	0	#DIV/0!
4.Homewares/Personal Services	400	30.2%	4	100
5.Professional Services/Commercial	211	15.9%	2	106
6.Vacant	100	7.5%	1	100
Occupied Retail	**1,014**	**76.5%**	**7**	**145**
Total Occupied	**1,225**		**9**	

Airport Village			Number of Records	Average Shop Size
Total	**868**	**100.0%**	**7**	**124**
1.Take Home Food	350	40.3%	2	175
2.Meals Out	0	0.0%	0	#DIV/0!
3.Apparel	0	0.0%	0	#DIV/0!
4.Homewares/Personal Services	84	9.7%	1	84
5.Professional Services/Commercial	0	0.0%	0	#DIV/0!
6.Vacant	434	50.0%	4	109
Occupied Retail	**434**	**50.0%**	**3**	**145**
Total Occupied	**434**		**3**	

Sun Valley Plaza			Number of Records	Average Shop Size
Total	**600**	**100.0%**	**4**	**150**
1.Take Home Food	495	82.5%	3	165
2.Meals Out	0	0.0%	0	#DIV/0!
3.Apparel	0	0.0%	0	#DIV/0!
4.Homewares/Personal Services	105	17.5%	1	105
5.Professional Services/Commercial	0	0.0%	0	#DIV/0!
6.Vacant	0	0.0%	0	#DIV/0!
Occupied Retail	**600**	**100.0%**	**4**	**150**
Total Occupied	**600**		**4**	

Other			Number of Records	Average Shop Size
Total	**11,799**	**100%**	**64**	**184**
1.Take Home Food	1,041	8.8%	13	80
2.Meals Out	1,401	11.9%	17	82
3.Apparel	299	2.5%	5	60
4.Homewares/Personal Services	7,679	65.1%	45	171
5.Professional Services/Commercial	454	3.8%	10	45
6.Vacant	925	7.8%	6	154
Occupied Retail	**10,420**	**88.3%**	**48**	**217**
Total Occupied	**10,874**		**58**	
GRAND TOTAL	**106,213**		**499**	

APPENDIX B

Socio-economic characteristics as at 2001 Census

Table B.1: Age Characteristics, 2001

Gladstone Retail Study

Age	Northern Gladstone (%)	Central Gladstone (%)	Southern Gladstone (%)	Gladstone City (%)	Calliope Pt A (%)	Gladstone & Calliope Pt A Catchment (%)	Rockhampton City (%)	Fitzroy SD (%)	Queensland (%)
0-4	6.6	7.0	9.4	8.2	7.1	7.9	6.9	7.4	6.8
5-9	7.0	8.0	9.7	8.6	9.3	8.8	7.0	8.0	7.3
10-14	5.8	8.8	8.7	7.9	9.4	8.3	7.4	7.8	7.2
15-19	6.8	7.6	7.9	7.5	7.4	7.5	8.8	7.7	7.2
20-29	15.0	12.6	14.4	14.3	9.9	12.9	14.5	12.8	13.6
30-39	14.1	14.4	16.6	15.5	15.5	15.5	13.3	14.6	14.7
40-49	14.9	14.3	15.5	15.1	16.3	15.5	13.5	14.7	14.5
50-59	12.1	12.1	10.4	11.2	11.8	11.4	10.8	11.5	12.1
60-64	5.1	4.6	2.5	3.5	4.2	3.7	4.1	4.4	4.4
65+	12.7	10.6	5.1	8.1	9.2	8.4	13.8	11.1	12.4
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* Totals may not add due to rounding
Source: ABS
CDATA01

Table B.2: Dwelling Structure, 2001
Gladstone Retail Study

Structure	**Northern Gladstone (%)**	**Central Gladstone (%)**	**Southern Gladstone (%)**	**Gladstone City (%)**	**Calliope Pt A (%)**	**Gladstone & Calliope Pt A Catchment (%)**	**Rockhampton City (%)**	**Fitzroy SD (%)**	**Queensland (%)**
Separate house	64.7	89.7	91.8	82.5	86.9	83.8	85.0	84.8	77.8
Semi-detached	2.3	0.6	3.8	2.9	2.2	2.7	2.8	2.3	6.8
Flat/unit	25.9	9.4	2.9	11.4	3.7	9.2	9.3	7.4	12.2
Other structure	7.0	0.3	1.5	3.2	7.2	4.4	2.9	5.5	3.1
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Table B.3: Dwelling Tenure, 2001 **Gladstone Retail Study**

Tenure	**Northern Gladstone (%)**	**Central Gladstone (%)**	**Southern Gladstone (%)**	**Gladstone City (%)**	**Calliope Pt A (%)**	**Gladstone & Calliope Pt A Catchment (%)**	**Rockhampton City (%)**	**Fitzroy SD (%)**	**Queensland (%)**
Fully owned	32.3	39.9	29.2	31.8	37.5	33.5	39.9	39.1	38.4
Purchasing	20.0	28.8	38.0	30.8	35.7	32.3	24.8	25.7	27.0
Renting	45.5	30.6	31.3	35.8	23.8	32.2	33.3	31.1	31.5
Other tenure	2.1	0.7	1.5	1.6	3.0	2.0	2.1	4.0	3.2
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: ABS CDATA01

Table B.4: Average Household Income (2004 $ values), 2001
Gladstone Retail Study

Income ($)	Northern Gladstone (%)	Central Gladstone (%)	Southern Gladstone (%)	Gladstone City (%)	Calliope Pt A (%)	Gladstone & Calliope Pt A Catchment (%)	Rockhamp-ton City (%)	Fitzroy SD (%)	Queensland (%)
$0-$10,399	6.9	4.7	2.8	4.5	3.8	4.3	6.0	5.5	5.2
$10,400-$15,599	13.8	8.8	4.3	8.0	6.2	7.5	11.2	9.1	8.8
$15,600-$25,999	21.0	17.0	12.8	16.1	16.4	16.2	20.8	18.9	19.7
$26,000-$36,400	12.0	12.4	10.7	11.3	10.2	11.0	14.4	13.2	14.3
$36401-$52,000	16.0	17.4	18.3	17.4	17.9	17.6	17.3	16.6	16.9
$52,001-$78,000	18.6	23.1	27.9	24.2	24.6	24.3	17.4	19.2	18.4
$78,001-$104,000	7.5	10.0	15.4	12.1	13.5	12.5	8.3	10.7	10.0
$104,000+	4.2	6.5	7.7	6.4	7.4	6.7	4.7	6.7	6.7
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Not stated/spouse absent	4.7	3.1	2.9	3.5	2.8	3.3	4.3	4.3	3.9
Average household income (June 2004 $ val)	$44,917	$53,338	$62,333	$55,397	$58,302	$56,245	$46,972	$52,035	$51,396

* Totals may not add due to rounding
Source: ABS CDATA01; Economic Associates calculations

Table B.5: Labour Force Status, 2001
Gladstone Retail Study

Labour force status	Northern Gladstone	Central Gladstone	Southern Gladstone	Gladstone City	Calliope Pt A	Gladstone & Calliope Pt A Catchment	Rockhamp-ton City	Fitzroy SD	Queensland
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
In labour force	63.1	65.0	72.3	68.4	63.4	66.9	61.4	63.7	63.1
Not in labour force	36.9	35.0	27.7	31.6	36.6	33.1	38.6	36.3	36.9
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Of those in labour force									
Employed	87.7	89.8	91.9	90.5	93.2	91.3	91.1	92.1	91.8
Unemployed	12.3	10.2	8.1	9.5	6.8	8.7	8.9	7.9	8.2
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Employed - full time	60.3	58.3	60.9	60.4	61.8	60.8	57.5	60.9	58.6
Employed - part time	24.6	29.5	28.8	27.7	28.8	28.0	30.5	28.3	30.3
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Persons employed per household	**1.0**	**1.2**	**1.4**	**1.2**	**1.2**	**1.2**	**1.1**	**1.2**	**1.2**

* Totals may not add due to rounding
Source: ABS CDATA01

Table B.6: Occupation of the Labour Force, 2001
Gladstone Retail Study

Occupation	Northern Gladstone (%)	Central Gladstone (%)	Southern Gladstone (%)	Gladstone City (%)	Calliope Pt A (%)	Gladstone & Calliope Pt A Catchment (%)	Rockhamp-ton City (%)	Fitzroy SD (%)	Queensland (%)
Managers and administration	5.4	5.0	4.5	4.8	6.2	5.2	4.7	9.1	8.7
Porfessionals	14.5	14.1	12.5	13.2	12.8	13.1	16.1	13.3	16.3
Associate professionals	12.6	12.6	11.4	11.9	11.4	11.8	12.5	11.3	12.2
Tradespersons and related workers	18.1	17.2	19.2	18.7	18.8	18.7	13.6	15.0	13.0
Advanced clerical services	2.4	4.7	3.4	3.2	3.1	3.2	3.0	2.9	3.6
Intermediate clerical services	13.0	15.0	14.6	14.2	13.0	13.8	18.7	14.9	17.3
Production and transport workers	15.1	13.6	15.4	15.1	17.6	15.9	7.7	12.3	8.7
Elementary clerical, sales services	8.0	8.9	10.5	9.6	7.7	9.1	11.1	9.1	10.3
Labourers and related workers	11.0	8.9	8.5	9.2	9.3	9.3	12.6	12.1	9.9
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Blue collar	44.2	39.6	43.1	43.0	45.7	43.8	33.8	39.4	31.7
White collar	55.8	60.4	56.9	57.0	54.3	56.2	66.2	60.6	68.3
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* Totals may not add due to rounding
Source: ABS CDATA01

Table B.7: Number of Vehicles per Household, 2001

Gladstone Retail Study

Vehicles	Northern Gladstone (%)	Central Gladstone (%)	Southern Gladstone (%)	Gladstone City (%)	Calliope Pt A (%)	Gladstone & Calliope Pt A Catchment (%)	Rockhampton City (%)	Fitzroy SD (%)	Queensland (%)
0	17.4	8.5	4.8	9.5	3.9	7.8	12.6	9.1	9.9
1	47.7	43.7	39.5	42.7	41.3	42.3	45.9	42.7	42.7
2	27.4	37.5	42.7	37.0	40.0	37.9	31.0	34.8	34.9
3	7.5	10.3	12.9	10.8	14.8	12.0	10.5	13.4	12.4
Total*	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* Totals may not add due to rounding
Source: ABS CDATA01

Table B.8 : Industry of the labour force, 2001

Gladstone Retail Study

Industry	Northern Gladstone	Central Gladstone	Southern Gladstone	Gladstone City	Calliope Pt A	Gladstone & Calliope Pt A Catchment	Rockhampton City	Fitzroy SD	Queensland
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
Agriculture, forestry and fishing	1.6	0.6	1.1	1.2	2.2	1.5	1.5	7.9	5.0
Mining	1.4	1.2	1.1	1.2	0.9	1.1	0.8	4.8	1.3
Manufatcuring	17.5	17.1	19.8	18.8	27.1	21.3	10.1	11.2	10.9
Elec, Gas & Water Supply	2.0	2.1	3.2	2.7	1.7	2.5	2.3	2.1	0.8
Construction	10.1	7.1	8.0	8.5	9.2	8.7	6.4	7.2	7.3
Wholesale trade	6.6	6.3	5.1	5.7	3.7	5.1	5.9	5.3	5.2
Retail trade	14.6	16.6	17.2	16.4	13.7	15.6	17.5	14.7	15.6
Accomm, cafes and restuarants	6.6	4.0	3.2	4.2	4.4	4.3	5.6	5.4	5.8
Transport and storage	7.7	9.0	8.2	8.2	5.8	7.5	6.6	6.1	5.1
Communications services	0.3	0.4	0.7	0.6	0.7	0.6	1.4	1.0	1.5
Finance and insurance	1.2	1.3	2.2	1.8	1.1	1.6	2.5	1.8	2.9
Property & business services	10.9	9.1	8.8	9.4	8.7	9.2	7.1	7.1	10.0
Govt. admin and defence	3.2	3.6	3.0	3.1	2.7	3.0	4.0	3.6	4.9
Education	5.9	8.1	7.9	7.4	7.2	7.3	10.1	8.6	7.8
Health & comm. services	5.4	6.7	6.7	6.4	6.5	6.4	11.7	8.5	9.8
Cultural & rec. services	1.6	2.1	1.1	1.4	0.9	1.2	1.9	1.5	2.4
Personal & other services	3.5	4.6	2.7	3.2	3.4	3.2	4.5	3.3	3.8
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* Totals may not add due to rounding

Source: ABS CDATA01

Table B.9 : Schooling and Education, 2001 **Gladstone Retail Study**

Education	Northern Gladstone (%)	Central Gladstone (%)	Southern Gladstone (%)	Gladstone City (%)	Calliope Pt A (%)	Gladstone & Calliope Pt A Catchment (%)	Rockhamp-ton City (%)	Fitzroy SD (%)	Queensland (%)
Educational institution attended (% of all persons)									
Pre school	1.2	1.6	2.0	1.7	1.6	1.7	1.4	1.6	1.5
Infant/primary school	9.0	12.4	13.1	11.8	13.2	12.2	9.9	11.3	10.1
Secondary school	5.3	7.4	7.8	7.0	8.3	7.4	7.4	7.2	6.6
TAFE	2.7	3.3	2.9	2.9	2.3	2.7	2.2	2.2	2.1
University/other Tertiary	2.3	3.1	2.7	2.6	1.8	2.4	5.4	3.2	4.0
Other	0.6	0.6	0.6	0.6	0.4	0.5	0.4	0.5	0.7
Not attending	78.7	71.5	71.0	73.3	72.3	73.0	73.4	74.1	74.9
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Age left school (% persons aged 15+)									
Year 8 or below	13.2	11.3	8.1	10.1	11.1	10.5	15.6	13.8	10.8
Year 9	8.2	6.8	7.1	7.4	8.0	7.6	7.3	7.9	6.9
Year 10	34.7	36.4	37.0	36.2	36.4	36.3	31.6	34.3	30.5
Year 11	8.8	8.5	10.0	9.4	9.9	9.5	6.8	7.8	8.1
Year 12	32.1	32.7	33.4	32.9	30.2	32.0	34.3	32.0	39.8
Still at school	2.6	4.1	4.1	3.6	4.2	3.8	3.7	3.7	3.2
Never attended school	0.5	0.2	0.4	0.4	0.2	0.3	0.6	0.5	0.6
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Highest qualification gained (% of persons aged 15+)									
Postgraduate Degree	0.9	1.3	0.6	0.8	0.6	0.7	1.0	0.8	1.4
Grad Dip & Assoc Dip	0.9	1.1	0.8	0.9	1.1	0.9	0.9	0.9	1.1
Bachelor Degree	6.1	7.5	6.5	6.5	6.0	6.3	6.9	6.2	8.3
Advanced Diploma and Diploma	4.0	3.9	4.1	4.0	4.4	4.2	4.0	4.1	5.5
Certificate	18.5	19.5	21.3	20.2	20.9	20.4	14.2	16.6	16.0
Total	**30.3**	**33.3**	**33.4**	**32.4**	**33.0**	**32.6**	**27.1**	**28.7**	**32.3**

Table B.10: Birthplace and language spoken at home, 2001

Birthplace/language	Gladstone Retail Study Northern Gladstone (%)	Central Gladstone (%)	Southern Gladstone (%)	Gladstone City (%)	Calliope Pt A (%)	Gladstone & Calliope Pt A Catchment (%)	Rockhamp-ton City (%)	Fitzroy SD (%)	Queensland (%)
Birthplace									
Australia	87.4	88.2	90.7	89.4	86.2	88.4	92.4	90.6	81.9
New Zealand	2.6	2.3	2.2	2.4	3.4	2.7	1.3	1.9	3.8
North America	0.3	0.3	0.2	0.2	0.4	0.3	0.3	0.3	0.5
United Kingdom/Ireland	4.3	4.2	3.4	3.8	5.3	4.3	2.3	3.2	5.6
South Africa	0.2	0.2	0.3	0.2	0.6	0.3	0.2	0.2	0.4
Other Europe	2.4	1.7	1.0	1.5	2.2	1.8	1.5	1.9	2.2
Asia	1.1	0.9	1.0	1.0	0.5	0.8	0.9	0.7	2.2
Other	1.8	2.2	1.2	1.5	1.4	1.4	1.2	1.2	3.4
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Main language spoken at home									
English only	90.7	93.2	94.5	93.2	94.0	93.4	92.7	92.8	86.8
Other	9.3	6.8	5.5	6.8	6.0	6.6	7.3	7.2	13.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* Totals may not add due to rounding
Source: ABS CDATA01

Table B.11: Family structure, 2001 **Gladstone Retail Study**

Family structure	Northern Gladstone (%)	Central Gladstone (%)	Southern Gladstone (%)	Gladstone City (%)	Calliope Pt A (%)	Gladstone & Calliope Pt A Catchment (%)	Rockhamp-ton City (%)	Fitzroy SD (%)	Queensland (%)
Couple family households									
with children under 15 years	15.0	21.0	29.6	23.7	27.7	24.9	17.3	21.9	19.6
with dependent students (15 - 24 years)	2.2	2.7	4.4	3.4	4.6	3.8	3.4	3.4	3.7
with children under 15 and dependent students	2.3	5.7	5.9	4.7	6.4	5.2	3.9	4.6	3.9
with non dependent children	3.5	5.3	6.0	5.1	5.6	5.3	5.0	5.1	5.3
Total couple family households	**22.9**	**34.6**	**45.8**	**36.8**	**44.4**	**39.0**	**29.7**	**35.0**	**32.5**
Couple without children	25.0	29.0	26.0	26.1	28.1	26.7	24.1	26.8	27.2
One parent family households									
with children under 15 years	8.4	7.4	7.2	7.6	5.4	6.9	7.4	6.5	6.3
with dependent students (15 - 24 years)	0.9	1.5	0.7	0.9	0.7	0.8	1.4	1.0	1.3
with children under 15 and dependent students	0.8	0.7	1.0	0.9	0.9	0.9	1.0	0.9	0.9
with non dependent children	2.7	3.0	2.0	2.4	1.9	2.2	3.8	2.8	3.1
Total one parent family households	**12.9**	**12.6**	**10.9**	**11.7**	**8.9**	**10.9**	**13.5**	**11.2**	**11.6**
Other family households	1.1	1.3	0.8	1.0	0.3	0.8	1.7	1.1	1.3
Lone person households	33.4	20.7	13.7	21.1	16.6	19.8	26.3	22.5	23.0
Group households	4.7	1.8	2.7	3.2	1.8	2.8	4.6	3.3	4.5
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* Totals may not add due to rounding Source: ABS CDATA01

APPENDIX C

Detailed Telephone Survey Results

- Selected responses
- Questionnaire
- Tabulated results

Selected Gladstone Area Telephone Survey Responses, June 2004

The following are a selection of individual comments by respondents recorded for Questions 6 and 7:

Q6: What additional retail stores and related facilities, if any, do you feel are missing or are needed to better serve Gladstone and surrounding area residents?

Q7: What other things, in your opinion, can be done to improve Gladstone's retail centres and shopping experiences?

Comments in *italics* are from Calliope Shire (Part A) respondents

Shopping (Gladstone general)
We need a nice little area for grocery shopping. There should be better variety in hardware, with a bigger Bunnings. We need more shopping centres - Kin Kora is too crowded. We need a one-stop-shop for furniture etcetera, like a Jamie Durie show, where you are able to buy everything for renovating or redecorating. Everything should be in one spot for one-stop shopping There should be more Sunday shopping. Extend shopping hours. Open Sunday for groceries. Encourage more local business, not big retailers. Something different, like gift shops. Service in Gladstone is shocking in all areas. Customer service is poor in bulky goods stores. Retailers should advertise more to get people to shop locally. There should be more imagination in the approach to shopping. Offer a more imaginative response to the needs of shoppers. Goods are overpriced – there is not enough competition. We need more variety, like Rockhampton. All the goods are the same in every centre. There are too many franchises – we need more private owners. We need competition for the major retail outlets – Big W, Kmart & Woolworths – they take the public for granted. I can never get everything I want at these stores.

We need more consolidated shopping centres where you can do your shopping in one area. *There are too many cheap rubbish stores.* *You have to go from one end of the town to the other to shop.* *Major appliances etcetera are cheaper at other centres so it is hard to support local retailers.* *The city centre needs a little grocery store for business people to use and not have to go out to the malls.* *Overall, shopping for the general public and for tourists is very poor. We have to go outside Gladstone for most things.* *There is a lack of stock, you need to order in all the time. It's easier to go and get it straight away and usually cheaper from Rocky.* *Everything is overpriced so people go out of Gladstone to buy.* *Woolies and Coles have complete control of the area - they need competition.* *White goods are more expensive and stores are not competitive. If you say you can get it cheaper elsewhere they say go elsewhere, so most people just do first up.* *Fashion doesn't bloom in Gladstone.* *Shopping has not improved greatly in twenty-one years.*
Eating Out (Gladstone general)
The quality of the restaurants is not very good. We need better selections. We need cafes that are open at night We need more places for kids and families to eat. We need more upmarket restaurants. We need more casual dining and a variety of interesting food outlets that are reasonably priced. Introduce different restaurants – Greek, Italian. We need more child-friendly cafes. Concentrate on restaurants in suburban areas, not just fast food. *Build more restaurants near the marina.* *We need a variety of restaurants of different ethnic origin.* *We need more family-oriented restaurants.* *There are no good restaurants around – they're mostly rubbish. We need good quality for evenings out.*

Traffic, Parking & Public Transport (Gladstone general)
We need better parking in the city centre, particularly to make it easier for parents with prams. There should be better parking in the city and Kin Kora, particularly during holidays. Parking is bedlam in the Valley and Kin Kora. We need better bus services between shops so we don't have to walk so far from one shop to another with kids in tow. There should be more public transport on weekends and in the evening. Public transport needs desperate attention. *There should be more parking for the elderly.* *It's hard to get to the shops – there are too many roundabouts.* *We need better road safety around the malls.*
Entertainment (Gladstone general)
There should be more entertainment for kids, like Townsville's water park. There should be more entertainment for teenagers. We need more entertainment for young people to enjoy. There should be more facilities for youngsters. The skating rink shouldn't have been closed. Bring in more family-oriented entertainment.
General (Gladstone general)
There should be more relaxing areas near the centres, and riverside leisure with cafes and markets. Flinders Parade needs opening up. It is too spread out. I'd like more entertainment and cafes in the suburbs. More attention is needed to the development of the harbour area. *The biggest mall hasn't got any banks there and you have to bank one place and then shop at another.* *Banks are not in convenient places – major banks are scattered over different centres.* *Gladstone needs a complete overhaul and better planning.*

I will go to the new Boyne centre when it opens and not bother with Gladstone.

It would be nice to recommend somewhere nice to go when approached by tourists, but we can't because there is nowhere.

The infrastructure doesn't keep up with the growing population.

There should be a better use of outdoor areas around the water.

There are lots of lovely seaside areas to develop and attract families and night eating.

City Centre

Shopping

The city centre shops are not useful enough. The shops should be connected, with a variety of shops for top-to-toe clothing, toys and gifts, to attract more people into the city centre.

Leave the city centre alone – just fill the shops.

McDonalds or other big name shops should be built in the main street to induce young people to go to the city centre.

Bring shopping back to the city centre.

Improve the city centre with more user-friendly shops and better ambience.

There are too many of the same type of shops in the city centre.

There are lots of empty shops in the city centre that could be filled

Eating out

The city centre needs more eateries. There are hardly any, and those that are there are crowded.

We need more al fresco eateries in the city centre that are easy to get to.

Traffic & parking

There is only limited parking in the city centre - we need more in there.

Since the city centre became one-way there is no parking. It should be a two-way street.

We should have a two-way street in the city centre because the parking is awful.

Upgrade parking in the city centre – it's lousy.

There is only limited parking in the city centre- we need more in there.

There is no parking in town – you have to park in the back streets and hike up hills. Elderly people and mums with prams can't walk up hills.

The pedestrian crossings hold up traffic in the city.

General

The city centre needs renovating – it is very dated.

There should be more shaded areas with seats in the city.

We need more trees, shade and benches in the city.

Close the main street in the city and have more cafés and shops in a confined area.

There is nothing uptown to draw you there.

Get rid of the mall in the city centre.

We need a newer complex in the city centre. It is too spread out and too old. Revamp it all.

The city has a 1950s feel – don't flog a dead horse.

The city centre is dead. It needs vamping up.

The city centre seems to be dying.

We need more seating in the mall.

Modernise and upgrade the buildings in the city centre.

Put the entrance to the mall elsewhere.

The Valley

The Valley car park is very dangerous.

Fix the cramped car park in the Valley.

The traffic situation in the Valley is appalling and needs fixing.

Fix parking and traffic flow in the Valley.

There is a blind spot coming out on Herbert Street from the Valley centre.

It is too hard to get from the roundabout into the Palms shopping centre.

Parking at Gladstone Valley is atrocious – nowhere near enough parking.

Kin Kora

Eating out

Stockland's needs more eateries to make a day of it.

Make Kin Kora more social like a food court.

We need more eating places in Kin Kora.

We need a food court in Kin Kora.

They need a roomy coffee facility in Kin Kora.

Traffic & parking

Kin Kora needs more undercover parking.

Kin Kora needs an overpass for pedestrians. The road is very congested with people pushing trolleys and heavy traffic.

Improve parking at Kin Kora.

The exits on Philip Street need lights.

The pedestrian crossing at Kin Kora is unworkable.

There should be more shade at Kin Kora for parking – maybe sails like at Biloela shopping centre.

The traffic system around Kin Kora needs improving, it gets very congested and the roundabout is horrific.

Kin Kora needs more undercover parking.

Entry in and out of Kin Kora mall is shocking.

Traffic flow is pathetic around Kin Kora and the city centre.

Fix the parking at Kin Kora. It's woeful.

Kin Kora is too crowded and the roundabout and exits are deplorable. Traffic is particularly bad at lunch and before and after school.

Fix the traffic problems around Kin Kora.

There should be traffic lights installed at Philip St. It is too dangerous at peak hour.

Parking at Kin Kora is hopeless on a Saturday.

Parking at Kin Kora is too compact – cars get damaged regularly.

General

Display areas at Kin Kora often clutter walkways, which aren't wide enough.

Kin Kora centre is like a madhouse at times – there are too many people.

Boyne Island/Tannum Sands area

We need more shops in the Boyne/Tannum area.

More variety is needed locally so we don't have to go into Gladstone for clothes, shoes and general everyday items.

Boyne town needs more retail to attract franchises, but don't double-up – provide ones that are not there already.

Tannum Sands needs one of everything that is in Gladstone to save travel.

Tannum needs more restaurants and any sort of shops.

There are too many cafes in the Boyne centre.

There should be better parking at Boyne Plaza – parking spaces are too narrow.

Gladstone Area Telephone Survey **6/04** *(office use)* ____________
04020

Name:________________________ **Telephone no:**________________ **Int. No.**______

Suburb:_______________ **Street**________________ **Post code**_________ *(office use)* **Area code**_____

Good______, I am from Sheila Storrs & Associates, a market research company. We are conducting a survey of household shopping patterns in your area. Could I please speak to the person responsible for most of your household's shopping?

(Check non-working household and age quotas)

Q1a Have you shopped at any of the following shopping centres or areas in the past **SIX** months? **READ OUT–RECORD IN GRID BELOW**

Q1b **For each centre visited:** About how often do you shop there?

Centre *(Read out)*	**1a Visited** *(Circle)*	**Q1b How often** *(Use codes below)*
Stockland Kin Kora centres (Kmart, Big W, Coles, Woolies)	1	
Gladstone Valley Shopping Centre (Woolies)	2	
Gladstone city centre area	3	
Night Owl Centre (near Gladstone High School)	4	
Clinton Plaza area	5	
Boyne Plaza, Boyne Island (Woolies)	6	
Tannum Sands centre area	7	
Other Gladstone area centres (specify)	8	
Rockhampton City Centre area	9	
Other Rockhampton area centres/retailers	10	
Bundaberg centres	11	
Sunshine Coast centres	12	
Brisbane centres	13	
Other (specify)______________________	14	
None	15	

Almost every day	1	About once every 2 months	6
About 3 or 4 times a week	2	About once every 3 months	7
About once or twice a week	3	About once every 6 months	8
About once a fortnight	4	Less frequently	9
About once a month	5		

Now, thinking about fashion and homewares shopping:

Q2a Of the centres just nominated, or any other centre, which centres have you used for your household's clothing and fashion accessories shopping in the past six months? *(Write in if not in list—multiple response possible)*

Stockland Kin Kora centres	1	Rockhampton City Centre area	8
Gladstone Valley Shopping Centre	2	Other Rockhampton area centres/retailers	9
Gladstone city centre area	3	Bundaberg centres	10
Night Owl Centre	4	Sunshine Coast centres	11
Clinton Plaza area	5	Brisbane centres	12
Boyne Plaza, Boyne Island	6	Other (specify)________________	13
Other Gladstone area centres	7	None	14

Q2b Of the centres you've just nominated, which ***single*** centre would you use for ***the majority*** of your household's clothing and fashion accessory shopping *(Single response only—record code from Q2A)*

(Check against Q1A response) [ ]

Q2c If you think of your household's total annual spending on clothing and fashion accessories as equalling 100%, can you please estimate, to the nearest 10%, about what proportion of your household's total annual spending on clothing and fashion accessories is spent at *(read out)*:

Gladstone centres and retailers	____%
Rockhampton centres and retailers	____%
Bundaberg Centres and retailers	____%
Sunshine Coast centres and retailers	____%
Brisbane centres and retailers	____%
____________ Elsewhere outside of Gladstone *(specify)*	____%

Make sure column adds to 100%

Q3a Which centres have you used in the past six months for your household's major appliance, furniture, home furnishings and similar homewares shopping? *(Write in if not in list—multiple response possible)*

Stockland Kin Kora centres	1	Rockhampton City Centre area	8
Gladstone Valley Shopping Centre	2	Other Rockhampton area centres/retailers	9
Gladstone city centre area	3	Bundaberg centres	10
Night Owl Centre	4	Sunshine Coast centres	11
Clinton Plaza area	5	Brisbane centres	12
Boyne Plaza, Boyne Island	6	Other (specify)____________	13
Other Gladstone area centres	7	None	14

Q3b Of the centres you've nominated, which ***single*** centre would you use for ***the majority*** of your household's major appliance, furniture, home furnishings and similar homewares shopping *(Single response only—record code from Q3A)*

(Check against Q1A response) [ ]

Q3c Again, if you think of your household's total annual spending on major appliance, furniture, home furnishings and similar homewares as equalling 100%, can you please estimate, to the nearest 10%, about what proportion of your household's total annual spending on major appliance, furniture, home furnishings and similar homewares is spent at *(read out)*:

Gladstone centres and retailers	____%
Rockhampton centres and retailers	____%
Bundaberg Centres and retailers	____%
Sunshine Coast centres and retailers	____%
Brisbane centres and retailers	____%
____________ Elsewhere outside of Gladstone *(specify)*	____%

Make sure column adds to 100%

Now, thinking about your household's food and other convenience shopping: (e.g. supermarket, specialty food stores, newsagent, chemist and the like)

Q4a Which centres have you used in the past three months for your household's **regular** food and convenience shopping? *(Write in if not in list—multiple response possible)*

Stockland Kin Kora centres	1	Rockhampton City Centre area	8
Gladstone Valley Shopping Centre	2	Other Rockhampton area centres/retailers	9
Gladstone city centre area	3	Bundaberg centres	10
Night Owl Centre	4	Sunshine Coast centres	11
Clinton Plaza area	5	Brisbane centres	12
Boyne Plaza, Boyne Island	6	Other (specify)____________	13
Other Gladstone area centres	7	None	14

Q4b Of the centres you've nominated, which ***single*** centre would you use for the ***majority*** of your household's regular food and convenience shopping *(Single response only—record code from Q2A)*

(Check against Q1A response) ☐

Q5 Overall, how would your rate your level of satisfaction with ...: ***(Read out)***

	Very satisfactory	Satisfactory	Unsatis-factory	Very unsatis-factory	Unsure	Not applica ble
Gladstone city centre's retail shops and services	1	2	3	4	5	6
Gladstone city centre's leisure and entertainment retailers such as restaurants and cafes	1	2	3	4	5	6
Gladstone's suburban shopping centres	1	2	3	4	5	6
Gladstone's suburban leisure and entertainment retailers such as restaurants, cafes and cinemas	1	2	3	4	5	6
Gladstone's retail showroom and bulky goods type retailers	1	2	3	4	5	6

Q6 What additional retail stores and related facilities, if any, do you feel are missing or are needed to better serve Gladstone and surrounding area residents? **(Record verbatim—Probe for specific store/facility types)**

(1)

(2)

(3)

Q7 What other things, in your opinion, can be done to improve Gladstone's retail centres and shopping experiences **(Record verbatim)**

(1)

(2)

(3)

Finally, we would like to record a few demographic details.

Q8 Sex Male 1 Female 2	**Q9** Number of persons in your household, including yourself: Number_____

Q10 Age: 15–19 1 20–29 2 30–39 3 40–49 4 50–59 5 60 & over 6	**Q11a** Do you work outside your home? Yes 1 No 2 **Q11b** If yes, what is your .....? Occupation____________________ Position ____________________

Q12 In which country were you born?

Australia	1
New Zealand	2
UK & Ireland	3
Other (Specify) ____________	

Q13 Which of the following best describes the structure of the household you live in? **(Read out)**

Younger person aged 15–39 living alone or in group share housing	1
Couple family with mainly children under 15 at home	2
Couple family with mainly dependent children/students aged 15–24 at home	3
Couple family without children at home	4
One parent family with mainly children under 15 at home	5
One parent family with mainly dependent children/students age 15–24 at home	6
Older person aged 40 or more living alone or in group share housing	7
Other *(specify)*	8

Q14 Your household income range (before tax) **(Read out ranges)**

0—$16,000	1
$16,001—$27,000	2
$27,001—$38,000	3
$38,001—$55,000	4
$55,001—$82,000	5
$82,001—$109,000	6
Over $109,000	7
Don't know	8
Refused	9

Be sure and thank respondent for their time

Day & Date of interview:		Time of interview:	Duration of interview:

I hereby certify that this is a true and accurate record of this interview and I have made a thorough check of all responses to all questions asked in accordance with the survey briefing and instructions.

NAME________________________________SIGNED____________________________________

Table 2: Have you shopped at any of the following centres in the past six months?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Stockland Kin Kora	366 96.1	262 97.0	104 93.7
Gladstone Valley Shopping Centre	324 85.0	249 92.2	75 67.6
Gladstone City Centre	208 54.6	163 60.4	45 40.5
Night Owl Centre	245 64.3	195 72.2	50 45.0
Clinton Plaza area	111 29.1	92 34.1	19 17.1
Boyne Plaza, Boyne Island	114 29.9	36 13.3	78 70.3
Tannum Sands centre area	77 20.2	23 8.5	54 48.6
Other Gladstone area centres	28 7.3	19 7.0	9 8.1
Rockhampton City Centre area	96 25.2	60 22.2	36 32.4
Other Rockhampton area centre/ retailers	148 38.8	112 41.5	36 32.4
Bundaberg centres	47 12.3	30 11.1	17 15.3
Sunshine Coast centres	39 10.2	25 9.3	14 12.6
Brisbane/Gold Coast centres	88 23.1	62 23.0	26 23.4

(continued)

Table 2: Have you shopped at any of the following centres in the past six months? (continued)

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Other	32 8.4	21 7.8	11 9.9
Toolooa area	159 41.7	141 52.2	18 16.2
Hanson Rd	117 30.7	83 30.7	34 30.6

Table 3: How often do you shop at Stockland Kin Kora centre?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	12 3.1	12 4.4	- -
About 3 or 4 times a week	66 17.3	57 21.1	9 8.1
About once a week	176 46.2	133 49.3	43 38.7
About once a fortnight	60 15.7	34 12.6	26 23.4
About once a month	40 10.5	20 7.4	20 18.0
About once every 2 months	6 1.6	2 0.7	4 3.6
About once every months	4 1.0	2 0.7	2 1.8
About once every 6 months	2 0.5	2 0.7	- -

Table 4: How often do you shop at Gladstone Valley Shopping Centre?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	12 3.1	11 4.1	1 0.9
About 3 or 4 times a week	30 7.9	29 10.7	1 0.9
About once or twice a week	122 32.0	101 37.4	21 18.9
About once a fortnight	61 16.0	42 15.6	19 17.1
About once a month	62 16.3	41 15.2	21 18.9
About once every 2 months	18 4.7	15 5.6	3 2.7
About once every 3 months	9 2.4	6 2.2	3 2.7
About once every 6 months	9 2.4	3 1.1	6 5.4

Table 5: How often do you shop at Gladstone city centre area?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270	111
		70.9	29.1
Almost every day	3	3	-
	0.8	1.1	-
About 3 or 4 times a week	7	7	-
	1.8	2.6	-
About once or twice a week	42	38	4
	11.0	14.1	3.6
About once a fortnight	44	33	11
	11.5	12.2	9.9
About once a month	52	41	11
	13.6	15.2	9.9
About once every 2 months	24	20	4
	6.3	7.4	3.6
About once every 3 months	16	10	6
	4.2	3.7	5.4
About once every 6 months	13	9	4
	3.4	3.3	3.6
Less frequently	4	2	2
	1.0	0.7	1.8

Table 6: How often do you shop at the Night Owl Centre?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	12 3.1	11 4.1	1 0.9
About 3 or 4 times a week	16 4.2	16 5.9	- -
About once or twice a week	60 15.7	53 19.6	7 6.3
About once a fortnight	47 12.3	39 14.4	8 7.2
About once a month	65 17.1	47 17.4	18 16.2
About once every 2 months	26 6.8	18 6.7	8 7.2
About once every 3 months	10 2.6	7 2.6	3 2.7
About once every 6 months	5 1.3	2 0.7	3 2.7
Less frequently	3 0.8	2 0.7	1 0.9

Table 7: How often do you shop at Clinton Plaza area

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	18 4.7	16 5.9	2 1.8
About 3 or 4 times a week	13 3.4	12 4.4	1 0.9
About once or twice a week	31 8.1	22 8.1	9 8.1
About once a fortnight	9 2.4	8 3.0	1 0.9
About once a month	21 5.5	18 6.7	3 2.7
About once every 2 months	8 2.1	6 2.2	2 1.8
About once every 3 months	6 1.6	6 2.2	- -
About once every 6 months	5 1.3	4 1.5	1 0.9
Less frequently	1 0.3	- -	1 0.9

Table 8: How often do you shop at Boyne Plaza, Boyne Island?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270	111
		70.9	29.1
Almost every day	5	-	5
	1.3	-	4.5
About 3 or 4 times a week	26	-	26
	6.8	-	23.4
About once or twice a week	37	3	34
	9.7	1.1	30.6
About once a fortnight	7	2	5
	1.8	0.7	4.5
About once a month	14	11	3
	3.7	4.1	2.7
About once every 2 months	10	8	2
	2.6	3.0	1.8
About once every 3 months	4	3	1
	1.0	1.1	0.9
About once every 6 months	4	4	-
	1.0	1.5	-
Less frequently	6	5	1
	1.6	1.9	0.9

Table 9: How often do you shop at Tannum Sands centre area?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	2 0.5	- -	2 1.8
About 3 or 4 times a week	11 2.9	1 0.4	10 9.0
About once or twice a week	28 7.3	3 1.1	25 22.5
About once a fortnight	11 2.9	1 0.4	10 9.0
About once a month	13 3.4	9 3.3	4 3.6
About once every 2 months	8 2.1	6 2.2	2 1.8
About once every 3 months	3 0.8	2 0.7	1 0.9
About onve every 6 months	3 0.8	1 0.4	2 1.8

Table 10: How often do you shop at Other Gladstone area centres?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	2 0.5	2 0.7	- -
About 3 or 4 times a week	5 1.3	3 1.1	2 1.8
About once or twice a week	7 1.8	6 2.2	1 0.9
About once a fortnight	4 1.0	3 1.1	1 0.9
About once a month	5 1.3	4 1.5	1 0.9
About once every 2 months	1 0.3	- -	1 0.9
About once every 3 months	2 0.5	1 0.4	1 0.9
Less frequently	1 0.3	1 0.4	- -

Table 11: How often do you shop at Rockhampton City Centre area?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	1 0.3	- -	1 0.9
About once a fortnight	3 0.8	1 0.4	2 1.8
About once a month	21 5.5	15 5.6	6 5.4
About once every 2 months	19 5.0	13 4.8	6 5.4
About once every 3 months	26 6.8	17 6.3	9 8.1
About once every 6 months	21 5.5	10 3.7	11 9.9
Less frequently	5 1.3	4 1.5	1 0.9

Table 12: How often do you shop at other Rockhampton area centres/retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	1 0.3	1 0.4	- -
About once or twice a week	1 0.3	1 0.4	- -
About once a fortnight	9 2.4	5 1.9	4 3.6
About once a month	27 7.1	19 7.0	8 7.2
About once every 2 months	32 8.4	28 10.4	4 3.6
About once every 3 months	37 9.7	27 10.0	10 9.0
About once every 6 months	34 8.9	24 8.9	10 9.0
Less frequently	7 1.8	7 2.6	- -

Table 13: How often do you shop at Bundaberg centres?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	1 0.3	- -	1 0.9
About once or twice a week	1 0.3	1 0.4	- -
About once a fortnight	3 0.8	3 1.1	- -
About once a month	6 1.6	3 1.1	3 2.7
About once every 2 months	5 1.3	3 1.1	2 1.8
About once every 3 months	14 3.7	9 3.3	5 4.5
About once every 6 months	15 3.9	10 3.7	5 4.5
Less frequently	5 1.3	5 1.9	- -

Table 14: How often do you shop at Sunshine Coast centres?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	1 0.3	- -	1 0.9
About once a fortnight	1 0.3	- -	1 0.9
About once a month	1 0.3	1 0.4	- -
About once every 2 months	2 0.5	1 0.4	1 0.9
About once every 3 months	9 2.4	6 2.2	3 2.7
About once every 6 months	13 3.4	8 3.0	5 4.5
Less frequently	12 3.1	8 3.0	4 3.6

Table 15: How often do you shop at Brisbane/Gold Coast centres?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
About once a month	2 0.5	- -	2 1.8
About once every 2 months	10 2.6	7 2.6	3 2.7
About once every 3 months	22 5.8	16 5.9	6 5.4
About once every 6 months	32 8.4	23 8.5	9 8.1
Less frequently	22 5.8	17 6.3	5 4.5

Table 16: How often do you shop at Other centres?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
About 3 or 4 times a week	1 0.3	1 0.4	- -
About once or twice a week	5 1.3	3 1.1	2 1.8
About once a fortnight	6 1.6	4 1.5	2 1.8
About once a month	1 0.3	- -	1 0.9
About once every 2 months	4 1.0	2 0.7	2 1.8
About once every 3 months	3 0.8	1 0.4	2 1.8
About once every 6 months	6 1.6	6 2.2	- -
Less frequently	4 1.0	3 1.1	1 0.9

Table 17: How often do you shop at the Toolooa area?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	6 1.6	6 2.2	- -
About 3 or 4 times a week	6 1.6	6 2.2	- -
About once or twice a week	67 17.6	61 22.6	6 5.4
About once a fortnight	29 7.6	28 10.4	1 0.9
About once a month	29 7.6	23 8.5	6 5.4
About once every 2 months	12 3.1	10 3.7	2 1.8
About once every 3 months	7 1.8	6 2.2	1 0.9
About once every 6 months	4 1.0	4 1.5	- -

Table 18: How often do you shop at Hanson Rd?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Almost every day	2 0.5	1 0.4	1 0.9
About 3 or 4 times a week	1 0.3	1 0.4	- -
About once or twice a week	13 3.4	12 4.4	1 0.9
About once a fortnight	12 3.1	10 3.7	2 1.8
About once a month	13 3.4	8 3.0	5 4.5
About once every 2 months	16 4.2	9 3.3	7 6.3
About once every 3 months	32 8.4	23 8.5	9 8.1
About once every 6 months	20 5.2	13 4.8	7 6.3
Less frequently	9 2.4	7 2.6	2 1.8

Table 19: Which centres have you used for clothing and fashion accessories in the past six months?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Stockland Kin Kora centre	293 76.9	210 77.8	83 74.8
Gladstone Valley shopping centre	88 23.1	69 25.6	19 17.1
Gladstone city centre area	46 12.1	37 13.7	9 8.1
Night Owl Centre	18 4.7	16 5.9	2 1.8
Clinton Plaza area	3 0.8	2 0.7	1 0.9
Boyne Plaza	22 5.8	5 1.9	17 15.3
Other Gladstone areas	2 0.5	2 0.7	- -
Rockhampton city area	28 7.3	16 5.9	12 10.8
Other Rockhampton areas	55 14.4	43 15.9	12 10.8
Bundaberg centres	19 5.0	10 3.7	9 8.1
Sunshine Coast centres	13 3.4	8 3.0	5 4.5
Brisbane/Gold Coast centres	44 11.5	31 11.5	13 11.7
Other	10 2.6	5 1.9	5 4.5

(continued)

Table 19: Which centres have you used for clothing and fashion accessories in the past six months?
(continued)

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
None	29 7.6	23 8.5	6 5.4
Toolooa area	1 0.3	1 0.4	- -
Hanson Rd	2 0.5	2 0.7	- -

Table 20: Which single centre do you use for the majority of your clothing and fashion accessory shopping?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Sockland Kin Kora centre	244 64.0	181 67.0	63 56.8
Gladstone Valely Shopping Centre	38 10.0	27 10.0	11 9.9
Gladstone city area	12 3.1	10 3.7	2 1.8
Boyne Plaza	10 2.6	1 0.4	9 8.1
Rockhampton City Centre area	5 1.3	4 1.5	1 0.9
Other Rockhampton area centres	12 3.1	8 3.0	4 3.6
Bundaberg centres	5 1.3	2 0.7	3 2.7
Sunshine Coast centres	4 1.0	2 0.7	2 1.8
Brisbane/Gold Coast centres	16 4.2	8 3.0	8 7.2
Other	6 1.6	4 1.5	2 1.8

Table 21: What proportion of your household's total annual spending on clothing and fashion accessories is spent at

	Total	Gladstone City	Calliope Shire (Part A)
Base	38100	27000 70.9	11100 29.1
Gladstone centres and retailers	80.5	82.9	74.8
Rockhampton centres and retailers	8.6	7.9	10.1
Bundaberg Centre and retailers	1.8	1.4	2.8
Sunshine Coast centres and retailers	1.3	.9	2.3
Brisbane/Gold Coast centres and retailers	6.1	5.6	7.2
Elsewhere outside of Gladstone	1.6	1.1	2.8

Table 23: What proportion of your household's total annual spending on clothing and fashion accessories is spent at Rockhampton centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
1-20%	61 16.0	44 16.3	17 15.3
21-40%	21 5.5	14 5.2	7 6.3
41-60%	15 3.9	8 3.0	7 6.3
61-80%	7 1.8	5 1.9	2 1.8
81-100%	7 1.8	4 1.5	3 2.7

Table 22: Wha proportion of your household's total annual spending on clothing and accessories is spent at Gladstone centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
0-20%	15 3.9	8 3.0	7 6.3
21-40%	15 3.9	7 2.6	8 7.2
41-60%	26 6.8	15 5.6	11 9.9
61-80%	53 13.9	41 15.2	12 10.8
81-100%	250 65.6	183 67.8	67 60.4

Table 24: What proportion of your household's total annual spending on clothing and fashion accessories is spent at Bundaberg Centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
1-20%	9 2.4	5 1.9	4 3.6
21-40%	2 0.5	1 0.4	1 0.9
41-60%	3 0.8	- -	3 2.7
61-80%	1 0.3	- -	1 0.9
81-100%	3 0.8	3 1.1	- -

Table 25: What proportion of your household's total annual spending on clothing and fashion accessories is spent at Sunshine Coast centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
1-20%	9 2.4	6 2.2	3 2.7
21-40%	4 1.0	2 0.7	2 1.8
41-60%	1 0.3	1 0.4	- -
61-80%	1 0.3	- -	1 0.9
81-100%	1 0.3	1 0.4	- -

Table 26: What proportion of your household's total annual spending on clothing and fashion accessories is spent at Brisbane/Gold Coast centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
1-20%	25 6.6	20 7.4	5 4.5
21-40%	12 3.1	11 4.1	1 0.9
41-60%	8 2.1	6 2.2	2 1.8
61-80%	6 1.6	2 0.7	4 3.6
81-100%	8 2.1	5 1.9	3 2.7

Table 27: What proportion of your household's total annual spending on clothing and fashion accessories is spent elsewhere outside of Gladstone?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
1-20%	5 1.3	1 0.4	4 3.6
21-40%	2 0.5	2 0.7	- -
41-60%	1 0.3	1 0.4	- -
61-80%	2 0.5	1 0.4	1 0.9
81-100%	3 0.8	1 0.4	2 1.8

Table 28: Which centres have you used in the past 6 months for major appliances, furniture, home furnishings and homewares?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Stockland Kin Kora	60 15.7	48 17.8	12 10.8
Gladstone Valley Shopping centre	39 10.2	26 9.6	13 11.7
Gladstone city centre area	51 13.4	36 13.3	15 13.5
Night Owl Centre	2 0.5	2 0.7	- -
Clinton Plaza area	1 0.3	- -	1 0.9
Boyne Plaza	1 0.3	- -	1 0.9
Other Gladstone areas	14 3.7	6 2.2	8 7.2
Rockhampton City Centre area	21 5.5	11 4.1	10 9.0
Other Rockhampton area centres/ retailers	33 8.7	22 8.1	11 9.9
Bundaberg centres	10 2.6	5 1.9	5 4.5
Sunshine Coast centres	2 0.5	2 0.7	- -
Brisbane/Gold Coast centres	13 3.4	6 2.2	7 6.3
Other	14 3.7	10 3.7	4 3.6

(continued)

Table 28: Which centres have you used in the past 6 months for major appliances, furniture, home furnishings and homewares? (continued)

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
None	109 28.6	84 31.1	25 22.5
Toolooa area	21 5.5	12 4.4	9 8.1
Hanson Rd	96 25.2	65 24.1	31 27.9

Table 29: Which single centre is used for the majority of your household's major appliance, furniture, home furnishings and similar homewares shopping?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Stockland Kin Kora	51 13.4	41 15.2	10 9.0
Gladstone Valley Shoping centre	30 7.9	22 8.1	8 7.2
Gladstone City Centre	33 8.7	24 8.9	9 8.1
Other Gladstone area centres	9 2.4	5 1.9	4 3.6
Rockhampton city centre	9 2.4	6 2.2	3 2.7
Other Rockhampton area centres	20 5.2	12 4.4	8 7.2
Bundaberg centres	6 1.6	3 1.1	3 2.7
Brisbane/Gold Coast centres	5 1.3	1 0.4	4 3.6
Other	9 2.4	6 2.2	3 2.7
None	1 0.3	1 0.4	- -
Toolooa area	20 5.2	12 4.4	8 7.2
Hanson Rd	80 21.0	54 20.0	26 23.4

Table 30: What proportion of your household's total annual spending on major appliances , furniture, home furnishings and similar homewares is spent at

	Total	Gladstone City	Calliope Shire (Part A)
Base	37400	26300 70.3	11100 29.7
Gladstone centres and retailers	80.5	82.5	75.5
Rockhampton centres and retailers	13.5	13.1	14.3
Bundaberg centres and retailers	1.9	1.5	3.1
Sunshine Coast centres and retailers	.3	.3	.5
Brisbane/Gold Coast centres and retailers	2.9	2.0	4.9
Elsewhere outside of Gladstone	.9	.6	1.7

Table 31: What proportion of your household's total annual spending on major appliances , furniture, home furnishings and similar homewares is spent at Gladstone centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270	111
		70.9	29.1
1-20%	23	15	8
	6.0	5.6	7.2
21-40%	10	8	2
	2.6	3.0	1.8
41-60%	28	19	9
	7.3	7.0	8.1
61-80%	32	18	14
	8.4	6.7	12.6
81-100%	256	189	67
	67.2	70.0	60.4

Table 32: What proportion of your household's total annual spending on major appliances , furniture, home furnishings and similar homewares is spent at Rockhampton centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
1-20%	29 7.6	15 5.6	14 12.6
21-40%	16 4.2	9 3.3	7 6.3
41-60%	17 4.5	12 4.4	5 4.5
61-80%	18 4.7	13 4.8	5 4.5
81-100%	18 4.7	13 4.8	5 4.5

Table 33: What proportion of your household's total annual spending on major appliances , furniture, home furnishings and similar homewares is spent at Bundaberg centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
1-20%	4 1.0	4 1.5	- -
21-40%	5 1.3	2 0.7	3 2.7
41-60%	2 0.5	1 0.4	1 0.9
81-100%	4 1.0	2 0.7	2 1.8

Table 34: What proportion of your household's total annual spending on major appliances , furniture, home furnishings and similar homewares is spent at Sunshine Coast centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270	111
		70.9	29.1
1-20%	2	2	-
	0.5	0.7	-
41-60%	2	1	1
	0.5	0.4	0.9

Table 35: What proportion of your household's total annual spending on major appliances , furniture, home furnishings and similar homewares is spent at Brisbane/Gold Coast centres and retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270	111
		70.9	29.1
1-20%	4	3	1
	1.0	1.1	0.9
21-40%	7	3	4
	1.8	1.1	3.6
41-60%	5	4	1
	1.3	1.5	0.9
61-80%	1	-	1
	0.3	-	0.9
81-100%	5	2	3
	1.3	0.7	2.7

Table 36: What proportion of your household's total annual spending on major appliances , furniture, home furnishings and similar homewares is spent elsewhere outside of Gladstone?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
1-20%	2 0.5	1 0.4	1 0.9
61-80%	3 0.8	2 0.7	1 0.9
81-100%	1 0.3	- -	1 0.9

Table 37: Which centres have you used in the past 3 months for your household's regular food and convenience shopping?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Stockland Kin Kora centre	293 76.9	226 83.7	67 60.4
Gladstone Valley Shopping Centre	170 44.6	152 56.3	18 16.2
Gladstone City area	12 3.1	10 3.7	2 1.8
Night Owl Centre	34 8.9	31 11.5	3 2.7
Clinton Plaza area	21 5.5	18 6.7	3 2.7
Boyne Plaza	74 19.4	2 0.7	72 64.9
Other Gladstone area centres	13 3.4	7 2.6	6 5.4
Rockhampton City Centre area	1 0.3	1 0.4	- -
Other Rockhampton area centres	3 0.8	1 0.4	2 1.8
Bundaberg centres	4 1.0	4 1.5	- -
Brisbane/Gold Coast centres	1 0.3	1 0.4	- -
Other	11 2.9	4 1.5	7 6.3
Toolooa area	108 28.3	98 36.3	10 9.0
Hanson Rd	2 0.5	1 0.4	1 0.9

Table 38: Which single centre do you use for the majority of your household's regular food and convenience shopping?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Stockland Kin Kora centres	222 58.3	185 68.5	37 33.3
Gladstone Valley Shopping centre	65 17.1	57 21.1	8 7.2
Boyne Plaza	57 15.0	- -	57 51.4
Other Gladstone area centres	4 1.0	1 0.4	3 2.7
Bundaberg centres	1 0.3	1 0.4	- -
Other	3 0.8	2 0.7	1 0.9
Toolooa area	28 7.3	24 8.9	4 3.6
Hanson Rd.	1 0.3	- -	1 0.9

Table 39: Overall, how would you rate your satisfaction with Gladstone city centre's retail shops and services?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Very satisfactory	15 3.9	9 3.3	6 5.4
Satisfactory	155 40.7	121 44.8	34 30.6
Unsatisfactory	106 27.8	76 28.1	30 27.0
Very unsatisfactory	49 12.9	39 14.4	10 9.0
Unsure	20 5.2	13 4.8	7 6.3
Not applicable	35 9.2	12 4.4	23 20.7

Table 40: Overall, how would you rate your satisfaction with Gladstone city centre's leisure and entertainment retailers such as restaurants and cafes?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Very satisfactory	17 4.5	16 5.9	1 0.9
Satisfactory	165 43.3	127 47.0	38 34.2
Unsatisfactory	62 16.3	47 17.4	15 13.5
Very unsatisfactory	15 3.9	11 4.1	4 3.6
Unsure	50 13.1	29 10.7	21 18.9
Not applicable	71 18.6	40 14.8	31 27.9

Table 41: Overall, how would you rate your satisfaction with Gladstone's suburban shopping centres?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270	111
		70.9	29.1
Very satisfactory	39	34	5
	10.2	12.6	4.5
Satisfactory	273	189	84
	71.7	70.0	75.7
Unsatisfactory	56	39	17
	14.7	14.4	15.3
Very unsatisfactory	6	5	1
	1.6	1.9	0.9
Unsure	3	2	1
	0.8	0.7	0.9
Not applicable	3	1	2
	0.8	0.4	1.8

Table 42: Overall, how would you rate your satisfaction with Gladstone's suburban leisure and entertainment retailers such as restaurants, cafes and cinemas?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Very satisfactory	20 5.2	16 5.9	4 3.6
Satisfactory	231 60.6	170 63.0	61 55.0
Unsatisfactoty	63 16.5	44 16.3	19 17.1
Very unsatisfactory	11 2.9	9 3.3	2 1.8
Unsure	29 7.6	17 6.3	12 10.8
Not applicable	26 6.8	14 5.2	12 10.8

Table 43: Overall, how would you rate your satisfaction with Gladstone's retail showroom and bulky goods type retailers?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Very satisfactory	21 5.5	14 5.2	7 6.3
Satisfactory	250 65.6	178 65.9	72 64.9
Unsatisfactory	70 18.4	48 17.8	22 19.8
Very unsatisfactory	12 3.1	11 4.1	1 0.9
Unsure	21 5.5	13 4.8	8 7.2
Not applicable	6 1.6	6 2.2	- -

Table 44: What additional stores and related facilities do you feel are missing or are needed to better serve Gladstone and surrounding area residents?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Sizzlers	33 8.7	26 9.6	7 6.3
Spotlight	48 12.6	37 13.7	11 9.9
Super A Mart	29 7.6	24 8.9	5 4.5
More cafes/coffee shops	19 5.0	16 5.9	3 2.7
More take away/eateries	14 3.7	8 3.0	6 5.4
More shoe shops	31 8.1	19 7.0	12 10.8
More clothing stores	42 11.0	30 11.1	12 10.8
Supermarkets	47 12.3	36 13.3	11 9.9
Women's clothes	19 5.0	15 5.6	4 3.6
Men's clothes	9 2.4	3 1.1	6 5.4
Younger/teenaged clothes	16 4.2	12 4.4	4 3.6
Middle/Older womens clothes	5 1.3	3 1.1	2 1.8
Larger women's clothes	2 0.5	1 0.4	1 0.9

(continued)

Table 44: What additional stores and related facilities do you feel are missing or are needed to better serve Gladstone and surrounding area residents? (continued)

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Kids clothes	12 3.1	8 3.0	4 3.6
Sports shop	12 3.1	11 4.1	1 0.9
More variety	33 8.7	25 9.3	8 7.2
Pizza outlet	6 1.6	1 0.4	5 4.5
Department stores (DJs, Myer)	19 5.0	15 5.6	4 3.6
Discount Department stores (Big W, KMart, Target)	7 1.8	6 2.2	1 0.9
Improved Target	9 2.4	6 2.2	3 2.7
Improved Bunnings	10 2.6	8 3.0	2 1.8
A 'one stop shop' centre	6 1.6	2 0.7	4 3.6
Boutique type shops	8 2.1	6 2.2	2 1.8
More/bigger shopping centres	12 3.1	8 3.0	4 3.6
More convenient banks	5 1.3	3 1.1	2 1.8

(continued)

Table 44: What additional stores and related facilities do you feel are missing or are needed to better serve Gladstone and surrounding area residents? (continued)

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Fruit and veggie shop	14 3.7	14 5.2	- -
Homewares shop	10 2.6	8 3.0	2 1.8
Cinema	9 2.4	7 2.6	2 1.8
Linen Shop	6 1.6	4 1.5	2 1.8
Trendy/up to date shops	3 0.8	1 0.4	2 1.8
Better quality goods	8 2.1	5 1.9	3 2.7
Computer/Electrical goods type shop	9 2.4	4 1.5	5 4.5
Hardware	13 3.4	11 4.1	2 1.8
More restaurants (varied-Italian, Chinese etc)	24 6.3	16 5.9	8 7.2
Furniture	25 6.6	21 7.8	4 3.6
Butcher/Delicatessin	5 1.3	5 1.9	- -
Other	47 12.3	37 13.7	10 9.0
Nothing needed	83 21.8	52 19.3	31 27.9

Table 45: What other things can be done to improve Gladstone's retail centres and shopping experiences?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Better parking	96 25.2	77 28.5	19 17.1
Better/safer roads accessing malls	34 8.9	25 9.3	9 8.1
Extended trading hours	19 5.0	16 5.9	3 2.7
Better customer service	38 10.0	30 11.1	8 7.2
More stores for competitive pricing	41 10.8	31 11.5	10 9.0
Better food courts	19 5.0	15 5.6	4 3.6
Less expensive	21 5.5	14 5.2	7 6.3
'One stop shop' centre	10 2.6	4 1.5	6 5.4
More variety	21 5.5	16 5.9	5 4.5
More seating	6 1.6	4 1.5	2 1.8
Better transport	8 2.1	6 2.2	2 1.8
More outdoor dining	8 2.1	5 1.9	3 2.7
More shaded areas	6 1.6	5 1.9	1 0.9

(continued)

Table 45: What other things can be done to improve Gladstone's retail centres and shopping experiences? (continued)

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Child minding services	3 0.8	3 1.1	- -
Kids entertainment	12 3.1	12 4.4	- -
Teenager entertainment/leisure	13 3.4	13 4.8	- -
Adult entertainment/leisure/nightlife	18 4.7	15 5.6	3 2.7
Fix stock problems (not enough stock, too long to order in)	9 2.4	5 1.9	4 3.6
Bigger centres/more centres	8 2.1	7 2.6	1 0.9
Renovate/update centes	6 1.6	2 0.7	4 3.6
Family entertainment/restaurants	14 3.7	14 5.2	- -
More private owned stores not franchises	3 0.8	3 1.1	- -
Mothers/parents room	3 0.8	3 1.1	- -
Other	59 15.5	43 15.9	16 14.4
Nothing needed	103 27.0	65 24.1	38 34.2

Table 46: Sex of respondent?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270	111
		70.9	29.1
Male	121	87	34
	31.8	32.2	30.6
Female	260	183	77
	68.2	67.8	69.4

Table 47: Number of person's in household including respondent?

	Total	Gladstone City	Calliope Shire (Part A)
Base	379	269	110
		71.0	29.0
Number	3.1	3.1	3.3

Table 48: Age of respondent?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
15-19	7 1.8	4 1.5	3 2.7
20-29	38 10.0	26 9.6	12 10.8
30-39	96 25.2	69 25.6	27 24.3
40-49	103 27.0	68 25.2	35 31.5
50-59	88 23.1	70 25.9	18 16.2
60	49 12.9	33 12.2	16 14.4

Table 49: Do you work outside your home?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270	111
		70.9	29.1
Yes	259	183	76
	68.0	67.8	68.5
No	122	87	35
	32.0	32.2	31.5

Table 50: If yes, what is your occupation?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Managers and administrators	25 6.6	13 4.8	12 10.8
Professionals	47 12.3	36 13.3	11 9.9
Associate Professionals	17 4.5	12 4.4	5 4.5
Tradespersons and related workers	39 10.2	27 10.0	12 10.8
Advanced clerical and service workers	12 3.1	9 3.3	3 2.7
Intermediate clerical and service workers	51 13.4	40 14.8	11 9.9
Intermediate production and transport workers	19 5.0	15 5.6	4 3.6
Elementary clerical, sales and service workers	21 5.5	13 4.8	8 7.2
Labourers and related workers	27 7.1	18 6.7	9 8.1

Table 51: In which country were you born?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Australia	335 87.9	237 87.8	98 88.3
New Zealand	14 3.7	7 2.6	7 6.3
UK and Ireland	11 2.9	9 3.3	2 1.8
Other	20 5.2	16 5.9	4 3.6

Table 52: Which of the following best desribes the structure of the household you live in?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
Younger person aged 15-39 living alone or in group share housing	11 2.9	9 3.3	2 1.8
Couple family with mainly children under 15 at home	134 35.2	94 34.8	40 36.0
Couple family with mainly dependent children/students aged 15-24 at home	63 16.5	41 15.2	22 19.8
Couple family without children at home	95 24.9	66 24.4	29 26.1
One parent family with mainly children under 15 at home	12 3.1	10 3.7	2 1.8
One parent family with mainly dependent children/students age 15-24 at home	4 1.0	4 1.5	- -
Older person aged 40 or more living alone or in group share housing	43 11.3	35 13.0	8 7.2
Other	17 4.5	9 3.3	8 7.2

Table 53: What is our household's income range?

	Total	Gladstone City	Calliope Shire (Part A)
Base	381	270 70.9	111 29.1
0-$16000	24 6.3	16 5.9	8 7.2
$16,001- $27,000	42 11.0	35 13.0	7 6.3
$27,001 -$38,000	19 5.0	13 4.8	6 5.4
$38,001-$55,000	61 16.0	40 14.8	21 18.9
$55,001-$82,000	128 33.6	95 35.2	33 29.7
$82,001-$109,000	47 12.3	36 13.3	11 9.9
Over $109,000	18 4.7	9 3.3	9 8.1
Don't know	16 4.2	11 4.1	5 4.5
Refused	26 6.8	15 5.6	11 9.9

APPENDIX D

Details of Draft Planning Scheme Amendments

List of Proposed Amendments to the Gladstone City Draft Planning Scheme

Location	Change	Discussion
Part 1, Div 2 s1.4 strategy for Mixed Business and Industry, point (i)	***Insert into point (i):*** (but not retail activities)	To reinforce the MBI area is not for the expansion of retail focused activities
Part 1, Div 2 s1.4 strategy for Commercial Centres point (i)	***Delete Hanson Road text and Insert:*** ▪ **Hanson Road:** no further expansion of retail focussed activities will be provided for and the centre will retain and increase the level of non-retail mixed business and industry activities; ▪ **Racecourse:** a centre providing for an integrated development of retail focussed activities where the range of goods are predominantly of a non-convenience nature including hardware, housing service trades, service industries, showrooms and warehousing bulky goods, storage and distribution, and chandlery to the City; and ▪ **Kirkwood Road:** a centre providing for an integrated development for a convenience based shopping centre also providing limited personal services, banking services, community services and service trades	To stop further expansion of retail in Hanson Road area, provide a new showroom/bulky goods/homemaker centre at the Racecourse and to provide for the new centre on Kirkwood Road
Part 1, Div 3 s1.8 (10 (c)	***Insert to list of precincts:*** (viii) Racecourse Precinct.	To add the new Racecourse precinct

Part 3, s3.1 (3) (b) DEO for Economic Development point (iii)	***Revise (iii) delete Hanson Road text and insert:*** (iii) the reinstatement of a viable central business district and a network of commercial centres which respond to and satisfy the shopping, commercial, administrative, entertainment and leisure needs of the City and regional populations in accordance with the following outcomes: ▪ **Central City:** remains the principal centre in the region and the city providing higher order administration, business services, office accommodation, cultural and entertainment, personal services and specialised fashion retailing; ▪ **Kin Kora:** remains an important centre in the City for shopping, also providing some personal services, banking services, community services and service trades with any expansion or other increase in activity demonstrating the ability to accommodate adequate vehicle access and parking while not adversely affecting the efficiency of the road network and improves the built form, urban design and streetscape character of the centre;	To ▪ Add strength to the DEO for a network of centres, ▪ Limit expansion of certain centres to traffic and design outcomes, ▪ stop further expansion of

	▪ **The Valley:** provides convenience shopping and small scale, mixed business services to the inner city; ▪ **Toolooa:** provides convenience shopping and small scale mixed business services mostly to South Gladstone and Toolooa; ▪ **Dawson Road:** a centre on the corner of Park Street and Dawson Road provides non-retail commercial services and convenience shopping with any expansion or other increase in activity directly related to the ability to accommodate adequate vehicle access and parking; while not adversely affecting the efficiency of the road network and improves the built form, urban design and streetscape character of the centre; ▪ **Hanson Road:** no further expansion of retail focussed activities will be provided for and the centre will retain and increase the level of non-retail mixed business and industry activities; ▪ **Racecourse:** provides for an integrated development of retail focussed activities where the range of goods are predominantly of a non-convenience nature including hardware, housing service trades, service industries, showrooms and warehousing bulky goods, storage and distribution, and chandlery to the City; and ▪ **Kirkwood Road:** provides for an integrated development for a convenience based shopping centre also providing limited personal services, banking services, community services and service trades	retail in Hanson Road area, ▪ provide a new showroom/bulky goods/homemaker centre at the Racecourse and ▪ provide for the new centre on Kirkwood Road
Part 3, s3.1 (3) (b) DEO for Economic Development point (iii)	***Insert footnote:*** [5] For the purposes of this DEO, the following explanations apply regarding key terms: ▪ 'higher order' refers to goods and services that have a catchment of at least the City or serve City and regional needs. ▪ 'convenience' refers to goods that can be typically categorised as daily to weekly needs such as groceries. ▪ 'small scale' refers to both physical size of the activity and to the level or intensity of activity generated relevant to other non-residential uses, the term can be used to describe the catchment area aspect of the activity. ▪ 'retail focussed' refers to any activities and uses that include the capacity for selling renting or otherwise interacting directly with the general public and this aspect is or becomes the dominant or most intense activity.	To provide explanation of terms used in the DEO
Part 4, Div 3, Table 4.1 Assessment Table for the City Locality	***Delete from Assessment Table in the Commercial and Mixed Business and Industry zone Columns:*** Showroom in Hanson Road precinct	To stop further retail activity in the Hanson Road precinct

Part 4, Div 6, s4.7 (6) overall outcomes for the Hanson Road Precinct	***Delete from (a) and insert new point (e):*** (from (a)): showrooms and warehousing, bulky goods and chandlery (e) new and existing uses that are retail focused or include a retail component that directly sells, rents or otherwise interacts directly with the general public , such as showrooms, warehousing, bulky goods and chandlery, will not be able to expand or locate in the precinct.	To stop further retail activity in the Hanson Road precinct
Part 4, Div 7, s4.8 specific outcomes for Commercial	***Insert to table under P1(iv):*** iv. a mixed business industry service centre in the Hanson Road precinct complement, but do not detract from, the role of centres in the Uptown, Waterfront and Valley precincts <u>and does not include uses with a retail focus such as showrooms, bulky goods and chandlery</u>.	To stop further retail activity in the Hanson Road precinct
Part 4, Div 10, s4.30 specific outcomes for Hanson Road Precinct	***Delete from table under P2:*** showroom	To stop further retail activity in the Hanson Road precinct
Part 7, Div 1, s7.2 (h) precincts in the Suburban Locality	***Insert to list of Precincts:*** (ix) Racecourse Precinct (Division 15).	To provide for the showroom/bulky goods precinct
Part 7, Div 3 Table 7.1 Assessment Table for the Suburban Locality	***The following amendments to Table 7.1:*** ▪ Insert 'Showroom in the Racecourse Precinct and in accordance with a masterplan' in the Commercial zone column ▪ Delete 'showroom' from Local industry zone column; ▪ Insert 'Impact except where the following which is Code assessable: Showroom in the Racecourse Precinct and in accordance with a masterplan' in the Urban Expansion zone column	To provide for code assessment in the Racecourse precinct and to make showrooms in other zones and locations impact
Part 7, Div 5 s7.5 (d)	***Delete '14' and insert:*** 15	To account for a new precinct
Part 7, Div 5 s7.6 (b)	***Delete '14' and insert:*** 15	To account for a new precinct

Part 7, Div 6 s7.7 (2) (d) overall objectives for the Suburban Locality	***Insert to the overall objective for the Suburban Locality Code:*** (d) in the Urban Expansion Zone, land is preserved in large lots or holdings for master planned urban development to be undertaken as an extension of the existing urban area <u>and will include a Shopping Centre based centre at the future intersection of Kirkwood Road and Dixon Drive and provide for a showroom based centre in the Racecourse Precinct</u>;	To specify the location of the new centre in the Kirkwood Road Precinct and the showroom focus for the Racecourse Precinct
Part 7, Div 6 s7.7 (4) overall objectives for the Suburban Locality	***Insert to the overall objectives new for the Racecourse Precinct:*** (4) In addition, the overall outcomes for the Racecourse precinct are: (a) the development of significant sites such as the racecourse and the showgrounds is facilitated in an integrated and coordinated manner and for the purposes of a showroom based centre; (b) open space buffers are provided along the Auckland Creek corridor; (c) the Dawson Road corridor is protected as a major entry road to the City and also as a major transport corridor to the City and the region; and (d) any development of the precinct provides appropriate vehicle access, maneuvering and parking and not adversely affecting the efficiency of the transport network, in particular the Dawson Highway. (e) any development of the precinct is preceded by a masterplan that addresses layout, uses, points (a) to (d) above and the Master Plans and Plans of Development Planning Scheme Policy	To provide overall outcomes for the Racecourse Precinct
Part 7, Div 6 s7.7 (5) (b) overall objectives for the Suburban Locality	***Insert to the end of overall objective (b) for the Kin Kora Precinct:*** 'or in the Racecourse Precinct'	To direct showroom development to the Racecourse Precinct
Part 7, Div 6 s7.7 (7) overall objectives for the Suburban Locality	***Insert to the overall objective (7) for the Urban Expansion zone:*** (a) insert: 'unless in the Racecourse Precinct'; (b) insert: 'or for the development of a showroom based centre in the Racecourse Precinct'; (c) insert: land within the Urban Expansion Zone '<u>except for land in the Racecourse Precinct'</u> is developed to: (d) insert new: 'land in the Urban Expansion Zone and in the Racecourse Precinct is developed to provide a showroom based centre with appropriate infrastructure, servicing and access and in accordance with a masterplan';	To provide for the development of a showroom based centre in the new Racecourse Precinct

Part 7, Div 6 s7.7 (9) overall objectives for the Suburban Locality	***Insert additional overall objective for the Kirkwood Road Precinct:*** (g) Provide provides for an integrated development for a convenience based shopping centre also providing limited personal services, banking services, community services and service trades at the intersection of Kirkwood Road and Dixon Drive.	To provide for the development of a shopping centre based centre based centre in the Kirkwood Road precinct
Part 7, Div 7 s7.11 specific outcomes for the commercial zone	***Insert to the Specific outcomes for P1:*** (iv) in the Kirkwood Road precinct development is in accordance with a masterplan and a shopping centre based centre; and (v) showroom development is located in the Racecourse Precinct in an integrated and masterplanned development with appropriate infrastructure, servicing and access.	To provide for the development of a showroom based centre in the new Racecourse Precinct
Part 7, Div 8 Specific outcomes and solutions for the Race Course Precinct	***Insert new Division 8 for the Racecourse Precinct with the specific outcome:*** P1 Development within the precinct is in accordance with an overall development plan for a showroom based development which provides justification for the range of uses proposed, size of allotments in addition to measures for managing the process and the effects of development. Note: The development flow is undertaken in accordance with the Master Plans and Plans of Development Planning Scheme Policy.	To provide for the development of a showroom based centre in the new Racecourse Precinct

Part 7, Division 10 table 7.22 specific outcomes for the Kin Kora Precinct	***Insert the additional specific outcome***:	To strengthen the requirements for further development in the precinct and to provide direction for particular issue to resolve

	P2 Development within the precinct is in accordance with an overall development plan for land in the Commercial zone and adjoining lands which addresses in particular: (i) traffic arrangements, flow and management to; (ii) integration of development with a high quality streetscape; (iii) applying urban design principles to integrate an manage pedestrian and vehicle movement for development and to adjoining lands; and (iv) applying urban design and landscaping principles to ensure appropriate high quality solutions are integrated with the masterplan for managing the commercial and residential interface. Note: The development flow is undertaken in accordance with the Master Plans and Plans of Development Planning Scheme Policy.	S2.1 congestion is not worsened at the intersection of the Dawson Highway and Phillip Street. S2.2 the route of the highway may be altered to reduce or remove regional and other through traffic from ground level between the commercial zoned land either side of the Dawson Highway, any alteration involving an overpass or other above ground road structure is not acceptable; S2.3 internal pedestrian linkages are provided that cross a minimum of roadways, increase the efficiency of pedestrian movement through the sites and is safe and convenient; S2.4 any additional floorspace or other intensification of use beyond the amount already approved or provided for under the Commercial Code will have regard to all issues affecting the precent, in particular traffic, streetscape, parking landscaping and urban design; and S2.5 An overall landscape masterplan is provided with features to improve the landscape, streetscape and urban design quality of the precinct and to contribute to improved quality and safety of pedestrian circulation.	
Part 7, Division 12 table 7.28 P2 specific outcomes for the Urban Expansion Precinct	***Insert the solutions for specific outcome P2***: S2.1 No solutions specified for non-commercial development. S2.2 Commercial Development provides for the day to day needs of residents in the surrounding area and has a gross floor area of no more than 500 m^2.		To limit the opportunity for a new shopping centre based centre ahead of time, such a new centre is not likely to be supportable until the end of the study timeframe at 2021

<table>
<tr>
<td>Part 7, Division 14 table 7.33 land use allocation specific outcome P1 for the Kirkwood Road South Precinct</td>
<td>Insert these solutions for P1:
S1.1 No solution specified for non-commercial development.
S1.2 Any proposal for a commercial centre with a gross floor area of more than 500 m^2 is located at the intersection of Kirkwood Road and Dixon Drive; and
S1.3 Any proposal for a commercial centre with a gross floor area of more than 500 m^2 is for a convenience based shopping centre also providing limited personal services, banking services, community services and service trades; and
S1.4 Any proposal for a commercial centre in accordance with S1.2 and S1.3 has a maximum commercial gross floor area of 6,000 m^2.</td>
<td>To provide for a shopping centre based centre in the precinct</td>
</tr>
<tr>
<td>Part 7, Division 14 table 7.37 commercial specific outcome P1 and P2 for the Kirkwood Road South Precinct</td>
<td>Insert the additional specific outcome and amend existing P1:
<table>
<tr>
<td>P1 Commercial Development other than that providing for the day to day needs of residents in the surrounding area and has a gross floor area of no more than 500 m^2 is for a convenience based shopping centre also providing limited personal services, banking services, community services and service trades located at the intersection of Kirkwood Road and Dixon Drive.</td>
<td>S1.1 Any proposal for a commercial centre with a gross floor area of more than 500 m^2 is located at the intersection of Kirkwood Road and Dixon Drive; and
S1.2 Any proposal for a commercial centre with a gross floor area of more than 500 m^2 is for a convenience based shopping centre also providing limited personal services, banking services, community services and service trades; and
S1.3 Any proposal for a commercial centre in accordance with S1.2 and S1.3 has a maximum commercial use gross floor area of 6,000 m^2; and
S1.4 Only one such centre as provided for by P1 and solutions S1.1, S1.2 and S1.3 will be provided in the Kirkwood Road South Precinct.</td>
</tr>
<tr>
<td>P2 Commercial Development other than for a convenience based shopping centre also providing limited personal services, banking services, community services and service trades located at the intersection of Kirkwood Road and Dixon Drive provides for the day to day needs of residents in the surrounding area and has a gross floor area of no more than 500 m^2.</td>
<td>S1 No solution specified.</td>
</tr>
</table>
</td>
<td>To provide for a shopping centre based centre in the precinct</td>
</tr>
</table>

Part 11, Div 4 Commercial Code s11.15 (2) (a) (i)	***Insert the additional point to overall outcome (2) (a) (i):*** (i) Is located on Commercial and Mixed Industry and Business zoned land, except showrooms are to be located in the Commercial Zone and/or the Racecourse Precinct of the Suburban Locality	To limit showrooms to commercial zones and the Racecourse Precinct
Part 11, Div 4 Commercial Code Table 11.4 Specific Outcome 1.1	***Delete the list of centres under Specific Outcome for Centre Functions 1.1 and Insert:*** ▪ Central City: remains the principal centre in the region and the city providing higher order administration, business services, office accommodation, cultural and entertainment, personal services and specialised fashion retailing; ▪ **Kin Kora:** remains an important centre in the City for shopping, also providing some personal services, banking services, community services and service trades with any expansion or other increase in activity demonstrating the ability to accommodate adequate vehicle access and parking while not adversely affecting the efficiency of the road network and improves the built form, urban design and streetscape character of the centre; ▪ The Valley: provides convenience shopping and small scale, mixed business services to the inner city; ▪ **Toolooa:** provides convenience shopping and small scale mixed business services mostly to South Gladstone and Toolooa; ▪ Dawson Road: a centre on the corner of Park Street and Dawson Road provides non-retail commercial services and convenience shopping with any expansion or other increase in activity directly related to the ability to accommodate adequate vehicle access and parking; while not adversely affecting the efficiency of the road network and improves the built form, urban design and streetscape character of the centre; ▪ **Hanson Road:** no further expansion of retail activities will be provided for and the centre will retain and increase the level of non-retail mixed business and industry activities; ▪ **Racecourse:** provides for an integrated development of retail activities where the range of goods are predominantly of a non-convenience nature including hardware, housing service trades, service industries, showrooms and warehousing bulky goods, storage and distribution, and chandlery to the City; and ▪ **Kirkwood Road:** provides for an integrated development for a convenience based shopping centre also providing limited personal services, banking services, community services and service trades	To be consistent with other proposed amendments regarding the number and function of retail centres
Part 11, Div 4 Commercial Code Table 11.4 Specific Outcome 3	***Delete existing no solution and insert:*** 3.1 Showroom development is located only in the Commercial zone and/or the Racecourse Precinct in the Suburban Locality.	To limit showrooms to commercial zones and the Racecourse Precinct

Kirkwood Road South Structure Plan (Part 14, Schedule 6)	***Include the following amendments:*** ▪ Location of shopping centre based centre at the intersection of Kirkwood Road and Dixon Drive	To provide for a shopping centre based centre in the precinct
Suburban Locality Plan 4	***Include the following amendments:*** ▪ Outline a new precinct – Racecourse Precinct with letter designation ‘K’ ▪ Include the Racecourse Precinct in the Urban Expansion zone	To provide for the Racecourse precinct and include it in an appropriate zone

APPENDIX E

Retail Study of Gladstone City

Consultants brief

REQUEST FOR QUOTATION BY CONSULTANTS

For

RETAIL STUDY OF GLADSTONE CITY

QUOTATION NO:	**Q03/04-E04**
QUOTATIONS CLOSE	**11:00 am on Monday 10 May 2004**

AT

TENDER BOX
THE CIVIC CENTRE
101 GOONDOON STREET
GLADSTONE QLD 4680

OR BY POST TO

THE CHIEF EXECUTIVE OFFICER
GLADSTONE CITY COUNCIL
PO BOX 29
GLADSTONE, QLD, 4680

Enquiries:	Trevor Gargan	Telephone:	07-49700778
		Fax:	07-49720164
		E-mail	trevorg@gcc.qld.gov.au

1. INTRODUCTION

The project is to examine the current provision of retail and associated space in the City, to examine the future needs for such space and to suggest suitable locations for new retail space taking into account industry standards and current trends.

2. AIM

The aim of the Study is to provide Council with a blueprint for the future development of retail activities in the City in a manner that will allow amendment of Councils Town Planning Scheme to reflect the agreed outcome of the Study.

3. OUTCOMES

Ten electronic copies of the report, associated documents and any GIS datasets should be provided on compact disc (CD) together with 10 copies, as hard copies. Any maps and GIS Data Sets shall be in MapInfo format and be capable of installation and operation on Council's Corporate database.

4. AVAILABLE INFORMATION

Gladstone City Council has the following information and data available:

Gladstone City Council, 1991 – *Planning Scheme for the City of Gladstone*
Gladstone City Council, 2004 – *Draft Planning Scheme for the City of Gladstone*
Queensland Government, State Development, 2002 – *The Gladstone Growth Management Initiative –Residential Land Study, Sinclair Knight Merz*
Gladstone City Council, 2003 – *Transport Infrastructure Policy*
TTM Consulting,2004 - *Gladstone CBD Redevelopment Project (Work in Progress)*
Mapro Pty Ltd, 1998 -*Gladstone Central Economic Analysis*

GIS Data (Mapinfo Format):

5. INVESTIGATIONS, INSPECTIONS BY TENDERER

All consultants shall be deemed to have carefully read and examined the Quotation Documents and if he has any doubts as to the meaning of any part thereof he is required to resolve such doubts.

Consultants may visit the sites of the work and satisfy themselves of local conditions and facilities, the Council not being liable for any claim on the ground of insufficient information.

In submitting a quote, the Consultant acknowledges that he has adequately informed himself regarding all conditions and matters relating to the quote and relies upon his own examinations and investigations as to the description, extent and location of the work to be performed and all local and general conditions which may affect performance of the contract.

A pre-lodgement presentation will be made to provide the opportunity for Council officers to make a brief presentation on Council's needs and for prospective consultants to seek any explanation of the brief that may be required together with an opportunity to review the documentation available to the successful consultant. The presentation will take place:

Gladstone City Council
101, Goondoon Street, Gladstone City Council
10.00am –11.00am
Tuesday 4 May 2004

Prospective attendees should advise Trevor Gargan (Tel 07-49700778 or e-mail trevorg@gladstonecc.qld.gov.au) of their intention to attend the presentation to allow arrangements for accommodation and document viewing to be made

6. SCOPE OF WORKS

BACKGROUND

Council is currently engaged in studies of the Gladstone CBD. It is expected that the outcomes of that work, insofar as they are available, will be incorporated into this Study. In particular, the intent to revitalise the CBD by increasing population densities and encouraging service retail functions will be respected in this Study. The consultant should not duplicate that work and any recommendations of this study should be consistent with the CBD work.

It is expected that the consultant will make contact with key stakeholders in the City. This could include key landholders as well as current commercial operators and landlords

STUDY AREA

The Area subject of the Study is the whole of the City of Gladstone. To the extent necessary, the adjoining areas of Calliope Shire, including Boyne Island/Tannum Sands and Calliope should also be included in the Study Area. The Study should also recognise, and take into account, the role of Gladstone as a sub-regional Centre servicing Miriam Vale and Banana Shires.

RETAIL FLOOR SPACE SURVEY

It is expected that the consultant will arrange for and carry out a survey of existing retail floor space categorised by location, occupation, quality etc. As far as possible, the consultant shall utilize existing published and unpublished information in carrying out this work. In addition, the quantity and location of proposed and approved developments should be researched and documented. This survey will be necessary to provide a quantitative basis for the balance of the work.

Deliverable 1

The consultant will provide Council a copy of the results of the retail floor survey

SHOPPER SURVEY

A shopper survey should be a valuable tool in determining the current shopping patterns in the City and surrounds although it is expected that the consultant will utilize whatever published and unpublished information as may be available in achieving the objective of this part of the study.. In addition, it is believed there may be significant leakage of shopping expenditure from the City to the Regional centre of Rockhampton. A survey, with a suitable sample size, may be a method of discovering the extent of this 'leakage' and provide pointers to the facilities that may be lacking, but viable, in the City. The content of any survey shall be discussed and agreed by Council before commencement.

Deliverable 2

A shopper survey with a sample size to be nominated by the Consultant which identifies current shopping patterns and the extent of shopping external to the City. This survey should be categorised by type, eg, groceries, furniture and white goods, fashion, etc

TRENDS IN RETAILING

It is expected that the consultants report will discuss recent trends in the provision of retail space as they may apply to a regional centre of the size of Gladstone. This discussion will include consideration of the population or other thresholds that have been established for particular retail functions or by significant retailers and shopping centre developers.

Deliverable 3

The consultant will provide Council with a report on existing and likely future trends in the provision of retail facilities with particular reference to the situation in Gladstone. If there is any projected shortfall in commercial facilities, then the consultant shall identify any potential sites for development. The sites should be assessed in terms of criteria to be agreed with Council taking into account impediments, including tenure, ownership, timing and available infrastructure. This assessment could form the basis of any rezonings that may be recommended by the consultant.

RECOMMENDATIONS

In the light of the previous tasks, it is expected the consultant will make recommendations to Council regarding the following issues:

- The extent of under or over-supply of retailing space in the City
- The quality, location and suitability of existing retail facilities
- The extent and desirable locations of new shopping locations in the City
- Inclusions in the Town Planning Scheme for the City deemed necessary to give statutory effect to the recommendations. It is expected that this task will not be carried out until Council has received and considered the recommendations above.

Deliverable 4

Recommendations for the consideration of Council in regard to the future needs and desirable location(s) for additional retail space in the City and appropriate measures for development and redevelopment of existing retail facilities.

Deliverable 5

In the light of Council's decisions on previous aspects of the Study, provide amendments to Council's draft Town Planning Scheme to give effect within the Town Plan to Council's preferred course of future action. This should include amendments both in terms of text and mapping.

7. NATURE OF CONTRACT

The ***Schedule of Information*** attached includes lump sum rates for completion of the project and staff rates for any additional work required. Council's budget for the study is $55,000 (incl. GST).

8. NEGOTIATION

Council reserves the right by negotiation to confer with any and all Consultants to reach an agreement or compromise in relation to all matters covered by the tender.

9. ACCEPTANCE OF QUOTATION

The Council may accept the whole, part or any combination of parts of the quote, which on a view of all the circumstances appears to it to be the most advantageous, or the Council may decline to accept any of the quotes.

A quotation shall be deemed to be accepted when notice in writing thereof, under the hand of the Chief Executive Officer has been given to or served upon the Consultant.

The Council shall not be bound to accept the lowest or any tender, nor will the Council be responsible for or pay for expenses or losses which may be incurred by any Consultant in the preparation of his quotation.

Unless and until a formal agreement is executed, the quotation together with the Council's written acceptance thereof shall constitute the contract between the Council and the successful Consultant and the contract shall come into force on the date of acceptance of quotation.

10. METHODOLOGY

The appointed Consultant will be responsible to Gladstone City Councils' Study Manager, Mr Trevor Gargan for this project. A senior employee from the Consulting firm shall be nominated as the person responsible for the project on behalf of the Firm.
Consultants shall describe in their submission the methodology by which they intend to conduct this project. This description should include the expected sources of information required for the study including resources and information available from outside the consultants firm.

11. TIMING

The closing date for the tender is Monday 10 May 2004 and the project will proceed immediately on appointing the successful consultant. The final report is to be completed within 8 weeks of the appointment of the successful consultant. The consultant is to include a project timetable with the milestones to produce the project deliverables required in this brief. The Consultants project timetable should be included in the quotation.

12. PROPOSAL / AGREEMENT

Consultant's submissions shall be limited to a maximum of 10 pages. The submission shall contain all the relevant information to allow an evaluation of the proposal. Attachments may be included but may not be read.

The Proposal should indicate the steps and tasks that the Consultant intends to use to achieve the project outcomes and projected timeline to complete each task.

The Proposal should also indicate if a subcontractor will be used, and if so, which part of the work the subcontractor will be undertaking.

13. SELECTION PROCESS AND EVALUATION CRITERIA

Consultants' submissions will be evaluated generally in accordance with the following criteria:

- Relevant experience and networks in the retail sector(previous work of this type);
- Performance record (general reputation for work, competence, capacity);
- Technical skills (people, systems, specific abilities);
- Management organization, acceptable insurance, economic stability, quality system);
- Time performance (likelihood of achieving proposed programme);
- Price (value for money); and
- Conformance to the project specifications.

Council's budget for the work is $55,000 (incl GST) and it is expected that the principal criteria for accepting a successful consultant will therefore be those which provide Council with the best outcome for that expenditure.

14. INSURANCES

The Consultant is to supply as part of their submission evidence of or provide an undertaking to have the following current insurance covers:

- Professional Indemnity Insurance with a minimum cover of $3 million;
- Public Liability Insurance with a minimum cover of $10 million; and
- Work Cover as per Queensland statutory requirements.

15. INTELLECTUAL PROPERTY

All intellectual property rights of all the data produced during the course of this project as well as any results and recommendations contained in the report will transfer to the Gladstone City Council on the completion or termination of the contract.

16. COMPLIANCE WITH LAWS

The Consultant will comply with all relevant laws and the requirements of any statutory authority in performing the Consultancy Services.

17. RESPONSIBILITY, NEGLIGENCE AND INDEMNITY

The Contractor agrees to indemnify and keep indemnified the Council against all claims for injury, loss or damage suffered in person or property by any person or body arising out of the performance by the Contractor of the contract and against all liability for costs, charges and expenses incurred by the Council in respect of any such person or body.

18. WORKPLACE HEALTH & SAFETY

All laws and regulations dealing with the safety of workmen, in particular, the Workplace Health and Safety Act 1995, shall be rigorously obeyed. For the purposes of the application for the Workplace Health and Safety Act to this contract, the "Principal Contractor" shall mean the Contractor for this Contract. The Contractor shall sign and lodge all forms and pay all fees associated with the Principal Contractor's responsibilities under the said Act.

Should an on-site work situation occur or an on-site work procedure be adopted, either of which in the judgment of the Superintendent constitutes an unsafe situation, the Contractor shall, upon being advised of it by the Superintendent, take immediate steps to rectify the situation.

The Contractor shall pay any fees due under the Workplace Health and Safety Act for the project.

The Contractor shall comply in all respects with the Health and Safety Regulations of Gladstone City Council.

19. PAYMENT

Progress payment will be made monthly provided that a retention of 20% of the total value of the project up to that point will be held by Council. Final payment will not be made by Gladstone City Council until all work required by this brief has been received together with all hard copy and electronic documentation required by the quotation documents.

20. VARIATION

The Council may by notice require the Consultant to vary the nature, scope or timing of the Consultancy Services.

Without limiting the generality of this clause, the Council may direct the Consultant to:

- Increase, decrease or omit any part of the Consultancy Services;
- Change the character or content of any part of the Consultancy Services;
- Change the direction or dimensions of any part of the Consultancy Services; and

- Perform additional work.

Where the Council requires a variation to the Consultancy Services, the parties will negotiate in good faith a variation of the fees and the time for completion. The Consultant will not commence work on the variation to the Consultancy Services without the Council's consent and the written agreement of both parties to the varied fees and time for completion.

21. DEFAULT OF THE CONSULTANT AND TERMINATION

If the Consultant:

- Breaches any clause of the Contract;
- Suspends payment of its debts or is unable to pay its debts;
- Has execution levied on any of its assets and the execution is not satisfied within twenty-eight (28) days;
- Enters into an arrangement, reconstruction or compromise with its creditors or any of them;
- Has a receiver appointed for all or any part of its assets; or,
- Has an application made or order filed for its administration, voluntary or compulsory liquidation, winding up, dissolution or bankruptcy,
- The Consultant will be in breach of the Contract and the Council may give the Consultant a notice to remedy the breach.

If within fourteen (14) days of receiving a notice under this clause, the Consultant does not remedy the breach or conflict, the Council may immediately terminate the Contract.

Upon termination of this Contract pursuant to this clause, all money which has been paid and all money to be paid for work done up to the date of the termination will be in full and final satisfaction of all claims by the Consultant under the Contract.

22. FREEDOM OF INFORMATION

The Freedom of Information Act 1992 (FOI) which came into operation on 19 November 1992 (State) and 19 May 1993 (Council), gives members of the public rights of access to official documents of Agencies including Local Authorities. These documents include documents submitted to Government by private persons and organisations. Therefore, an offer submitted in response to an invitation is subject to the FOI Act. The FOI provides for a specific exemption if disclosure would disclose trade secrets or information of commercial value unless disclosure is shown to be in the public interest.

The FOI extends as far as possible the right of the community to access information in the possession of the above organizations, limited only by certain exemptions and exceptions necessary for the protection of essential public interests and private and business affairs of persons in respect of whom information is collected and held by such organizations.

23. SUBMISSIONS

Consultants must include in their submission:

- The proposed methodology to conduct the consultancy;
- The proposed project timetable;
- The proposed project management structure which will be responsible for the project;
- The Quality Assurance accreditation held by the company. A copy of the Quality Assurance certification must be supplied;
- A project quality plan that will be applied by the Consultant in undertaking the work;
- Key personnel who will be employed on the assignment. The Curricula Vitae of all nominated personnel shall be included in the proposal. No substitutions for the personnel nominated to conduct the various tasks will be accepted without prior written consent of the Gladstone City Council. Such consent will only be given if the replacement is able to provide the same level or better specialised service;
- Evidence of insurance cover requirements; and
- A representative list of previous clients who have undertaken projects of a similar nature;

Firms are required to complete the attached ***Schedule of Information*** and return it with their submission. Submissions in a sealed envelope, clearly endorsed on the outside with **"PROPOSAL FOR RETAIL STUDY FOR GLADSTONE CITY"** shall be in the hand of the Chief Executive Officer at the address below, **no later than 11:00 am on Monday 10 May 2004**.

Three (3) copies of the submissions shall be either posted to the address hereunder

The Chief Executive Officer,
Gladstone City Council,
P.O. Box 29,
GLADSTONE. QLD. 4680

or hand delivered and placed in the Tender Box at the office of the Gladstone City Council at

The Civic Centre
101 Goondoon Street,
GLADSTONE. QLD. 4680

The Gladstone City Council, at its discretion, may reject a submission delivered after the closing time specified herein, no matter what the reason for the late delivery. Firms wishing to submit alternate proposals to that outlined in this brief are encouraged to do so.

Enquiries in relation to this Brief should be directed to the Project Manager, Mr. Trevor Gargan at Gladstone City Council via (07) 49700778 or via email on trevorg@gcc.qld.gov.au