

Byellee Waters Gladstone Economic and Community Needs Assessment

Includes Council RFI Response

Site Incorporating 6 Jefferis Road, Beecher

Submitted to: Clava Limited
Trading as Yaralla Sports Club



'Gadalung Djarri'

Liz Belanjee Cameron

'Gadalung Djarri' – translates to Hot Red Country. Representing Queensland.



The use of reds, purples, pinks and oranges illustrate the tones and natural hues of the Queensland environment, a place of ancient warmth against a backdrop of fluctuating terrains. Pink hues along with a criss-cross of patternings illustrate a sense of playfulness, with correlating lines of pink magenta and fuchsia moving into reds to represent the blood of Country. Along with the use of oranges these colours cultivate a strong visual link between all life and the immediacy we carry with nature.

Ethos Urban acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We acknowledge the Turrbal, Jagera and Yugara peoples, the Traditional Custodians of the land where this document was prepared, and all peoples and nations from lands affected.

We pay our respects to their Elders past, present and emerging.

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Executive Summary

Background

- i. **Clava Limited Trading as Yaralla Sports Club (Yaralla) is proposing the relocation of the Gladstone Golf Club.** A site of 58 hectares has been identified outside the south-west urban fringe of Gladstone on the western side of the Dawson Highway at Beecher (Subject Site). The proposed development will comprise a new championship level 18-hole golf course, clubhouse, mini-golf course, and RV and caravan park.
- ii. **The proposed development will allow for the creation of a new championship standard golf course,** and also overcomes some of the operational issues associated with the existing Gladstone Golf Club course. It is intended that the new golf course is a top 100 standard in Australia and the highest rated course between the Sunshine Coast and Port Douglas. Other components include high-quality ancillary golfing facilities, comprising a driving range and mini-golf course.
- iii. **Further, the proposed development includes the creation of a Recreation Vehicle (RV) and caravan facility, including a mixture of cabins and powered sites.** Approximately 82 sites are expected (subject to detailed design), comprising approximately 32 cabins. The cabins and powered sites will be leading practice, including high-quality support services such as an on-site manager and laundry facilities, as well as bespoke facilities for RVs.
- iv. **An on-site clubhouse will support golf operations and include café and restaurant uses, as well as providing functions/events spaces, including the ability to host events on a lawn area.** It is envisioned that the club house will host various events including weddings, community celebrations, regional and state sporting celebrations, corporate retreats, and community recreation. An area in proximity to the club house will also be available for regular community markets.
- v. **The proposed development will support and deliver on a range of strategic plans and policies for the local area and region, including assisting in building capacity and diversifying the tourism sector.** A nature-based design approach means the development will integrate with the wetlands located on-site, with walking paths and other features consistent with a nature-based tourism offer. The proposal is consistent with the *Gladstone Region Economic Development Strategy 2021-2025*, the *Gladstone Region Visitor Economy Strategy 2025*, and the *Gladstone Region Recreational Vehicle Strategy (RV Strategy)*. These strategies support investment in the tourist and visitor market, with RV and drive-based tourism particular market segments supported by strategic tourism policy in Gladstone.

Needs Assessment

- vi. **A need met by the proposed development of the Subject Site is providing a new, 18-hole, championship standard golf course which is free of the operational constraints of the existing Gladstone Gold Club.** This golf facility will enhance recreational infrastructure in the region for the local community and increase tourism and related spending.
- vii. **In addition, the proposed development includes RV and cabins which respond to strong domestic tourism demand and high occupancy levels at existing facilities, as identified in local policy.** Importantly, the facility provides a point-of-difference to existing RV facilities in Gladstone, providing a high-quality new option integrated into a nature-based location with complementary golf and function facilities.
- viii. **Food and drink retail services at the Subject Site will be complementary to the operation of the golf club,** providing a tailored and differentiated role to existing food and drink facilities elsewhere in Gladstone. A high-quality food and drink offering is a standard inclusion at popular golf courses, providing patrons with the chance to maximise their recreation and leisure time.
- ix. **Function facilities, such as those included in the proposed development,** are also a general community expectation for a quality golf club facility. In particular, the Subject Site provides the opportunity for function facilities to provide a unique space enhanced by the surrounding landscaped golf course and natural environment. These facilities will generate employment opportunities, support local events and social engagement, enhance tourist visitation, and deliver additional spending in the Gladstone region.
- x. **The opportunity to include regular community markets at the Subject Site will result in increased opportunities for local and primarily small boutique businesses,** promote the local and regional economy and support local products and product innovation.

- xi. **Key benefits of the proposed development of the Subject Site include employment opportunities, increased economic value, additional tourist visitation, and enhanced spending in the local economy.**

The project also overcomes existing operational constraints at the Gladstone Golf Club and provides a facility of a high-standard likely to enhance golf participation, including delivering the well-known social and health benefits associated with leisure and recreation activities.

Introduction

Background

Clava Limited trading as Yaralla Sports Club (Yaralla) have recently purchased land (the Subject Site) located at and adjoining 6 Jefferis Road, Beecher, on the south-west fringe of urban Gladstone.

Due to a range of constraints in terms of operations and adjoining land uses, the existing Gladstone Golf Club, owned and operated by Yaralla, requires re-location to ensure it remains fit for current and future purpose.

As a result, Yaralla proposes to develop the Subject Site for a new championship-level 18-hole golf course with associated clubhouse facilities, driving range, putting green and mini golf facility, and a tourist park including Recreation Vehicle (RV) sites and cabins.

Report Purpose

Yaralla has engaged Ethos Urban to provide an economic and community needs assessment for the proposed development having regard to the requirements of the Gladstone Planning Scheme SC6.4.4 *'Guidelines and process for preparing a Community and economic needs assessment'*.

In response to these guidelines, this report has been prepared by an experienced team of consultants who have a strong understanding of planning and development economics, namely:

- Sean Stephens: Group Director of Economics at Ethos Urban with over 23 years' professional experience,
- Emma Keller: Principal in the economics team with ten years' professional experience, and
- Zack Heap: a Senior Urbanist in the economics team with three years' professional experience.

Methodology

This report has assessed the economic and community need considerations for the proposed development, including the golf course, tourist park (RV sites and cabins), food and drink services, functions and events and community markets. This has been done through consideration of the key economic factors relevant to supply and demand, with a summary of factors relevant to assessing economic and community need also provided.

This Report

This report contains the following Chapters:

- Chapter 1:** Project Background and Description
- Chapter 2:** Gladstone Economic Profile and Trends
- Chapter 3:** Industry Insights and Context
- Chapter 4:** Economic Needs Assessment
- Chapter 5:** Economic and Community Benefit

1.0. Project Background

This Chapter outlines the background relevant to the development of the Subject Site, including the location, description of the proposed development, and the relevant policy context.

1.1. Subject Site Location

Gladstone is a major regional city on the coast of Queensland approximately 160km north of Bundaberg and 440km north of Brisbane.

Containing the large Port of Gladstone, which is a significant exporter of commodities, Gladstone has an urban population of over 34,000 people. Gladstone is an important regional service centre for the wider Gladstone Region, including the area covered by Gladstone Regional Council.

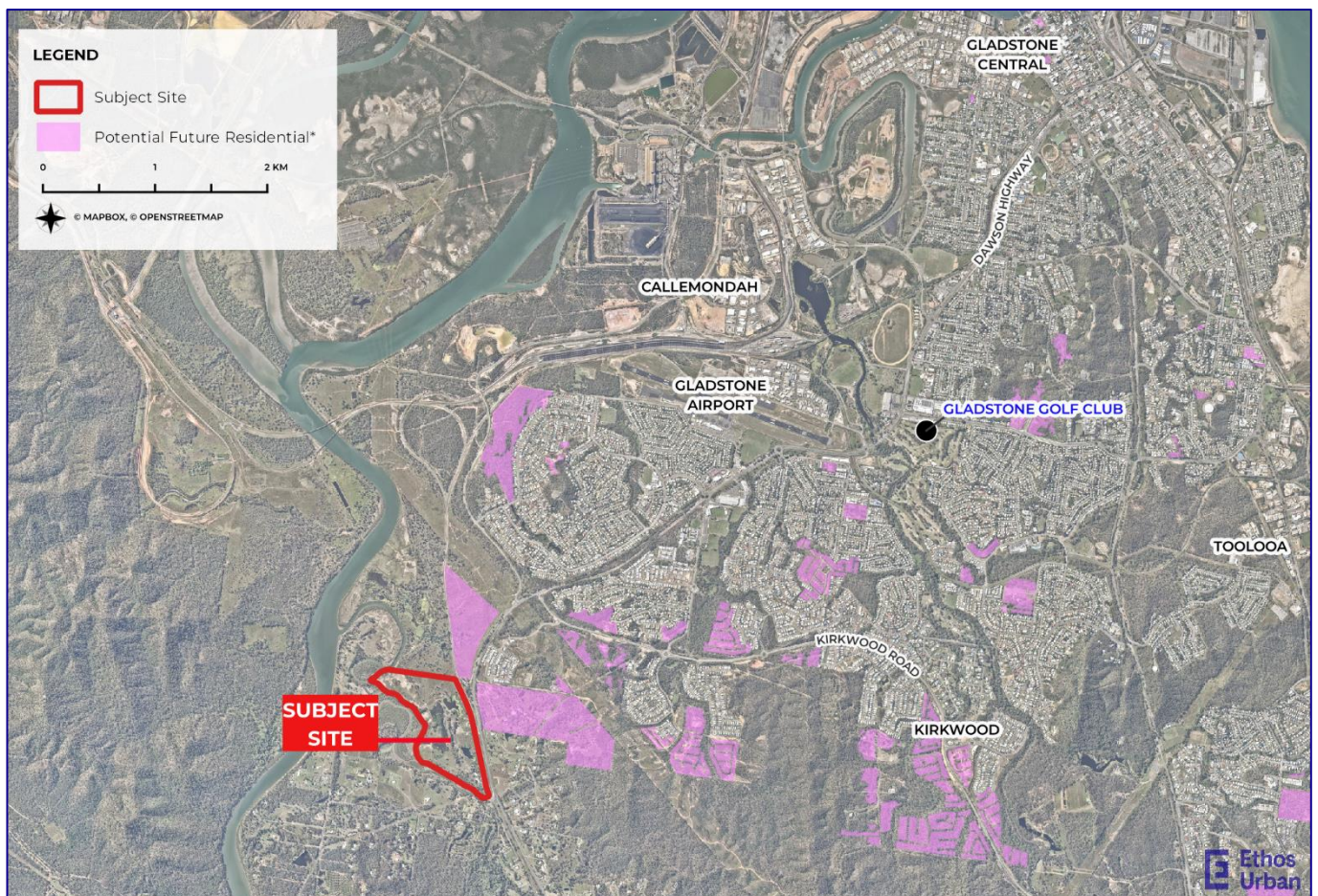
The Subject Site is located at 6 Jefferis Road (and adjacent sites) in Beecher, approximately 8km south-west of Gladstone Central (CBD) and is beyond the outer fringe of Gladstone's urban area. Prominent frontage of over 1km is provided to the Dawson Highway and the location is highly accessible to urban Gladstone (including Gladstone Airport) and the wider region.

Covering approximately 58 hectares of land, the Subject Site comprises of eight land parcels located in a mix of the Rural, Rural Residential, and Open Space zones of the Gladstone Regional Council Planning Scheme.

Bordered by Clyde Creek on the western edge, the Subject Site currently supports a range of natural features, including water bodies and vegetation, with the current primary land use being for farming in the form of grazing paddocks.

The location of the Subject Site is shown in Figure 1.1.

Figure 1.1 Subject Site Location



Source: Ethos Urban

1. Queensland Government Statisticians Office - Residential land supply and development - Broadhectare study

1.2. Gladstone Golf Club Relocation

Yaralla currently operate the Gladstone Golf Club located on approximately 47 hectares of land at 1 Hickory Avenue, Kin Kora, approximately 5km north-east of the Subject Site. The golf course has operated from this site for approximately 70 years.

However, golf course operations are increasingly compromised by a range of issues that limit course usage and the amenity for the golf playing community. This includes constraints associated with the increasingly dense urban form around the site which has evolved over time, and which includes residential properties, a major retail centre and the busy Dawson Highway.

To ensure the safety and security of surrounding properties, the Gladstone Golf Club has undertaken a range of operational changes for golfers, including:

- Banning the use of drivers on certain holes
- Reducing the length or layout of holes resulting in reduced par, and
- Relocated greens.

Notwithstanding these changes, the Club is still considering the need for further adjustments, potentially including the closure of entire holes.

As such, the operation of current golf course is increasingly unsustainable. The Gladstone Golf Club recognises that these operational changes do not result in a positive golf experience for users of the course.

As a result of these issues, Yaralla have identified the opportunity to relocate the golf club from its current site to the Subject Site at Beecher.

1.3. Proposed Development

Yaralla are proposing to create a new championship level 18-hole golf course (including ancillary golf facilities such as putting green), clubhouse, mini-golf course and RV and cabin tourist park. That is, the project comprises the following key features:

- Championship standard 18-hole, 72 par golf course and mini-golf course.
- Associated golf course facilities, including a clubhouse incorporating food and drink outlet, function and events capability and golf shop.
- RV and Caravan Park, with indicative designs allowing for approximately 82 sites, including 32 cabins
- Capability to host regular or semi-regular markets (i.e. temporary stalls).

Golf Course

Yaralla are proposing a development at the Subject Site which is focused on the creation of a new championship level 18-hole golf course. This new golf course will reflect, with the ambition to exceed, the contemporary expectations of the golf playing public and is unconstrained by issues impacting operations at the existing Gladstone Golf Club.

The proposed location provides the opportunity to deliver a bespoke golf course development designed from a first principles basis. An opportunity also exists to incorporate the course with the existing freshwater lagoons and bushland in a complementary manner.

As such, it is intended that the new golf course at the Subject Site will be of a high standard. Current aspirations are for a course rated within the top 100 golf courses in Australia, and to deliver the best course between the Sunshine Coast and Port Douglas.

In addition to the golf course, other golf-related ancillary uses at the Subject Site will include practice greens, a driving range, as well as mini-golf facilities.

Tourist Park (RV Sites and Cabins)

Proposed development of the Subject Site also includes a tourist park with sites for RVs and cabins. This will provide on-site accommodation options for golf course users, including tourists and visitors, as well as support the function and event component of the development by providing guest accommodation options.

The development of a dedicated RV facility is also consistent with the growing demand for this accommodation format for retirees and other self-drive holiday makers.

A total of approximately 82 sites are proposed to be located immediately south of the club house, as shown in Figure 1.2.

These sites are currently planned to include **32 high-quality cabins** with wetland views, as well as **50 powered RV and caravan sites**. Ancillary facilities will include an on-site manager, laundry facilities, shared bathroom, and camp kitchen.

Yaralla are engaging with an architect to design the cabins to ensure they provide a high-quality accommodation option that is related to the attributes of the Subject Site. This contrasts with an otherwise cheaper and inferior 'off the shelf' design and assemble option.

The proposed tourist park also leverages off the surrounding wetlands, with the ability for guests to utilise walking trails through the landscape. This adds an eco-tourism component of the development for those seeking an accommodation option within a nature-based setting.

We are informed by Yaralla that discussions are being held with potential operators of the RV and Caravan Park component of the development, including two leading national brands. This offers the potential for the proposed facility:

- To operate with the expertise, and to the standards of, established and credible operators.
- Benefit from the network effect of marketing, bookings and customer relationships held by a large operator.
- Quality assurance that the facility will continue to operate at a standard that meets the requirements of these operators into the future.
- Form part of the travel patterns for those RV and caravan users who stay at other branded properties on their travels through regional Queensland.
- Adds to the tourism appeal of the subject proposal, and the wider Gladstone Region, given the lack of a local presence of these brands at the current time.

If no satisfactory commercial agreement can be reached with an operator, Yaralla are committed to developing and operating the facility independently with their own on-site manager.

Clubhouse Functions and Events, Food and Drink Capabilities

A high-quality clubhouse to be located on site will include café and restaurant uses, as well as providing a functions/event capability, including the ability to host 'marquee' events on a lawn area.

It is envisioned that the club house will host various personal and professional events including weddings, community celebrations, regional and state sporting celebrations, corporate retreats and community recreation.

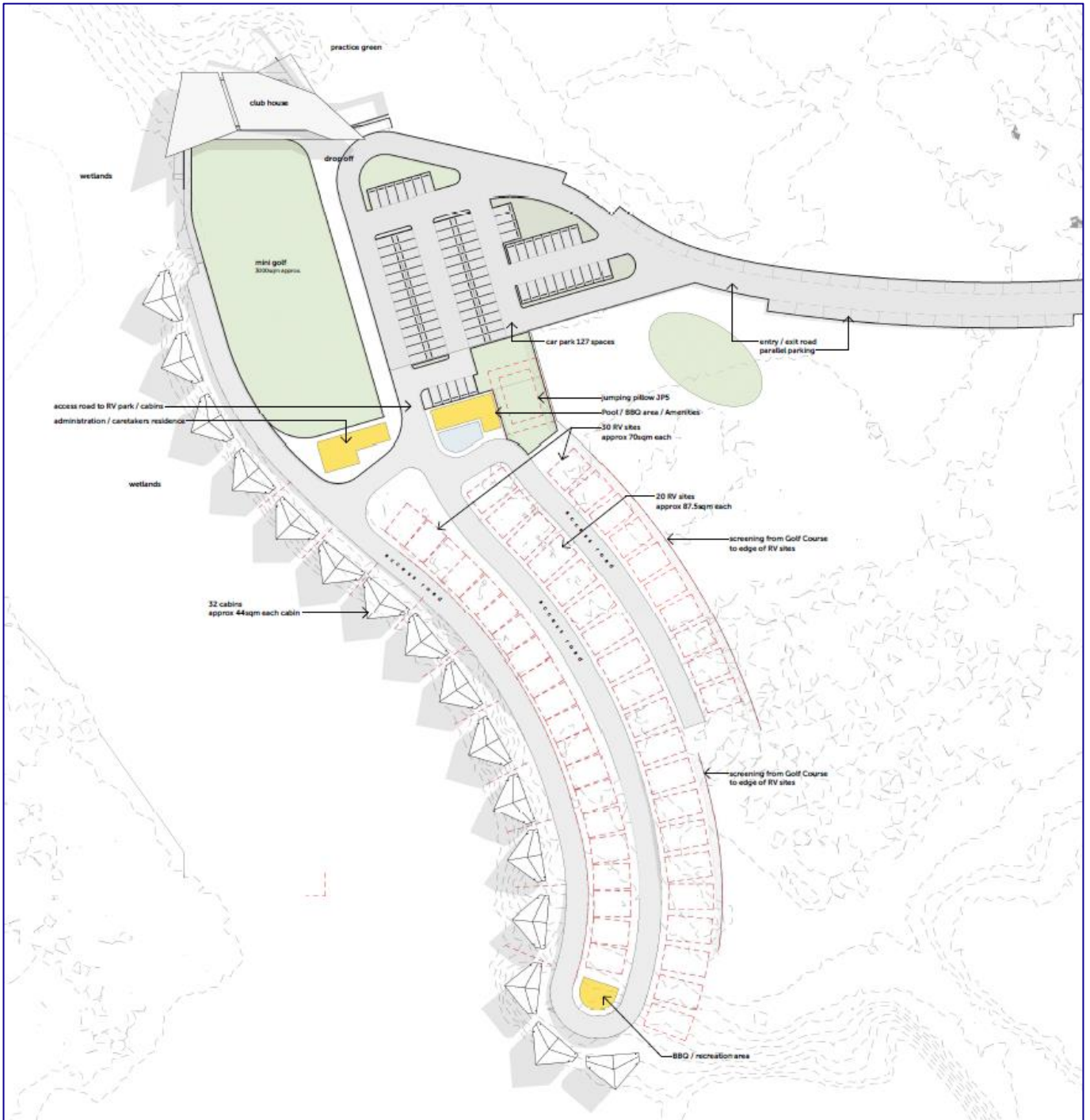
Further, the food and drink outlets ensure that golfers are supported by dining and drinking options, and that other guests and visitors also have a place to relax and eat.

Markets

The proposed development also allows for community markets to be held on a regular or semi-regular basis. These will be temporary stalls rather than permanent fixtures and allow local businesses and suppliers to sell products direct to the public, including both locals and tourists.

An important advantage for markets at the site is the relative accessibility, availability of complementary infrastructure (parking, toilets etc) and the high level of amenity delivered by a nature-based location.

Figure 1.2 Subject Site Development Plan



Source: BSPN Architecture

1.4. Policy Context

Local policy and documents of relevance to the proposed development of the Subject Site are summarised below. Note that this is intended to be contextual only, and detailed town planning advice in relation the project is provided in separate reports.

1.4.1. Policies

Gladstone Regional Council Planning Scheme

A diverse range of housing and accommodation typologies are highlighted as an important strategic outcome within the strategic framework of the Gladstone Regional Council Planning Scheme.

Specifically, this includes providing forms of accommodation which can accommodate the temporary population of the region, including tourists. Notably, the strategic framework highlights the support this provides to the regional economy, including from the provision of short-term tourist accommodation.

Supporting direction includes:

Themes	Objectives
Gateway to the World	<ul style="list-style-type: none"> • 3.3.2 Elements (A gateway for tourism) – The Gladstone region offers diverse tourism attractions for visitors and residents. <ul style="list-style-type: none"> – Development provides for low impact and low intensity tourism accommodation servicing the needs of tourists and employees together with limited entertainment, dining and convenience shopping.
Community Living	<ul style="list-style-type: none"> • 3.4.1 Strategic Outcomes (9) – Major short-term accommodation is concentrated in the Gladstone CBD, urban revitalisation areas and mixed-use centres. Smaller scale short-term accommodation within rural and coastal townships supports tourism associated with rural and coastal attractions. • 3.4.2 Elements (Short term and non-resident workforce accommodation) - Other forms of accommodation perform important roles in temporarily housing tourists, visitors and some workers (at peak times) throughout the region. This supports the regional economy particularly in the tourism, business and major industry sectors.
Connecting Our Places	<ul style="list-style-type: none"> • 3.5.1 Strategic Outcomes (3) – All communities have access to a range of facilities and services, public spaces, open space, sport and recreation areas. • 3.5.2 (Connecting through community wellbeing) – Local communities in urban locations and in coastal and rural places are provided with necessary community services and sporting facilities to meet their local needs.

Gladstone Region Economic Development Strategy 2021-2025

Gladstone’s Region Economic Development Strategy was developed to support the vibrancy, diversity, resilience and sustainability of the communities within the Council area.

The Strategy lists five priorities to help enable and facilitate their mission.

The proposed development will support two of those priorities:

- **Priority 4:** Support the Gladstone Region’s appeal as a place in which to work, live, play and stay.
- **Priority 5:** Support the development of the Gladstone Region’s visitor economy.

Gladstone Region Visitor Economy Strategy 2025

The *Gladstone Region Visitor Economy Strategy 2025* was developed for Gladstone Regional Council in November 2019.

The Strategy recognises the importance of tourism for the Gladstone Region and the visitor market as a key economic driver. As such, the strategy looks to provide a long-term vision and strategic direction for the visitor economy in the Gladstone Region.

A framework is established in the Strategy which seeks to collaboratively maximise the economic benefits of tourism, while remaining conscious of environmental impacts, social impacts, and the impacts on resident lifestyles.

Identified key priorities to drive the tourism market in Gladstone into the future, include:

- Building capacity in the tourism sector
- Develop key market segments, including specific reference to RVs and driving tourism, and
- Creating one-of-a-kind experiences.

Gladstone Region Recreational Vehicle Strategy

Developed for Gladstone Regional Council in November 2019, the *Gladstone Region Recreational Vehicle Strategy* (RV Strategy) is a supporting document for the *Gladstone Region Visitor Economy Strategy*.

The RV Strategy outlines the potential opportunity for growth in the region related to the so-called 'drive market', in particular the RV market. Within the Strategy are a range of directions seeking to attract the visitation and length of stay of RVs, and to grow the contribution of this market segment to the tourist sector generally and the wider Gladstone Region economy.

Within the Strategy it is recognised that currently the Gladstone Region has capacity issues for RV and caravan spaces during the high season, with caravan parks reaching 100% occupancy. Significant levels of illegal free camping are also reported to occur.

Including through actions such as developing additional RV friendly sites, the Strategy provides strategic direction to grow the Gladstone Region's reputation as an RV friendly destination.

Four key objectives are identified under the Strategy to further this aim, as follows:

- Identify economic outcomes and opportunities to attract RV travellers to the region with repeat visitation.
- Consider Council owned sites and identify their current facilities.
- Provide recommendations for enhanced visitor experience at these sites.
- Improve RV marketing opportunities and dissemination of information to RV travellers.

The development of an RV Strategy for Gladstone highlights general support for the development of additional RV facilities in the region, as is enabled through the proposed development at the Subject Site.

1.4.2. Policy Implications

Strategic policies and objectives emphasise the importance of tourism as a key economic driver, diversifying the economy, and enhancing the region's vibrancy, liveability and sustainability.

The Subject Site is a significant opportunity to deliver a new championship grade golf course, low-impact and low-intensity tourism accommodation with an emphasis on the natural environment, and an associated clubhouse that can provide food and drink, and enable functions and events. The project also allows community markets to be held on a regular or semi-regular basis.

The proposed development will support and deliver on a range of strategic plans and policies for the local area and region, including, but not limited to:

- Build capacity in the tourism sector.
- Create unique experiences.
- Support the development and diversification of the region's visitor economy.
- Address capacity issues in the provision of RV suitable accommodation.
- Enhance the appeal of the region for living, playing, staying.
- Deliver short-term accommodation options temporarily housing tourists, visitors and some workers.
- Provide access to a range of facilities and services, open space, sport and recreation areas.

2.0. Gladstone Economic Profile and Trends

This Chapter provides an overview of the population, demographics and other key economic indicators for Gladstone Regional Council (Gladstone), providing context for the demand for the proposed development at the Subject Site.

2.1. Population and Socio-Economic Profile

Population Trends and Forecasts

Gladstone Regional Council had a resident population of approximately 65,300 persons in 2022. From 2006 to 2022, the population increased by +13,250 persons, equivalent to +830 persons or +1.4% per annum (pa). Over this period, Gladstone experienced strong population growth between 2006 and 2016 averaging +1,100 persons pa, before easing to +250 persons pa between 2016 and 2021 as major construction projects concluded.

In 2021-22 population growth in the Council area rebounded strongly recording an increase of +1,020 persons.

Table 2.1 Recent Population Trends, Gladstone Regional Council

Category	2006	2016	2020	2021	2022	2006 to 2022
Population	52,050	63,020	63,890	64,280	65,300	+13,250
Annual Average Growth (no.)		+1,100	+220	+390	+1,020	+830
Annual Average Growth (%)		+1.9%	+0.3%	+0.6%	+1.6%	+1.4%

Source: ABS Estimated Resident Population; Ethos Urban

Population projections from QLD Treasury (medium series, 2023) forecast population growth to moderate from 2021-22 and record consistent population growth of +580 persons pa over the next 15-years to reach a total resident population of 74,580 persons by 2038.

In our view, these population forecasts can be considered easily achievable and are potentially a conservative view of the actual outcome. Nonetheless, these official projections set an expectation for ongoing population growth in the region for the foreseeable future.

Table 2.2 Forecast Population, Gladstone Regional Council

Category	2023	2028	2033	2038	2023 to 2038
Population	65,890	68,840	71,750	74,580	+8,690
Annual Average Growth (no.)		+590	+580	+570	+580
Annual Average Growth (%)		+0.9%	+0.8%	+0.8%	+0.8%

Source: ABS Estimated Resident Population; Ethos Urban; Queensland Population Projections – Medium Series, QLD Treasury

Socio-demographics

Demographic data for Gladstone Regional Council and 'Rest of QLD' has been drawn from the 2021 ABS Census of Population and Housing and are also shown in Table 2.3. Key findings include:

- **Higher median household incomes.** Household incomes in Gladstone (\$85,460) are moderately higher than the regional QLD benchmark (\$79,320).
- **Younger age profile.** The median age of Gladstone residents (38.4 years) is younger than the regional benchmark (40.4 years), with higher proportions of residents aged between 5-19 years and 35-64 years.
- **Predominately Australian born.** Residents born in Australia comprise 85.7% of Gladstone's population, compared 81.5% in Rest of QLD.
- **Varied household composition.** Gladstone's household composition broadly aligns with that of Rest of QLD. Couple families with no children (28.6%) and with children (30.1%) comprise over half of all households in Gladstone. Other key household types include lone person households (25.6%) and one parent families (11.8%).
- **Primarily detached dwellings.** Approximately 85.7% of all private occupied dwellings are detached houses in Gladstone, compared to 76.5% in Rest of QLD.

- **High share of traditional blue-collar jobs.** Technicians and trades workers (21.0%), labourers (12.6%) and machinery operators and drivers (12.4%) make up nearly 50% of Gladstone's resident workforce, compared to a total of 34.4% in Rest of QLD.
- **Large proportion of households with mortgages or renting.** A large share of dwellings is owned with a mortgage (37.1%) compared to dwellings owned outright (27.8%) in Gladstone. This difference is significantly higher than for the Rest of QLD (33.7% to 32.9%, respectively). Gladstone also has a higher proportion of households renting (33.8%) compared to Rest of QLD (31.3%)

Table 2.3 Socio-Economic Profile, 2021

Category	Gladstone	Regional Qld
Income		
Median household income (annual)	\$85,460	\$79,320
Variation from Regional Qld median	+7.7%	n.a.
Age Structure		
0-4 years	6.4%	5.4%
5-19 years	21.4%	18.8%
20-34 years	17.3%	18.1%
35-64 years	41.1%	38.6%
65-84 years	12.8%	17.1%
85 years and over	1.1%	2.0%
Median Age (years)	38.4	40.5
Country of Birth		
Australia	85.7%	81.5%
Other Major English Speaking Countries	8.1%	10.1%
Other Overseas Born	6.2%	8.4%
% speak English only at home	93.8%	90.5%
Household Composition		
Couple family with no children	28.6%	30.0%
Couple family with children	30.1%	27.7%
Couple family - Total	58.7%	57.6%
One parent family	11.8%	11.8%
Family households - Total	71.3%	70.4%
Lone person household	25.6%	25.7%
Group household	3.1%	3.9%
Dwelling Structure (Occupied Private Dwellings)		
Separate house	85.7%	76.5%
Semi-detached, row or terrace house, townhouse etc.	6.0%	12.1%
Flat, unit or apartment	7.1%	10.4%
Occupancy rate	85.0%	88.4%
Average household size	2.5	2.5
Tenure Type (Occupied Private Dwellings)		
Owned outright	27.8%	32.9%
Owned with a mortgage	37.1%	33.7%
Rented	33.8%	31.3%
Occupation		
Managers	9.5%	12.7%
Professionals	14.7%	18.4%
Technicians and trades workers	21.0%	15.4%
Community and personal service workers	11.0%	13.3%
Clerical and administrative workers	10.4%	12.0%
Sales workers	8.2%	9.3%
Machinery operators and drivers	12.4%	7.5%
Labourers	12.6%	11.5%

Source: ABS Census of Population and Housing 2021; Ethos Urban

2.2. Tourism Trends

This sub-section considers the characteristics and trends relevant to the visitor market broadly, which influences demand for golf courses, commercial short stay accommodation, including for RV and caravan parks.

2.2.1. Industry Outlook and Expectations

Current Trends and Expectations

With travel bans due to the COVID-19 pandemic having been lifted for both national and international tourism, the tourism sector in Australia has seen a strong recovery.

Deloitte Access Economics' Tourism Market Outlook highlights that although domestic overnight and domestic day visitor expenditure in Australia has returned to 2019 (pre COVID-19) levels, international visitor expenditure remains below 2019 levels. International arrivals are a significant portion of tourism demand for Australia's major capital cities.

In contrast, very strong domestic tourism demand means that regional areas of Australia, including Gladstone, are now at, or marginally above, above pre COVID-19 levels.

The strong growth in the domestic tourism market is reflected in strong rates of the growth forecast for domestic overnight trips to 124 million by the end of 2023, above the 117 million trips in 2019. This trend is forecast to continue upwards, reaching 132 million trips by the end of 2024 according to Deloitte Access Economics.

Changes in Tourist Preferences

A structural shift has occurred towards domestic tourism visitation and spending post the COVID-19 pandemic. This is being reflected in the expectations for future visitor growth outlined above, as well as increasing demand for commercial accommodation options which is having a positive impact on occupancy rates and price points for accommodation.

Potential exists for this shift to be strengthened by enhanced visitor experiences through post-pandemic recovery/strategic investment in the tourism sector, and an increased awareness of domestic tourism assets.

Scale, diversity and quality of short-term accommodation options are an important factor in the ability of regional destinations, such as Gladstone, to both attract and retain visitor spending. This includes the tourist, visiting friends and relatives (VFR) and business markets.

Of note for the caravan and RV accommodation market is the rise in popularity of caravan and camping tourism.

In the decade before the COVID-19 pandemic, the number of caravan and camping trips grew by 67%, with Australians taking 13.9 million caravan and camping trips in 2019. Although seeing a decrease during the pandemic, caravan and camping trips have recovered well with 12.7 million trips in the year ending June 2022.

Registration data shows 4% annual growth in the registration of RV vehicles across Australia, indicating the expectation of ongoing growth in this tourism sector. Importantly, the growth in RVs is being driven by a mixture of both retirees and those aged in 30 to 55-years, with retirees taking longer trips relative to those of working age.

Golf Courses as tourism destinations

Golf is a significant contributor to Australia's tourism sector. Each year, an estimated 1.6 million domestic trips are made, and 150,000 international tourists visit Australia to play golf according to the Australian Golf Industry Council's (AGIC) recently commissioned report (2023 Community Benefits of Golf in Australia, October 2023).

The report estimates that the value of golf tourism to the Australian economy each year is approximately \$336 million, including \$63 million towards the QLD economy.

2.2.2. Gladstone's Tourism Profile

In relative terms, tourism is not as significant an industry for the Gladstone economy compared to other significant coastal cities in Queensland.

Nonetheless, the tourism industry directly accounted for approximately 1,790 jobs or 5.5% of employment in the Gladstone tourism region in the pre pandemic year of 2019. As such, the importance of the tourist industry continues to be strongly reflected in local and regional policies and strategies.

The tourism market in Gladstone is primarily driven by:

- **Holiday visitation** in both Gladstone as well as the nearby Boyne Island and Tannum Sands areas, located 15km south of the Gladstone CBD. Visitation is also generated by the broader region's 200+ annual festivals and events, including the Brisbane to Gladstone Yacht Race and the Boyne Island Tannum Hook-up fishing tournament (Source: Gladstone Region Visitor Economy Strategy 2025).
- **Business visitation** is underpinned by the significant employment precincts around Gladstone, including the Port of Gladstone which is one of the largest bulk commodity ports in the world.

Of the 622,000 overnight visitors in the Gladstone tourism region in the year to December 2019, 48% stated the purpose of their travel as being for holidays. Comparably, VFR and business overnight visitors comprised 22% and 24% respectively.

With a location on the Bruce Highway between Brisbane and Far North Queensland, the Gladstone Region is very well placed geographically to benefit from the driving market, including RVs and caravans. This is further enhanced by the presence of extensive outdoor attractions and activities, and a favourable climate.

As such, it is relevant that high levels of occupancy have been identified for RV friendly locations and caravan parks serving the tourist sector in Gladstone by local tourism strategies, as identified in Section 1.3 of this report.

This high occupancy has also been reflected in commentary within the local press for many years. An implication of the high demand is Council continuing to allow short-term stays by RVs and caravans at the Gladstone Showgrounds.

2.2.3. Visitor Outlook

The near-term outlook for domestic tourism is positive, with market indicators pointing to a continued recovery post COVID-19 and long-term growth expectations. This is underpinned by the following:

- **Strong industry outlook:** Deloitte Access Economics forecast the domestic tourism market to grow at 15% in 2023 and 6% in 2024, resulting in a total increase of +24 million domestic overnight trips on 2022 levels. This forecast is supported by pent-up demand and redirection of international travel to domestic trips due to weakness in the Australian dollar and structural shifts in travel preferences.
- **Regional markets are better positioned:** Regional Australia has, and will likely continue to, see relatively stronger growth relative to capital city markets, as demand is generally less reliant on international visitation which has declined significantly post-COVID-19.
- **Upward trend in historical visitation:** Prior to the COVID-19 pandemic, the trend for domestic visitor nights in Gladstone has been positive and this long-term trend can be expected to continue based on initial data and observed trends in the post-COVID19 era.
- **Policy support from Council:** Enhancing the visitor economy, and opportunities around the growth in business travellers are key themes of the *Gladstone Region Economic Development Strategy 2021 – 2025*, and *Gladstone Visitor Economy Strategy 2025*. These Strategies in combination place significant weight on achieving outcomes which enhance visitation and spending from the tourist sector, including with specific reference to the RV and drive markets which would be served by the proposed development at the Subject Site.

In this regard, domestic visitation in the Gladstone tourism region can be expected to continue to rebound to at least the pre COVID-19 levels observed in 2019 (1.9 million domestic visitor nights compared to 1.5 million in 2020) and likely well-above this in the next few years.

In addition, it is expected that international tourism will continue to rebound, although at a much lower rate. This is a market of less, although still notable, relevance to a regional destination such as Gladstone.

3.0. Industry Insights and Context

This Chapter highlights industry insights and recent trends for the proposed uses at the Subject Site, as they relate to demand for these uses.

3.1. Golf

Golf has long occupied a place as one of Australia's most popular sports. However, prior to the COVID-19 pandemic golf was experiencing declines in overall participation rates.

The COVID-19 pandemic led to a nationwide increase in the popularity of golf courses, particularly as it was often one of the very few social activities permitted during the extended lockdowns.

The acceleration in golf participation is expected to continue in 2023-24, with Golf Australia investing in a series of strategies to ensure the game is more accessible. One of the biggest challenges for boosting golf's participation rates will include broadening the appeal to new players, with the sport historically struggling to attract younger players and women.

AUSPLAY

Golf is one of Australia's most popular sports. The sport has a level of mass participation across the community enabled by a network of more than 1,500 courses of diverse character, including many public courses.

Approximately 1.3 million adults, or 5.8% of the total adult population (aged 15+ years) participated in golf over 2022/23. Participation is heavily skewed towards males, with an overall participation rate of 9.4% compared to 2.3% of the female adult population.

After years of diminishing participation rates, golf has rebounded strongly and continues to maintain a post pandemic surge. An additional +230,000 people are playing the game compared to participation levels pre-pandemic.

Golf participation rates in Queensland are equivalent to the national benchmark at 5.8%, albeit with a slightly higher participation rate for females (2.5%) and slightly lower for males (9.2%).

2022/23 Golf Participation Report, Golf Australia

Golf Australia releases an annual participation report, with the most recent report released in November 2023 for the 2022/23 financial year. The analysis indicates that 3.5 million Australian played a golf related activity, including golf courses, driving ranges, simulators or mini golf facilities during the year. This included 434,825 golf club members and 1.8 million individuals (of all ages) playing at least a round of golf. Another 615,00 individuals only used outdoor hitting facilities.

Approximately 1,287 member clubs of Golf Australia reported membership numbers for 2022/23. Key observations relating for golf clubs in Queensland include:

- 17 clubs are in metropolitan Queensland and 192 clubs are in regional Queensland.
- 166 clubs, or 75.8%, are classified as small clubs (< 500 members).
- 35 clubs, or 16.0%, are classified as medium clubs (500 to 1,000 members), Gladstone Golf Club is within this classification.
- 18 clubs, or 8.2%, are classified as large clubs (> 1,000 members).

Golf memberships have been on the rise across Australia and Queensland over the past five years.

Golf Club memberships numbers in Australia have increased at +2.7% per annum between 2018 and 2023. Younger members, boys (+6.4% per annum) and girls (+5.0% per annum), recorded the highest rates of growth.

In Queensland, male (both men and boys) memberships have increased by +1.3% over the past year, while females (women and girls) have recorded strong increases at +4.6%. The strong growth in female memberships reflects sustained efforts within the golfing community to increase female participation rates.

At the current time in Queensland a total of 69,410 people are golf club members.

At a finer grain, Golf Australia breaks up membership numbers by state-based districts.

The Central District, which includes Gladstone, Rockhampton and surrounding regional towns, has approximately 3,380 members. Golf Australia highlights that membership numbers in the Central District have increased by more than five per cent between 2021/22 and 2022/23.

Community Benefits of Golf in Australia, 2023

According to the recently commissioned Golf Australia report, the total annual benefits of golf towards the Australian economy is \$3.3 billion per annum, comprising:

- **\$1.4 billion in economic benefits**, including benefits accruing to golf players, golf related businesses (including tourism related), golf workers, and the health sector.
- **\$1.0 billion in social benefits**, including benefits accruing mainly via physical and mental health benefits.
- **\$890 million in environmental benefits** through biodiversity, flood and stormwater protection, water filtration and purification, carbon sequestration and urban cooling.

Other key findings include:

- **7.23 million Australians per annum** visit a golfing facility annually for meals, drinks and various social leisure and business activities which are often not directly golf related.
- An estimated **\$10.3 billion in annual household expenditure is associated with golf**, of which, \$6.7 billion is specifically associated with expenditure of golf players and community members in their local area. The remaining **\$3.6 billion is associated with golf tourism**.

Overall, golf continues to be a very important leisure and recreational activity in Australia which generates substantial social and economic benefits.

3.2. RV and Caravan Park Industry

The “*Caravan Park, Holiday House, and Other Accommodation Industry*” in Australia, as defined by the ABS, is an industry definition which includes RV and caravan park tourism.

The caravan park, holiday house and other accommodation industry in Australia is worth \$4.3 billion. The industry employs over 19,000 people, with the industry including caravan parks, holiday flats, units and houses, holiday parks, hostels, camping grounds, student accommodation, and bed and breakfast accommodation.

Revenue for the industry was severely impacted by the COVID-19 pandemic. However, given that industry performance is primarily driven by tourism activity, as restrictions have eased, demand has grown a strong recovery has occurred. This has been largely driven by domestic travellers, who make up the largest share of guests.

An increase in competition has been experienced in the industry over the past decade, with the increasing presence of Airbnb in the market.

This has resulted in increased supply as well as increased pricing transparency, although has placed some pressure on revenue and profit margins for some operators. However, the nature of Airbnb means that its growing popularity has a greater effect on hostels, holiday houses and bed and breakfasts, rather than on RV and caravan parks who have a different market positioning.

Over the next five years, the industry is forecast to grow and expand, with this growth driven by demand from international and domestic tourists returning to pre-pandemic levels. Segments of the industry catering to domestic tourists will benefit from ongoing geopolitical uncertainty and rising environmental consciousness, with caravan and holiday park operators particularly benefiting from this.

“With an ageing population and increasing leisure time, future trends for the recreational vehicle and caravan and camping market are likely to continue its upward trend.”

- Gladstone Region Recreational Vehicle Strategy (p.14)

Specific Data on RVs and Caravan Parks

Specific data on the RV and caravan park industry available via a range of public sources also indicates strong demand growth, and the opportunity for delivering a high-quality and purpose-built facility at the Subject Site.

In Queensland, occupancy rates for both cabins and powered sites with caravan parks has been increasing and are currently above pre-COVID levels. In 2023, an occupancy rate of 66% has been identified for cabins according

to a sample of parks identified by the Caravan Industry Association of Australia. This is well-above the occupancy rate of 55% identified in 2019. Likewise, the daily rates achieved for cabin accommodation are also increasing, as shown in Table 3.1

Table 3.1 Cabin and Powered Sites Occupancy and Revenue Per Site Trends, Queensland

Category	2019	2023	Total Change
Cabins			
Average Occupancy (%)	54%	68%	+26%
Revenue per site (\$)	\$84	\$122	+44%
Powered Sites			
Average Occupancy (%)	52%	60%	+16%
Revenue per site (\$)	\$24	\$34	+42%

Source: Caravan Industry Association of Australia and Tourism Research Australia

This trend is also apparent for powered sites where in Queensland an increase in both occupancy rates and the revenue per site, has been identified in the survey of operators undertaken by the industry association.

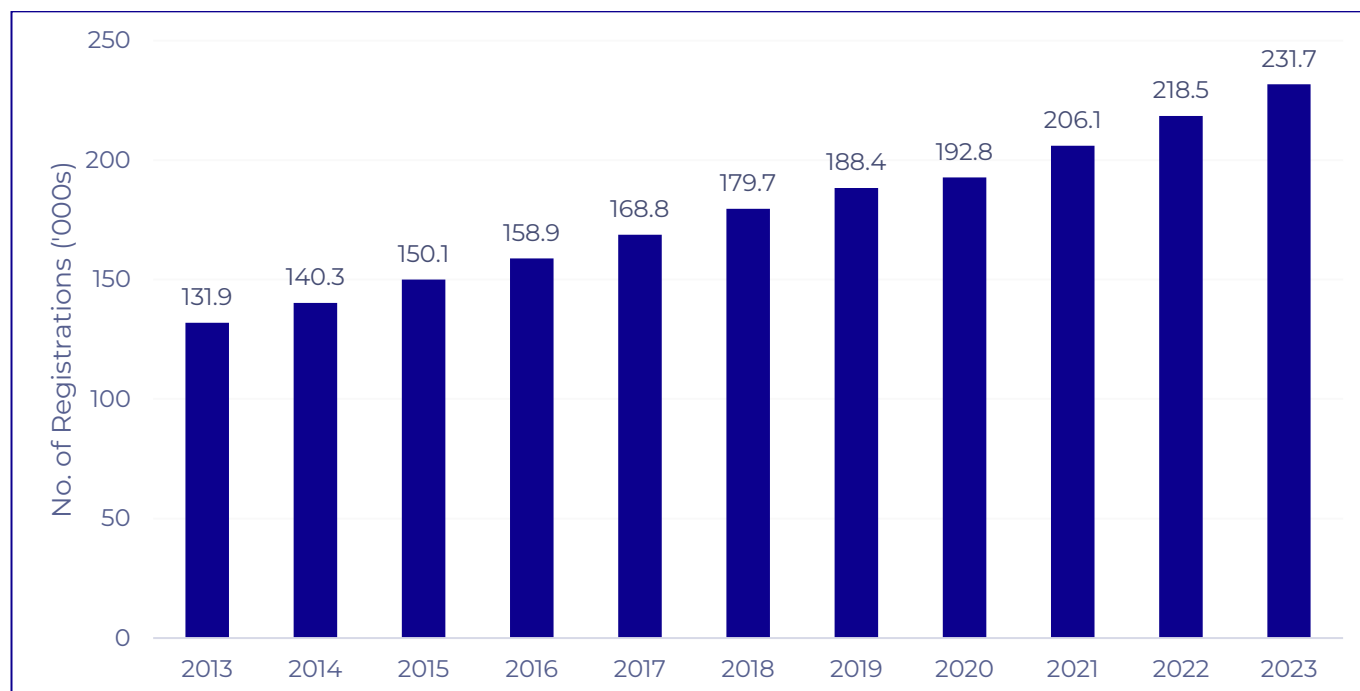
Importantly, Queensland is currently achieving an occupancy rate for cabins of 66% which is above the national average of 61%. Further, the 54% occupancy rate identified for powered sites is also above the current national average of 50%.

Quite clearly, strong demand conditions for both cabins and powered sites are being achieved in the Queensland market, above and beyond growth in demand also being experienced more generally across Australia.

A further indicator of demand for driving holidays of the type which can be served by the proposed development is the registration of RVs and campers with State-based road authorities. A long-term increase in these registrations is occurring, as identified in Figure 3.1, with available data to 2021 showing a 39% increase in total registrations in the 7-year period from 2014.

At the current time it is estimated approximately 800,000 RVs and campers are registered across Australia.

Figure 3.1 Queensland RV and Camper Registration, 2013 to 2023 (year ending June)



Source: Tourism Research Australia

Overall, the information available highlights the growing importance of the self-drive holiday market, and in particular the increase in demand which is being experienced in Queensland.

3.3. Other

Functions and Events

The functions and events industry provides event catering services for weddings, private events and corporate functions.

Across Australia the functions and events industry generated \$5.3 billion of revenue in the 2023 financial year, employing over 26,000 people. Overall demand is expected to grow over coming years associated with population growth and the rapid return of domestic and international travel in the post-Covid 19 period.

The functions and events industry also directly supports the local visitor economy by attracting domestic and international visitation.

Operators typically seek to distinguish themselves from competitors based on unique offerings and the scale and quality of their services and packages (such as combining events with overnight accommodation).

The boutique nature of many operators results in a highly diversified range of facilities across Australia including various:

- Themes
- Settings
- Food options
- Locations
- Prices
- Operator sizes
- Overall quality of service and experience

Functions and events demand is largely population driven and influenced by demographics, employment status and income levels.

In suburban locations, function spaces tend to primarily cater to private functions such as weddings and other personal and family milestones. Areas with a strong business presence have increased demand for corporate functions.

The locational context for the Subject Site suggests that a mixture of private and corporate functions will be held at the proposed facility, with a bias towards private functions.

According to an Easy Weddings report, 30% of couples choose their wedding venue based on venue availability, The same survey found that approximately one fifth of wedding receptions were held in garden/outdoor settings. Reception venues are typically the most expensive item in a wedding plan, accounting for 43% of the total wedding budget on average. The same survey also found that an average of 92 guests attended the average wedding.

The above survey data indicates the importance of providing choice to the community which allows for availability of venue, and allowing for people to make a choice of venue that best reflects their own needs and price points.

Such choice will be enhanced in Gladstone through the delivery of a function and events capability at the Subject Site.

Food and Drink

The inclusion of a food and drink component at a golf course is a contemporary expectation that is met by most membership based golf courses, and those serving a significant tourist and visitor market. This includes the existing Gladstone Golf Club which includes a bar.

The restaurant industry is a significant component of the retail sector in Australia, with annual revenue of \$20.2 billion, returning \$869 million in profit and supported approximately \$5.1 billion in employees' wages in 2022/23.

Since the end of the pandemic, spending on the restaurant sector has rebounded strongly with revenue increasing by +4.0% per annum between 2019/20 and 2022/23.

Cafes and coffee shops are also an important part of the retail sector, with \$10.3 billion of revenue in 2022/23 reflecting +3.8% growth per annum since 2019/20.

Overall, the ability for consumers to access a diverse and conveniently located range of food and drink options is an important element of economic and community need, reflecting:

- That food and drink outlets are an important location for social interaction.
- The labour intensive nature of the industry which supports a range of jobs, including for many young people.
- The ability of food and drink outlets to support local food and produce suppliers.
- That people will integrate a wide range of leisure and recreation activities with a visit to a food and drink outlet.

For the proposed development, the food and drink component will be complementary and ancillary to the golf course and tourist park operations.

Community Markets

Markets can be broadly defined as community events bringing consumers and producers together. This is in the context of markets held on a regular or semi-regular basis, often outdoors, rather than permanent markets with dedicated fixed tenancies and other infrastructure.

Markets are one of the oldest forms of direct selling by producers to consumers. Markets serve as cultural and social hubs, fostering a sense of community, and providing opportunities for local artisans, farmers and entrepreneurs to sell their products to a mix of locals and visitors.

Markets, including Farmers Markets and other themes, have significantly increased in popularity in the past 20-years and are typically found across most regions in Australia.

A rise in food and drink tourism and farm-to-table trends across Australia has helped grow demand for markets and growing agritourism.

Likewise, many smaller retailers and businesses selling niche products often find markets an affordable and effective means of generating sales and increasing customer awareness. A commonly cited example is the now international retail brand Cotton On which began as a stall at a weekend market in Geelong.

For the tourist sector, markets allow regions to showcase local products and specialties. Markets can also be a visitor drawcard from which other regional tourism businesses and experiences can benefit.

The number of individuals visiting markets has increased significantly since data was collected by Tourism Research Australia on 'Food Markets' from the beginning of 2016. Comparing pre-Covid 19 visitation trends (2016/17 to 2018/19) to the latest 2022/23 financial year highlights:

- The number of domestic tourists who visited a food market on their daytrip increased by +27% in Queensland and +32% in Australia.
- The number of domestic tourists who visited a food market on an overnight trip increased by +30% in Queensland and +17% across Australia.

Table 3.2 Tourism 'Food Market' Visitation

Category	Pre-Covid Average (2016-2019)	2022/23	% Change
<u>No. of Domestic Day Trips ('000s)</u>			
Queensland	323	411	+27%
Australia	1,720	2,272	+32%
<u>No. of Domestic Overnight Trips ('000s)</u>			
Queensland	513	666	+30%
Australia	2,348	2,758	+17%

Source: Ethos Urban; Tourism Research Australia

Overall, the importance of community markets within the retail sector continues to increase, providing an offer which reduces the shift of retail spending to the internet, and which has been proven to co-exist successfully with more traditional bricks and mortar retail formats.

4.0. Needs Assessment

This Chapter assesses the economic and community need for the proposed development at the Subject Site, including estimating supply and demand for the proposed uses.

4.1. Golf Course

Supply

Gladstone Regional Council has six public golf courses, with two offering 18-hole courses. No members-only private golf courses operate in the municipality.

The current **Gladstone Golf Club** course, as previously mentioned, has become increasingly compromised by site and design constraints. As such, Yaralla Sports Club has announced the intention to relocate the Golf Club from the current Kin Kora location to the Subject Site.

Calliope Golf Club is the Council areas only other 18-hole golf course, approximately 4.9km south of the Subject Site and 17.9km from the Gladstone CBD. Ancillary facilities include the clubhouse, which provides food and drink in the café/restaurant, as well as function and event capability for up to 100 persons.

The balance of the golf courses can be broadly characterised as small-scale regional golf courses primarily servicing local community needs. These include (see also Table 4.1):

- **Boyne Island Tannum Sand Golf Club** is a 13-hole public golf course, approximately 16.1km southeast of the Subject Site. The course includes a licensed clubhouse.
- **Miriam Vale Golf Club** is a nine-hole public golf course, approximately 60.7km southeast of the Subject Site.
- **Town of 1770 Golf Course** is a nine-hole public golf course approximately 77.5km southeast of the Subject Site. The golf course is in the popular tourist town of Agnes Water/Town of 1770, approximately a 90 minute drive from Gladstone. The golf course also provides function capabilities, with a marquee overlooking the golf course that is available for hire.
- **Mount Morgan Golf Club** is a nine-hole public golf course in Hamilton Creek, approximately 84.7km northwest of the Subject Site.

Table 4.1 Gladstone Region Golf Courses

Name	Suburb	Holes	Facility Type	Distance to Subject Site (km)
Gladstone Golf Club*	Kin Kora	18	Public	4.9km
Calliope Golf Club	Calliope	18	Public	11.0km
Boyne Island Tannum Sands Golf Club	Boyne Island	13	Public	16.1km
Miriam Vale Golf Club	Miriam Vale	9	Public	60.7km
Town of 1770 Golf Course	Round Hill	9	Public	77.5km
Mount Morgan Golf Club	Hamilton Creek	9	Public	84.7km

Source: Ethos Urban; Golf Australia

*Owned by Yaralla Sports Club

Proposed

Hummock Hill Island Development is a proposed \$1.2 billion tourism project that will deliver four precincts, including resort hotels, holiday units, camping grounds, residential dwellings, 18-hole golf course, and retail, commercial and educational facilities.

The development was first proposed in 2007 and has since undergone extensive planning review. Latest information indicates that it has gone to the Minister for State Development for a decision after being rejected by Council.

Golf - Key Demand Drivers

Demand Driver	Considerations
Population Growth	Ongoing population growth (see Table 2.2) in the Gladstone Region will increase the potential participant pool for golf and thus support additional demand for golf facilities and services.
Discretionary Income	Golf participation rates increase with household income according to AUSPLAY data. Gladstone has a median household income 7.7% above the regional Queensland benchmark (see Table 2.3) suggesting increased demand for golf facilities in Gladstone compared to regional Queensland.
Tourism Visitation	<p>Although golf courses typically serve the local and surrounding community, some courses provide a standard of quality, design, amenity and natural environment which are significant factors in attracting players who are tourists and other visitors.</p> <p>Many keen golfers base their holidays around the availability of quality golf course experiences. Approximately one-third of total household expenditure on golf is associated with golf tourism according to the recently released <i>'Community Benefits of Golf in Australia'</i> report prepared by the Australian Golf Industry Council.</p> <p>A high-quality nature-based course at Gladstone which provides a standard of play notably superior to that provided by the existing Gladstone Golf Club can be expected to attract significant visitation from the travelling golf public. This potential is enhanced with the proposed provision of on-site accommodation and club house facilities.</p> <p>This tourism visitation generated by a high-quality course at the Subject Site also has the potential to generate visitation to other courses in the region as part of extended golf trips by visitors.</p>
Inclusive and Accessible Facilities	<p>The accessibility and inclusivity of golf facilities play a pivotal role in driving higher participation levels.</p> <p>Efforts to attract a more diverse demographic, including women, families, and younger generations, have become crucial to growing participation. Tailoring facilities and programs to meet the preferences of a broader audience enhances overall participation rates.</p> <p>Making courses and programs more welcoming to individuals of varying skill levels, abilities, and backgrounds can boost participation.</p> <p>The golf industry has been successful in reversing previous declines in participation, with recent improvements in participation by women and young persons.</p> <p>The proposed new golf course at the Subject Site is being designed as an inclusive and enjoyable course which contributes to the wider appeal of golf in the Gladstone region for people of diverse backgrounds, and will drive additional demand for golf facilities</p>
Clubhouse Facilities	<p>A high amenity and quality clubhouse provides a convenient and attractive proposition for players and potential members, as well as visitors.</p> <p>A clubhouse providing food and drink options adds value to the overall experience and can be a factor in driving demand and visitation.</p>
Health and Wellbeing	<p>Golf's alignment with health and wellness positions it as an appealing recreational activity, particularly for the older population seeking a low-impact sport.</p> <p>The sport's outdoor exercise opportunities contribute to its attractiveness, particularly in a region with a complementary climate such as Gladstone.</p>

In addition to the above factors which contribute to demand for the proposed golf facility at the Subject Site, it is noted that a clear and demonstrable demand for golf facilities is being served by the existing Gladstone Golf Club. This is notwithstanding the operational constraints impacting the current gold course.

The proposed development will be a direct replacement of the existing, constrained golf course, and as such existing demand will transfer to the new purpose-built golf course and associated facilities.

Economic and Community Need

Overall, the following factors are considered relevant in terms of the economic and community need for a golf course as part of the proposed development at the Subject Site:

- **Remove existing golf course operational constraints.** The relocation of the Gladstone Golf Club enables the creation of a new facility which overcomes the extensive, and increasing, operational constraints associated with the existing course.
- **Introduce a championship-level grade golf course.** A new purpose-built championship standard golf course incorporating a range of complementary golf-related support infrastructure will be available to the community. The quality of design and playing environment of the golf course is expected to be of a standard not comparable to any currently in Gladstone Regional Council and the broader region, and indeed between the Sunshine Coast and Port Douglas. The course is anticipated to be rated one of the best in regional Queensland, with the potential for top 100 status.
- **Enhance recreational infrastructure.** The new golf course will contribute to the creation of enhanced recreational infrastructure for the community providing a modern and well-equipped facility that promotes an active and healthy lifestyle for residents. The proposed development will enhance golf playing options and opportunities that can increase overall golf participation levels and visitation to the region.
- **Increase educational and training opportunities.** The presence of a premium standard golf course provides enhanced opportunities for educational and training programs related to golf. This includes golf academies, coaching clinics, and other initiatives, contributing to skill development and sports education offerings.
- **Enhance the tourism appeal of Gladstone.** The proposed development will broaden the appeal of Gladstone to a broader domestic and international tourism market. Providing a high-quality golf course can be expected to enhance golf-related visitation that is complementary to the region's tourism nature-based brand.
- **Facilitate increased spending in the region.** Many golfers base their holidays around golf, with tourists spending money on accommodation, transportation, food and drink, in addition to direct spending at golf facilities.
- **Attract professional and amateur events.** The quality of design and environment of the proposed golf course positions it as an ideal venue for hosting professional and amateur golf events. These events bring prestige to the region and attract participants and spectators, fostering a sense of community pride and engagement. This is already the case in Gladstone with events such as the *Junior Jason Hetherington and Gary Larson Rugby League Carnival* demonstrating the ability of sport to generate economic and community benefit. It can be anticipated that the proposed development will further enhance these benefits to the Gladstone region.

Overall, the proposed championship-level golf course provides new investment in the local community, overcomes the operational constraints associated with the existing Gladstone Golf Club, and will create a new sporting and recreational facility that will boost the tourism and destination appeal in Gladstone.

On this basis, a strong existing economic and community need for an enhanced golf course and complementary facilities at Gladstone will be met by the proposed development.

4.2. RV and Caravan Park

Existing Supply

The *RV Strategy* for Gladstone Regional Council recognises five types of sites in the Gladstone region available for overnight camping for RVs and caravans. These are the following:

- **Council owned overnight sites and facilities:** land owned or managed by Council where overnight stays are permitted.
- **Commercial caravan parks and campgrounds:** usually providing a higher level of services and infrastructure compared to Council sites, including showers, laundry facilities, communal areas, powered and non-powered sites, on-site potable water, wastewater disposal point, and sometimes swimming pools, family activities and playgrounds.
- **State forests, national parks and recreation areas:** camping areas in state forests, national parks, and recreation areas, typically requiring the acquisition of a permit online for an overnight stay.
- **Roadside rest areas:** providing locations where motorists can stop to take breaks, with the aim of the sites being to assist in curbing driver fatigue. Primarily intended as day rest areas, some roadside rest areas allow camping for a single night.
- **Unauthorised sites:** sites in the Gladstone Region where intermittent unauthorised camping occurs.

It is estimated that approximately 27 sites are within the first two categories, being Council owned overnight sites and facilities, and commercial caravan parks and campgrounds. Of these, five are Council sites, with 22 commercially operated parks. These facilities are located across the municipality and are listed in Table 4.2.

Table 4.2 Gladstone Municipality Council and Commercial RV and Caravan Sites

Site	Location	Type	Distance from Subject Site
Kin Kora Village Caravan and Residential Home Park	Kin Kora	Commercial	4.2km
Bouganvilla Caravan Park	Burua	Commercial	6.5km
Gladstone Showground RV Campsite	Gladstone	Commercial	7.3km
Gladstone City Caravan Park	Gladstone	Commercial	7.8km
Calliope River Picnic Area	River Ranch	Council	8.8km
Calliope Caravan Park	Calliope	Commercial	11.8km
Lilley's Beach	Boyne Island	Council	14.5km
Boyne Island Caravan Park	Boyne Island	Commercial	16.4km
Greenacres Motel and Van Park	Benaraby	Commercial	17.1km
Boyne River Tourist Park	Benaraby	Commercial	18.2km
Discovery Parks Tannum Sands	Tannum Sands	Commercial	18.9km
Gladstone Harbour Islands	Gladstone Harbour	Council	19.0km
Lake Awoonga Caravan Park	Benaraby	Commercial	22.0km
Mount Larcom Tourist Park	Mount Larcom	Commercial	24.2km
Futter Creek Camping Reserve	Taragoola	Council	27.2km
Boynedale Bush Camp	Boynedale	Commercial	36.7km
Bushchooks Travellers Village	Bororen	Commercial	49.1km
Discovery Centre Ubobo	Ubobo	Commercial	58.2km
1770 Camping Ground	Seventeen Seventy	Commercial	75.1km

Site	Location	Type	Distance from Subject Site
Travellers Rest 1770 Campground	Agnes Water	Commercial	76.0km
Captain Cook Holiday Village	Seventeen Seventy	Commercial	76.5km
The Reef Caravan Park	Agnes Water	Commercial	77.3km
1770 Eco Camp	Agnes Water	Commercial	77.8km
NRMA Agnes Water Holiday Park	Agnes Water	Commercial	79.7km
Workman's Beach Campgrounds	Agnes Water	Council	80.3km
Baffle Creek Fishing Lodge and Camping (Midskinrick Lodge)	Rosedale	Commercial	104.6km
Baffle Creek Nomad Caravan Park	Baffle Creek	Commercial	105.6km

Source: Ethos Urban; various sources

An issue with the supply of RV and caravan spaces is that in some instances operators have replaced these with cabins. For example, Barney Beach Accommodation is a cabins-only facility which formerly accommodated caravans.

A desktop review of the 12 facilities within 20km of the Subject Site indicates that:

- None are of a modern standard and quality that is directly comparable to that which will be delivered at the Subject Site.
- A number of facilities are unpowered and lack infrastructure likely to be required by most RV and caravan visitors.
- The powered and serviced options are generally in an urban environment, and with limited exception do not provide the eco-tourism values offered by the Subject Site.
- Some caravan parks provide permanent resident accommodation which will not be offered at the Subject Site.
- Only selected facilities are genuinely available for a combination of cabins, RVs and caravans.
- Numerous existing facilities are ageing with a standard of facilities which no longer reflects leading industry practice.

Overall, the assessment of existing facilities shows that an opportunity exists to deliver a modern facility catering to the RV and caravan market that is differentiated from the existing offer located in the immediate region.

In particular, integrating with a new championship golf course and clubhouse (including food and drink, and functions and events capability) means that the facility can potentially generate visitation and spending to the region which otherwise would not occur.

That is, the proposal adds to the potential scale of the overall visitor market in Gladstone rather than simply redirect visitation which otherwise would have occurred.

Proposals

In addition to the above sites, Gladstone Shire Council have approved development of a caravan park at **33 Springs Road, Agnes Water**, 79.7km south-east of the Subject Site and immediately south of the NRMA Agnes Water Holiday Park. The application was originally approved in April 2018, although since this time a number of minor change applications have been approved, with the latest approved in January 2023. The latest plans for the development include 40 caravan or RV sites, four cabins, and supporting utility buildings.

The proposal is considered of no relevance to the development at the Subject Site, given the relative distance and contrasting locational context.

Key Demand Drivers – RV and Caravan Park

Demand Driver	Considerations
<p>Tourism Visitation</p>	<p>Demand for RV and caravan parks is primarily driven by domestic tourist visitor nights. Domestic tourist visitor nights can be influenced by factors such as changes in household discretionary income, time available for travel and holidays, travel budgets, seasonal and climatic factors, and the value of the Australian dollar.</p> <p>Prior to the COVID-19 pandemic, domestic tourist visitor nights for the Gladstone tourism region were 1.9 million. Although the pandemic impacted tourism globally, domestic tourism has bounced back quickly. Both Access Economics and Tourism Research Australia are expecting ongoing growth in domestic visitor nights over coming years, with this growth indicating increasing demand for RV and caravan park accommodation in the Gladstone tourism region.</p> <p>Visitor nights from international tourists can be a source of demand for RV and caravan parks, although this market segment is less important than domestic tourism. Prior to COVID-19 international tourists accounted for approximately 8% of RV and caravan park tourists.</p> <p>International tourist visitor nights for the Gladstone tourism region totalled 245,000 in 2019. However, the COVID-19 pandemic and subsequent border closures resulted in a decrease of -87% of international tourist visitor nights in the region in 2020.</p> <p>A continuing return in international visitors will provide further support in demand for RV and caravan park facilities.</p>
<p>Discretionary Income</p>	<p>Growth in real household discretionary income tends to correlate with an increase in demand for RV and caravan parks, as higher discretionary incomes allow households to spend more on non-essential items, including domestic holidays.</p> <p>However, for some, driving holidays represent a more affordable option and thus the impact of inflation and rising interest rates can result in a substitution away from other holiday types and towards self-driving options.</p> <p>Therefore, it is noted that during times of tightening living costs many prefer a driving holiday, increasing demand for facilities supporting this holiday type.</p>
<p>Demand for Hotels and Resorts</p>	<p>Hotels and resorts provide some competition to RV and caravan parks in terms of providing an alternative holiday or travel experience.</p> <p>Similarly, to other tourism related businesses, hotels and resorts experienced lower levels of demand during the COVID-19 period, particularly with the closure of international borders. However, hotels and resorts are expected to recover and expand in coming years due to a rebound in tourism, with industry revenue forecast to increase by 1.7% per annum in the period to 2028. In some domestic tourism markets, strong demand for hotel rooms has resulted in sharp increases in room rates, thus increasing the price differential with self-drive trips.</p> <p>A decrease in discretionary income with higher interest rates and inflation means that tourism consumers may be increasingly price conscious and prefer a more affordable accommodation option, such as RV and caravan parks, driving increased demand for this facility type.</p>
<p>International Travel by Australians</p>	<p>As Australians return to international travel, the demand for domestic tourism may be impacted. After a substantial decrease in international travel during the COVID-19 pandemic, Australians have returned to international trips, with</p>

	<p>7.28 million departures in 2022/23 compared to 11.23 million departures in 2018/19.</p> <p>International departures are forecast to exceed pre COVID-19 levels by 2024/25. However, international travel by Australians is largely driven by the value of the Australian dollar and international flight affordability, with both drivers currently raising concerns for tourists, and supporting domestic holidays.</p>
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Economic Need

The following factors are relevant in terms of the economic and community need for the proposed development of a tourist park incorporating cabins and RV bays at the Subject Site:

- **The project enables the delivery of an RV and caravan park facility including both cabins and powered sites** that complements the golf and event capability, while also delivering a new accommodation option in Gladstone with nature-based characteristics.
- **Relevant tourism strategies identify the opportunity for an enhanced RV and caravan park capability in Gladstone** to increase visitation and spending. This is an outcome directly enabled by the proposed development.
- **The Gladstone Region Recreational Vehicle Strategy identifies very high occupancy rates in RV and caravan locations across the region at peak periods**, highlighting the importance of the new supply which is delivered the subject proposal.
- **Overall demand for RV and caravan park accommodation is demonstrated by observed increases in the occupancy rates for these facilities nationally, particularly in Queensland**, with such growth in self-drive holidays expected to continue for the foreseeable future.
- **The facility proposed by Yaralla at the Subject Site provides a standard and nature of facility which is not directly comparable to any currently in Gladstone** and provides a genuine point-of-difference that can increase overall levels of visitation and spending to the region.
- **Although the RV and caravan park will be available for the general traveller, it also provides additional accommodation options for functions and events** held at the new golf course and for those seeking to play golf during their visit, reflecting the complementary nature of this component of the development.
- **In overall terms, the proposed RV and caravan park provides new investment in the tourism and visitor infrastructure available in Gladstone** that enhances the ability of the region to benefit from the visitor market.

Overall, on matters relevant to our expertise, a clear and immediate economic and community need is served by the proposed development.

4.3. Function and Event Space

Existing Supply

Venues supporting function and events capabilities in the broader Gladstone urban area include (see also Table 4.3):

- **Gladstone Entertainment and Convention Centre (GECC).** GEEC is central Queensland’s fully integrated convention and entertainment facility located in Gladstone’s CBD and approximately 8.1km from the Subject Site. The venue hosts a wide range of events, including gala dinners and special events, business events, touring shows and theatre productions and weddings. The venue can cater to an event up to 1,000 people.
- **Gladstone Events Centre.** Gladstone Events Centre is a multi-purpose events venue, capable of hosting large private and corporate events including gala dinners, trade shows and weddings.
- **Oaks Gladstone Grand Hotel.** The Oaks Gladstone provides flexible function and conference spaces that can accommodate a range of events from 50 to 500 guests, including business conferences and weddings.
- **Gladstone Reef Hotel.** Gladstone Reef Hotel has four function spaces, capable of hosting up to 220 guests. Function facilities are targeted towards social events, including wedding receptions, cocktail parties, work functions and wakes.
- **Gladstone Yacht Club.** Gladstone Yacht Club can provide catering for up to 100 guests, providing function space for a variety of events.
- **Tondoon Botanic Gardens.** Tondoon Botanic Gardens has been awarded one of Australia’s top regional botanic gardens and are set on an 83-hectare site, approximately 5.6km south from Gladstone’s CBD and 5.8km east of the Subject Site. The Gardens allows a range of functions and events to take place, including small scale birthday events to weddings and corporate events.
- **Granite Ridge Gardens.** Granite Ridge Gardens is a privately owned wedding venue situated on approximately ten hectares of bushland. The venue is approximately 8.0km south of the Subject Site.
- **Kalori Training and Conference Centre.** Kalori Training and Conference Centre provides conference and event space (including Weddings) in Tannum Sands, approximately 16.7km southeast of the Subject Site.
- **Calliope Golf Club.** The Calliope Golf Club Clubhouse offers catering for all types of functions up to 100 guests, including weddings and community events. The venue is located 4.9km south of the Subject Site and 17.9km southwest of the Gladstone CBD.

Outside of the Gladstone Urban Area, private function and events space can predominately be found in tourist towns, including Agnes Water/Town of 1770. These include Sandcastles 1770 Motel and Resort, Town of 1770 Golf Club, and Drift and Wood Restaurant.

Table 4.3 Gladstone Function and Event Spaces

Name	Location	Distance from Subject Site
Tondoon Botanic Gardens	Glen Eden	5.8km
Granite Ridge Gardens	O'Connell	8.1km
Oaks Gladstone Grand Hotel	Gladstone Central	8.1km
Gladstone Reef Hotel	Gladstone Central	8.1km
Gladstone Yacht Club	Gladstone Central	8.1km
Gladstone Entertainment Convention Centre	Gladstone Central	8.1km
Gladstone Events Centre	South Gladstone	8.3km
Calliope Golf Club	Calliope	11.0km
Kalori Training and Conference Centre	Tannum Sands	16.7km

Source: Ethos Urban

Overall, the proposed function and event capability at the Subject Site will provide further choice in the region, allowing potential users to choose a facility with the price points and features that best suits their own needs.

The proposed function and events capability is likely to be utilised principally, although not exclusively, for personal milestones and events, with a more limited presence of corporate functions. Importantly, the facility is not of a scale that directly competes with the major function and events spaces within urban Gladstone, including on the fringe or within the CBD.

Key Demand Drivers – Function and Events Space

Demand Driver	Considerations
Population Growth	<p>The resident population in the region surrounding a function centre is an important determinant of demand. Population drives demand for event spaces as more people seek venues for weddings, corporate events, and other personal milestones and celebrations. A growing population correlates with increased demand for more diverse event hosting options, and the need for additional choice that limits the potential for scheduling conflicts and lack of availability. Noting the growing population in the Gladstone region, demand for function centres will also grow.</p> <p>Additionally, function centres serve a wide geographic catchment, with many users willing to travel significant distances for the right function centre to meet their individual needs.</p> <p>As such, the community need met by any function and event capability at the Subject Site will be regional in nature rather than limited to the Gladstone urban area.</p>
Discretionary Income	<p>The level of discretionary income plays a significant role in the price point and facilities sought by patrons. As discretionary income rises, individuals and businesses are more likely to allocate additional funds for events, leading to increased demand for suitable venues.</p> <p>With higher average median household income levels in Gladstone relative to regional Queensland, as well as a corporate sector driven by primary production (agriculture and mining), the expected demand for high-quality function facilities in an integrated nature-based development - including golf course - can be expected to be strong.</p>
Tourism Appeal	<p>Queensland’s popularity as a destination for weddings and events is also an influence on demand.</p> <p>For those events requiring people to travel a significant distance, the availability of an integrated function and events space including accommodation options is expected to be popular. For many who travel, accommodation will also be found with other providers in Gladstone thus adding to the wider business and economic benefits. Many will travel and choose golf courses as wedding venues for their scenic appeal and the quality of the course.</p>

Economic Need

A function and event capability is an important element of the proposed development, including the potential for marquee events. The function and events industry is a significant component of the Australian economy, which directly employs over 26,000 people and accommodates a wide range of corporate and private events reflecting community need.

Other key considerations relevant to economic and community need include:

- Choice and Venue Availability:** A function and event capability at the Subject Site contributes to the community having a choice of venues and the ability to find a location which meets their specific needs or preferences. This benefit is closely related to the expectation of the community that a range of facilities are available at various price-points and with a variety of locational and other attributes which allows a considered choice to be made on the preferred venue.

Where insufficient choice is present, a lack of availability and the increased likelihood of scheduling conflicts comes at a cost in terms of both economic and community benefits.
- Venue Characteristics:** A unique event space will be available at the proposed development with an outlook onto a brand new championship standard golf course and pleasant surrounding natural environment, which includes freshwater lagoons and bushland. Gladstone currently only has three ‘scenery-based’ facilities, including Tondoon Botanic Gardens, Granite Ridge Gardens and Calliope Golf Club. The addition of a new

contemporary functions and events space will provide extra choice and diversity for Gladstone's residents, in addition to attracting a wide range of visitors from outside the region.

- **Complementary Uses and Infrastructure:** The desirability of the function and events capability is enhanced by the presence of complementary infrastructure. Food and drink spaces, ample dedicated carparking and on-site accommodation incorporating architecturally designed cabins reflect this complementary outcome.
- **Locational Attributes:** The location of the Subject Site is in a semi-rural area just outside, although highly accessible to, the Gladstone urban area. This adds to the amenity of the venue and ensures it is easily accessible to a large permanent population, as well as visitors from further afield.
- **Economic Benefit:** Additional employment opportunities are generated by the function and event capability. Jobs for event staff (event manager, kitchen staff, wait staff etc) and others contributing to events include event planners, photographers, florists / decorators, officiates, chauffers, artists and musicians. This provides a broad range of hospitality and entertainment related employment opportunities of benefit to the local economy.
- **Tourism Visitation and Spending:** Some events also generate tourist spending associated with out-of-town guests, including inter-state and international visitors. Flow-on tourism spending includes commercial accommodation, food outlets and other tourist activities un-related to the other uses at the Subject Site.

As an illustrative example only, inter-state visitors to a wedding held at the Subject Site may choose to stay a further four nights at another location in the region such as Tannum Sands.

Overall, the function and events capability at the Subject Site responds to market demand from a location which is well-suited to this purpose. Importantly, the function and events are ancillary and complementary to the clubhouse and the wider proposed development, which includes the golf course, and tourist park.

4.4. Food and Drink Facilities

Existing Supply

Various retail centres throughout the City of Gladstone offer food and drink retailing, including dining and takeaway food options. Other food and drink options are also located on key transport routes and in some instances standalone locations.

The closest locations to the Subject Site for food and drink are as part of retail centres in Clinton and Kirkwood, with both areas supporting retail centres with a limited range of eat in and takeaway food options. Clinton also supports a tavern with a bistro.

The principal activity centre of Gladstone Central supports a wide range of successful food and drink retailers, many of which are supported by tourism and visitors to the region.

Key Demand Drivers - Food and Drink

Demand Driver	Considerations
Population Growth	<p>A growing resident population results in higher demand for food and drink retail. This expanding population can both increase patronage at existing food and drink retailers, and support the development of new food and drink outlets.</p> <p>The Gladstone Region is forecast to experience ongoing population growth for the foreseeable future, as identified in Chapter 2 and Table 2.2, driving growing demand for food and drink retail.</p>
Median Age	<p>Demand for dining out or take away food and drink options is driven in part by the age of consumers. Older age groups are less likely to choose to visit food and drink retailers than younger age cohorts, although more likely to do so at golf related facilities given the older average age profile of regular golfers (see Section 3.1).</p>
Discretionary Income	<p>Discretionary income levels play a significant role in demand for food and drink retail. Discretionary income includes spending on food catering, being spending on eating out or purchasing take away food rather than cooking at home. With increased discretionary income, individuals and households are more likely to spend on food and drink outside of the home.</p> <p>Median household income levels in the Gladstone Regional Council area are above the regional Queensland average, suggesting a higher propensity to visit and spend money at food and drink outlets, including associated with the proposed development at the Subject Site.</p> <p>Notably, per capita food catering spending for Gladstone is 16.8% above the regional Queensland average, suggesting greater demand for food catering retail.</p>

Market Share Analysis

In order to assess any potential economic impact from the proposed food and drink outlet within the proposed development, the potential market share for food and drink sales at the proposed development has been estimated.

For the purposes of this analysis, the ABS defined Gladstone Significant Urban Area (SUA) has been referenced. In 2023, Gladstone SUA had an estimated resident population of approximately 46,650 persons and an average per capita spending on food catering of \$2,150. Total retail spending by residents on food catering in 2023 is estimated at \$100.3 million.

High level forecast turnover for food and drink at the Subject Site is estimated at \$2.4 million. An estimated 30% of this turnover is forecast to come from outside of the Gladstone SUA, noting the tourism role of the Subject Site and ability to accommodate visitors from the wider region.

Note that potential turnover for a food and drink outlet has been estimated based on a high-level assessment of trading area and likely trading density. The turnover potential is expressed in constant FY2023 dollars inclusive of GST.

Noting this, \$1.7 million of food and drink turnover at the Subject Site is forecast to come from the population of the Gladstone SUA, with this being a 1.7% market share of total food catering spending, as shown in Table 4.4.

Table 4.4 Estimated Food and Drink Market Share

Measure	Value
Gladstone SUA Population 2023	46,650
Food Catering Spending Per Capita	\$2,150
Total Food Catering Spending	\$100.3m
Subject Site Indicative Food and Drink Sales	\$2.4m
Minus Beyond Share of Sales (@ 30%)	\$0.7m
Turnover from Gladstone SUA	\$1.7m
Market Share	1.7%

Source: Ethos Urban

This market share is at a negligible level unlikely to result in any meaningful impact to trading levels at other retailers or centres. That is particularly the case given that some sales will be redirected from the existing Gladstone Golf Club, and that the overall population and spending levels will continue to grow over time.

It is also relevant to consider the very different role and function between food and drink sales at the proposed development, which is focussed on golfers and other visitors to the proposed facilities, relative to the food and drink outlets in the balance of Gladstone meeting the needs of the general population.

No basis exists for concern that the proposed development has implications for the role and function of any centre in the hierarchy serving Gladstone Regional Council.

Economic Need

The provision of food and drink facilities is complementary to the operation of a high-quality golf course as is proposed for the Subject Site. Indeed, a project of this standard which is seeking to deliver a top 100 course will include a food and drink offer as a general expectation of the golfing public.

Any food and drink offer at the Subject Site will not impact on the exiting retail offer in the surrounding Gladstone area. Food and drink retail at the Subject Site to serve a complementary role to the predominant use of the Subject Site for a golf course and commercial accommodation.

It is important to note the ongoing growth in demand across the Gladstone Region for a wide range of food and drink outlets expected to arise from an increased resident population combined with additional tourist visitation and spending.

In this respect, the proposed facility at the Subject Site represents only a small component of any such growth in demand, noting that the existing Gladstone Golf Club has a bar facility that will be replaced and enhanced by the new development.

4.5. Community Market

Existing Supply

Gladstone has two recognised markets based on the Queensland Government’s Tourism and Events body, including (see also Table 4.5):

- **Rotary Markets Gladstone.** The rotary markets are held once a month in Tondoon Botanic Gardens.
- **Beach Arts Music (BAM), Tannum Sands.** BAM is a free community event held once a month, except for January and February.

The region is also home to three other markets, including:

- **Caliope Historical Village Markets** is a general market held once every two months at the Calliope River Historical Village.
- **Miriam Vale Community Markets** is a general market held once every month at the Miriam Vale Hotel.
- **Discovery Coast Rotary markets at 1770** is a general market held twice a month at the 1770 SES Grounds.

Table 4.5 Gladstone Region Markets

Name	Location	Frequency	Distance from Subject Site
Rotary Charity Markets - Tondoon Botanic Gardens	Glen Eden	Once a month	5.8km
Caliope Historical Village Markets	Caliope	Once every two months	8.8km
Beach Arts Music - BAM Markets	Tannum Sands	Once a month	18.6km
Miriam Vale Community Markets	Miriam Vale	Once a month	60.6km
Discovery Coast Rotary Markets at 1770	Agnes Water	Twice a month	76.2km

Source: Ethos Urban

Key Demand Drivers – Community Markets

Demand Driver	Considerations
Population Growth	Population growth directly expands the potential customer base for markets. As Gladstone's population increases, so to will demand for markets.
Buying Locally	Consumers are increasingly becoming more aware of the importance of supporting local producers and businesses, particularly off the back of the COVID-19 pandemic. One of the primary appeals of markets is the direct interaction between producers and consumers. This is particularly the case for Farmers Markets where fresh food is sold directly to consumers in a so-called 'paddock to plate' transaction.
Sustainability Trends	Growing awareness of environmental sustainability and a desire for eco-friendly practices contribute to the demand for locally sourced, sustainably produced goods available at many markets.
Agritourism	Agritourism, otherwise known as food tourism, is becoming an increasingly important sector of the Australian economy, adding to demand for farmers and community markets.
Business Incubator	For many small businesses, the ability to sell products at markets is a low cost means of generating revenue and building a customer base and profile, with this ability driving increased demand for market facilities at which to do this.

Economic Need

Farmers and community markets are becoming increasingly popular for local and regional communities, as well as serving as a distinct attraction for tourists. The Australian Farmer's Markets Association (AFMA) highlights that markets provide communities with many unique benefits and give producers and local businesses a strong competitive advantage and distinct identity over mainstream retailers.

According to AFMA, markets deliver economic, environmental, health and social benefits to local communities, consumers and farmers through the following:

- Forging links between rural and urban communities
- Providing education about food and nutrition
- Promoting the consumption of fresh and local produce
- Revitalising town and public space
- Regenerating community spirit
- Facilitating community-based food security programs
- Recycling green waste and promoting appropriate packaging

Overall, the following factors are considered relevant in terms of the economic and community need for the proposed development at the Subject Site:

- **Increased business opportunities.** Establishing an additional market provides local businesses with more opportunities to sell and promote their products. This, in turn, assists in stimulating economic activity by increasing sales and awareness for vendors.
- **Promoting local products.** The markets hosted at the Subject Site can showcase and celebrate the diversity of local products. This helps in preserving regional identity and encourages residents to support and build the profile of locally produced goods.
- **Support local and regional agricultural economy.** Central Queensland's significant agricultural economy stands to benefit from increased market presence through generating additional sales and revenue.
- **Strengthening community spirit.** Community and farmers markets foster a sense of community by bringing people together in a shared space. The proposed nature-based golf course setting can provide a picturesque and welcoming backdrop, creating an environment that encourages social and community interaction.
- **Attract visitors.** A well-publicised and popular market at the golf course can attract visitors, including tourists interested in experiencing local culture and products.

The Subject Site can play a crucial role in expanding market opportunities in Gladstone, supporting local producers and entrepreneurs, and fostering economic opportunity as well as social connection and interaction.

4.6. Centres Hierarchy

The following implications for the centres hierarchy operating in Gladstone Regional Council from the proposed development are noted:

- **Golf Course:** is not a use accommodated in centres.
- **RV and Caravan Park:** commercial accommodation can be located both within and outside of centres. Typically, RV and Caravan Park type accommodation is located outside centres reflecting their low intensity of development. Overall, the additional visitation supported by RV and Caravan facilities at the proposed development will generate a positive benefit for the centres hierarchy.
- **Function and Event Space:** are a use accommodated both within and outside of centres. Some limited trading impact may be experienced by function and event spaces in centres. However, this can be balanced against growing demand for these facilities and that consumers will benefit from competition and choice.
- **Food and Drink Facility:** As noted, the potential market share for a food and drink facility at the Subject Site is estimated at no more than 1.7% of food catering spending in the Gladstone SUA. Any redirection of food catering spending will be spread across food and drink retailers in centres, resulting in very minor impacts to traders within the normal bounds of a competitive trading environment.
- **Market:** No significant markets operating within the centres hierarchy in Gladstone.

5.0. Economic and Community Benefit

The proposed development at the Subject Site will provide an important community facility delivering recreation opportunities for both residents and tourists in the region, particularly tourists who plan their trips around golf.

The development of an 18-hole championship standard golf course will attract visitors to the region who would otherwise not visit Gladstone.

Further, the proposed facility will replace the current Gladstone Golf Club facilities, which are becoming increasingly compromised due to surrounding urban development.

Both the construction and the operation of the proposed development at the Subject Site, including the golf course, RV and caravan park, function facilities, food and drink retail, and market capabilities, will support a number of economic and community benefits, including the following:

- **Construction phase employment**, including direct construction jobs supported by the construction of the development and indirect jobs supported across all other industries over the construction period.
- **Operation phase employment**, including direct and indirect jobs supported by the ongoing operation of the facilities annually. These direct jobs will comprise roles including course management, grounds maintenance, hospitality, event management, and other related sectors. These employment opportunities for local residents will contribute to the economic well-being of the community. We estimate total employment of approximately 40 direct jobs on an ongoing basis, although the actual number relies upon future operational decisions that are impossible to accurately forecast in advance.
- **Economic value added**, being direct and indirect value generated during both the construction and operation of the Subject Site. This value is represented by the wages, salaries, and supplements, plus gross operating surplus (income earned by businesses) required in producing the extra output (construction investment and operating output/turnover).
- **Visitor nights**, generated by increased tourism presence in the region due to the championship level golf course along with the proposed RV and caravan park facilities. We estimate approximately 31,000 visitor nights will be accommodated at the Subject Site annually.
- **Spending in the local economy**, generated by the facilities and associated with accommodation, food, drink and other retail, fuel, and visitor or tourism activities. On an indicative basis, the RV and Caravan Park guests would generate annual accommodation spending of approximately **\$2.18m**. We consider this a conservative assessment of potential spending given the high-quality nature of the facility and the apparent strong demand conditions. In addition, a further **\$3.08m** of spending on food, drinks and other shopping is expected to be generated in Gladstone by park guests. As such, a total of **\$5.26** million of direct spending into the local economy will be supported by guests of the proposed RV and Caravan Park per annum (expressed in 2023 dollars), again noting the conservative nature of this assessment.
- **Golf Participation**: the creation of a high-quality new golf course and ancillary facilities at the Subject Site will leverage from the recent surge in golf participation, including for young people and females (both adult and youth). Participation in sports, including golf, is an important contributor to positive public health outcomes.

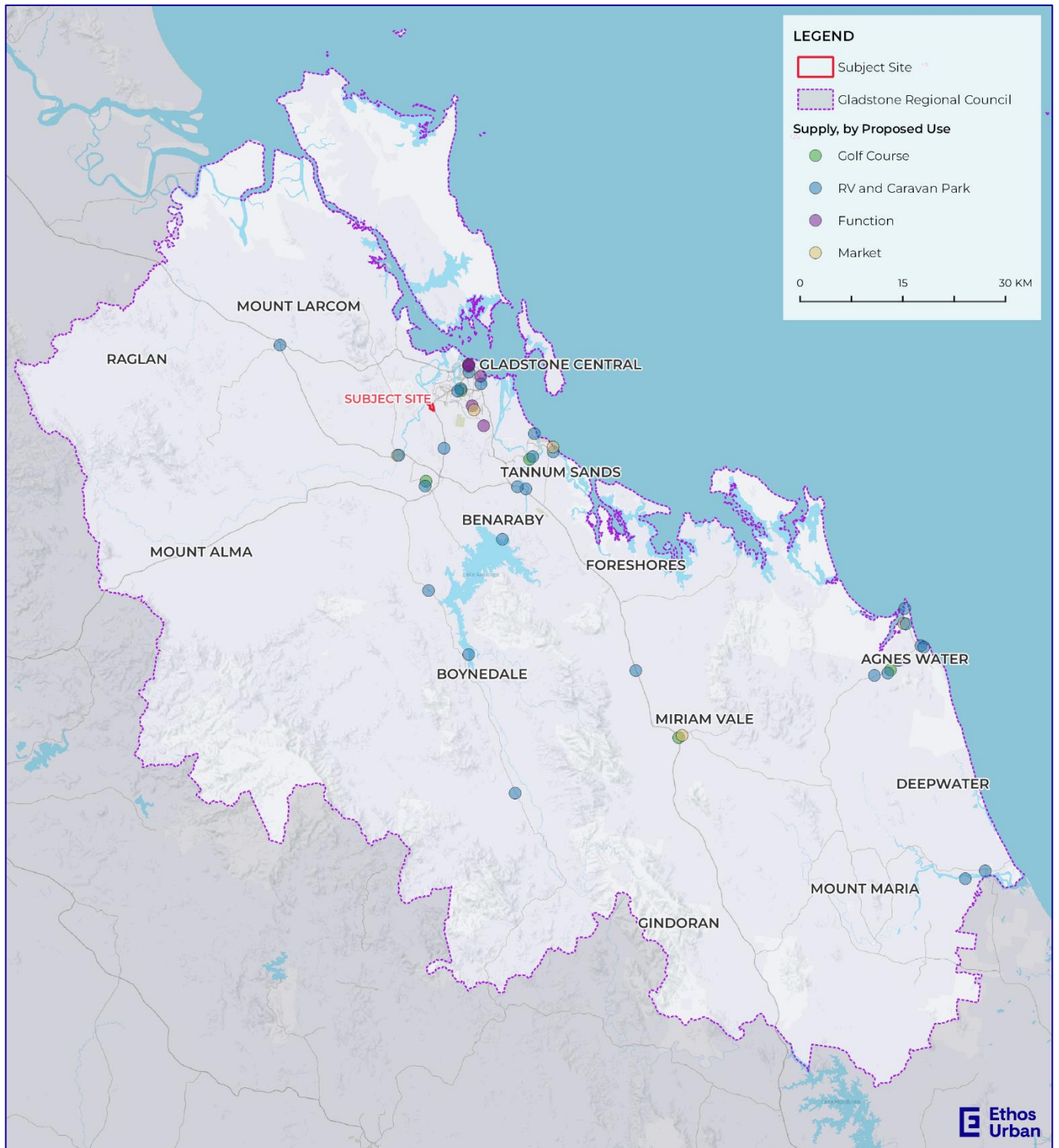
As relates to economic matters, we can identify no dis-benefits associated with the proposed development

Appendix A Supply Maps

A.1 Current Supply of Comparable Uses - Close View



Figure A.2 Current Supply of Comparable Uses - Wide View



Appendix B Request For Information Response

RFI Item Number	RFI Comments	EU Response
1a	An outline of the purpose of the assessment.	See Introduction – Report Purpose
1b	A description of the methodology used and why this methodology is appropriate for the type of proposal	See Introduction - Methodology
1c	An estimation of the demand, or likely future demand, for the proposed uses / accommodation.	See Chapter 4 – Key Demand Drivers under each use.
1d	An estimation of the market share of the proposal and commentary on changes to the supply/demand balance upon approval and implementation of the proposal, including whether the proposal would represent an excess of supply for the community	See Section 4.4 Food and Drink Needs Assessment – Market Share Market share analysis not appropriate for other uses.
1e	In relation to commercial uses, the identification of the impacts the proposal would have on the successful trading of other centres (including the period of time) and the identification of the impacts on the Gladstone regional centre hierarchy and functionality of existing activity centres.	See Section 4.4 Food and Drink Needs Assessment – Market Share and Section 4.6 Implications for Centres Hierarchy
1f	As the proposal is located outside of urban zoning, evidence that feasible alternatives in appropriately zoned locations have been investigated and assessed so that the reasoning behind the selection of the preferred site is clear. It is noted that Council will not accept justification based upon ownership of land as the primary reason for location choice.	This analysis has been prepared in another report by Place Design Group. We have reviewed the analysis and support the findings, noting: <ul style="list-style-type: none"> • The lack of alternative site of sufficient scale to accommodate a golf course • The strong community connection to larger sites which might otherwise be available for a golf course (e.g. Toondoon Botanic Gardens)
1g	A summary of the overall need for the proposal including a description of the potential community and economic benefits and potential negative impact. This summary is to consider aspects other than employment through construction related roles. Historically large developments, which have short-term increase in construction roles, generally result in low levels of long-term employment benefits. Applicants are to demonstrate the long-term community and economic and outcomes such a proposal is expected to provide.	See Chapter 4 Needs Assessment and Chapter 5 Economic and Community Benefit